



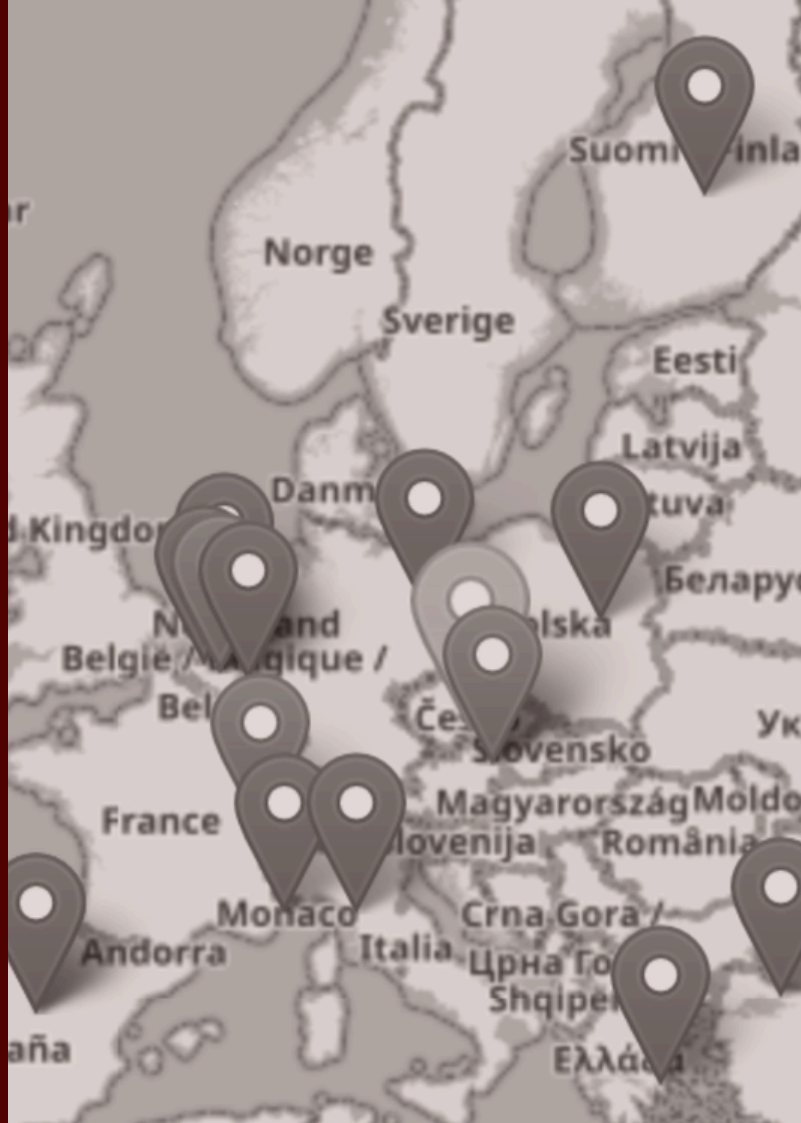
Reviving, Boosting, Optimising
and Transforming European Film
Competitiveness

Newsletter

February 26

Edited by
Gentiana Ramadani

Layout & Design
Simon Haslauer



This project has received funding from the European Union's Horizon research and innovation programme under grant agreement 101094796



REBOOT FACT SHEET

361

INTERVIEWS CONDUCTED

1

PROJECT WEBSITE

432

RESPONDENTS

12

TRADITIONAL MEDIA
INTERVENTIONS

42

INTERNATIONAL CONFERENCES
ATTENDED

77

WEBSITE ITEMS POSTED

736

STRATEGIC DOCUMENTS/POLICIES
REVIEWED

10,000+

WEBSITE VISITORS

10

LANGUAGES

5

NEWSLETTERS PUBLISHED

11

ADVISORY BOARD MEMBERS

250+

NEWSLETTER SUBSCRIBERS

13

POLICY BRIEFS

2,300+

FOLLOWERS ON LINKEDIN

46

ACADEMIC PUBLICATIONS

19,000+

VIEWS ON INSTAGRAM

5,000+

CHILDREN AND YOUNG ADULTS
PARTICIPATED IN SURVEY

60+

TOTAL PROJECT RESEARCHERS

24

FESTIVAL/ROUNDTABLE
PARTICIPATION

Table of Contents

CONCLUDING REBOOT

- 01** The sleeping giant, the European Film Industry
- 02** UNIVIE's REBOOT journey
- 03** Concluding REBOOT: Letters from the consortium
- 04** From the Advisory Board: Competition, Sovereignty and Cultural Futures in the Streaming Era
- 05** The REBOOT Podcast
- 06** Audience views on European film competitiveness

WHAT'S NEW

- 07** Release of Film-Industry Competitiveness Dashboard
- 08** Polish REBOOT Team Presents Research on Film Consumption and Internationalization at National Conferences
- 09** The Netflix-Warner deal as seen from Europe

01 The sleeping giant, the European Film Industry

REBOOTing right questions and daring answers

By Katharine Sarikakis

Professor of Media Governance and Media Industries

Director, Media Governance and Industries Research Lab

Coordinator, REBOOT project

One of the pressing questions in the film industries across the world has historically been how to best protect national cinema and how to make it competitive. Europe has been returning to this question over several decades now, sometimes through policies, sometimes through refocusing its research agenda. This question is not new. It has also not had any definite answers.

Across many national and regional film industries, the underlying concern is that the Hollywood engine remains unbeatable in the box office and even threatens the viability of national cinema. It is not a coincidence how Hollywood came to inhabit every daily mediated experience across the western world, to say the least. It is almost omnipresent in the cinemas and streaming platforms, in the market as merchandise, in the news media in the form of interviews with or gossip about celebrities. Certainly, what we witness is the end result of a sophisticated system promoting the interests of the US American film industry. It does so not only through an oligopolised system of distribution channels and stardom, but also through a historically long and systematic pursuit of bilateral agreements globally, and on the EU level since 1993. Hollywood is clearly a dominating actor globally. And clearly, this is not simply because it produces better products than anyone else.

