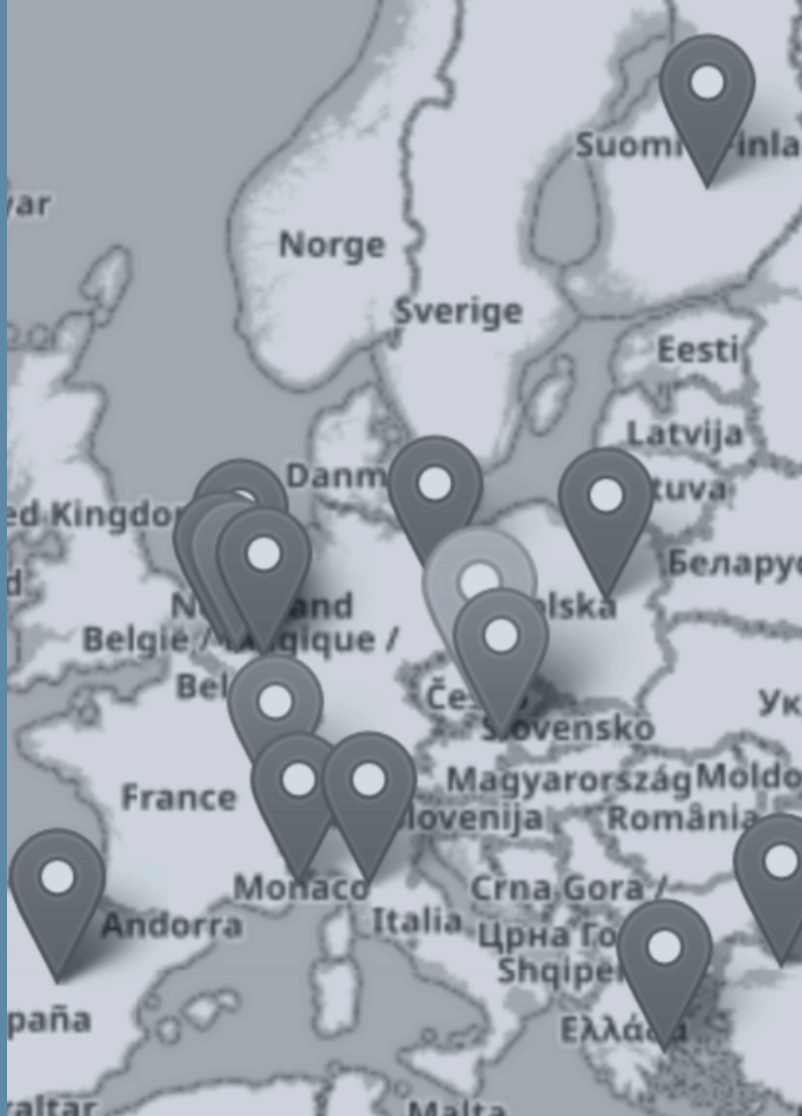




Reviving, Boosting, Optimising
and Transforming European Film
Competitiveness



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01 Competitiveness and cultural diversity in EU audiovisual policies

Dr. Apostolos Samaras, senior researcher, participated in the 6th Conference on Cultural and Creative Industries, held in Patras on December 6-7, 2024. As part of the panel on “Music and Audiovisual Industries,” Dr. Samaras delivered a presentation titled “Competitiveness” and “Cultural Diversity” in EU Policies for the Audiovisual Sector,

offering insights into the evolving policy landscape of the European audiovisual industry. His presentation examined the interplay between economic competitiveness and cultural diversity in EU policymaking, highlighting the challenges posed by digital platforms and rapid technological advancements. He also discussed how EU policies navigate the delicate balance between economic growth and the preservation of cultural diversity in the film and audiovisual sectors.



Apostolos Samaras presented research results on competitiveness and cultural diversity in Patras

The data presented was drawn from the report Competitiveness in European Law (Psychogiopoulou, Samaras, Comerma, Vlassis, Riga), conducted within the framework of the REBOOT project. Dr. Samaras' contribution to the conference underscored the importance of research-driven policy recommendations in shaping the future of the European audiovisual sector.

02 REBOOT at the European Night of Researchers in Pisa

By Caterina Sganga, Denise Amram, Pelin Turan, Piergiorgio Pilo, Veronica Punzo

On 27 September 2024, the REBOOT Research Team of Scuola Superiore Sant'Anna (Pisa, Italy) participated in the annual “BRIGHT-NIGHT: European Night of Researchers 2024” to meet and talk with cinema enthusiasts visiting the event venue from Pisa and its surroundings.

Held under the auspices of the European Commission, BRIGHT-NIGHT is a cultural and scientific initiative dedicated to spreading science and culture through a series of events, workshops, interactive sessions, experiments and interactive sessions, experiments and presentations.

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Standing for “Brilliant Researchers Impact on Growth, Health and Trust” in research, BRIGHT-NIGHT creates a vibrant atmosphere by transforming – only for a night – publicly accessible places such as town squares, community parks, university premises and even pubs and bars, into venues where the citizens can meet researchers, hear about their research activities and scientific/cultural output – or even be part of these research endeavours.

Having the opportunity to be part of this unique experience, the REBOOT researchers of Scuola Superiore Sant’Anna held a stand at the premises of one of Sant’Anna’s historical buildings, Palazzo Pilo Boyl, from 5 to 11 pm. They presented the REBOOT Project and encouraged citizens of all ages to engage with the Project’s ambitions and tasks. REBOOT attracted the attention of a wide range of visitors who engaged in a conversation with the research team about the current status and the future trajectories of the European Film Industry.

The REBOOT stand was a hot spot also for the younger cinema enthusiasts. The research team was delighted to talk to kids and their families, teenagers and young adults and to hear about their opinions on cinema. The BRIGHT-NIGHT was also



SSSA's stand attracted interested visitors.

a great opportunity to involve teenagers and young adults in some of the participatory research activities carried out in the context of the project, such as focus groups and surveys on young audiences’ preferences of cinematographic content. Whilst the memories of the BRIGHT-NIGHT 2024 are still fresh, the REBOOT researchers are already excited for next year’s event. Stay tuned!

03 Discussing Heritage

Meanings of European Film

REBOOT at the ELABCHROM Conference

By Tuuli Lähdesmäki

European film is not only an important European industry, but also an essential part of Europe’s cultural heritage and, as such, could be promoted more effectively to reach audiences who want to engage with it. This is the argument presented by Tuuli Lähdesmäki at the conference *Tangible and Intangible Cultural Heritage: A Dichotomy under*

Debate, held on 24-25 October in Sibiu, Romania. The conference was organised by the Horizon Europe-funded ELABCHROM project with its project partners, the Lucian Blaga University Sibiu in Romania, the University of Burgundy in France, and the University of Jyväskylä in Finland. The conference brought together over 70 experts from different European countries, representing not

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only universities and research institutes, but also museums and cultural institutions. In 14 thematic panels, speakers and participants discussed the intertwining of tangible and intangible cultural heritage and the challenges of distinguishing them in cultural policy and governance.



Tuuli Lähdesmäki held a talk about REBOOT's research on EU film festivals.

One of the conference panels focused on festivals as cultural heritage. This theme linked the conference to the local cultural scene in Sibiu, known for its lively international festivals. During the conference, the city hosted the Astra Film Festival (<https://www.astrafilm.ro/en>), which has been held annually in Sibiu since 1993. It is known for presenting a diverse selection of documentaries from around the world.

Lähdesmäki's presentation at the conference focused on the EU Film Festivals that the REBOOT partners from the University of Jyväskylä, Erasmus

University Rotterdam (the Netherlands), and KadirHas University (Türkiye) have jointly researched based on grey literature and interview data collected among EU Delegations and EU Film Festival organisers in eight non-EU countries. Lähdesmäki's presentation focused on EU Film Festivals in two case countries, the UK and Canada, both of which include populations, migrants, and ex-patriots with heritage and cultural roots in (continental) Europe.

The analysis of this interview data showed that European films have a particular heritage meaning that is not addressed in EU film policy. This meaning is based on film as personal cultural heritage, i.e. historical, cultural, and familial elements that shape one's identity and sense of belonging to a cultural group. According to the interviews with festival organisers, European expatriates, migrants and citizens with a migrant background and their families form an important audience for festivals in multicultural metropolises, such as London, Toronto, Ottawa, and Vancouver. Such audiences are eager to see European films from their (or their parents', grandparents' or relatives') home countries, to experience their culture and cultural environment and to hear their native language.

Since 2000, EU cultural policy discourses have identified film as cultural heritage and launched policies to promote European film heritage. Film as heritage is also mentioned in practical guidelines for EU Film Festivals. However, neither the policies nor the guidelines recognise the personal heritage meaning of European films. Such a meaning is important for a specific audience segment, which could be better recognised as a potential market niche for European films.

04 Small Cinemas Conference in Zagreb sparks dialogue between scholars and film industry leaders

By Gentiana Ramadani

From November 5th to 7th, the 15th Small Cinemas Conference in Zagreb hosted an insightful cluster panel titled „Approaches to Competitiveness in Small Film Industries.“as a connecting minds, this panel brought together leading voices from three prominent EU Horizon Europe projects, REBOOT, SCENE, and CresCine, to discuss how small film industries in Europe navigate the complexities of international competitiveness.

Moderated by Petr Szczepanik from Charles University in Prague, the panel featured:

- Antonios Vlassis, University of Liege (REBOOT project)
- Anastasios Drosou, Information Technologies Institute, Centre for Research and Technology Hellas (CERTH), Thessaloniki (SCENE project)
- André Rui Graça, CISCANT, Lusófona University, FilmEU European University, Lisbon (CresCine project)

The discussion explored what competitiveness means for the film business in smaller countries and how small film industries in Europe can enhance their international reach. The panelists shared insights on challenges such as limited resources, distribution obstacles, and global competition while emphasizing the unique strengths of small markets, including cultural diversity, regional storytelling, and supportive policy frameworks.

REBOOT: Rethinking Competitiveness

Antonios Vlassis presented the work of the REBOOT project, highlighting its comprehensive approach to understanding competitiveness in the

European film industry. He emphasized that focusing solely on market and economic metrics falls short of capturing how institutions, stakeholders, audiences, and citizens relate to the film industry. Instead, he argued for exploring political and social dynamics to fully grasp the complexities of competitiveness. Vlassis stressed the importance of considering Europe's socio-economic, cultural, and political landscape to build a more inclusive and competitive film industry.



Representatives of the cluster projects REBOOT, SCENE and CresCine discussed small European film industries.

SCENE: Leveraging AI for Global Reach

Dr. Anastasios Drosou, coordinator of the SCENE project, introduced innovative AI tools designed to support small film industries by increasing efficiency in production, distribution, and market analysis. He showcased how these AI-driven solutions enhance international reach, optimize workflows, and create new opportunities for collaboration and innovation within the European cinema industry. Dr. Drosou emphasized the importance of digital transformation and international networking to foster competitiveness.

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CresCine: Innovating Across the Value Chain

André Rui Graça presented an overview of the CresCine project, which aims to increase the international competitiveness of the film industry in small European markets. The project takes a comprehensive approach by addressing the entire film production, distribution, and consumption ecosystem. It seeks to innovate at all levels of the value chain, from policy frameworks to data management, new business models, and distribution modes. Graça highlighted the achievements of the project to date and its potential to reshape small film markets through strategic innovation.

Paving the way for competitive small film industry, the panel concluded with a consensus on the need for tailored strategies that combine digital transformation, international networking, and supportive policy frameworks. By integrating diverse perspectives and innovative solutions, small film industries in Europe can effectively navigate global markets and enhance their international competitiveness.

On behalf of the Reboot Project, two insightful papers were presented in the same conference, shedding light on crucial aspects of the European film industry. The presentations explored the roles of film festivals in fostering alternative cinema and public service media in promoting public value through film productions.



Gentiana Ramadani presented research on the relation of public service media, film industries and public value.

Gentiana Ramadani presented research results of the paper by Katharine Sarikakis and Ramadani herself, “The Role of Public Service Media in promoting Public Value through film productions” and talked about how public institutions support the film industry to enhance public value. Focusing on the three-year period following the pandemic (2021-2024), the study examined the evolving concept of public value, tracing its roots from Moore's 1995 definition in public administration to its application in media, beginning with the BBC in 2004. The paper emphasized the importance of public funding in fostering a competitive film industry that contributes to societal enrichment. By analyzing investments and initiatives from three countries, Greece, Austria, and Albania, it showcased the strategic role of public service media in promoting public value and competitiveness within the sector.



Angeliki Chatziefrimidou held a talk about film festivals as space for alternative cinema.

Meanwhile, Angeliki Chatziefrimidou presented the paper she co-authored with Katharine Sarikakis, „Film festivals as support mechanisms for alternative cinema“, examining how film festivals in Austria, Belgium, and Greece create platforms for alternative and innovative films. By offering specific awards for experimental works and dedicating space to unconventional narratives, these festivals encourage non-commercial productions and the exploration of extraordinary, sometimes uncomfortable topics. The presentation highlighted the role of small film markets in nurturing creativity and giving voice to filmmakers who challenge mainstream cinematic norms.

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05 Co-production is the future!

An interview with director Otwin Biernat

By Gentiana Ramadani

In this interview, we sit down with Otwin Biernat, an accomplished film director with a diverse career. From his early days studying drama in Vienna, where he later pursued a career as an actor, to transitioning into filmmaking in Berlin, Otwin has made a significant mark in the film industry. His career began with music videos and short films, including the Berlin Film Festival-featured *Codewort Mr. Bean* in 2011. In this interview, he shares insights on the challenges and opportunities within the industry, discussing everything from the evolution of filmmaking to the importance of social justice, gender (in)equality, and representation in cinema.

Takeaways from this conversation include the belief that co-productions should be considered the future of European cinema. Otwin believes that co-productions not only offer financial advantages, such as tax credits, but also serve as cultural exchanges, enriching films with diverse perspectives. Another key pillar is the importance of adapting funding models. The current funding landscape in Austria, and Europe more broadly, is facing challenges. Traditional institutional funding often favours certain genres or storytelling styles, which can limit creative freedom.

Additionally, Otwin addresses navigating industry inequality, emphasizing that the industry is heavily influenced by connections and networks, which can create inequalities for young filmmakers without the right resources or background. He stresses that while talent is essential, connections and luck also play a significant role in career progression. This leads to the final pillar, the role of passion and merit in filmmaking.

Despite the challenges posed by industry competition and structural inequalities, Otwin believes that the key to success is staying true to one's vision.



Gentiana Ramadani: What are your insights into the state of the European film industry? Where do we currently stand, and what challenges do young filmmakers face when entering the market?

Otwin Biernat: It's difficult to define the situation uniformly across Europe because conditions vary from country to country. In Austria, for example, the direction of the industry is uncertain at the moment. It's not an easy time. That said, Europe presents significant opportunities, particularly in co-productions. Different countries offer unique advantages for filmmaking. This is why countries like Romania and Bulgaria have become attractive production hubs because of lower costs. Romania offers a 35% tax rebate. Certain regions in Europe are thriving in film production. I lived in Naples for six years and witnessed the high volume of films being produced there, including many American productions. On the other hand, some areas are struggling. In Germany, for instance, industry professionals are facing uncertainty. Many producers and filmmakers are unsure about the future, which has created a temporary standstill in

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production. One thing is clear: European filmmakers need to strengthen connections and collaborations across countries. Co-productions are becoming increasingly essential. I recently spoke with an Austrian producer who confirmed the difficulties of producing films within Austria alone. He suggested that my project would be more feasible as a co-production with Italy or another country.

Another concern is the role of national broadcasters like ORF in Austria, whose cooperation with filmmakers plays a significant role in funding and production. Uncertainty surrounding public broadcasters adds to the challenges faced by the industry.

Gentiana Ramadani: Given these circumstances, what do you see as the most promising path forward for European filmmakers?

Otwin Biernat: Collaboration is key. The future of European cinema lies in co-productions and cross-border partnerships. Filmmakers must explore international opportunities and leverage the strengths of different countries to overcome financial and structural barriers. By fostering a more interconnected industry, we can create a stronger, more sustainable filmmaking environment in Europe.