When we, therefore, ask what Europe can do to be more competitive, often the underlying question is

what Europe can do to compete against Hollywood. During the course of this project, I have had several times the opportunity to talk to journalists and the media about our work. There is a great interest in what we do, but there is also a widespread cultural 'fixation' of prioritising the perceived need to compete against Hollywood. Funnily enough, even when I say that, to my personal opinion, this is the wrong question if we want to enhance the competitiveness of the European industry, newspaper titles claim exactly that!



While the REBOOT project is coming to its official end, Katharine Sarikakis argues that the time for the conversation to develop has just started. *Credit: Simon Zhu*

So, what are the right questions to ask and what has REBOOT done to answer those? To set the scene, we need to take a sober look at the social and political and cultural historical legacies and today's conditions frame European societies. A starting point is to consider the fact that European traditions and innovation in culture are distinct and derive from a history of difference and commonality translated into a most diverse spectrum of cultural practices. From languages to ways of life, everyday social systems and political cultures, Europe has been a hub of human centred legal frameworks, philosophy and vocation across the arts and

sciences, crafts and service. It is characterised by the historical reign of public service institutions and their provision, free at the point of service, such as education and health care. At the surface, all of these traits can be easily framed as losses and weaknesses in a market driven economy. This is the case, if the market driven economy prioritises concentration of ownership and is regulated as such. In other words, this is the case when public policy prioritises the interests of a few.

A second point is to define exactly whose interests must be pursued under public policy for cinema and the film industry. Universally, culture is the domain where the building blocks for Aristotle's Eudaemonia, the 'Good Life' are built: humanistic, planetary friendly and aware culture transforms imagination to vision, allows free expression and experimentation, provides the stage for innovation and tackling crises, enhances and reinforces human bonds and social cohesion, provides mental and psychological support and generally, makes life worth living. When looking at the European experience in particular, drenched with conflict, but also amazing cross-national living and loving, we can easily understand that culture for Europe, not just the EU, is and should be the pivotal geopolitical 'moment' for the preservation of meaningful democracies, social integration and cohesion and for the 'Good Life'.

From these two fundamental factual starting points, the questions to be asked are what REBOOT sought to research and answer over the three years. An incredibly complex and rich tapestry of research and outputs was crafted by more than 60 researchers and an advisory board of protagonists in the film and audiovisual sector and hundreds of others, stakeholders as we call filmmakers and music producers, policymakers and young professionals through interviews, in depth analysis and archive and desk research, focus groups and workshops. Thousands of children and young people, over 5000, across Europe talked to us and helped us with their incredible sophistication and passion to reimagine and realise and reposition all these questions, once and for all.

We asked through many different ways and formats, what are the weaknesses of the European film industry, what remains underutilised or neglected, what is its greatest contribution and, given all that, what does competitiveness look like and what does the future of the European film industry look like?

Again and again, we were told, in no uncertain way, that European films are authentic and speak of truth and life, precisely because they come from all possible places. They tell a mosaic of the human experience and paint all colours of human existence. Concepts of diversity and democracy are not decorative lip service but a true goal across the board, from filmmakers to young audiences, from policymakers to global industries to public institutions. This does not mean everybody sees the film industry and European film as a nonprofit organisation, for some profit-making is more important and authenticity in storytelling is considered secondary to box office success. To a certain extent, coproductions have occasionally diluted the taste of commitment to diversity of nations and human experience to fit economic prescriptions. Yet the overwhelming response from 5000 children and young people is clear: fatigue from and aversion to blockbuster logic, repetition and 'cheapness' of stories. If the film industry in Europe wants to resonate with future audiences, then it must open its creativity box and invest in distinction more strongly, not less. It must invest in original film soundtrack and in compelling storytelling.

Public institutions in Europe have played an enormous role in historically investing in the creation of know-how, educating and funding the making of storytelling in films. They have a central role in crafting spaces for newcomers, independents, marginalised groups and themes. However, they can be notoriously hard to navigate bureaucratically and downright exclusive to young filmmakers. Special trends need to be created for filmmaking connecting not only film schools, but also young people outside those into a larger mentoring and supporting hub of possibilities.

Measures must be taken at EU and national levels to break down the barriers of filmmaking by introducing core courses in film studies as humanistic centred subjects across basic primary and secondary education, with a coordinated effort for common modules across university education. Film educates, inspires and creates lasting impressions of science, for example.

All of these are responses to address some of the weaknesses and optimise some of the strengths found in the European filmmaking landscape. Truly, a sleeping giant, the European Film Industry within and outside the EU needs more internal, cross-institutional, cross-national and cross-regional coordination to open up entry points and create sustainable futures. More, and not less, distinctive content, a plethora of genres, and authentic storytelling are the markers of the recipe for success for all. As Artificial Intelligence is being rapidly used and entered our lives, the real storytelling and the pattern prediction dominated storytelling must be further apart if we do not want the annihilation of culture for future generations.

This journey of exploring the right questions cannot be told in a few words. As coordinator of this truly humbling exploration, I am grateful for the teams I have led here at the University of Vienna and for my dream team collaborators across 16 countries. We brought society and the knowledge communities collective experience and knowledge from over 5000 children, 360+ industry professionals and over 750+ strategic documents and policies reviewed. Yet, the outputs we have produced and we are still continuing to work on do not end here. The time for the conversation to develop has just started: our 2,371 followers in social media and their 70,000 visits across social media and website attest to that.

To those caring and providing for the storytelling of our societies, to the nomads bringing the stories and to the fire-keepers making sure the stories remain alive while keeping the fires burning for our communities, involve our expertise and knowledge and help us support you. Read, debate and examine our work, tear it apart and reconstruct it, disseminate it, use it.

Stay in touch.



02 UNIVIE's REBOOT journey



Angeliki Chatziefrimidou aka Alik

Favourite movie I have watched since REBOOT started: Loving Vincent (2017, Poland & the United Kingdom, Dir: Dorota Kobiela and Hugh Welchman)

The film is an experimental animated historical drama, which has won the Best Animated Feature Film Award at the 30th European Film Awards in Berlin, in 2017, as it is the first fully painted animation film from 125 artists around the world, who used the technique of Van Gogh: The 65.000 frames of the film are all oil paintings on canvas.

Favourite moment at REBOOT: One personal highlight of this project was the first Children's University (Kinderuni) Workshop, in which our team participated in 2024. It was the first effort to disseminate the REBOOT project's mission to children aged 10 to 12 through an interactive workshop. The activities our team organised for this purpose, the setting, the team-work, children's creativity and their special outcomes, turned this into a special experience for me. One more experience was the REBOOT's consortium meeting in Château de La Napoule, in Cannes, which included the REBOOT's participation in the Cannes film festival (2025).

My experience in REBOOT was life-changing, as it was the first project I worked on. The focus of the field and its impact not only highlighted the role of children as civic actors in the film industry and a key factor for the industry's competitiveness, but also showed how film can be a means of creativity, expression and connection in the digital age.

Collaboration with the partners was an amazing experience. Working with professionals across Europe who shared the same passion, while also having unique opportunities for exchange and cooperation, was truly interesting. The working environment within the Vienna team was excellent - and it was an honour to work with people who are passionate and deeply committed to everything they do.

It was a once-in-a-lifetime opportunity to learn about the European film industry through the eyes of young people, to grow within academia through conferences and publications and to develop both as an individual and as a team under the leadership of Prof. Sarikakis, a remarkable visionary and academic professional leader.

As this project comes to an end, its impact has only just begun, shifting the perspective of competitiveness in the European film industry away from numbers and toward people: toward children, preferences, needs and voices behind the statistics. Film is no longer seen merely as a product, but as the identity and stories of those who create and express them, and of those who see themselves represented or learn about the stories and cultures of others.

I want to extend my gratitude to my colleagues who worked beside me through deadlines, deliverables, research, writing, publications, travel and celebrations, because, at the end of the day, these people made my journey so special.



Gentiana Ramadani aka Genta

Favourite movie *La vita è bella* (1997, Italy, Dir: Roberto Benigni)

Favourite moment at REBOOT: Working on research, exploring diverse themes and transforming research questions into a meaningful final product has been my favorite moment...because the challenge was always there!

Another important aspect of my work on the project was the opportunity to meet, listen to, and collaborate with experts and professors in the field, from whom I learned a lot and began to think differently. Reboot was a project that placed me in “reboot mode” every day, constantly challenging me to reflect, rethink and operate.



Katharine Sarikakis aka KS or Prof

Favourite movie I have watched since REBOOT started: *The Murderess* (Greek: *Η Φόνισσα*) (2023, Greece, Dir: Eva Nathena)

Directed by Eva Nathena, the film derives from Greek literature of the early 20th century. *The Murderess*, *Η Φόνισσα*, was written by Alexandros Papadiamantis, in 1903. The work is set in the late 1880s Skiathos in Greece and is the story of midwife Chadoula, who commits a series of murders of infant girls in her small village. Chadoula resorts to murder, in order to spare girls from a life of oppression and suffering as adult women. The film and book show her psyche, traumatised by a life of severity and suffering, as it is tormented between her conscience and her desire to deliver women from an insufferable, inescapable fate. The film criticises the conditions leading to femicide, here in this story ironically by a woman with the intention of salvation, the victims of misogyny to our days. The underpinnings of the work are also to be found in the critique against violence against women and femicide as direct hate crimes. Chadoula’s acts are importantly motivated not by hate against women, but by compassion for girls and by rage against the fate that awaits them - a misguided, desperate act to save women from a prolonged death and assault on their soul and body. The film returns to the theme of violence against women through its treatment of femicide both through a historical lens and an unmistakable sharp view of the persistence of violence against women and girls that spikes in times of crises. The movie came out of the post-covid era, a time where violence against women and the killings of women rose significantly across the world. The power of storytelling lies in its connecting, in an unsettling manner, practices of times gone that, however, remain painfully persistent in our times: not only the murder of female infants, but also that of girls and women.

Favourite moment at REBOOT: The excitement and conviction of our work; the amazing opportunity to convey children's voices through our research; the deep and long lasting friendships made at our consortium. The moment I was called 'Coordinator of our Hearts'.

Leading young people to expand their skills, realise their capabilities and challenge their perceptions: working with an amazing team of young people to support the work of the whole consortium was incredible. Our work will generate publications for years to come and we are convinced we have something invaluable to offer to the future of our common heritage of European culture and film. The moments in festivals, meetings, workshops and the opportunity to expand the research as it developed. The incredibly rich intellectual volume of 'smarties' all around me: my team, my colleagues and all the young people that became involved and part of our 60 strong consortium.

The storytelling of storytelling!



Sarah Baumgartner aka Sarah

Favourite movie I have watched since REBOOT started: *The Day Iceland Stood Still* (2024, Iceland, USA, Dir: Pamela Hogan)

The Day Iceland Stood Still is an Icelandic-American documentary film by Pamela Hogan and Hrafnhildur Gunnarsdóttir from 2024. It focuses on the major women's strike on October 24, 1975, during which 90 percent of Icelandic women stopped both their professional and domestic work to demonstrate for gender equality.

Favourite moment at REBOOT: The conference in Vienna - my first experience in an academic space. Truly exciting, full of new insights, inspiring conversations, and perspectives that broadened my view and motivated me both intellectually and personally.

REBOOT taught me that research isn't just books, theories, and serious faces - it's curiosity, chaos, strong opinions, late questions, and people who care *a lot*. Basically: less ivory tower, more real life. And somehow, that made it even more exciting.

From the very beginning, REBOOT stood out to me as a project that engages with a highly central and timely research topic. Even though I joined at a later stage, I immediately felt how relevant and meaningful the work was, and how much care and commitment had already been invested in the project. Becoming part of this process was both motivating and inspiring.

REBOOT was my first experience in a research project, and it allowed me to engage deeply with questions that are crucial to understanding film not only as an industry, but as a cultural and social space. As a passionate cinema-goer, it was especially exciting to work on a topic that I genuinely care about, and to see how personal interest and research-driven inquiry can come together in such a productive way.

What truly shaped my experience was the team. Working with such dedicated, open and enthusiastic people created an environment in which exchange, collaboration and mutual support were central. The strong sense of teamwork made it easy to stay motivated, to ask questions and to contribute ideas, regardless of the limited time I spent in the project.