Gentiana Ramadani: How are Austrian filmmakers currently navigating funding challenges, and what alternative funding opportunities are emerging?

Otwin Pierna: The Austrian film industry is closely tied to institutions like the Austrian Film Institute. However, many filmmakers' express frustration over the limitations of institutional funding. Some projects, particularly those with more commercial or genre-driven storytelling, struggle to receive support. There is a growing sentiment that funding decisions do not always reflect the quality or potential of a project but rather align with institutional preferences. Some filmmakers have

even suggested adopting a more anonymous selection process to ensure fairness in funding allocation.

Another shift is happening with private investment. A new private TV channel in Austria, owned by the Red Bull group, has started providing funding for fiction feature films. This marks a change in Austria's funding landscape, introducing more market-driven financial support.

Internationally, filmmakers are also exploring alternative financing models inspired by the American system. In Italy, for example, state funding alone is often insufficient, prompting filmmakers to seek funding from private investors, large brands, or wealthy individuals. This approach allows them to produce films much faster than relying solely on government grants. Some Austrian filmmakers, including myself, are now exploring similar models by collaborating with producers from the United States to access a different funding structure that prioritizes commercial viability and speed.

Gentiana Ramadani: If you were to propose changes in institutional support within Austria, what would they be?

Otwin Biernat: Reforming funding policies to be more inclusive of different genres and storytelling styles would be a step in the right direction. Filmmakers should not feel limited to certain themes or artistic styles simply because they align with institutional preferences.

Additionally, increasing the transparency of funding decisions and potentially implementing more anonymous project evaluations could improve fairness and diversity in Austrian film production. Furthermore, establishing stronger connections between Austrian filmmakers and international funding sources would be beneficial. This could involve fostering more co-production agreements, encouraging private-sector investment, and adapting funding models to be more dynamic and responsive to industry needs.

Ultimately, Austria must evolve to remain competitive in the European and global film

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markets. By embracing both traditional funding structures and new financing models, Austrian filmmakers can have greater creative freedom and access to the resources necessary to bring their stories to life.

Gentiana Ramadani: As a producer and head of a company, what are the biggest challenges you face in the industry economic, social, or cultural?

Otwin Biernat: I consider myself lucky because my company operates in two areas. On one side, I shoot commercials, which provide a stable income. This is crucial because film funding can take a long time, and there are periods when no money is coming in. Some projects go months or even years without financial support.

I made the decision five years ago to establish a steady income stream. I had experience shooting music videos, but working with larger brands on commercials provided more financial stability. While it is time-consuming, I love it because it constantly sharpens my directing skills.

The second part of my work involves developing film projects, writing, pitching, and applying for funding. The biggest challenge, by far, is securing funding. Without financial support, a project cannot move forward.

Gentiana Ramadani: You've mentioned co-productions. Many see co-production as primarily a financial strategy. Do you believe it has a broader cultural impact, such as fostering audience engagement, democratic values, and public interest?

Otwin Biernat: Absolutely. For my historical film, we would need funding from Austria, Italy, and European grants. Without that, it would be impossible. I certainly hope so. Personally, I view co-productions as cultural exchanges. I want to work with different countries to create films that blend perspectives and traditions. My goal is to shoot ten films in ten different countries. Collaboration between nations naturally leads to

cultural exchange, not only among the cast and crew but also for the audience. For instance, my historical film follows an Austrian who falls in love with an Italian during a war between their countries. Viewers in both Austria and Italy would be able to connect with the story from different angles. This is the essence of co-production, it brings people together, offering new perspectives and fostering understanding.



Biernat's films have been shown, among other places, at the Berlin Film Festival.

Gentiana Ramadani: What does competitiveness mean to you, and how does it relate to public value in the context of filmmaking?

Otwin Biernat: Competitiveness is inevitable when pitching a project, as not everything will receive support or funding. However, the real mistake is when filmmakers focus too much on outshining others. If you approach filmmaking with the sole aim of being better than someone else, you lose sight of your passion and your project's true essence. Success comes from focusing on your story, your vision. While it's important to be aware of what topics are relevant today, the key is to remain true to your project without letting competition overwhelm you. There will always be talented people out there, and trying to beat them will only drive you crazy.

Gentiana Ramadani: How do you perceive the inclusivity and fairness in the film industry, especially for young filmmakers?

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Otwin Biernat: The film industry, much like the economy, isn't entirely fair. It's shaped by the larger global system, geopolitics, economics, and sometimes even venality. In the film industry, this manifests as favouritism, where certain people get preferences because of personal connections or networks. It's a common practice in every industry. For example, if you go to a doctor, you may prefer one you know, and they'll likely treat you differently. The film industry operates similarly, connections play a significant role, and that's just the way the world works. However, the idea of inclusivity is complex. All groups and communities should be part of the market, but that's not always the case. Some young people, for example, might not have the formal education required but are incredibly talented in what they do. The problem is that without certain connections, it's harder for them to break through. Yes, you need "vitamin B" (Beziehung-connections) to succeed in this industry. It depends on your education, your projects, and the recognition you receive through festivals or awards. Some creative people just don't have the luck or the right connections to be seen, while others, who might not be as talented, are given preference because of their networks.

Gentiana Ramadani: Based on your description, it seems like the film industry doesn't truly value meritocracy. Connections, socioeconomic background, and other factors seem to play a significant role in career progression.

Otwin Biernat: Yes, I agree. While connections and luck are important, we should also remember how less exclusive the industry used to be. Forty or fifty years ago, only a select few could afford to make films because of the equipment needed. Now, anyone can pick up a camera and make a film. Funding opportunities have also expanded. It's no longer just about state funding, you can find private sponsors or partners to help finance projects. This has opened doors for more diverse voices and ideas.

Gentiana Ramadani: What changes would you suggest to promote diversity, meritocracy, and social justice in the film industry?

Otwin Biernat: One change would be to provide equal opportunities for everyone, ensuring that quality is the main factor in determining success. However, this is a difficult issue, and I'm not sure if it's entirely possible to eliminate the influence of connections. I know a producer in Europe who made Hollywood-style genre films, but the filmmaker community never took his projects seriously. This is something that happens everywhere, long time industry professionals sometimes aren't taken seriously because they don't fit into the "right" genre. I think this is part of human nature, but we should focus more on the content of the films themselves. Evaluating a screenplay based on its merits, whether people want to watch it or not, is essential. If the story resonates, it will find an audience. That's where support should go behind projects with strong, compelling stories.

06 Children's University Workshop “3,2,1...and action!”

By Angeliki Chatziefrimidou

In recent years, academic interest has focused on informal settings such as workshops, extracurricular activities, and projects on children and filmmaking that inspire and encourage learning and creativity. Studies have found that engaging children in video and film production boosts their creativity and improves their understanding of complex concepts. For instance, Leung et al. (2020) found that in the video workshop they organised, children can experiment with professional equipment from a young age and use “epistemic play” to explore and understand new ideas. Similarly, Drotner (2020) highlighted the benefits of filmmaking outside school for children ages 6 to 16, underscoring the importance of collaboration, praxis-oriented learning and semiotic dialogue in the filmmaking process.

Furthermore, during the Play Observatory project they organised, Cannon et al. (2024) showed how informal media creation, such as filmmaking and animation, increased children's creativity and media literacy, and became an important post-pandemic educational component. These studies emphasise the value of educational filmmaking activities to empower children to express themselves and develop their skills. Aligned with the studies, [the REBOOT project](#) team held a workshop for children aged 10 to 12 in Vienna at the [Children's University](#) on July 12, 2024 with the title “3,2,1...and action!”.

The [Children's University](#) has been offering research experiences for children since 2020. Children can explore topics that interest them from a variety of over 400 contributions designed by scientists from several universities.

Our workshop focused on filmmaking was aiming to:

- Raise interest among young people in the film industry.
- Foster their creativity by enabling them to create their own stop-motion videos.
- Educate them about the process and tools required for filmmaking.
- Provide an opportunity for children to learn about different professions in the industry and try out various roles in real filmmaking practice.



The children built their own sets from the available material.

The workshop began with an introductory game where the children shared their names and favourite films. By passing the ball to each other, the children felt more comfortable and connected as they discovered common interests. The next activity involved matching different professional tasks with the corresponding filmmaking professionals and categorising them into

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preproduction, production, and postproduction phases. All children were involved in assigning the jobs to the professionals and showed great interest in the classification into the production stages. The children were surprised by the variety of occupational groups and very motivated to present their own profession. This activity was very interactive as everyone was careful to match their card to another participant's card. The activity had an important informative and educational aspect. For example, one girl was confused but also surprised when she matched the job of film producer to the production phase and after the discussion realised that this is actually part of the pre-production phase. Following this, the invited professionals introduced the eight steps of filmmaking and provided two additional short training sessions on camera angles and lighting, where children could see in real life the interaction and combination of cameras and lights. Children were very interested asking questions and giving examples from their own video projects.



Under the guidance of the REBOOT team, the children learned the basics of stop motion films.

The participants were then divided into three groups to create their own films. Each group received support from researchers and professionals, along with a booklet that guided them step by step in making decisions about selecting characters, developing plots and creating the storyboard. The children, working in teams, had to complete the entire process of making stop-motion videos on their own, while the role of the

professionals, researchers and assistants was mainly to organise and support them. Based on their talents, children assumed the responsibility of various tasks, such as choosing characters, defining the title and creating prompts. All groups had access to materials corner stocked with sceneries, Playmobil figures, animals, Lego box and other available materials.

Upon completing the editing, it was “movie time”, where participants had the opportunity to watch all three stop-motion films they produced. Children were very excited watching their own productions. Finally, the participants received certificates and small gifts featuring the animal and figures they had used in their films. In their feedback, the children expressed an interest in the film industry, with over 20 participants indicating a desire to pursue a profession in this field. The majority already had some experience in filmmaking, having shot videos on their own, either with friends or with parental support. Participants shared new things they learned from the workshop, including “I learned about the three-lights effect” (boy), “I learned that the process of production starts before the actual production phase of the film” (girl), and “I didn’t know that so many people work to make a film” (girl). Although the children found the teamwork process challenging due to the variety of opinions and roles, they also found it exciting.

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the process of production starts before the actual production phase of the film” (girl), and “I didn’t know that so many people work to make a film” (girl). Although the children found the teamwork process challenging due to the variety of opinions and roles, they also found it exciting.

The workshop had a profound contribution to the aim of the REBOOT project at the enhancement of the competitiveness of the European film industry, that can be achieved by: 1) Encouraging labour mobility; (2) Investing in education; (3) Boosting productivity (Esposito & Tse, 2012, p. 81). Through this workshop children had an educational experience of the process, equipment such as mobiles or computers and international young professionals of the film industry, having the opportunity to explore the different areas of filmmaking by themselves. Getting knowing the variety of the available professionals, sharing the same passion for film making and fostering their creativity and aspirations for the future.

Working with children required careful ethical considerations. We ensured that children’s participation was entirely voluntary and conducted the workshop with them, not at them. Throughout the workshop, we were mindful of the power dynamics between adults and children, and between professionals and children. We always emphasised child-friendly communication and used language appropriate to their developmental stage.

This workshop was an important communication of the REBOOT project demonstrating how early exposure to filmmaking skills can spark young people’s interest and creativity and potentially inspire them to pursue future careers. The workshop not only provided hands-on experience with professional tools and processes, but also educated participants on the diverse roles in the film industry. By involving children in such activities, the REBOOT project supports the development of a skilled and passionate young generation, which is vital for the continued growth and competitiveness of the European film industry.

Finally, we want to thank the people running the workshop, who consisted of four researchers (Sarikakis K., Chatziefrimidou A., Jüngst J. and Ramadani G.), two film industry professionals (Permana C.J. and Zogo Y.S.C.), two assistants (Bismarck-Sarikakis K.G. and Lesi S.) and one photographer (Schröder L.).

Angeliki Chatziefrimidou is a PhD candidate at the University of Vienna, Department of Communication. After many years working in education, she is a research assistant at the University of Vienna, specialising in children and media.

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07 Teaching Through Inquiry

REBOOT's effort to educate against and beyond boundaries

By Simon Haslauer

The unity of teaching and research has long been a defining principle of higher education, yet its implementation often falls short in today's increasingly corporatized and precarised state of academia. Rooted in Wilhelm von Humboldt's vision of the modern university, this principle was never just about maximising research output but about academia as a holistic and humanistic endeavor. More than a century later, bell hooks' concept of "engaged pedagogy" expanded on this ideal, arguing that education should be an act of freedom, where students and teachers co-create knowledge through critical dialogue.

The REBOOT Project's main objective is to explore European film industry competitiveness through research. With the resources allocated towards this significant research, there is space opened to create synergies in the classroom: integrating research into teaching can transform students from passive recipients into active participants, ensuring that education remains not just a means to an end, but a process of intellectual and personal growth.

Wilhelm von Humboldt (1767-1835) was a German aristocrat, linguist and education politician. On his initiative, Friedrich Wilhelm III. founded the Universität zu Berlin (today's Humboldt-Universität) in 1809. Humboldt's ideas of the modern university informed the reformation of universities as institutions. Instead of giving practical training to doctors and clerics or mannerly education to aristocratic elites, the university developed into a place of scholarly inquiry. Humboldt aspired to combine autonomy – both of the institution and the students – holistic studies of the arts and sciences in connection with the respective field of study and

most infamously: the unity of research and teaching. The seemingly less popular part of the Humboldtian university model is that the "modern research university was originally designed to serve humanistic rather than scientific goals". To be cynical, central were not grants or maximum publication output but the utilization of academic research for a bigger, educational cause.

It goes without saying that, with Humboldt being a man of his time, the "modern" university at the time was only accessible to men, adhering to bourgeois ideals of women's space being the private.

Undoubtedly a more comprehensive approach to modern education was provided by bell hooks in her 1994 series of narrative essays Teaching to Transgress: Education as the Practice of Freedom. Influenced by her experience as a student in both racially segregated and so-called integrated schools, and later as a student and teacher at universities such as Stanford and Yale, hooks dissects the state of the U.S. education system and the difficulties arising in pedagogy and culture if problems of class, gender or race are not brought to the conscious of teaching staff.

Building on Paulo Freire's critical pedagogy, hooks is suggesting an "engaged pedagogy". In today's corporatised education system, it may seem dramatic to say that engaged pedagogy is – like a lot of hooks' work – rooted in love, it is true, nonetheless. With decentering "students" and "teachers" and relating to them as human beings with human experience rather than their roles in the classroom, hooks undoubtedly revolutionised the discourse on what it means to educate children of different backgrounds.

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Seeing children and young adults as the leaders of the future, be it as producers, directors or cultural policy makers, has been engrained in REBOOT's mission from the beginning. It is only consequential to see academic students as the leading scholars of tomorrow.

There is no need to sugarcoat it: Courses on methodology, epistemology and even practical research are not areas of academic education students, especially on the undergraduate level, usually are interested in. Or to put it differently: They are not areas a lot of teachers tend to interest their students in.

REBOOT related courses, whether they are lectures on the politics of media or thesis courses on undergraduate and graduate level, always aspire to not treat participating students as passive listeners, material as closed and ultimate truths. Instead, students are invited into the discussion, inspiring autonomous research, utilizing interactive methods to nurture their interest and engagement, with student body and teachers forming the learning process with their interests – together.

Putting bell hooks' ideas into practice, we believe in inviting personal standpoints and stories of student and teachers into the classroom, departing from the teacher as sober lecturer and examiner, creating space for togetherness, inquiry as human beings and most importantly: dignity.

Teaching in the framework of a research project like REBOOT, not only gives students the possibility to work with real data but also gives them the chance, as young scholars and humans, to find out what aspects of media scholarship they are interested in, translating their personal interests into practical research that is connected back to the „real life“.

But the unity of inquiry and teaching, that is so emblematic in the Humboldtian university model and implicit in hooks' philosophy of teaching, doesn't stop at the classroom door. For us, students are not side effects of a staff position, renting our rooms and time for a few years, never to

be seen again. We see them as project collaborators, future team members and of course: human beings.