Throughout my involvement, I was able to develop further, learn new things and gain valuable insights through hands-on research work and constant exchange with the team. I felt encouraged to grow, to reflect and to engage more confidently with complex questions, which made the experience particularly rewarding.

I feel very honoured to have been part of REBOOT. The project offered a space to engage seriously with a central research theme, to exchange ideas and to experience how collaborative research can be shaped by shared curiosity and dedication. At the same time, it highlighted how colourful and diverse the European film industry truly is, and how artistic independence functions as a lifeline of society - an expression of diversity and, ultimately, a celebration of life.



Simon Haslauer aka Simon (/zi:mɔn/)

Favourite movie I have watched since REBOOT started: Passages (2023, France, Dir: Ira Sachs)

Favourite moment at REBOOT: Visiting schools and talking with children about their opinions about (European) film and hosting the Screening the Scene conference in Vienna

It is important to understand – and I think that the REBOOT project has incorporated this sentiment into its work to a considerable degree – that the artistry of film and the conditions of the film industry are inseparably intertwined, or as to say it in the words of Debord: Cinema as “spectacle is not a collection of images; it is a social relation between people that is mediated by images”.

Participating in a big research project like REBOOT for the first time, I was impressed by the project’s volume of work and output, exceeding even the already ambitious grant agreement.

I was even more impressed by the project’s commitment to create visibility for emerging researchers like myself – and at the same time highlight young voices as part of the research. In fact, my most fond memory during the project is our trips to Viennese schools, talking to children and young adults about their opinions on film and getting into conversation with young filmmakers about their experience in the European film industry. It has become apparent to me that as (publicly funded) researchers, it is our responsibility to lift and highlight the voices at the fringes of the European film industry – and I can say confidently that every single person part of REBOOT has done its best to do just that.

This short text is way too little to communicate even a fraction of the project’s findings or the gratitude I feel towards the entire consortium – and especially my team in Vienna, led by Univ.-Prof. Katharine Sarikakis – who I have constantly felt uplifted and appreciated by. Finally, what is left to say for me is only two words: Thank you.



Yves Saint Clair Zogo aka Mr. Zogo

Favourite movie I have watched since REBOOT started: Qu'est ce qu'on a fait au bon Dieu? (2014, France, Dir: Philippe De Chauveron)

Favourite moment at REBOOT: Seeing our research puzzle across all its dimensions piece up during our final conference was my highlight.

Navigation would be the word that best describes my experience throughout the REBOOT project. Its scope fascinated me with a blend of professionals, teams and stakeholders from different horizons coming together with a shared objective: changing prevailing narratives. Coming from a purely practitioner background, REBOOT opened the door to a deeper understanding of the relationship between research and practice, allowing me to witness first-hand what was truly at stake. Working across such a wide range of dimensions from research with children to legal frameworks and emerging technologies was both challenging and stimulating. The project broadened my perspective in many ways: through intergenerational exchange, personal encounters and collaboration with remarkably dedicated teams, to whom I remain profoundly grateful. Thank you to every single one of you!

This experience has given me a new lens through which to see European cinema. I have come to understand that Europe's future film competitiveness will not depend on replicating global commercial models, but on strengthening access, supporting diverse creators and ensuring that European stories continue to circulate across borders, platforms and audiences. The project has come to a formal close, but I firmly believe this is only the beginning of an inspiring journey.

03 Concluding REBOOT: Letters from the consortium

**Dr. Apostolos Samaras**

Research Fellow at the Hellenic Foundation for European and Foreign Policy (ELIAMEP)

Participating in the REBOOT project as a researcher in the ELIAMEP team was an enriching professional experience, but also personally meaningful, as it was my first Horizon Europe project. From the very start I found the collaborative spirit across partners and institutions inspiring, the diversity of perspectives refreshing, and the shared commitment to strengthening European film competitiveness motivating. Working closely with colleagues from different countries (great teams of academics, researchers and experts) brought fresh insights, encouraged me as an EU law researcher to think beyond familiar frameworks, and it deepened my appreciation for the value of cross-disciplinary partnerships.

What stayed with me most was how much we learned together about navigating complex research challenges while building trust and mutual respect. The REBOOT project gave me the opportunity to engage with experts on the European cultural and audiovisual sectors, to contribute to impactful research reports, papers, policy-oriented outputs, and conferences, as well as to experience firsthand the potential of collaborative research to make a difference for European film. I am grateful for the opportunity and look forward to seeing how our research continues to resonate beyond the project itself.

**Fernando Ramos Arenas**

Universidad Complutense, Madrid

Three years of REBOOT – on looking back and moving forward

Almost three years after the start of REBOOT, the project is now about to wrap up. The results have been published, the deliverables submitted and the milestones accomplished. We have travelled to present results at conferences, round tables and festivals, we have discussed them with representatives from the European Film Industry while at the same time trying to make a wide audience aware of what is at stake in its defence. Many of us will keep working on some of the questions tackled in these 36 months in future publications and research projects.

It's also time to mention some aspects that personally stood out in this process.

Being a media historian specialized in the short 20th century, working for the second work package of the project came as a novelty. It meant confronting history still in the making. The different teams involved in this part looked back at the last thirty years of European film, at its stakeholders, institutions and policies. We did dozens of interviews that helped us to understand a complex field where industry, culture and policy go hand in hand. We wanted to give space to its voices, seeking to reflect its complex and sometimes competing opinions. We highlighted shifts and continuities, challenges and paradoxes. We tried to understand its problems and, while preparing policy briefs, offer solutions and advice for the future.

This meant also adopting a stance and committing to a Film Industry shaped by European values. Writing history of the present time means accepting that we are not merely observers but also participants, that we share the ecosystems with our case studies; we confront similar challenges and are moulded by the same cultural forces as the subjects we analyse. REBOOT has provided a vehicle for analysing the intricacies of the European project, but also for taking position for it.



Daniël Biltereyst and Jens Van Landschoot
Ghent University

Takeaways from the REBOOT report Lessons from the past.

The REBOOT-report, deliverable 2.4, Lessons from the past. European film industry looks back at thirty years of changes, challenges, and paradoxes, is part of the broader WP2 of the REBOOT-project, and it is a collaboration between Ghent University, UCM and the University of Warsaw. This report is inspired by the annually returning, widely spread and quoted Nostradamus report, which entails a bottom-up, future oriented perspective of the (European) filmed entertainment industry through means of expert-interviews with senior European industry professionals. However, this report, although it incorporated a similar methodological approach, gathered the data based upon a more extensive body of interviews and altered the future oriented perspective by implementing a historical approach. This allowed the report to provide a comprehensive and extensive overview of the most profound changes, challenges and developments in the European film industry (EFI) over the span of the last thirty years. In total, 68 pan-European industry professionals and important senior stakeholders were contacted and successfully interviewed: twenty-five Flemish-, twenty-three pan-European- and twenty Spanish interviews.

This unique approach resulted in the emergence of rich data sets elaborating on the challenges and developments perceived by important European industry professionals, which was subsequently subdivided into four thematic clusters structuring the report in general. Those clusters are related to production, distribution, exhibition and policy. The most preponderant questions delved into overproduction, the long standing American dominance in the global film industry, the impact of streaming services' recently acquired hegemonic position, the impact of digitization processes and corresponding technological shifts, the divide between economic and cultural interests, the place of cinema in the current ecosystem, the perceived idea of competitiveness in

general, and, finally, some questions related to policies implemented in the fragmented European film industry.

Furthermore, this report and its distinguished thematic clusters also resulted into an international conference, Frames of Change, co-organized in Madrid (22-23 May 2025) by the Spanish UCM and Ghent University. During this conference, several questions regarding the state of the European film industry were posed and answered by international researchers, while sparking rich, productive and highly relevant discussions as well. This international gathering also was an important moment of feedback for the authors of the report.



Luis Albornoz, Mª Trinidad García Leiva & Isabela Miranda
Universidad Carlos III de Madrid

UC3M and the REBOOT Project

From the outset, REBOOT offered UC3M a unique opportunity to advance research on the international circulation of European cinema, its competitiveness, and the role of public policies and institutional frameworks in promoting European films abroad. The UC3M research team participating in the project was led by Prof. Luis A. Albornoz, with Prof. María Trinidad García Leiva and Isabela M. Vargas Miranda, and engaged in qualitative and quantitative methods including desk research, interviews, an online survey, policy analysis, and active participation in international events and discussions.

Within this work, UC3M analyzed the policies and incentives supporting the international promotion of the European and Spanish film industries (Task 3.4). This involved interviews with institutional representatives and an analysis of Spain's public support framework. In parallel, the team examined the perceptions of international film professionals regarding the European film industry (Task 4.3), focusing on Latin America, through desk research, semi-structured interviews and an international survey with key film industry stakeholders in Argentina, Brazil and Mexico. Both lines of inquiry provided nuanced insights into the opportunities and challenges of promoting European films internationally, highlighting the institutional support available in Spain and the perspectives of Latin American stakeholders, identifying potential avenues for stronger cultural, industrial, and economic collaboration.

UC3M also prioritized the dissemination of REBOOT's research results, participating in a range of academic and industry-oriented events. A major contribution was the roundtable at the International Seminar on Diversity and On-Demand Audiovisual Services organised by the Diversidad Audiovisual research group (Madrid, 23–25 October 2024), which examined the intersection of European cinema and streaming services. Beyond academic settings, the team contributed to industry-facing events, including a session at the Marché du Film (Cannes, 15 May 2025) and a panel at the 2025 International Film Festival Rotterdam (Rotterdam, 3 February 2025). These engagements provided opportunities to present findings, exchange perspectives with film industry stakeholders, and reflect on policy implications in real-world market contexts.

The UC3M team is part of the Audiovisual Diversity research group based at Universidad Carlos III de Madrid. Executed under the umbrella of the Spanish Institute of Film Studies (IUCE-UC3M), REBOOT reinforced UC3M's commitment to fostering innovation and excellence in film studies. The team was supported by Dr. Leandro González (Universidad Nacional de General Sarmiento, UNGS) and Dr. Argelia Muñoz Larroa (Universidad Autónoma de México, UAM-Cuajimalpa), who contributed to the case studies in Argentina and Mexico; as well as by the Conference of Audiovisual and Cinematographic Authorities of Ibero-America (CAACI), who assisted in disseminating the survey among Latin American film industry entities and professionals. Further information on the UC3M team's activities and publications related to the REBOOT project can be found on the Audiovisual Diversity research group website, [here](#).



Team Université Côte d'Azur

Université Côte d'Azur in REBOOT – Innovation, Immersion and the Future of European Film

As the REBOOT project is brought to completion (2023–2026), Université Côte d'Azur (UniCA) is honored to have been part of the consortium's common goal: boosting the competitiveness of European film industry while keeping cultural diversity, creativity, and young audiences at the very core of the conversation.

UniCA examined how Extended Reality tools (VR/AR/MR/XR) might alter the way young audiences engage with screen-based content. We approached XR as an extension of cinema as well as an emerging form of storytelling where attention, space, and interaction become part of the narrative. By comparing public funding and support schemes (in Europe and beyond), we identified that current policy frameworks remain fragmented and often provide insufficient support for cinema/XR hybridization at scale. Alongside this policy work, we conducted experimental audience research using eye-tracking to better understand how viewers perceive and process spatial information in immersive environments. The findings point toward distinctive cognitive and attentional dynamics in XR settings-suggesting that immersive formats may open new paths to engage younger publics and renew the attractiveness of European audiovisual creation.

Second, UniCA explored a frequently under-discussed dimension of competitiveness: film music. Through qualitative survey work and case-based analysis (including observation of professional recording sessions), we highlighted how scoring practices combine creativity, technical expertise, teamwork, and time-sensitive production constraints. Understanding these processes helps make visible the artistic and industrial value of composers and orchestra: key contributors to film identity, emotional impact, and cultural distinctiveness.

Across both strands, our contribution underlines a simple message: European cinema's future competitiveness will depend not only on markets and funding distribution, but also on innovation in formats, skills, and creative ecosystems-especially those that speak to new generations.