After all, the academy should not be only a knowledge machine for the industry, producing well-skilled workers but a place of inquiry, learning and even self-actualisation. Thinking research and teaching not as a dichotomy but two sides of the same coin, creates chances for student and teacher to grow as researchers, as human beings, as critical citizens in the process of knowledge creation. Or as bell hooks puts it: "the academy is not paradise. But learning is a place where paradise can be created."

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08 From Queer Tragedies to Joy

Expanding the Representation and Queer Gaze in European Cinema



By Annika Seppänen

In this essay, I discuss queer representation in European film, taking advantage of preliminary observations made while transcribing young people's interviews from the Finnish REBOOT data. I noticed that the theme of representation came up in several interviews. The young people considered the representation of minorities important and wished for their more authentic representation in films. The interviewees wanted to see the depiction of minorities that originates from the narrative, not from the need to meet inclusivity requirements.

In the last few years, I have watched many European films featuring queer women, such as Arantxa Echevarría's *Carmen & Lola* (*Carmen y Lola*, Spain 2018), Inari Niemi's *Light Light Light* (*Valoa valoa valoa*, Finland 2023), and one of my favourites – Céline Sciamma's *Portrait of a Lady on Fire* (*Portrait de la jeune fille en feu*, France 2019). In the last film, the story set in France in the late 18th century depicts a relationship between a young woman, Héloïse, and a painter, Marianne, commissioned to paint her wedding portrait. All films mentioned have the kind of representation the interviewees wished for: characters who are authentic, multidimensional, even messy.

However, these films have the same, predictable ending. For example, *Portrait of a Lady on Fire* is a heart-wrenching tragedy, which also makes it

touching and memorable. But I cannot unsee how typical of an ending it is for a queer relationship portrayed in film: one of the characters dies or submits to heterosexual marriage, or their family is not accepting. Queer tragedies are so common that I find myself checking the ending beforehand and making lists of feel-good movies in a desperate attempt to avoid them. Because representation can be thought of as a phenomenon that constructs and produces reality (Rossi 2015, 80), it is natural to ask what kind of reality this type of queer representation creates.

In a way, the tragedies feel justified. Queer history – and still for many, also the presence – is a story full of tragedies, and these experiences should not be forgotten. Sara Ahmed (2010, 105–106) writes about the importance of embracing the unhappy queer: because the world doesn't accept us, we must stay unhappy with this world so that the realities of discrimination, non-recognition, and violence are not concealed. While the representation of unhappy queers shouldn't be overlooked, I suggest expanding the imagery.

Representations have the power to normalise or mythologise queerness (Rossi 2015, 83), and the persistent tragedies establish happiness as an unattainable myth for queers. Therefore, the representation of queer joy is vital in order to normalise queerness. I understand that queer

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happiness is a privilege and not accessible for all. With that in mind, it is part of the authentic representation that the interviewees wished for and significant not only for this reason, but also because it has the potential to act as a political force to clear the way for others. As Tyler Quick (2020, 33) shows, queer representation in film has resulted in greater self-awareness and community identity. Films with glimpses of queer happiness offer representation with the power to shape reality – both in the lives of individuals and at a societal level. Similarly, the persistent representation of tragic endings to queer lives deviates us from that hope and potentiality.

In the pursuit of an expanded queer representation, happy queers shouldn't be represented at the expense of diluting queerness to a digestible form for heterosexual audiences. Since happiness tends to come with straight conditions – even with perverse desire, one can have straight aspirations allowing for the possibility of happiness, such as accumulating family possessions – this kind of representation might adopt the forms of happy heterosexuality, which annuls the political power of the unhappy queer (Ahmed 2010, 91, 106, 114).

Ahmed (2010, 113) argues that the risk of promoting happy queers is that it reimagines the world as if there is no discrimination. Because I do not see representation as a binary – completely happy or sad, good or bad – I question whether the representation of queer happiness would require overcoming discrimination and suppressing queer suffering. Ahmed (2010, 117) describes this as being happily queer: encountering the unhappiness of the world but refusing to be made unhappy by that encounter. Drawing from Ahmed, Angela Jones (2013, 2) recognises that queer futurity is not about a utopian society in which everyone is happy, and life is ideal. Rather, it is about making life more bearable in the present by giving hope and creating the potential for a better future (Jones 2013, 2–3).

Since the world remains unhappy with queer love, the hegemony of queerness cannot be ignored

while addressing the representation of minorities.

Normative whiteness and able-bodiedness can be seen, for example, in European queer film festivals (Vince 2023, 1475). Strategies of visibility and representation are understood as the most important tools for fighting oppression, but visibility renders queer people of colour especially vulnerable to violence (Wiedlack 2023, 922–923). While the white hegemonic individuals have the choice to remain invisible, the racialised oppressed are forced to reveal themselves for the purpose of Western knowledge production (Wiedlack 2023, 926–927).

To establish meaningful queer-feminist solidarity and to take into consideration the vulnerability of hypervisible minorities, new visual practices are necessary (Wiedlack 2023, 932). Katharina Wiedlack (2023, 924, 933) shows how the shift from queer representation to the queer gaze in film can become a starting point for queer solidarity: it has the possibility to build and strengthen connections to vulnerable populations without exposing them. Instead of explicitly representing queer identities, bodies, or desires, cinematographic forms can still be used to sustain queer living, dreaming, and world-making (Wiedlack 2023, 932).

While I see representation as an important form of rebellion, utilising the queer gaze is something to consider. I wonder if ideas from the queer gaze applied to the means of queer representation could support normalising queerness instead of mythologising it into an inevitable tragedy. Could queerness be just one part of a character – a part of their lives, not something that defines and condemns them?

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09 Defining Arthouse

By Sena Öndün

Since the early 2000s, Turkey has experienced remarkable growth in its audiovisual industry, with the success of local films dominating the box office charts, Turkish TV series winning global syndication and a notable presence at international film festivals. However, despite this overall success and visibility in the industry, Turkey's position in film circles remains a complex issue to this day. Turkey's historical and cultural components, as well as its geopolitical position between Europe and Asia, make it difficult for the country to position itself. The collaborative nature of filmmaking leads to cross-cultural exchanges between Turkish and European filmmakers. Co-productions and collaborations cross national borders by fostering a cinematic environment that embraces different perspectives. In this blog post, based on a study I conducted on Kadıköy Cinema, an arthouse movie theater in Istanbul, I would like to share some findings on how Turkish audiences perceive and relate to European cinema, and the place of cinema in audiences' cinematic practices.

The results shared here are a part of a bigger study on the only remaining commercial arthouse movie theatre of Istanbul/Turkey "Kadıköy Cinema", which

The Reception of European Cinema among the Istanbul Arthouse Audiences

was conducted between September 2022 and January 2023, engaged 237 participants through an online survey comprising 42 multiple-choice questions and in-depth interviews with 17 participants. While the primary focus was on the audiences' own narratives, the study tried to understand diverse dimensions of the audiences' cinematic experiences, ranging from their movie-watching and cinema-going practices before and during the COVID-19 pandemic to their affiliations with film festivals and specific theaters while exploring the intersection of the relationship between the urban landscape and arthouse cinema scene in Istanbul. In the in-depth interviews, I found that the European cinema occupies a very important position for the Turkish arthouse audiences.

For the participants of this study, there is a prominent distinction between arthouse movies and mainstream movies and arthouse cinema has a close relationship with European cinema. One of the major findings in the study was about the audiences' relationship with festivals. Festivals are the primary channels through which the audiences follow arthouse films, getting to know new directors and following the news from the industry. In the

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interviews, it was noticeable that some of the participants based a large part of their film-watching on films that were only shown at festivals and on films by directors who participated in festivals. Moreover, I observed that “prestige” has an important place in the audiences’ film preferences, and the audience considers some festivals more important and prestigious than others, and therefore forms their film preferences accordingly: “But not every festival, of course. I mean, there are such prestigious ones in Europe” (Female, 33 years old), “...I started to follow more current arthouse films. Cannes, Venice Film Festival, etc. I am curious about the films I hear about at these events” (Male, 28 years old), “I go through films that have made a splash at big festivals, or I go through certain directors who have made a splash at big festivals in the previous periods and whom I know. I usually discover them at a festival, a festival gives visibility to films after all. I can roughly say I follow four big European festivals: Cannes, Berlin, Venice, and San Sebastian” (Male, 34 years old). One noteworthy aspect here is that the audience generally included only European cinema and European festivals in the definition of arthouse cinema. Among the 2 festivals named throughout the interviews, only one non-European festival was ever mentioned (Sundance).

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In particular, American cinema almost never comes to mind in terms of independent cinema and the concept of "Hollywood film" is used to define mainstream cinema, but the contradiction here is that when we asked the same interviewees about the directors they follow and watch, they easily listed American independent directors such as Francis Ford Coppola and David Lynch, and even a classical Hollywood director such as Alfred Hitchcock. One of the participants defined arthouse film as "A24" movies without knowing that it is an American based entertainment company, which shows how the American independents are also considered something exterior to "Hollywood" and as a part of arthouse cinema. For European arthouse cinema, most frequently named directors by audiences were Yorgos Lanthimos, Michael Haneke, François Ozon, Céline Sciamma, Christian Petzold, Gaspar Noé, Agnès Varda, and Federico Fellini. From Turkey, Zeki Demirkubuz, Emin Alper, Yeşim Ustaoğlu, and Nuri Bilge Ceylan were cited. For the participants, European Cinema is considered to be the fortress of independent cinema and art film; leading me to deduct that the European-based idea of "classical" cinephilia continues to have an ideological basis in the eyes of the audience. On the other hand, American Cinema, and the concept of "Hollywood film" fell

into the category of mainstream and more "entertaining" films for the participants. It appears that American Cinema has a bad connotation for the arthouse audience. However, in the practical experience of watching, as I have explained earlier, American independent cinema has an undeniable place alongside European cinema.

In conclusion, the question of how European cinema is defined remains ambiguous. However, this study highlights that for the audience, Hollywood versus European, critical prestige versus box office success, and auteur versus mainstream has a place. Arthouse cinema still has an equivalent as auteur cinema: "I prefer auteur cinema, because what we call art cinema actually leads us towards auteur" (Female, 33 years old). The Eurocentric concept of the 'classic' cinephile has a strong place among arthouse audiences in Turkey. As the cinema landscape evolves under the influence of online platforms, the dynamics between European and American cinema continue to shape the arthouse preferences of Turkish audiences. The complex interplay of industry forces, distribution challenges and audience reception raise ongoing questions about the future of arthouse cinema in Istanbul. But it is possible to say that defining European arthouse cinema opposite to Hollywood still has a validity in the eyes of the Turkish arthouse audience.

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10 Cinema and social media in the digital age

Upholding the right to sociality for children. Insights from Focus Groups

By Veronica Punzo, Nicoletta Patti, and Denise Amram

Play and sociability [1] are children's fundamental rights such as health, private life, and family, and education. Each State has thus the duty to guarantee through appropriate legislative initiatives safe environments and appropriate conditions to realize one's personal attitudes and interests.

The first international document recognising the importance of play and sociability is the UN Convention on the Rights of the Child [2]. In Article 31, it enshrines the right of children and adolescents to engage in play and recreational activities appropriate to their age. It commits States Parties to ensure their participation in cultural and artistic life in accordance with the principle of equality. Article 31 should be interpreted in light of the entire Convention, which identifies four principles as essential for the healthy growth and optimal development of children and young people: the right to non-discrimination (Article 2), respect for the child's best interests (Article 3), the right to life, survival, and proper development (Article 6), and the right to be heard (Article 12).

These principles find significant practical application in the creative industries, especially in performing arts, like cinema. In this context, the performing arts contribute significantly to building inclusive and cohesive societies. This contribution is not only a strategic priority but also essential for promoting EU

values and, in turn, supporting the well-being of children—both in their present lives and as they grow into adulthood.

Today, the economic value created by creative industries, such as the film industry, and their growth potential in comparison to other sectors of the economy, is becoming more evident. To become true promoters of sustainable and inclusive local development, these industries must be able to express a creative environment that fosters responsible competitiveness while also including and valuing minors' needs and rights. Cinema, in particular, should be designed as a space where young people can actively engage with culture and express themselves. By providing opportunities for participation, storytelling, and representation, cinema can contribute to their personal development, enhance their well-being, and reinforce their social and cultural rights, ensuring they are acknowledged not only as future citizens but also as active members of society today.

The analysis undertaken within Reboot's WP5 combines a theoretical and normative framework with the findings of empirical research to understand how new generations experience cinematic narratives in the digital age. The ongoing empirical study, which collected the experiences and impressions of 60 young people aged 12 to 24 living in Pisa, Italy, demonstrated how cinema is not

1 Janot, J.B., & Rico, A.P. (2020). The right of the child to play in the national reports submitted to the Committee on the Rights of the Child. *International Journal of Play*, 9(4), pp. 400–413.
2 Convention on the Rights of the Child, New York, 1989.

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only a tool for entertainment, but also a powerful means of cultural and social growth. According to preliminary findings, young people who participated to our focus groups view cinema as a space for inclusion and reflection, capable of raising awareness about critical issues, encouraging shared responsibility, and increasing participation in their community's social dynamics. [3]

The focus group discussions explored participants' film preferences, shedding light on their perceptions and expectations regarding cinematic content. For instance, films such as *The Intouchables* (in French *Intouchables*), and *Inside Out* were mentioned by the participants as examples of narratives that offer safe spaces to explore emotions, diversity, and relationships, contributing to the development of self-esteem, imagination, and social skills.

In addition, the desire to explore distant cultures and worlds emerged as a recurring reason for watching films. For several participants, cinema represents a way to “travel without moving”, offering the opportunity to learn about different realities and traditions.

Through narrative journeys, cinema not only entertains but becomes a powerful educational tool that encourages self-exploration and openness to new cultures and realities. Much like play and social interaction, it promotes paths of self-determination and reflection, building symbolic bridges between places, cultures, and generations.

The discussions also highlighted the pivotal role that social media plays in how new generations consume and reinterpret audiovisual content. Social media platforms have expanded the possibilities for discovering and sharing creative and artistic performances, enabling young people to creatively engage with film narratives. However, the widespread use of these platforms also presents significant challenges, influencing the growth process, including tastes and attitudes, affecting the overall well-being of minors [4].

Digital inclusion and access to the web are vital tools for reducing inequalities and ensuring the exercise of rights such as play and sociability, as the physical, geographical, and socio-economic barriers can be easily overcome. The insights gathered through the focus groups demonstrate that young people use social platforms not only for entertainment, but also to discover, evaluate, and reinterpret film content in creative ways as well as to discuss plots and characters, and sharing experiences and ideas. These online spaces become arenas for self-expression and experimentation, where young people can express their opinions, by creating short reviews, personal reinterpretations, and edited clips (“short cuts”). That is an unprecedented opportunity to recognise children's perspectives as users and consumers of the given creative industry.

Yet, rapid and fragmented access to content risks diminishing attention to more complex narratives. Many young people choose what to watch based on short trailers or promotional content shared on social media, which has become a powerful marketing tool. While this amplifies the reach of mainstream cinema, it tends to obscure lesser-known films that hold significant cultural value.

It is evident that a delicate balance must be struck: minors shall be allowed to access the internet to exercise their fundamental rights to play and socialise, while ensuring that their development and education take place in a protected, egalitarian, pluralistic, and democratic environment.

In this scenario, the role of the creative industries, particularly the film one, is crucial. A long-term vision that balances economic objectives with social responsibility shall be adopted through targeted strategies.

Firstly, inspired by the remarks expressed by the young participants, it is essential to promote inclusive and meaningful content. Representing cultural and social diversity is not only an ethical choice but also an educational one. The focus

3 Bertacchini, E., & Santagata, W. (2012). *Creative Atmosphere. A Sustainable Development Model for Piedmont Based on Culture and Creativity*. Bologna: Il Mulino.

4 This dual nature of social media – as a space for creative engagement and a potential source of challenges – reflects broader findings on how minors interpret risks and opportunities in online environments. See: Livingstone, S. (2014). *Developing Social Media Literacy: How Children Learn to Interpret Risky Opportunities on Social Network Sites*. *Communications*, vol. 39, no. 3, pp. 283–303.

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groups revealed that young people appreciate films that address authentic and complex themes, reflecting universal experiences and offering positive role models.

Moreover, fostering interaction with audiences through collaborative projects and initiatives that involve young people as active protagonists can transform the digital experience into a space for in-depth analysis and cultural exchange, counteracting the tendency toward passive consumption of content. In this regard, most common social media platforms can evolve from mere tools of instant entertainment to vehicles for richer and more engaging narratives.

Another crucial aspect is investing in cultural education through partnerships with schools and institutions to integrate cinema into educational programmes. In this way, cinema becomes a tool for stimulating critical thinking and initiating dialogues on social and cultural issues.

Parents also play an indispensable role in guiding their children toward conscious and balanced consumption. Article 5 of the UN Convention [5] recognises *“the responsibility, right and duty of parents (...) to provide appropriate guidance and advice to the child, in a manner consistent with the development of his or her capacities, for the exercise of the rights recognised in the present Convention”*. This role involves managing the timing and way visual content is consumed. Neuroscientific studies indicate that the immediate accessibility and speed of digital content, as noted by the young participants themselves during the focus groups, can negatively affect their ability to concentrate, exercise self-control, and support cognitive development [6]. It is therefore essential to set healthy boundaries and encourage a balanced use of both digital technologies and film

viewing. Additionally, parents can foster cultural dialogue by watching films together, discussing their messages, and addressing the complex issues they raise. This approach transforms entertainment into an educational opportunity, helping young people develop critical thinking and view cinema as a means for personal growth.

Ultimately, the success of a strategy that balances competitiveness and responsibility depends on collaboration among creative industries, families, and institutions [7]. Ensuring the well-being of young people means finding the right balance between the right to play and the responsible use of technology. The challenge is to create safe and enriching digital environments where children can express themselves and grow without sacrificing their right to play, socialise, and experience harmonious development.

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6 Firth, J., Torous, J., Stubbs, B., Firth, J.A., Steiner, G.Z., Smith, L., Alvarez-Jimenez, M., Gleeson, J., Vancampfort, D., Armitage, C.J. and Sarris, J. (2019), The “online brain”: how the Internet may be changing our cognition. *World Psychiatry*, 18: 119-129. <https://doi.org/10.1002/wps.20617>.

7 “However, legislative policies must be established within a specific framework of reality, namely that of an evolving society. As a result, new strategies must be developed on a continuous basis to meet current and future needs while prioritising the best interests of children, both boys and girls, and carrying out actions in accordance with the principle of subsidiarity.” Varricchio, A. (2023). The right to play and sociality of children and adolescents. In *Juridical review on childhood and adolescence*, 3/23, Legal study attached to the quarterly periodical Bibliographic Review on Childhood and Adolescence registered at the Court of Florence with n. 4963 of 15/05/2000.

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11 Nuevas políticas, nuevos nombres, nuevas miradas

By Jorge Moarrero Zapatero

En la última década el incremento de directoras mujeres en el panorama cinematográfico español ha sido notable. Quizá una de las mejores formas de verlo a través de datos objetivos es deteniéndose en la categoría de “mejor dirección novel” de los Premios Goya: entre 2017 y 2023 todas las ganadoras han sido mujeres. Pero su relevancia no se queda simplemente en el triunfo de sus óperas primas, muchas de ellas son realizadoras cuyas obras destacan entre los estrenos españoles de los últimos años, ya sea por su recepción crítica o por su presencia continua durante la etapa de premios anuales. Nombres como Carla Simón o Pilar Palomero son fundamentales a la hora de aproximarse al cine nacional reciente, sus cambios y tendencias.

Directoras mujeres en el cine español de la última década



Laia Costa in *Cinco Lobitos* (2022) (filmaffinity.com)

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Algunos cambios en las políticas públicas de apoyo al cine español han sido cruciales en esta transformación: en los últimos años, se ha puesto mayor atención e interés por financiar proyectos de realizadoras mujeres y jóvenes a las que, de otra forma, les era difícil producir sus proyectos. El ICAA (Instituto de la Cinematografía y de las Artes Audiovisuales), con ayuda de asociaciones como CIMA (Asociación de Mujeres Cineastas y de Medios Audiovisuales), han llevado a cabo importantes modificaciones en la Ley del Cine de 2007 durante los últimos años. El cambio fundamental se produce en el Real Decreto de 2015, que instaura el concepto de “obras audiovisuales difíciles” y establece normas específicas de financiación para los proyectos que encajaran dentro de esa misma categoría: cortometrajes, obras de nuevos realizadores, producciones en lenguas cooficiales... Sin embargo, la modificación de ley más relevante sucede en 2020, cuando, entre muchos otros cambios, se incluye la financiación pública de hasta el 75% del coste a obras “realizadas exclusivamente por directoras”.

Por ello, son precisamente esas cuestiones legislativas las que han permitido un cambio destacable en la filmografía nacional de la última década a todos los niveles. En primer lugar, la modificación de ley de 2015 fue la que permitió una nueva aparición de talento novel entre los realizadores españoles y el incremento de películas rodadas en lenguas cooficiales. Esto se puede ver reflejado en diferentes ediciones de los Premios Goya, con obras como *Estiu* 1993 de Carla Simón, rodada en catalán, y reconocida como uno de los mejores debuts de los últimos años, *Handía* de Aitor Arregui y Jon Garaño, rodada en euskera, o *O que arde* de Oliver Laxe, rodada en gallego. Todas ellas ganaron varios galardones en sus respectivas ediciones. La ley de 2020, por su parte, ampliaba el alcance de las ayudas, apoyando, por ejemplo, el género documental y permitiendo el aumento de trabajos realizados por mujeres. Todo ello demuestra la suma importancia que las políticas tienen a la hora de permitir o no el desarrollo de un

cine determinado en países como España, en el que la industria cinematográfica depende, en gran parte, de la financiación pública y las ayudas. Se trata, por tanto, de una renovación del panorama audiovisual nacional que ha permitido tanto el surgimiento de nuevas voces y aproximaciones creativas como un posicionamiento internacional del cine español ciertamente novedoso.

A partir de 2020 el aumento de obras dirigidas por mujeres es radicalmente significativo: *Las niñas* (2020) de Pilar Palomero, *Libertad* (2021) de Clara Roquet, *El Agua* (2022) de Elena López Riera, *Cinco Lobitos* (2022) de Alauda Ruiz de Azúa, *Creatura* (2023) de Elena Martín Gimeno, *20.000 especies de abejas* (2023) de Estibaliz Urresola Solaguren... Estos films resultan sumamente significativos ya que responden a muchas de las categorías recogidas dentro del concepto ya mencionado de “obras audiovisuales difíciles”: están dirigidos por mujeres, son óperas primas, algunos están rodados en lenguas cooficiales... Lo más relevante, sin embargo, son las características puramente cinematográficas (temáticas, visuales...) de gran parte de todas las películas mencionadas. Hay, en muchas de ellas, una voluntad de acercamiento continuo a lo íntimo y personal, a las experiencias tanto individuales como colectivas de sectores marginados o de mujeres que descubren o desarrollan sus identidades en diferentes etapas vitales. Ejemplo de ello es la problemática de la maternidad, ya sea adolescente (*La Maternal* de Pilar Palomero), o adulta (*Cinco Lobitos*), la sexualidad femenina (*Creatura*), o las identidades queer (*Carmen y Lola* de Arantxa Etchevarría o *20.000 especies de abejas*).

Puede apreciarse, sin embargo, cierto agotamiento en una de las temáticas que más se repite entre todas estas obras: el distanciamiento de lo urbano y el acercamiento íntimo a lo rural. Es por eso que puede hablarse de un “cine rural español”, que no está formado exclusivamente por obras realizadas por mujeres, y que tiende, quizá, a romantizar de forma excesiva una posible vida campestre de

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forma algo reiterativa. Su puesta en escena suele tener rasgos comunes: cámara en mano, uso habitual del plano detalle, y otras decisiones que se toman en pos de cierta intimidad que, en ocasiones, resulta algo impostada.

Como se ha mencionado con anterioridad, uno de los aspectos más significativos de estas obras reside, en muchas ocasiones, en su presencia internacional en los festivales de cine más importantes. En la Quinzena de Realizadores del Festival de Cannes, por ejemplo, se presentó *El Agua* en 2022 y ganó *Creatura* en 2023. El Festival Internacional de Cine de Berlín, por su parte, otorgó el Oso de Oro a Alcarrás de Carla Simón en 2022 y el Oso de Plata a Mejor Interpretación a Sofia Otero, protagonista de *20.000 especies de abejas*, en 2023. En 2023 el Festival Internacional de Cine de San Sebastián también otorgó su máximo galardón a una obra española dirigida por una mujer: *O Corno* de Jaione Camborda, segundo largometraje de la cineasta. Lo que estos triunfos permiten vislumbrar es una presencia de cine español a nivel europeo cada vez más creciente e indudablemente positiva para nuestro cine. Sitúan paulatinamente a España como una filmografía de relevancia dentro del cine europeo, y a figuras representativas de nuestro cine contemporáneo en lugares de relevancia como galardones o jurados.

En definitiva, el aumento de las posibilidades para directoras mujeres es, indudablemente, algo que celebrar del panorama cinematográfico nacional y un asunto que está en continua conversación junto a cuestiones relacionadas con la exhibición en salas o el surgimiento de las plataformas (hubo una última modificación de ley en 2023). Lo recurrente de ciertas temáticas es perfectamente entendible, pues se está dando voz a perspectivas que anteriormente no tenían tanta cabida, y muchas de las películas están repletas de aciertos y talento. Se puede, por tanto, mirar con esperanza hacia el futuro de un cine nacional dirigido por mujeres que aporten nuevas visiones y logren presencia internacional y renombre para nuestro cine.

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12 Public value as a factor of competitiveness of the European film industry

Insights from six European markets

By Gentiana Ramadani, Angeliki Chatziefrimidou and Katharine Sarikakis (UNIVIE)

Who is this aimed at:

- EU policy-makers
- national authorities
- industry stakeholders
- national institutions

Key messages

Public value is an important aspect of the European Film Industry (EFI) that represents an evolving framework through which the industry's impact, contributions, and potential to enhance societal well-being can be understood.

Public value in and of the film industry is rooted in active citizen participation and culminates in empowering communities by sharing stories about experiences and the human condition.

Supporting the industry's public value through policy and strategic actions, funding and long-term comprehensive governance of the industry's ecosystem is a crucial factor in strengthening the competitiveness of the EFI.

Competitiveness in the sector goes beyond financial profitability. Instead, competitiveness for the EFI must be understood as a process, which often has roots in the ability to address societal and cultural concerns through storytelling, for which public funding principles and EFI aims align. The process of supporting the EFI through public institutions enables diverse players, from independent producers to smaller companies, to engage in film production and reach global audiences.

Initiatives such as gender equity in production roles, environmentally conscious practices, and multilingual content are essential for societal impact and future audience engagement. Investments in infrastructure, co-productions, and independent productions stimulate cultural identity, artistic innovation, and societal well-being alongside economic growth.

Overview

The film and audiovisual sector in Europe has long been shaped by public policies aiming at supporting and protecting the EFI, primarily due to the dominant market position of Hollywood and the economic challenges faced by national film industries. European public authorities are driven by the need to address cultural and political concerns about image production and distribution (European Audiovisual Observatory, 2004).

Over the past few decades, the EFI has significantly transformed the ways in which competitiveness is defined and pursued. Conversations and interviews with industry experts, many of whom have been active for over 30 years, reveal a remarkable shift in focus. While competitiveness remains a key pillar of the industry, its form has evolved, reflecting changes in priorities and market demands. During the 1980s and 1990s, the industry's primary concern revolved around production. Stakeholders were engaged in discussions about developing and producing films with clear purpose and impact. The emphasis was on the creative and technical dimensions of filmmaking, focusing on the process of crafting stories that could stand out in a competitive

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landscape. At that time, the notion of competitiveness was narrowly tied to production capabilities, quality, and innovation within the studio and on set. However, beginning in the 2000s, a noticeable shift occurred. The conversation moved beyond production and began to centre on how to reach and engage audiences, and ensure films resonated with diverse viewers. Distribution strategies became a focal point, with stakeholders exploring new ways to connect films with broader and more varied audiences, whether through traditional cinemas or emerging digital platforms. This evolution marked a transition toward a more comprehensive understanding of competitiveness, one that considered not just the act of making films but also the entire value chain from production to distribution and audience engagement [1] (Ramos Arenas, 2025). As the film industry has evolved significantly in recent years, particularly with the blurring of traditional roles due to the emergence of major new players like streaming platforms, today, companies like Netflix, Amazon, and Disney+ are simultaneously producers, distributors, and exhibitors, financing original content, controlling its distribution, and hosting it on their own platforms. This vertical integration allows them to bypass traditional intermediaries, directly influencing market access, content visibility, and audience engagement.

Today, this comprehensive approach to competitiveness recognises the importance of accessibility, cultural relevance, and economic sustainability. The EFI is called to navigate a complex market to succeed: the evolving EU audiovisual and film policy reflects this complex interplay between priorities for cultural diversity, democratic values, and economic imperatives (Michalis 2014). This policy landscape is increasingly shaped by digital transformation, which has opened new opportunities while presenting new challenges, such as the need to remove barriers to digital trade, improve cross-border access to content, and ensure a level playing field among

market participants. Strategies integrate innovative distribution models, targeted marketing, and the preservation of cultural heritage to ensure that films reach their intended audiences and leave a lasting impact. These efforts aim to enhance the competitiveness of the EFI and the broader audiovisual sector while safeguarding cultural diversity and promoting innovation across the region (Vlassis 2021).

The European Commission's initiatives, such as the Creative Europe program, emphasise the importance of public funding in bolstering the sector's competitiveness. Such policies recognise that public investment is not merely a financial contribution, but an essential mechanism for fostering industrial growth, creativity, and cultural exchange. Public funds enable filmmakers to experiment with new ideas and narratives, particularly in genres that may not be commercially viable, thus promoting a rich diversity of voices in cinema. Additional initiatives prioritise media literacy and the preservation of Europe's rich film heritage, underscoring the cultural and educational dimensions of EU policies.

In a Europe marked by its rich diversity of nations, cultures, and languages, film production and transnational networks play a key role in fostering cultural unity. While cultural policies were not initially at the forefront of European Union priorities, historical treaties and initiatives have increasingly recognised the significance of these networks for both cultural and political integration (Bondebjerg, 2016).

Public intervention in the industry has taken various forms, particularly in regulating the economic structure of television, which plays a key role in shaping the industry's dynamics. Authorities influence the sector through public funding, regulation of private funding, and imposing investment obligations on broadcasters.

1 Conversation with Fernando Ramos Arenas in an exchange workshop on behalf of the event: "Reinventing Public Service Media for the Age of Platforms" workshop in Warsaw – Reboot in collaboration with Chanse funded project PSM-AP, Warsaw, Poland (January 22–24, 2025).

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Additionally, sectoral aid, which includes direct subsidies, tax relief, preferential credit, and financial guarantees, has been crucial for supporting production and promoting investment. Public policies also include the organisation of practical support for filming, such as film commissions, and film promotion activities like festivals and international marketing efforts. These interventions aim to strengthen the competitiveness of national film industries and foster collaboration across borders. Thus, these transformations in the EFI highlight the importance of adaptability and innovation. By shifting from a production-focused model to one that prioritizes audience connection and market reach, the industry has embraced new opportunities for growth and cultural exchange. As part of this evolution, the focus has expanded to include priorities such as public value, and recognising the essential role of cultural production in enriching society (Sarikakis, Ramadani, Chatziefrimidou, Juengst, 2024).