04 From the Advisory Board

Competition, Sovereignty and Cultural Futures in the Streaming Era

By Sarah Baumgartner

"Culture is the 'factory of dissent,' which is essential to a pluralistic democracy." Culture does more than entertain; it actively produces questioning, criticism and alternative viewpoints that keep democratic societies vibrant. By framing cultural production as a "factory of dissent," Juliette Prissard highlights how artistic works generate the debate and pluralism needed to challenge dominant narratives, safeguard freedoms and nurture informed citizenship. In the European audiovisual context, this insight underlines the importance of protecting diverse cultural expression from homogenising pressures of global platform capitalism, ensuring that film and media continue to serve as arenas for public scrutiny and democratic participation.

The REBOOT Horizon Europe project brings together scholars, policymakers, industry leaders and civil-society actors to rethink the future of European cinema in the streaming era. Its core premise is that the battle for competitiveness now takes place in the channels of circulation, where a handful of U.S. technology giants control the algorithms, infrastructure and financing that determine which films reach audiences. By exposing the structural asymmetries between global platform capitalism and Europe's public-service ethos, REBOOT aims to devise policies that preserve cultural sovereignty, democratic participation and ecological responsibility while enabling a vibrant audiovisual market.

The initiative brought together diverse perspectives. As the REBOOT project is coming to a close at the end of January four key contributors - Ufuoma Akpojivi, Rodrigo Gómez, David B. Nieborg, Juliette

Prissard and Iris Zappe-Heller - who serve as members of the project's Advisory Board have shared their assessments and critical reflections on the project's direction and findings. Each of them highlights a distinct yet complementary challenge facing the European audiovisual sector: the need for a European-run streaming corporation and a redefinition of competition; the threat that AI-driven platforms pose to data, cultural and economic sovereignty; the inseparability of culture, democracy and ecology as pillars of a free and competitive Europe; and the ethical re-balancing of competition toward collaborative, sustainability-focused models. Together, these contributions set the intellectual agenda for REBOOT's policy proposals, which seek to align regulation, public-service investment and interdisciplinary research with the twin goals of safeguarding Europe's cultural identity and ensuring its long-term economic resilience.

Rodrigo Gómez reframes the REBOOT debate around circulation rather than production, emphasizing that U.S. streaming platforms now serve as the core distribution infrastructure that determines visibility and financing for audiovisual works across borders. He proposes a European public-service streaming corporation to guarantee discoverability for European works, operate under public-interest governance, and collaborate internationally to build a "mundialized" audiovisual citizenship. Gómez stresses that competitiveness must be redefined as a political-cultural project that couples regulation, investment in circulation infrastructures, and education, rather than simply emulating U.S. industrial models.

Building on this focus on distribution, David B. Nieborg highlights how platform concentration and

the rapid spread of generative AI are eroding Europe's data, cultural, and economic sovereignty. He notes that most leading AI firms are headquartered in the United States or China, a geographic concentration that pressures linguistic diversity and the distinctive cultural ecosystems of European audiovisual production. He calls for trans-national scholarly networks and policy-research initiatives to map platform power, trace AI diffusion, and assess their impact on audiovisual economies.

From there, Juliette Prisard frames culture, democracy, and ecology as an inseparable triptych that must guide Europe's competitiveness. She describes, as mentioned at the outset, a free, pluralistic cultural sphere as a "factory of dissent" essential for authentic democratic debate, while pointing out that the ecological dimension of culture - stories and images that raise environmental awareness - is largely ignored. She warns that opaque algorithms and platform oligopolies undermine both democratic debate and ecological consciousness, urging a culturally-centric policy response to technological upheaval.

From a Global-South perspective, Ufuoma Akpojivi reconceptualises competition as ethically grounded collaboration rather than destructive rivalry.

Drawing on media technology shifts across Africa, Europe, and the Americas, he suggests that competition must be rebalanced within the ecological space of media and creative industries, promoting partnership to achieve sustainability. His vision calls for a competition ethic that leverages collective strengths to address societal challenges, ensuring the media sector remains viable and socially responsible.

Iris Zappe-Heller concludes by emphasizing that the involvement and empowerment of young people is crucial for the long-term sustainability and competitiveness of the European film industry; without youth audiences and participants, cinema risks losing its role as a shared cultural space and a forum for shaping European values and identities.

Together, these perspectives outline a roadmap that couples targeted regulation, public-service investment and interdisciplinary research to protect Europe's cultural identity while ensuring long-term economic resilience. By aligning technological innovation with democratic values and ecological stewardship, REBOOT aspires to transform Europe's audiovisual sector into a model of responsible, inclusive competitiveness.

05 The REBOOT Podcast

Research Insights on European Film in a Changing Global Landscape

By Yves Saint Clair Zogo

At a moment of high-pace transformation for the European Film Industry, the REBOOT Podcast emerged as a research-driven platform that brought together empirical research and expert perspectives to examine the structural, economic, cultural and technological forces already shaping European cinema. By placing academic analysis in direct dialogue with industry practice and policy debate the podcast documented how competitiveness, visibility and cultural diversity are

being negotiated in a rapidly evolving audiovisual landscape.

Across its episodes, the podcast examined how European cinema is being reshaped by digitalisation, global competition as well as shifting audience behaviours. Central themes comprised the impact of video-on-demand platforms on national film industries, the dominance of US-based streaming services and the persistent fragmentation

of the European audiovisual market. Drawing on REBOOT research and expert commentaries, discussions highlighted how distribution models, visibility mechanisms and recommender systems increasingly influence what audiences see, raising questions about cultural diversity, competition and regulatory intervention amongst others in the algorithmic age.

A strong policy dimension ran throughout the series with episodes exploring the role of EU film policy instruments such as quotas, visibility obligations, and regulatory frameworks in adapting to automated recommendation systems and platform governance. Legal and policy experts highlighted the challenges of transparency, the "black box" problem of algorithms, and the limits of traditional cultural policy tools in a streaming-dominated environment, illustrating how policy choices directly affect the circulation and competitiveness of European films. The podcast also addressed structural issues within the European film ecosystem ranging from funding models through production structures to the growing influence of digital platforms on creative and economic decision-making. Through exchanges with key stakeholders in the likes of film institute directors, cultural managers, researchers and industry representatives, the series documented ongoing debates around sustainability, creative freedom and the balance between market competitiveness and cultural responsibility.