The concept of ‘public value,’ introduced by Mark Moore (1995), refers to creating a legitimate, sustainable, and efficient contribution that addresses societal needs. While widely used in the public sector (Bracci et al., 2019; Bryson et al., 2014; Van der Wal et al., 2015), its application in the film industry is less developed. There is limited research on how public value is assessed within the film sector, especially regarding its impact on society and the measurable outcomes. However, public institutions have been at the forefront of this shift, providing important support and boosting collaboration to meet the changing needs of filmmakers and audiences alike. Their efforts have ensured that the EFI remains vibrant, competitive, and capable of navigating the challenges of a rapidly evolving global landscape. Public support for the arts and culture, including film, is fundamental to preserving the public value inherent in cultural production. Cultural and artistic endeavours, which often carry significant social, historical, and aesthetic importance, rely heavily on public funding to thrive. Hence the public value of the EFI is widely recognised through the practical

support as part of public policy in Europe. Without this support, many forms of artistic expression might struggle to survive or remain accessible only to an elite minority (Dickinson & Harvey, 2005; Pratt, 1997, 2005). Since public funds provide strong support for the market, they play a crucial role in enabling diverse and inclusive cultural representation. By ensuring that society's many voices are heard and reflected in creative industries, public funding helps to promote equity and inclusivity. This support manifests in several ways, from direct subsidies for filmmakers to financial aid for cultural institutions and initiatives. Public funding not only sustains a diverse cultural ecosystem, but also makes cultural experiences more accessible to the general public, breaking barriers and democratizing access to the arts. In doing so, it reinforces the public value of the film industry, aligning its evolution with broader societal goals and ensuring its role as a key driver of cultural, social, and economic enrichment. Public intervention is often considered necessary to correct market failures and to meet these cultural policy goals (European Audiovisual Observatory, 2024). This intervention helps ensure that the cultural sector is supported in ways the market alone might not provide, enabling the promotion of broader cultural values.

Evaluating public value in the film industry

First the concept of public value, as introduced in 1995, emerged not as a rigid definition, but as a fluid ideal. Moore envisioned public managers as stewards, tasked with fostering and expanding the value that benefits society. Their decisions, rooted in the public good, aim to enhance the effectiveness of public institutions. Over time, this vision has evolved into a broader understanding, one that emphasizes the artful and purposeful use of public resources, shaping them to serve the collective interest and uphold the shared values that bind communities together. Based on how public value in the film sector is understood or studied, in this document with an analysis of six selected film markets currently operating in Europe, presents a comprehensive look at the public

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institutions supporting the sector within five categories: public service media, national film institutions, ministries or departments responsible for film, academic institutions, and film festivals. While these institutions support and finance the film sector according to the national regulations, the majority of their funding is based on economic formulas and financial grant schemes. Social and cultural aspects are also integrated into these schemes with considerable weight. Although states are increasingly taking cultural impacts into account when designing fiscal incentives, this process is still in its early stages and does not yet provide sufficient (comparable) data to allow for an in-depth analysis of these impacts.

However, a clearer way to measure the public value in the film industry's budgeting is possible by focusing on employment. By examining the direct impact of the film and audiovisual industries, it is also possible to assess the indirect impacts on output and employment. Thus, the analysis of the impact of public value in the film sector begins by focusing on incentive schemes, highlighting key characteristics such as production spend, which reflects the level of financial support provided to the industry, and employment growth, measured by the number of jobs created as a result of these incentives.

Furthermore, the analysis looks at a selection of films funded by these institutions, with particular attention to the themes and subjects of their production. By evaluating these factors, it is assessed how effectively these incentives affect both the economic and cultural development of the sector. In Europe, three primary types of film production incentives are used: tax shelters, rebates, and tax credits (Audiovisual Observatory, December 2014).

Tax shelters allow high net-worth individuals or firms to invest in qualifying productions and deduct these investments from their tax liabilities, while still being able to benefit from long-term profits, which are taxed upon receipt. Rebates, on the other hand, are based on production spending, reimbursing a

percentage of eligible expenses after the production is completed and audited. These are funded directly by the state. Tax credits function similarly to rebates by reimbursing a percentage of production costs through a predetermined formula, but instead of being paid from a state fund, the incentive is deducted from the producer's tax liabilities, with any excess refunded in cash.

These schemes are designed to incentivise investment in film productions by offering financial relief, with each having distinct methods of distribution and calculation. A brief overview of the data underscores the crucial role of public institutions and funding mechanisms in supporting the film industry across Europe, as exemplified by the tax schemes outlined in Table 1.

Country	Rebate Details
France	30% rebate (max €30 million per project)
Spain	30% for the first million, 25% for the rest; 50% in Canary Islands
Belgium	42% rebate, €465 million in 2019 for film/TV
Austria	€5 million allocated for local and international projects in 2020
Poland	30% cash rebate, €45 million attracted between 2019-2021
Greece	40% cash rebate, €100 million allocated between 2018-2021

Table 1. The table presents data analysed, work conducted by the authors, based on the Sarikakis et al. (2024) "Governance and Public Value Report - Producing Value through the Moving Images: An Analysis of Public Value and its Cultural Contribution to the Strength and Competitiveness of the European Film Sector" part of the Horizon Europe project REBOOT.

Key findings

Austria's public support for the film sector is assessed across several dimensions: economic, cultural, societal, and democratic value. Economically, public funding from organizations like the Austrian Film Institute (ÖFI) and the Austrian Television Fund plays a crucial role in supporting film production while also stimulating other sectors, such as tourism, by showcasing Austria's locations and culture internationally.

As noted by industry representatives, public funding serves as a direct investment in the film industry

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and contributes to economic competitiveness [2] (Goeschl and Deutsch – interview 2024). In 2023, the Austrian Film Institute (ÖFI) operated with a total budget of €36.5 million, comprising €21 million for selective funding and €15.5 million allocated to the newly established location incentive scheme, ÖFI+. A total of 187 projects received support that year, reflecting ÖFI's commitment to fostering Austria's film industry (Report, ÖFI, 2024).

Culturally, Austria's film funding policies aim to preserve and promote the country's cultural identity. The Austrian Film Institute and the Art Section of the Federal Chancellery support projects that reflect Austria's cultural and artistic diversity, including experimental films that would not thrive in the commercial market. As Peter Schernhuber [3] (Interview, 2024) highlights, public funding ensures the distinctiveness of Austrian cinema by promoting films with unique artistic qualities that strengthen national identity. On the societal front, public funding is evaluated based on its role in supporting films that engage with critical societal issues such as historical memory, migration, and cultural diversity. Projects funded by the Austrian Film Institute and the Art Section encourage public discourse on these topics, enhancing the social relevance of Austrian cinema (based on the public list available). This highlights the role of film as a platform for public dialogue, contributing to a more inclusive and culturally conscious society.

Belgium's film industry exemplifies a well-balanced approach to fostering economic growth, cultural preservation, and social inclusion through a combination of public funding, tax incentives, and regional support. Public broadcasters such as RTBF and VRT are instrumental in driving this progress. RTBF, for instance, invests a minimum of €30 million annually in local productions through co-productions and pre-purchase contracts, while VRT provides extensive backing for filmmakers through production orders, development funds, and partnerships. These investments not only stimulate

the film production value chain and create employment but also help Belgian films achieve international recognition and highlight themes central to national identity. Economic contributions are further bolstered by the Belgian Tax Shelter, a fiscal incentive introduced in 2002. Offering a 40% tax deduction for investments in eligible audiovisual works, this initiative has significantly increased private sector involvement, ensuring the financing of local productions and attracting international projects (Wallimage, n.d.). Complementary to this, regional film funds such as Wallimage, with an annual budget of €5.5 million, Screen Brussels at €3 million, and the Flanders Audiovisual Fund (VAF) at €4.5 million, have a critical role in supporting regional productions, co-productions, and infrastructure development. As per the societal aspect, Belgium's film industry has made remarkable strides in engaging communities and cultivating talent. Prestigious institutions such as INSAS, RITCS, KASK, and LUCA School of Arts provide cutting-edge education in filmmaking, equipping young professionals with the skills to succeed in a competitive industry. Film festivals further enhance accessibility and cultural engagement. With around 35 festivals annually, these events showcase a wide range of genres and bring specialized films to underserved regions.

In 2022 [4], for example, Flemish films attracted over 1.8 million cinema-goers, reflecting the growing interest in local productions and their capacity to connect with diverse audiences. Culturally, Belgium's policies ensure that its cinematic identity remains distinct and impactful. Mechanisms such as the CCA Cinema Decree emphasize cultural contributions as a key criterion for financial support, ensuring that films reflect and preserve Belgian and European heritage. Language-specific funding further reinforces linguistic and cultural diversity, particularly in the French-speaking and Flemish communities.

2 Monique Goeschl and Markus Deutsch are representatives of the trade association Film and Music Austria (FAMA) in the Austrian Federal Economic Chamber (WKO) and were interviewed in September 2024.

3 Peter Schernhuber is head of the Film Department at the Federal Ministry for Arts, Culture, the Civil Service and Sport in Austria and was interviewed in September 2024.

4 Flanders Audiovisual Fund (VAF). (2024). <https://www.vaf.be/>

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The Spanish film industry exemplifies a well-coordinated network of public institutions and financial frameworks that can generate significant public value. The sector benefits from a robust combination of national and regional support systems, targeted initiatives, and comprehensive policies that nurture both the cultural and economic dimensions of filmmaking. It showcases the effective synergy between public institutions, financial incentives, and supportive legislation, generating significant cultural and economic value. With robust national and regional support, including €50 million in direct subsidies from Spain's Instituto de la Cinematografía y de las Artes Audiovisuales (ICAA)⁵ and tax incentives like those in the Canary Islands, Spain has become a global audiovisual hub. Similarly, ICEX Spain Trade and Investment promotes Spanish audiovisual productions internationally, with an annual budget of €130 million (ICEX, 2024)⁶.

The sector also thrives through cultural diplomacy, with festivals and international successes like La Casa de Papel elevating its global influence. The combination of public investment, a strategic legislative framework, and strong international promotion reinforces Spain's position as a leader in the audiovisual industry.

The French film industries deliver significant public value through job creation, economic growth, and cultural export. Key players such as France Télévisions, Arte, and France 24 contribute notably to both direct and indirect employment. France Télévisions, with over 10,000 employees, invested €285 million in drama production in 2023, making it the largest investor in French drama (France Télévisions, n.d.), while Arte, with 500 employees, focuses on European cultural programming and co-productions, boosting both job creation and cultural diversity (Arte, 2023). France 24, employing 1,800 people, broadcasts to over 355 million households globally, strengthening France's cultural diplomacy (France Médias Monde, 2022). These organizations

also support related sectors like digital media and translation services. Together, their substantial financial investments, such as France Télévisions' €3.5 billion in total revenue and Arte's €287 million, illustrate how public institutions drive economic benefits, international influence, and employment within the broader creative industries, reinforcing France's position as a leader in global cultural production.

Data shows that in 2022, **Poland's film industry** made a substantial economic impact, with an investment of 2,528 million PLN (US \$569 million) resulting in an economic output of 8,671 million PLN (US \$1,952 million) (Materska-Samek, 2023, p. 28). The Gross Value Added (GVA) from production was 3,416 million PLN (US \$769 million), reflecting the additional economic value generated. The sector also created 21,021 full-time equivalent jobs, highlighting its contribution to employment.

Key Recommendations

1) Enhance the collection of basic data regarding film and TV sector incentives. There is a need for more granular and comprehensive data from national institutions and agencies to better assess the impact of these schemes. Specifically, data collection should be expanded to include, more detailed breakdown of projects benefiting from incentives, including genre, distribution channels, and audience reach; more precise tracking of funding allocations, distinguishing between national and international productions; information on co-production structures and cross-border collaborations; data on long-term economic and cultural impact, such as job creation, diversity in storytelling, and sustainability of funded projects; essential data should include details about the projects benefiting from these schemes, such as project lists, funding amounts, countries of origin, budgets, and financing structures. This type of data is currently lacking in countries like Greece and Poland, while Austria, France and Spain have a more structured reporting system.

⁵ Ministerio de Cultura y Deporte

⁶ Acción Cultural Española, 2024; Spain Audiovisual Hub, 2023

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2) Additionally, sector-specific data, including the number of productions, production spending, employee numbers, and investments in facilities, should be gathered. Data on both direct and indirect economic impacts, as well as the fiscal impact (gross and net benefit/cost for the state), is crucial for comprehensive evaluation. To collect this information, collaboration with national statistics agencies and the European Audiovisual Observatory would be valuable in strengthening the work on structural business statistics.

3) Develop metrics to evaluate Public Value impact and introduce comprehensive tools for assessing and measuring the societal and cultural impacts of public value initiatives. These metrics should extend beyond economic indicators to encompass educational outreach, audience engagement, and contributions to cultural diversity and sustainability.

4) Balance Economic Competitiveness with Cultural Diversity. Policies fostering competitiveness in the film industry do not overshadow the need for cultural diversity and originality.

Policymakers should consider funding schemes and regulatory frameworks that support industry growth while safeguarding cultural diversity. This includes allocating resources to independent and underrepresented voices, incentivizing local storytelling, and ensuring that market-driven strategies do not marginalize diverse content. Public value initiatives within the film industry need greater coherence and integration across different governance levels. Policymakers should establish unified frameworks to better coordinate efforts, streamline funding mechanisms, and ensure public value considerations are consistently embedded in decision-making processes.

5) Support for emerging talent and innovation through public funding. It should prioritize nurturing newcomers and diverse voices in the film industry through targeted mentorship programs, competitions, and grants. This support should also extend to innovative and experimental projects that may lack commercial appeal but contribute significantly to cultural and societal enrichment.

For references and further information please visit <https://thereboot-project.eu/research>

13 Lessons from the past

European film industry looks back at thirty years of paradoxes

By Daniel Biltereyst (UGent), Fernando Ramos Arenas (UCM), Engelart Willems (UGent) and Laura Caballero Ruiz de Martín-Esteban (UCM)

This policy brief is aimed at:

- EU policy-makers
- national authorities
- industry stakeholders

Introduction

As part of the broader European REBOOT project, researchers from Ghent University and Complutense University of Madrid examined how senior professionals in the European film industry

(EFI) look back at thirty years of changes. While the important Nostradamus reports (see Koljonen, 2023, 2024) tend to glance in the future of the industry, this research looked backwards: it covers the trends, tensions, and paradoxes in the development of the EFI over the past thirty years.

Using oral history methodologies, the two research teams conducted 68 interviews with senior professionals from various segments of the industry. These include representatives from film production, distribution, exhibition, and policy, as

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well as a broader 'other' category including film critics, journalists, festival personnel, etc. The report prioritises testimonies on historical shifts in the film and audiovisual industries across three types of territories: a regional focus on the Belgian region of Flanders, a national perspective centred on Spain's major film industry, and a pan-European overview of broader trends. This study is grounded in these key witnesses' personal memories and experiences, offering a unique perspective on how the EFI has evolved. They cover their experiences with digitization, their evaluation of policies implemented in Europe, their perspectives on the rise of streaming platforms and how do they perceive the impact these changes the EFI's competitiveness, both regionally and globally.

Interviewees' reflections: diagnosis of a transformation

While we acknowledge the need for a more holistic approach regarding European film policy, our report focused on key segments of the EFI separately. Due to its bottom-up approach, the report has generated a rich set of opinions and recommendations, while it recognized key challenges in the stakeholder's evaluation of the last thirty years. The challenges identified in each of the key segments of the EFI are first summed up separately before the brief provides eight general policy recommendations that connect concerns in all these areas (production, distribution, exhibition and policy).

The interviewees highlighted several critical themes regarding changes in European film production. Technological advancements, particularly digitization, have democratized production and fostered creative innovation but also intensified overproduction, which many see as unsustainable and detrimental to competitiveness. The rise of private broadcasters and global streaming platforms has reshaped funding, with streamers introducing new financial opportunities but also eroding creative autonomy and shifting focus toward commercially driven series over independent films. Atomization, marked by numerous small production companies persists as a structural

weakness, while market consolidation threatens mid-tier producers, risking cultural diversity. Hollywood's dominance continues to challenge European cinema, though some view it as an impetus for resilience. Additionally, tensions arise around the evolving role of producers, who increasingly act as service providers within centralized models favouring global conglomerates.

The main issues in film distribution focus on the profound impact of digitization, leading to democratized access and expanded audience reach, but also heightened competition and market oversaturation. Another key issue is the difficulty of European films to penetrate transnational borders. When European films penetrate markets in other regions, they tend to be in the form of co-productions with other countries. The market penetration of European films is heavily concentrated within Europe itself, with 92% of admissions occurring there in 2023. Of these, 68% are in their national markets, leaving only 23% for intra-European exports and a declining 8% in non-European markets (EAO, 2023). Consolidation among major players has intensified financialization, concentrating power in multinational corporations while sidelining independent distributors who have great difficulties to survive or rely heavily on public subsidies and niche markets. Streaming platforms have disrupted traditional distribution by monopolizing high-profile content, emphasizing marketing, and favouring global over local cultural narratives, yet also offering innovative opportunities for collaboration. Geo-blocking remains a contentious but vital mechanism to preserve cultural diversity and regional market dynamics, with its removal potentially threatening Europe's localized film ecosystems.

Related to film exhibition, the main issues highlighted by the interviewees revolve around the profound transformations in the cinema exhibition sector due to digitization, changing audience behaviours, and the rise of streaming platforms. Key themes include the democratization and oversaturation of content driven by digital flexibility,

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oversaturation of content driven by digital flexibility, which has created challenges in sustaining smaller or independent films amid a "winner-takes-all" market. The communal and immersive experience of cinema remains vital, especially in attracting younger audiences, with cinemas increasingly focusing on event-based and premium experiences to differentiate themselves. Multiprogramming has allowed for more tailored, diverse programming, but shorter theatrical runs challenge traditional audience-building.

When we asked our interviewees about the state of European film policy, most interviewees stressed that it remains crucial for the existence of a so called "European cinema". However, there are several key issues that need to be addressed in future film policy. These include the overproduction of films, which strains resources and market capacity; the limited circulation of European films within the internal market, which hampers cultural exchange and economic viability; and the bureaucratic inefficiencies in funding processes that create barriers for smaller producers and slow down innovation. Additionally, there is a need to balance cultural diversity with industrial competitiveness, ensuring that policies support both artistic expression and economic sustainability. The interviewees also stress the importance of transparency and responsiveness in policy implementation, particularly in addressing the evolving needs of the film industry and fostering long-term, sustainable collaborations across Europe. Finally, the interviewees underscore the necessity of shifting more focus to supporting distribution and promotion to enhance the visibility and success of European films globally.

Policy recommendations

1) An overarching, perhaps unsurprising, recommendation, is a call for more robustly financed support mechanisms. This appeal applied across all levels; supranational, national, and regional.

Against usual criticism, we want to highlight how most respondents stressed the immense challenges faced by an industry that, over the past three decades, has successfully transitioned from a 'sector' to a fully-fledged industry, effectively utilizing the limited budgets provided by public institutions. Interviewees stressed that if European policymakers accept or recognize that cinema is valuable in terms of its cultural impact, economic value, and job creation, they need to respond by structurally strengthening support.

2) Improve data collection and market transparency. To address the lack of insight into audience preferences, European policymakers should require streaming platforms operating in Europe to share anonymised audience data with EU institutions and independent distributors. This would enable smaller stakeholders to compete effectively by aligning their strategies with solid market intelligence.

Establishing a centralised European hub for audience data would further improve transparency by aggregating data on viewing behaviour, film circulation and market performance. While the EAO is an extremely effective institution, there is a call for a more fine-grained understanding of audience behaviours and preferences. Such measures would complement existing policies such as the Audiovisual Media Services Directive (AVMSD, Article 13),^[1] which promotes European productions, and the Digital Services Act (DSA), which emphasises the accountability of platforms. Incorporating these new requirements would modernise the policy framework to meet the demands of a data-driven digital economy.

3) Strengthen distribution and promotion. There is a need to move beyond supporting film production and to focus on strengthening initiatives related to exhibition, distribution, and promotion of European films. Attention should be directed toward initiatives that enhance

¹ The data law-related aspects of the operationalisation of the CHDS are to be analysed in the context of the third part of this policy brief series and will be consolidated into Deliverable 7.14 due in Month 36 of the REBOOT project's life-cycle.

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co-productions, cross-border circulation, and the distribution of films made in the EU and Europe and thus address the question of overproduction through stronger collaboration among partners and sectors.

To improve the visibility of European films, Creative Europe MEDIA funding should be increasingly allocated to support independent distributors in developing innovative marketing campaigns and cross-border promotions. A Europe-wide promotional initiative could exhibit culturally significant films across festivals, digital platforms, and mainstream media, creating synergies between regional and global markets. Encouraging hybrid distribution models, such as partnerships between streaming platforms and cinemas, could extend the lifespan of European films, ensuring that they reach diverse audiences. Existing provisions under the MEDIA program (cf. Regulation (EU) 2021/818 of the European Parliament and of the Council of 20 May 2021 establishing the Creative Europe Programme (2021 to 2027) and repealing Regulation (EU) No 1295/2013) [2] already support film circulation, but additional targeted investments are essential to strengthen these initiatives and ensure sustained visibility for European productions.

4) Protect cultural diversity through strategic regulation. The preservation of cultural diversity in the EFI hinges on maintaining territorial exclusivity through geo-blocking. Retaining the exemption for audiovisual content under the Geo-blocking Regulation (EU 2018/302) [3] ensures that distributors can sustain localized funding models and maintain market segmentation.

Additionally, strengthening content quotas for European works on streaming platforms—raising the existing AVMSD (Article 13) [4] quota from 30%

to 35%—would enhance the prominence of lesser-known European films. These measures would protect regional market dynamics while supporting the EU's cultural objectives, ensuring that Europe's fragmented but vibrant film ecosystem continues to thrive in the face of global competition.

5) Combat piracy on a larger pan-European scale, as this remains a significant threat to the financial stability of the European film industry.

Policymakers should develop a Europe-wide anti-piracy initiative targeting IPTV systems and torrent-based platforms. This initiative could leverage the existing framework of Directive 2004/48/EC [5] on the enforcement of intellectual property rights, combined with the Digital Services Act's provisions on illegal content removal. Public awareness campaigns should accompany these efforts, highlighting the economic and cultural impact of piracy while promoting legal alternatives. Addressing piracy at both the regulatory and societal levels would strengthen the industry's capacity to protect intellectual property and revenue streams, benefiting both large-scale productions and independent filmmakers.

6) Support exhibitors in their new curatorial role and increase audience engagement. Interviewees highlighted how the sustainability of cinema as a cultural and economic institution requires investment in premium experiences and community engagement.

Exhibition funding under Creative Europe MEDIA should enable cinemas to implement high-value features such as IMAX, 4DX, and integrated dining experiences, enhancing their appeal as social and immersive venues. Parallel efforts should focus on youth engagement through educational initiatives under MEDIA or Erasmus+, fostering an

2 Regulation (EU) 2021/818 establishes the Creative Europe Programme for 2021-2027. It aims to safeguard, develop, and promote European cultural and linguistic diversity and heritage, while increasing the competitiveness and economic potential of the cultural and creative sectors, particularly the audiovisual sector. The programme has three strands: Culture, Media, and Cross-sectoral, each with specific priorities to enhance cooperation, innovation, and sustainability across the cultural and creative industries

3 Regulation (EU) 2018/302 addresses unjustified geo-blocking and other forms of discrimination based on customers' nationality, place of residence, or place of establishment within the internal market. It aims to ensure the proper functioning of the EU's internal market by preventing such discriminatory practices in online and offline transactions. The regulation prohibits blocking access to websites and re-routing without the customer's consent, and it ensures equal conditions of access to goods and services for all EU customers.

4 *Ibid.* (footnote 1)

5 This directive aims to harmonize the laws of the Member States concerning the enforcement of intellectual property rights to ensure a high, equivalent, and homogeneous level of protection in the internal market.

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appreciation for European cinema among younger demographics. These measures should also prioritize underserved regions, offering grants to improve infrastructure and expand access to diverse cultural content. Building on MEDIA's support for cinema networks like Europa Cinemas[6], these initiatives would ensure the long-term relevance of cinemas while addressing regional inequalities.

7) The focus on audiences should be integrated in a broader set of initiatives promoting European films and fostering European film culture.

Interviewees mentioned the importance of strengthening the mediation side of film culture, such as promoting cinema literacy in education and encouraging public broadcasters to give as much attention to European films as they do to (mostly Hollywood) blockbusters. Many of these initiatives (e.g., media literacy programs, collaborations with educational institutions) were mentioned during the conversations; the general impression is, however, that they would benefit from a stronger, coordinated support through a more integrated policy. This approach is also crucial in industrial terms, central for creating an environment where people will become more interested in European films than they are today.

8) Accepting that the EFI is a plural reality, EU-policy makers should engage more intensely in a meaningful dialogue which fully considers the professionals' expertise and experiences when developing policies related to the filmed entertainment industries.

Regarding issues like windowing or the potential abandonment of geo-blocking, the interviewees were largely unanimous in their view that policymakers' positions often contradicted the EFI's interests and appeared to be influenced by GAFA (Google, Apple, Facebook and Amazon) and other powerful lobby groups. Policy guidelines should

thus accept that **Europe's film industry shouldn't mirror that of the USA and its concerns**, and recognize, as one interviewee who worked as a lobbyist in Brussels pointed out, that Europe and the EU are "a union of different markets"; he also added that "despite the dominance of big studios, European audiences are increasingly going to the cinema and consuming more content." It's about acknowledging that, much like Europe's food, beverage, fashion, and other cultural industries, the EFI is a "milky way" made up of a multitude of producers, distributors, and exhibitors.

For references and further information please visit <https://thereboot-project.eu/research>

6 Europa Cinemas is the first network of cinemas focusing on European films. Created in 1992 at the initiative of a group of thirty cinema exhibitors, it has become in 30 years a network of 1,302 cinemas and 3,192 screens in 39 countries. Its main objectives are to provide operational and financial support to cinemas that undertake to give a significant part of their screenings to non-national European films and to put in place activities for young audiences.

14 Pathway to the Operationalisation of the Common European Data Space for Cultural Heritage

On the Interplay of Cultural Heritage Law and Digital Cultural Assets

By Caterina Sganga and Pelin Turan (SSSA)

Who is this aimed at:

- EU and national policy- and law-makers
- Industrial stakeholders
- Cultural heritage institutions

Key messages

The Common European Data Space for Cultural Heritage (hereinafter 'CHDS') was launched by the European Union (hereinafter 'EU') in 2021 as one of the fourteen domain/sector-specific data spaces setting up the Common European Data Space (hereinafter 'CEDS') promoted by the European Strategy for Data (Communication COM(2001) 140 final Communication COM(2002) 263 final). The CHDS aims at accelerating the digitisation, online availability, reuse and digital preservation of diverse forms of European cultural assets (i.e. tangible, intangible, movable, immovable, natural, born-digital, analogue) forming the cultural heritage (hereinafter 'CH') of the EU Member States (Recommendation (EU) 2021/1970).

Audiovisual/cinematographic content constitutes one of the key areas of the CHDS due to the low rate of digitisation of this category of CH assets and the risk of deterioration of the media on which such

cultural content is fixated (Recommendation (EU) 2021/1970, Recommendation 2011/711/EU, Recommendation 2005/865/CE). However, the digitisation, reuse and cross-border flow of digital audiovisual/cinematographic content is a complicated task due to, on the one hand, the distribution of competences between the EU and the Member States and, on the other hand, the bundle of overlapping (if not clashing) EU and national legal regimes governing the digitisation, online availability and reuse, and digital preservation of audiovisual/cinematographic content. [1]

The European Commission (EC) referred to the enactment of an implementing act for the CHDS in the near future (Commission Decision C(2021) 4647 final). The successful realisation of this plan and the population of the new data space with audiovisual/cinematographic content not only urges the adoption of a robust roadmap that could facilitate data transfers among key stakeholders/market actors, but also requires a meticulous assessment of the legal tools and incentive mechanisms available and to be provided in order to enable the digitisation of such content and data transfers in a reliable and interoperable information technology (IT) infrastructure. This

1 For the copyright-related aspects related to the operationalisation of the CHDS, please see the first part of this policy brief series. See: Sarikakis, K., Ramadani, G., Chatziefrimidou, A., Juengst, J., Psychogiopoulou, E., Samaras, A., Comerma, L., Vlassis, A., Riga, D., Sganga, C., Turan, P., Lähdesmäki, T., & Hiltunen, K. (2024). Policy briefings deriving from WP2-5. Zenodo. <https://doi.org/10.5281/zenodo.10605192>.

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document, which constitutes the second part of the policy brief series dedicated to the operationalisation of the CHDS, addresses the cultural heritage law-related aspects of the data-sharing practices concerning the digitisation and transfers of digital(ised) audiovisual/cinematographic content. [2]

Introduction

The CHDS constitutes a landmark initiative in the EU cultural and digital policies and agenda since the adoption of the Lisbon strategy in 2000. This strategy launched the transition of the EU into a knowledge-based society and data-agile economy in parallel to a wave of digitisation endeavours targeting European CH assets (Communication COM(2001) 140 final Communication COM(2002) 263 final).

The New European Agenda for Cultural Heritage, adopted in 2018 in the European Year of Cultural Heritage, elevated CH to one of the top priorities of the EU's digital policies and advocated for the digitisation and circulation of European artworks across Europe (Communication COM(2018) 267 final). The EU-wide efforts to enhance the digitisation and online accessibility of CH assets, eventually, paved the way for integrating the Union's digital policies concerning CH into the EU's flagship initiative - the CEDS.

Launched in 2018, the CEDS aims to unleash the potential of the extensive volume of data collected and stored within the EU by facilitating the free flow and efficient use of such data across Europe (Communication COM(2018) 232 final, Communication COM(2020) 66 final). Envisaged as 'a seamless digital area', or a smoothly operating single market for data, the CEDS would realise cross-border and cross-sectoral transfers of a multitude of types of data with different levels of intensity through a trustworthy and secure IT infrastructure (Communication COM(2018) 232

final, Communication COM(2020) 66 final). The types of data referred to in this context include but are not limited to personal and non-personal, public- and private-sector, publicly-held and privately-held, publicly-funded, machine-generated, research-related, and dynamic data.

As one of the domain/sector-specific data spaces incorporating the CEDS, the CHDS envisions a single digital space facilitating the sharing of born-digital and digitised CH assets, including works of European film heritage (Recommendation (EU) 2021/1970). Nevertheless, the limited success of the EU Member States in digitising audiovisual/cinematographic content necessitates the collaboration of several stakeholders/market actors to map the needs of the CH sector/domain and to assess to what extent the current EU and national legal regimes might be of help to realise the CHDS ambitions.

Statement of the problem

The launch of the CHDS space revolutionised the legal discourse centred around CH assets, placing them at the intersection of copyright law, data law, and cultural heritage law, which are legal disciplines originating from disparate policy objectives and evolved independently by following different paths. Standing at the crossroads of these three bodies of law, the challenges faced by the CHDS are multi-faceted and require multi-disciplinary approaches to help unfold their layers, while unveiling the policy and legislative gaps that necessitate action at the Union and national levels.

The complications imposed by cultural heritage law upon the operationalisation of the CHDS are two-pronged.

On the one hand, the establishment of a digital infrastructure opening the access to and reuse of multiple categories of CH assets – including those of audiovisual and cinematographic content – to public bodies, citizens and businesses for both commercial and non-commercial purposes requires

² This policy brief stems from the research conducted for a prospective publication, entitled "Common European Data Space for Cultural Heritage: Is the European Union Taking the 'High Road' from 'A Single Access Point' to 'A Single Market for Data' for Digital Cultural Content?", co-authored by Pelin Turan and Caterina Sganga, which has been presented by the co-authors at the EPIP 2024 Conference co-organised by and held in September 2024 at the premises of Scuola Superiore Sant'Anna and the University of Pisa.