Importantly, the REBOOT Podcast extended its analysis beyond Europe's internal dynamics to global circulation and audience transformation. A central focus, based on research with more than 4,500 young people across Europe, episodes examined the preferences of digitally fluent, socially inclusive younger audiences, who are drawn to narratives of "otherness" and cooperation rather than traditional hierarchies. Simultaneously, the podcast highlighted the limited market share of European films in parts of Latin America - often between 1% and 3% despite the presence of streaming platforms, pointing to structural barriers such as limited marketing, niche positioning and low visibility. Case studies from Latin America and Europe illustrated emerging strategies, from gender-balanced production models to innovative digital distribution experiments, that seek to address these gaps.

Beyond serving as a dissemination tool, the REBOOT Podcast offered a dialogue platform, translating research outputs into accessible conversations while connecting policymakers, researchers, filmmakers and industry stakeholders. By documenting concrete research insights and real-world practices, the series contributed to a profound understanding of how European cinema currently operates within a globalised, platform-driven audiovisual landscape - and where tensions, inequalities as well as opportunities are already evident.



The REBOOT Podcast #4: Circulation of European films: youth preferences and Latin American markets

Recorded live at the Cannes Marché du Film - Festival de Cannes

Is the film industry ready for the next generation? This episode is part of our special issue series on strategies to enhance European film competitiveness.

We explore research insights from the REBOOT project revealing how young audiences across Europe are reshaping cinema based on insights from over 4,500 young people.

06 Audience views on European film competitiveness

Results from the Screening the Scene conference survey

By Sarah Baumgartner

"How can European cinema remain competitive in a rapidly changing global landscape?" The REBOOT research is helping to answer this question - and audiences are taking notice. Feedback gathered from our recent international conference SCREENING THE SCENE: Rethinking European Film Competitiveness, which took place in Vienna on 9–10 October, shows overwhelming support for the relevance of the research, with participants highlighting its fresh perspectives on youth audiences, technology, policy, and global markets. Most respondents not only learned something new, but also felt inspired to continue the conversation and take action. Here's what they had to say - and why the REBOOT findings matter for the future of European film.

The survey aimed to assess participants' perceptions of the relevance, impact, and usefulness of the research, as well as to identify which thematic areas and findings were considered most important for the future of the European film industry.

Participants included students, policymakers, academics and professionals from diverse European and international backgrounds. The evaluation reflected broad international and European representation, with respondents from Austria, Belgium, Brazil, Belgium, Cameroon, Finland, Germany, Greece, India, Indonesia, Ireland, Mexico, the Netherlands, Poland, Portugal, Russia, Slovakia, Spain, Turkey and the United States. This diversity strengthens the evaluation results by showing that the research resonates with a wide, internationally engaged audience concerned with the competitiveness of European film.

The survey employed a five-point Likert scale, where 1 indicated no agreement at all with a given statement and 5 indicated very strong agreement. The evaluation shows that respondents strongly believe in the necessity of research into European film competitiveness, which received an average score of 4.76 out of 5. This suggests near-universal agreement that such research is essential in the current media and cultural landscape. Similarly, participants agreed that European films can benefit directly from the REBOOT research, with an average score of 4.58. Such results suggest that the research is perceived not merely as theoretically significant but also as possessing tangible industry applicability.



The *Screening the Scene* conference took place October 9-10, 2025 at the University of Vienna
Credit: Simon Zhu

In terms of intellectual impact, respondents felt that the research opened up new and innovative ways of thinking about European film competitiveness, scoring 4.61. Many participants also reported that they learned something new from the findings (4.58), indicating that the research successfully contributed new knowledge rather than reiterating familiar ideas. Importantly, the research also showed a capacity to inspire action: respondents expressed a strong willingness to take action

together with colleagues based on the findings (4.50), and a clear interest in learning more about the REBOOT project in the future (4.58).

One question addressed whether the research changed how respondents think about supporting competitiveness in the European film industry. While the average score remained positive (3.74), it was slightly lower than other items. The interpretation of this result is not entirely straightforward, as it may indicate that the research primarily confirmed existing views rather than fundamentally changing perspectives, or that deeper shifts in thinking require more sustained engagement over time. At the same time, this suggests that the research resonates with respondents and encourages reflection on the topic, even if it does not necessarily lead to immediate or fundamental changes in perspective.

Participants were also asked to evaluate the importance of specific research themes. The highest-rated topic was the views of young people and children as audiences in Europe (4.71), highlighting the central role of future audiences in discussions of competitiveness. Closely following were technological advancements in the film industry (4.55) and the views of professionals working in the European film sector (4.50).



The conference attracted academics, industry stakeholders and filmmakers as well as representatives of the Greek and French embassies.
Credit: Simon Zhu

Strong importance was also attributed to global markets and industries, as well as young people's experiences as filmmakers (both 4.47), underlining a forward-looking and internationally aware perspective among respondents. Research into film and cultural policies also scored highly (4.39), reflecting recognition of the policy environment's influence on competitiveness. Lower scores were given to the history of the European film industry (3.79) and musical soundtracks in the film industry (3.61). Although these topics remain relevant, their lower scores indicate a peripheral status compared with respondents' priorities - youth engagement, innovation, and the strategic positioning of European cinema globally. This suggests participants focus on factors seen as directly affecting competitiveness, while historical and niche artistic aspects are considered less central, reflecting broader trends toward forward-looking, market-oriented cultural policy.

In conclusion, the evaluation clearly demonstrates that the REBOOT research is perceived as highly relevant, timely, and impactful. Respondents strongly value its contribution to understanding European film competitiveness and appreciate its emphasis on future audiences, technological change, professional perspectives, and global dynamics. While some impacts - such as shifts in long-term thinking - may develop gradually, the research has already succeeded in informing, inspiring, and engaging its audience. These results confirm the importance of continuing to disseminate the REBOOT findings and fostering dialogue between researchers, policymakers, and industry professionals to strengthen the future competitiveness of European cinema.