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a common perception of what constitutes European film heritage and an EU-wide standard in selecting and digitising the assets to be used to populate the CHDS. Nevertheless, the limited EU competence in matters concerning culture and CH hinders any harmonisation endeavours at the Union level, leaving the regulation of this area to the discretion of Member States. Article 167 of the Treaty on the Functioning of the European Union (hereinafter 'TFEU') holds that the EU 'shall contribute to the flowering of the cultures of Member States, while (...) bringing the common cultural heritage to the fore'. In this sense, the EU's competence and role are limited to encouraging cooperation across the Union and, if necessary, supporting and supplementing the national actions, such as dissemination of culture, preservation and safeguarding of CH, and cultural exchanges of a non-commercial nature (TFEU, Article 167(2)). Whereas the EU is given the power to adopt incentive measures to achieve these goals, Article 167(5) TFEU clarifies that such efforts cannot result in 'harmonisation of the law and regulations of the Member States'. This implies that the operationalisation of the CHDS heavily depends on the different national views of CH embraced by disparate Member States.

On the other hand, recent trends in the international and regional policy-making and norm-setting forums show a positive shift from a 'static' depiction to a 'dynamic' understanding of CH (Faro Convention, Article 2(a), Communication COM(2018) 267 final). Emphasising the 'constant evolution' of the values, beliefs, knowledge and traditions that form CH, these instruments also enable the consideration of not only 'old' works that have fallen into the public domain but also of 'new' works protected by copyright in the context of CH. Such a broad articulation of CH, nevertheless, requires guidance on the interplay of national CH laws with the EU and national copyright regimes – especially given that the in-copyright and public domain status of CH assets plays a crucial role in the EU data laws applicable to the sharing of

digital(ised) CH assets (Directive (EU) 2019/1024, Art. 1(2)(c); Regulation (EU) 2022/868, Art. 2(11)). [3]

Policy recommendations

1) The successful deployment of the CHDS primarily depends on a shared understanding of CH and a harmonised selection of assets to be digitised for the purposes of a data space dedicated to CH. To achieve this goal, **the EU shall adopt soft law instruments to guide the Member States through the identification and selection of CH assets to be digitised for the CHDS**, whilst taking into consideration the distribution of powers, and without prejudicing Member States' discretion to regulate the legal regime applicable to national CH in light of national cultural priorities and policies.

2) Likewise, for the successful deployment of the CHDS, the EU shall mentor and monitor the digitisation of CH asserts by collecting **empirical evidence** via comprehensive studies, which could map **the past and ongoing CH digitisation endeavours of the Member States** and develop, on this basis, **codes of best practices to engage in such digitisation projects vis-à-vis the experiential knowledge held by the Member States and their competent bodies**.

3) The population of the CHDS with audiovisual/cinematographic content urges clarification of the EU vision and plans on the interplay of such content with the CHDS. At the time being, the information disseminated by the EC does not go beyond the need to digitise audiovisual/cinematographic content. Nevertheless, the feasibility of enabling online access to and reuse of digital(ised) audiovisual/cinematographic content requires further clarification on the EC's expectations from the Member States and the means to promote and enable the reuse of such content in line with the EU data economy goals (e.g. boosting data-based innovation, goods and services).

³ The data law-related aspects of the operationalisation of the CHDS are to be analysed in the context of the third part of this policy brief series and will be consolidated into Deliverable 7.14 due in Month 36 of the REBOOT project's life-cycle.

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4) Last but not least, the EU shall introduce **incentive mechanisms** to gather **empirical evidence** aimed at mapping and understanding how copyright, cultural heritage and data regimes in different Member States **interact over national CH assets**.

The mechanisms adopted at the national level to cope with the intricacies of this interplay could shed light on the need for further legislative interventions in areas that fall under the scope of the EU competences, or soft law instruments in areas that are subject to the discretion of Member States.

For references and further information please visit <https://thereboot-project.eu/research>

15 Developing the EU Film Festival into a two-way event with a clear international cultural relations approach

By Tuuli Lähdesmäki (JYU), Mafalda Dâmaso (EUR), Kaisa Hiltunen (JYU), Ruken Doğu Erdede (KHAS), Elif Akçali (KHAS), Melis Behlil (KHAS)

Who is this aimed at

- Officials of the European External Action Service (EEAS) and EU delegations;
- staff and representatives of EU Member States' embassies, consulates and cultural institutions;
- Cineuropa managers; local curators and film festival representatives who work with EU delegations to organise EU film festivals

Key messages

The EU Film Festival (EUFF) is an important tool for developing cultural relations between EU Member States and third countries. The European Commission has already recognised the strategic importance of the festival in its 2016 Communication "Towards an EU strategy for international cultural relations" (EC, 2016, p. 14). The EUFF has great potential to strengthen two-way exchanges between local and European film professionals, while promoting the competitiveness of film industries in Europe and third countries

through increased cooperation and co-productions. Previous research has also recommended more negotiations on co-productions and the screening of co-produced films at festivals, as they attract audiences by involving local creators (Helly & Chandran, 2023, p. 21). The EUFF could be further developed by clarifying its overall objectives for all stakeholders involved in the organisation of the festival, by improving two-way exchanges and integrating the festival into broader public diplomacy efforts, by supporting the organisation of side events and expanding the film repository managed by Cineuropa, and by increasing the overall financial support for the festival.

Introduction

To explore the different rationales and organisational challenges behind the EUFF, we conducted a combined desk research and qualitative content analysis of interviews with EEAS officials and EUFF organisers in eight non-EU countries that hosted the festival in 2023, namely Argentina, Canada, Chile, Indonesia, the Republic of South Africa, Türkiye, the United Kingdom and Vietnam. The desk research data consisted of

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various grey literature, such as communications, reports and festival catalogues, and feedback responses from festival organisers in 27 countries collected by Cineurope in 2023. The research also included an analysis of the content of the most screened films and the ways in which they represented cultural diversity and other EU values. Finally, the results were explored vis-à-vis the EEAS's approach to strategic communication.

Statement of the problem

Over the past decade, the EU has refined its external relations policies by emphasising bottom-up activities, people-to-people links, dialogue and mutual exchange. However, such an approach to international cultural relations (Murray & Lamonica, 2021) has not been consistently incorporated into all EU policy discourses and guidelines. This situation poses multiple challenges for cultural actors, who must navigate the demands of an as yet unfamiliar policy and its complex governance model in order to serve ambitious, long-term foreign policy goals (Dâmaso, 2021, p. 9). Previous research has shown that, in practice, the EU's foreign policy lacks a coherent doctrine at world level and "coordination could be improved at different levels [...] or through better exchange of information between the EEAS and the EU Delegations" (EP, 2022, p. 17).

In the case of the EUFF, this situation is exacerbated by its governance, which requires the cooperation of EU delegations with the national institutes of EU Member States. The managers of the EUFF programmes must therefore aim for success in the face of competing policies and approaches. Indeed, a similar point was made in the external evaluation of the EUFF commissioned by the European Commission. In it, experts identified the need "to fully align the action with future policy priorities, presentation and debate of the results of this evaluation in the short-term OMC [Open Method Coordination] group on EU international cultural relations, to provide a clearer strategic level of ambition and guidance to film festivals writ large" (Helly & Chandran, 2023, p.15). Film is an important industry at the crossroads of the EU's commercial and external relations

interests. The main objective of the EUFF is not explicitly to make a profit. However, it is an implicit tool to promote and increase the visibility of European film.

European Policy Gap

The European Commission's Communication on the EU Strategy for International Cultural Relations proposed the creation of a new funding scheme for EU delegations to organise the EUFF (EC, 2016). The idea was based on a feasibility study which found that more than half of EU delegations are involved in organising film festivals and other film events that promote the EU, showcase European culture and use film as a diplomatic tool (EC, 2015, p. 6). However, special support was deemed necessary as "a number of obstacles prevent the diversity and excellence of European films from being shown in the best conditions in many third countries: lack of professionalism, limited budgets and shortage of human resources" (EC, 2015, p. 6). Our research highlights similar practical shortcomings, such as the lack of film expertise in the EU delegations and embassies. The local festival organisations often compensate for this, but in some cases all the organising is done by the EU delegation.

The EUFF guidelines and funding criteria refer to multiple diplomatic approaches with arguably contradictory underpinnings. Our research underlines the need to sharpen the festival's diplomatic purpose by taking the international cultural relations approach more seriously and consistently into account in the EUFF guidelines, funding criteria and communication, and by better informing all EUFF stakeholders about it.

Similar observations and suggestions are contained in the external evaluation of the EUFF commissioned by the European Commission. It notes that EUFF programme managers must strive for success in the face of competing policies and approaches, and that there is therefore a need to "provide a clearer strategic level of ambition and guidance to film festivals writ large" (Helly & Chandran, 2023, p.15).

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Recently, the President of the European Commission requested from the European Commissioner for International Partnerships that the EU takes “a more assertive approach in aligning its interests with its partnerships in a more contested and unstable world” (EC, 2024, p. 5). Our research suggests that strengthening the links between the implementation of the EUFF and the international cultural relations approach is compatible with such an alignment – as long as EU actors avoid an instrumentalising logic, continue to demonstrate consistency between rhetoric and action, and prioritise long-term relationships and audience-building efforts.

Policy recommendations

Our research led to several policy implication, which we summarise below.

1) Communicate EUFF objectives continuously:

Clearly define and communicate the objectives of the EUFF to EU Member States in order to build consensus and shared ownership, highlighting the importance of mutuality and the need to eschew instrumentalism.

2) Frame the EUFF within broader public diplomacy efforts: Better emphasise and clarify for festival organisers the international cultural relations approach in the implementation of the EUFF.

3) Focus on shared values: Promote shared values rather than exclusively “EU values”, avoiding the perception of a neo-colonial approach.

4) Support the engagement of independent film professionals and cultural workers: Financial support for independent professionals (both European and from third countries) is crucial for their engagement. Such support is in line with the promotion of European values such as diversity and equality.

5) Strengthen co-productions: Strengthen existing EU funding for co-productions between European and third countries and prioritise small-scale projects with local professionals and markets to foster deeper collaboration.

6) Improve two-way exchanges and highlight side events: Develop the EUFF to better support two-way exchanges between EU and non-EU film professionals, allowing visits by non-EU professionals to the EU, supporting the screening of non-EU films at film festivals in Europe, aiming for the systematic inclusion of local films in the EUFF programme to promote balance and inclusion, and transforming side-events into dialogues, supporting co-learning, collaboration and co-productions, and using films as a basis for discussions on common challenges.

7) Develop tailored audience engagement: Develop strategies to engage with existing and new audiences, and improve festival design accordingly.

8) Address diversity and representation in communication materials: Address diversity in communications materials to better reflect societal values and inclusivity.

9) Increase funding for Cineuropa and Delegations: Provide more financial support to EU Delegations and Cineuropa to increase the number and diversity of films in the repository and at the festivals and to cover costs in low-income markets.

10) Consider broader indicators in implementation monitoring: Use non-quantitative and non-market indicators to measure the impact of the EUFF, including cultural and social outcomes,

For references and further information please visit <https://thereboot-project.eu/research>

16 The Circulation of European Films in Latin America

Focus on Major Markets and Box Office Performance

By Luis A. Albornoz, M^a Trinidad García Leiva, Isabela Vargas Miranda (UC3M)

This policy brief is aimed at:

- EU policy-makers
- national authorities
- industry stakeholders

Key messages

Despite strong cultural, linguistic, and historical ties between Latin America and Europe, the circulation of European films in Latin America is limited and its economic impact unknown. To address this, several key actions should be considered. Firstly, existing support programs for European film distribution and promotion in Latin America should be reviewed and simplified to enhance their accessibility to distributors. Reviving initiatives like Europa Cinema Mundus, which fostered theatrical programming and cross-border exchange, could significantly boost this effort. Secondly, co-production agreements between countries should be revised to align with current industry practices. Furthermore, establishing a central database containing information on co-production agreements and support programs would significantly improve access to resources and facilitate cross-country exchange. Finally, fostering stronger cooperation with publicly managed exhibition windows would enhance the presence and prominence of European films in the region. In short, these measures aim to improve the circulation and, in turn, the potential economic viability of European films in Latin America by simplifying support programs, modernizing coproduction agreements,

enhancing information access, and supporting stronger partnerships in film exhibitions with public institutions.

Introduction

Latin America is a key region for the European film industry due to its strong cultural, historical, and linguistic ties to Europe, particularly with Spain and Portugal, and, to a lesser extent, France, Italy, Germany, and Netherlands. The region also plays a vital role in the global film market, hosting prestigious international film festivals and representing some of the largest markets worldwide in terms of admissions numbers. Despite these connections, several barriers hinder the circulation of EU films, including regulatory challenges, and the overwhelming dominance of Hollywood blockbusters in the region. This policy brief is based on a study conducted in the REBOOT project aimed at examining the views of international film professionals towards the European Film Industry (EFI) in six international markets.

The UC3M research team focused on Latin America, more specifically, in the three countries with the most developed film industries: Argentina, Brazil and Mexico. These countries have the largest cinematographic industries in the region, representing more than 80% of the fiction films produced (Rodríguez, 2020). Additionally, Mexico and Brazil have considerable home audiences, with Mexico being the fourth largest market in the world in terms of tickets sold, while Brazil ranks ninth. Whereas Argentina is the tenth largest market globally by feature film production ([Kanzler & Fioroni, 2024](#)). Using existing market data and

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preliminary findings from interviews conducted by the team as a starting point, the objective of this brief is to provide an overview of European films' performance in theaters in Argentina, Brazil, and Mexico, along with basic recommendations.

Context

A recent study by the European Audiovisual Observatory revealed that between 2014 and 2023 Latin America [1] accounted for 5% of total admissions to European films followed by the US and Asia, each with 5%, while Europe accounted for an overwhelming 82%. Focusing exclusively on 2023, non-European markets accounted for only 26% of export admissions [2], a notable decline compared to previous years, during which the market share of admissions to European films consistently fluctuated around 50%. Out of the said 26%, Latin America accounted for 10%, followed by North America with 7%, Asia with 4% and other markets with 5% (Fioroni, 2024).

	Argentina	Brazil	Mexico
Population 2023 (million)	46.8	204.2	131.2
GDP per capita 2023 (USD)	13.297	10.413	13.804
Gross box office 2023 (million USD)	168.4	447.9	832.0
Admissions 2023 (million)	40.6	114.1	218.4
Average ticket price 2023 (USD)	4.1	3.9	3.8
Average admissions per capita 2023	0.9	0.6	1.7
Screens 2023	954	3.468	7.389
National market shares 2023	7.6%	3.2%	4.0%

Source: European Audiovisual Observatory - Focus - World Film Market Trends 2024

In terms of cinema attendance, Brazil saw an increase of 19.7% in 2023, reaching 114 million tickets. Still the market share of European films based on ticket sales was only 1.8% (2.097.690 tickets), domestic titles took 3.2% (3.701.853), while US titles accounted for 87% of the market (99.201.177) (Ancine, 2023). A similar pattern

occurred in Mexico: cinema attendance increased by 26.2% in 2023, with 218 million tickets sold corresponding to 64% of 2019 figures (Kanzler & Fioroni, 2024). Out of those, Europe accounted for 2.3% of the market (5.016.683), domestic films took 4.19% (9.157.699 tickets) and the US represented 90% (196.542.936) (Imcine, 2023). In Argentina, a total of 40.6 million tickets were sold marking a significant increase compared to the previous year's figure of 34.6 million. Out of this figure, national films achieved a market share of 7.6% (3,089,600) (Kanzler & Fioroni, 2024). Since 2022 INCAA has not released its annual report, meaning there is no official data on market share by country of origin.

Nevertheless, the Panorama Iberoamericano 2024 report provided market share based on cinema attendance for the Top -100 films in 2023, indicating European films at 1.7% (717.200), US films at 89.3% (37.004.473), and national films at 6.7% (2.793.176) (Egeda, 2024).

When considering solely the number of European films released in each market, European cinema appears to have a stronger performance. In Brazil, out of the 709 films exhibited in 2023, 105 (that is 14.8% of the total) were European, 186 were American (26,2%) and 271 were national titles (38.2%) (Ancine, 2023). In Mexico, Europe released 110 films while the US released 143 films; 95 were Mexican (Imcine, 2023). In Argentina, out of the 420 films exhibited in 2023, 204 were national films while 222 were foreign films (Egeda, 2024). As previously stated, an official breakdown of the number of European and US films exhibited in Argentina in 2023 has not been published by INCAA [3].

Beyond figures, it is evident that although European films reach all three countries examined, contemporary European productions encounter significant barriers to attract audiences. Part of this difficulty seems to arise from the dominance of

1 Countries covered in the study mentioned representing Latin America are Argentina, Brazil, Chile, Colombia, Mexico, and Venezuela.

2 Export admissions refer to ticket sales in all markets outside the domestic market, including those in co-producing countries where the financial contributions are minority

3 INCAA provides a list of films exhibited each year, which can be accessed through [this link](#). Using this list in conjunction with the Lumiere database to determine the country of origin, it is possible to estimate that 102 European films and 117 US films were exhibited in Argentina in 2023. However, because institutions can classify the country of origin of coproduced films differently, making accurate comparisons and assessments regarding the number of films per country and their respective market shares remains challenging.

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American films in the box office. These films are distributed by US distribution companies, the majors, which, backed up by Hollywood studios, prioritise blockbusters and other commercially appealing films, invest heavily in promotion and have an extensive occupation strategy, releasing multiple copies and taking a significant portion of the screens in a predatory manner that can't be matched by independent distributors.

Screen quotas for national films in place, both in Brazil and Argentina, further restrict the opportunities for screenings of European films in these countries. Exacerbating the situation, exhibitors tend to favor franchises and blockbusters to attract a perceived guaranteed audience, additionally limiting the exhibition space for films from other countries. As a consequence, independent distributors that normally handle non-mainstream films (European titles, for instance) have difficulty finding a theatrical window of exhibition for their releases.

Although available data is limited, a similar pattern worth highlighting can be detected outside the theatrical market. Brazil and Mexico have well established commercial television companies that maintain their market dominance despite all the changes in the audiovisual sector. Mexican owned Televisa (now TelevisaUnivision) and Brazilian owned Grupo Globo, are vertically integrated conglomerates that take part in both production and distribution activities, generating most of what they broadcast. While Argentina doesn't have a large national television company, its audience also favours domestic content. As a result, broadcasters in the region have little interest in showcasing European cinema. Despite the fact that some European channels including European films are available either on pay cable or satellite TV bundles in all three countries, such as Europa Europa, Eurochannel, France 24, TVE Internacional, Rai DW and RTP International, to name a few, their viewership numbers remain modest.

On the other hand, video-on-demand (VOD) services have a strong presence in the region, driven by US-based global streamers, such as Netflix, Disney+, Max and Prime Video. The popularity of these services has significantly altered viewing habits and impacted traditional cinema consumption patterns. In Argentina, Netflix was the leading VOD provider in 2023, holding a market share of 35,8%, followed by Disney+ (15,4%), Max (13%) and Star+ (12,8%) ([Obitel, 2024](#)). In Brazil, despite limited data, Globoplay (Grupo Globo), seemed to surpass Netflix in number of subscriptions, boasting 30 million users [4] during 2023. Nevertheless, Netflix was still the leading service when it came to market share with 28.5%; Globoplay had 8.7%. In the case of Mexico, Netflix maintained a market share of 53% while Disney+ and Max experienced growth in 2023, reaching 13.5% and 11.8%, respectively. Meanwhile, ViX+ (TelevisaUnivision) emerged as a significant competitor, quadrupling its market share to 7%.

Findings from the interviews

All three markets considered share similarities but also present distinct differences when it comes to the circulation of European films in their territory. Through 46 interviews with film professionals (16 from Argentina, 16 from Brazil, and 14 from Mexico), conducted from September 2023 to October 2024, key insights have emerged regarding the challenges and opportunities encountered within the circulation of European cinema in these countries.

A. THE EXISTENCE OF IMPORTANT NON-COMMERCIAL CIRCUITS

“European cinema is highly sought after and prestigious. We not only have the Cannes Film Week, which obviously features European films, along with films from other countries, but here in Argentina, we also have the French Cinema Week, the Italian Cinema Week, and the German Cinema Week. It's very common to see European films in various cycles or settings. Particularly, there is a

4 See es.statista.com/grafico/29404/servicios-de-streaming-con-mas-suscriptores-en-america-latina/. Neither Globoplay nor Netflix release official numbers of its subscribers. Globoplay is estimated to have 30 million users, including unpaid ones. See www.bloomberglinea.com.br/2023/02/23/guerra-do-streaming-globoplay-desafia-netflix-pela-lideranca-do-mercado/

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very eager art film circuit, including director retrospectives” (Argentinian policymaker).

In Argentina, Brazil and Mexico there are two primary channels for the circulation of European films. There's a non-commercial circuit intertwined with diplomatic efforts, by European embassies and cultural institutions, organizing events like European film weeks, film festivals and exhibitions, which have symbolic importance. There is also a commercial circuit, which, post-pandemic, faces notable hurdles in showcasing European films.

While non-commercial initiatives are important to disseminating European films and culture, they don't seem to translate into a significant increase in the circulation of European films within the commercial circuit. Contemporary European cinema (particularly non-mainstream films) seems to be mostly confined to specialised arthouse or independent outlets, film festivals, a few pay cable and satellite TV channels and platforms like MUBI that focus on independent films. Notable exceptions include European films attaining international acclaim by securing prestigious festival awards and films that have a partnership either with Hollywood studios or a transnational VOD service, as they are likely to be exhibited.

A notable initiative worth highlighting, since it combines commercial and non-commercial aspects and players, is the Tour de Cine Frances in Mexico, the world's most important traveling French film festival according to Unifrance [5]. This itinerant French film festival was created nearly three decades ago in a partnership between Mexican distributor Nueva Era Films, the Cinopolis exhibition chain, the French Embassy and Mexico's Alliances Françaises network. This particular festival differs from others in the region for its reach which goes beyond the main capital cities, travelling to 73 cities in Mexico and 15 cities in Central America (Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua) and for its selection which prioritise commercial French films that don't reach Mexico

rather than via independent or festival-oriented films. In 2023 the event had an audience of 253.000 spectators while in 2018 it reached an unprecedented 420,000 viewers (Unifrance 2024).

B. THE ENDURING CHALLENGES OF COMMERCIAL CIRCUITS

While audiences in all three countries enjoyed European cinema in the past, and classic French, German, Italian and Spanish filmmakers are esteemed among cinephiles, existing data reveals that contemporary European films struggle to secure an exhibition space in theaters as well as in other windows of exhibition. Among the main reasons mentioned by interviewees are the following:

- *High risk for distributors*

"In the markets and festivals where we all meet, generally, all Latin American distributors know each other, we have very good relationships, and we form alliances. In fact, we form alliances with Argentine and Brazilian distributors to buy the rights for all of Latin America and have more reasonable prices, with lower risk" (Mexican film distributor).

Latin American distributors carry a high risk when acquiring rights of European films. European films 'prices are often high when converted into local currency while ticket prices are comparatively low. As a result, distributors need to sell more tickets in their local market to cover costs. Given that European films usually don't draw large crowds or run for extended periods in theatres, distributors frequently struggle to make a profit. In the case of Argentina, the country's economic instability exacerbates the situation, with the steep devaluation of the local currency often preventing distributors from purchasing films at high prices for the local market or fulfilling payment obligations to European counterparts. The country's implementation of non-tariff trade barriers and import restrictions complicates the acquisition process for foreign films, including cultural services and copyright fees. In addition, independent distributors lack sufficient capital for extensive

5 See: <https://en.unifrance.org/news/16986/28e-tour-de-cine-frances-the-world-s-most-important-traveling-french-film-festival>

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promotional activities, limiting the visibility of these films.

Some independent distributors across the region are attempting to overcome these limitations by establishing partnerships to acquire films with rights across Latin America, subsequently dividing distribution responsibilities based on their respective territories. This collaborative approach enables them not only to buy films at a better overall price compared to individual rights purchased for each distributor's respective region, and enhance their leverage when negotiating with film producers but also to use digital aggregators to commercialise films to niche streaming services, expanding the reach of these productions in the region. It also allows for the possibility of selling the film to a global streaming service, which is more inclined to buy from a local distributor that holds regional rights.

Remarkably, although independent distributors in Mexico go through the same hurdles, they benefit from the existence of Cineteca Nacional in Mexico City. This space focuses mainly on independent and European cinema and has earned a loyal following among the city's cinephiles, as reflected in its consistently high ticket sales. Unlike traditional commercial cinema chains, like Cinopolis and Cinemex, the Cineteca offers prolonged runs of eight weeks for every film, providing an extended opportunity for these films to reach a wider audience.

- Limited support programme

"[Support programmes for distribution] needs to be less bureaucratic, because you have to create impressive dossiers... and then when it's approved, you're granted the help. Then, it's another issue, you have to send a lot of paperwork, etc. And the amounts are very small. So, we're all fighting over a smaller and smaller pot." (Mexican film distributor)

Support programs for the distribution and promotion of European films are available, often contingent on certain national film institutions (e.g., French films benefit from incentives provided by Unifrance, German films receive support from German Films).

However, interviewees across all three countries expressed concerns regarding the complexity and bureaucratic nature of these schemes. In addition, many distributors noted a consistent decline in the financial support offered by these programs over the years. It was also mentioned that payments are often delayed several months after the initial expenditure.

- Concentration of exhibition

"Theaters or television platforms have ceased to be, due to the way they are organized, a viable alternative for acquiring, for example, a French film, a Latin American film, or even distributing Argentine cinema that is not the most mainstream. With the current market concentration, there is no real opportunity in theatrical exhibition, nor is there a substitute or complement like there once was with DVDs, or as there used to be with certain TV sales in subregions like the Southern Cone—something that would allow us to continue acquiring quality European cinema, quality Latin American cinema, or quality Argentine cinema, which today faces greater challenges in theaters. The dominance of this concentration, and the ongoing trend toward even greater consolidation, has reached a point where support, funding, or incentives are urgently needed for such films to regain the tools they need to reconnect with audiences." (Argentinian film distributor)

The exhibition sector in all three countries is highly concentrated, with foreign players dominating the sector in Brazil and Argentina and two local exhibitors taking 97% of the market in Mexico. These big multiplex chains prioritise Hollywood blockbusters, limiting the space for European films in all three countries. As a consequence, European films, particularly independent or non-mainstream, are limited to independent cinemas or relegated to film festivals or thematic weeks. Independent exhibitors mentioned the importance of Europa Cinemas Mundus, a programme that provided support for the exhibition of European films from 2011 to 2013. They emphasized that a similar initiative would help them remain viable and allocate more space in their programming for

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non-mainstream films, including European productions.

- Scarce media coverage

“Distribution has always been difficult. There have always been significant investments in marketing for big films. However, thanks to the support of the press, there was an important space in Brazil for non-Hollywood cinema. After the pandemic, this space has drastically diminished. Today, the main need in Brazil’s non-Hollywood film market is to create a media outlet, both print and online, dedicated to cinema and capable of generating constant public interest.” (Brazilian film exhibitor and distributor)

It was noted by interviewees in Brazil and Argentina that the press has ceased its coverage of cinema showtimes and reduced the number of critics’ i reviews of non-mainstream films. This absence of traditional media coverage diminished even more the avenues through which non-blockbuster films were previously promoted and is believed to have a direct impact on their discoverability and potential consumption.

- Growing importance of streaming services

“Basically, the other problem we face is that many platforms and TV networks only buy rights for all of Latin America, while we only have the rights for the Southern Cone. This makes it impossible to sell a film to a major platform. Even if we had rights for all of Latin America, most of these major platforms are very difficult to access, to pitch material, have it evaluated, and get it purchased. It’s very hard for a distributor, acting alone, to sell to a major platform, even with rights for all of Latin America. As a result, we’re practically limited to theatrical exploitation, which comes with its own challenges and limitations.” (Argentinian film distributor)

The theatrical performance of European films has been significantly impacted by the rise of streaming services. In all three countries, while European titles are present on different streaming offerings, their representation is largely confined to films from France, Spain, and, occasionally, Germany. As a

result, smaller productions struggle to be featured. Furthermore, global streaming services such as Netflix, Max or Prime, usually bypass local distributors, buying European films directly from sales agents. MUBI engages with local distributors but offers low prices. In the case of local streaming services operated by national cinema institutes, like Cine.Ar Play in Argentina and Nuestro Cine in Mexico (Brazil is planning to launch its own service, Tela Brasil, in the first trimester of 2025), their focus is primarily on domestic productions, while those owned by local broadcasters, such as Globoplay (Grupo Globo) and Vix (TelevisaUnivision), prioritize their own content, typically excluding European films.

The one exception seems to be content aggregators, such as Sofa Digital in Brazil, that resell niche content to smaller VODs, aiding in this way European film distribution. These services are one of the few willing to buy European films from local distributors in the region. It is also worth noting that during the pandemic some local independent distributors in Brazil launched their own VOD services to promote their catalogues. Most services didn’t survive, but their attempts highlight the limited visibility of non-mainstream films in general and European productions in particular.

C. SHORTCOMINGS OF COPRODUCTION AGREEMENTS

“These coproduction agreements need to be renewed because they are very outdated, considering a reality that has changed a lot. If you look at, for example, the Brazil-Italy Coproduction Agreement from the 1970s, it doesn’t make sense. In light of this changing reality, it is necessary to restructure it.” (Brazilian film producer and director)

Some professionals emphasized that several coproduction agreements with European countries are outdated, failing to address the current needs of the audiovisual industry and its professionals, thereby hindering collaboration. Finding information about coproduction agreements and grants available for non-European professionals from each European country is also challenging. They suggested that aggregating and centralizing the information

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available would make it easier to access and understand requirements.

Policy recommendations

Despite its limited scope, the preliminary findings of this study have several policy implications that require further consideration for action.

1) Reboot support programmes: Taking into account the difficulties outlined by interviewees when it comes to distributing and exhibiting European films in Latin America, reviving programs such as the Europa Cinema Mundus, which used to offer support for theatrical programming based on circulation and exchange between MEDIA countries and non-MEDIA member states, should be considered. The MEDIA Mundus program, which existed between 2011-2013, also had lines focused on distribution, promotion and even co-production with countries outside of Europe and it was highly regarded amongst Latin America professionals.

Furthermore, current support programs for the distribution and promotion of European films could be reviewed and restructured to simplify the complexity and administrative burden involved in accessing funding, which can deter participation, especially of small players, and hinder the efficient use of resources. Streamlining application procedures and providing clear, user-friendly guidelines would significantly improve the accessibility of these programs for distributors. Moreover, a more predictable and timely payment system should be introduced to ensure that distributors can plan and execute promotional activities effectively.

2) Revise and modernise co-production agreements: As mentioned, the vast majority of interviewees highlighted the importance of coproduction agreements for the internationalization of films and knowledge exchange between different countries. Due to the fact that a significant number of co-production agreements date back to the 1990s or early 2000s, making them outdated and in need of revision, to ensure the alignment with contemporary industry practices it would be useful to revise and change agreements currently in place.

3) Consolidate and centralise information: Information about coproduction agreements with European countries and existing support schemes is often scattered and fragmented across multiple websites, institutions and countries. As a consequence, it can be hard for foreign film professionals to find the correct data and understand the requirements, especially considering that resources are also in different languages. A central database with all the content would ensure easy accessibility and facilitate better access to resources and possibilities of exchange across countries.

4) Explore partnerships with publicly managed windows of exhibition: Reflecting on ways of leveraging possible cooperation between publicly managed windows of exhibition, such as Cineteca National in Mexico, Cine Gaumont in Argentina or CineSesc in Brazil, could be beneficial to increase the circulation of European films in these markets. These institutions already assign and give prominence to independent and arthouse films in their programs and tend to exhibit more European films than commercial chains. Greater support with issues such as exhibition rights, dubbing and subtitling, could enhance the presence and visibility of European films. The same would apply to publicly managed streaming services such as CINE.AR Play and Nuestro Cine. While these services prioritise national films, a partnership could foster the circulation and exchange of titles, giving European films another window of exhibition while possibly opening a window for Latin American productions in the EU.

For references and further information please visit <https://thereboot-project.eu/research>

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