07 Release of Film-Industry Competitiveness Dashboard

An interactive way to see the EFI

By Piergiorgio Pilo

The newly developed Film-Industry Competitiveness Dashboard is an innovative digital tool designed to help stakeholders, researchers, and policymakers better understand—and ultimately improve—the performance of Europe's screen industries. Accessible through the Reboot project website, the Dashboard provides open access to a rich collection of data, indicators, and analyses generated through extensive research carried out by the project's consortium partners. These include insights from Deliverable 2.4, which explores key paradoxes in the European film industry over the past three decades; Deliverable 3.6, which examines the institutional context shaping industry dynamics; and Deliverable 6.2, which presents socio-economic indicators of the European Film Industry (EFI).

Grounded in Michael Porter's Diamond Model (Porter, 1990), the Dashboard adopts a well-established economic framework and adapts it to the specific realities and complexities of the European film and media sectors. While Porter's model was originally designed to assess national competitive performance, its reinterpretation within this project enables users to explore the creative industries through a multidimensional and context-sensitive lens.

The Dashboard is organised into four interactive domains, each corresponding to one of the model's core determinants of competitiveness. Through a combination of qualitative and quantitative indicators, users can navigate the following areas:

Factor Conditions, which highlight the availability of skilled professionals, state-of-the-art facilities, technological infrastructure, and training ecosystems.

Demand Conditions, which assess audience behaviour, levels of sophistication, cultural diversity, and the overall scale and structure of film markets.

Related and Supporting Industries, examining how complementary sectors – including advertising, tourism, education, and technology – contribute to and benefit from audiovisual activity.

Firm Strategy, Structure, and Rivalry, which explores how companies innovate, collaborate, and compete within their local, national, and European environments.



The dashboard can be found on the REBOOT project's website <https://thereboot-project.eu/dashboard>.

Reflecting the multidisciplinary nature of film-industry research, the Dashboard integrates data from legal, economic, sociological, and cultural perspectives. This approach builds on a strong academic foundation (Porter, 1998; Chapain & Comunian, 2011; Huang & Zou, 2024), offering a robust analytical tool for understanding how institutional, technological, and cultural conditions shape the competitive advantage of creative clusters.

By consolidating diverse research outputs into a single interactive platform, the Film-Industry Competitiveness Dashboard serves as a strategic resource for evidence-based policymaking, industry benchmarking, and targeted intervention. Whether used to identify regional strengths, understand market dynamics, or design new support measures, the Dashboard empowers users to make informed decisions that foster long-term sustainability and competitiveness across Europe's film and media sectors.

08 Polish REBOOT Team Presents Research on Film Consumption and Internationalization at National Conferences

As part of the dissemination of research findings within the REBOOT project, members of the Polish research team presented their work at key national conferences in fall 2025. At the 9th National Conference “The Polish Media System in the Process of Change”, held in Kielce, Poland, on December 4, 2025, the team presented the paper “Intergenerational Changes in the Contemporary Approach to Film Consumption: Generation Z Preferences in Film Creation, Distribution, and Presentation”, authored by Jacek Mikucki and Alicja Waszkiewicz-Raviv.

Earlier, at the 7th Congress of the Polish Communication Association – “People at the Center of Contemporary Media Transformation”, held in Katowice, Poland, from September 22–24, 2025, the same team presented the paper “Strategies for the Internationalization of Polish Cinema: The Role of Contemporary Public Institutions and Their Tools for Foreign Exposure”, also authored by Jacek Mikucki and Alicja Waszkiewicz-Raviv.

Participation in these conferences helped share the project’s insights into contemporary film consumption patterns, generational preferences, and strategies for promoting Polish cinema internationally.

09 The Netflix-Warner deal as seen from Europe. And why does YouTube change everything?

By Loreto Corredoira

After two years of careful studying the SVOD market, Reboot can offer an answer to this question. An answer that forces us to first consider which are the limits of the market under consideration. If services such as YouTube or Tiktok are included in the EU-calculations, this merger, although important (as it would change some aspects of the film and TV distribution sector), should not be a concern in terms of market concentration. But if these other services are taken into consideration, European citizens and policy

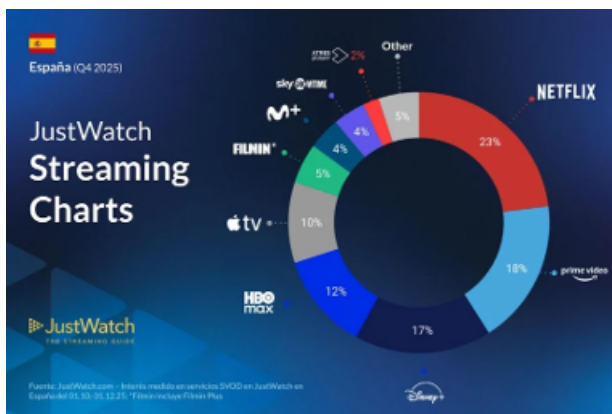
makers should start paying more attention to what is coming from the US.

The application of antitrust laws in Europe – in particular, the Council Regulation (EC) No 139/2004 of 20 January 2004 on the control of concentrations between undertakings (the EC Merger Regulation) (OJ L 24, 29.1.2004 – to the possible acquisition of Warner Bros. Discovery (WBD) by Netflix - still pending the decision of the US Federal Trade Commission- could represent a significant regulatory challenge in Europe; similar in

some regards to the situation created in the US, but also with some local specificities: if the merger finally takes place, the European Commission should conduct a careful review of the merger and the market before clearance.

Definition of the relevant market with or without YouTube

The critical point in considering this merger as compatible with European law is related to the limits and definitions of the "relevant market." If European regulators define the market solely as streaming video on demand (SVOD), the increase in Netflix's market share by absorbing HBO Max would generate significant "red flags". In Spain, for instance, Netflix and HBO would add up to 35% of the VOD market (Justwatch data from December 2025).



Instead, if regulators adopt a broader definition that also includes cable TV, free-to-air TV and even user-generated video platforms such as YouTube, concerns about market concentration would be greatly diminished.

And what do we do with sports?

From an European perspective, a key aspect concerns those part of Warner Bros. Discovery that Netflix is apparently not interested in acquiring. These assets include several television stations, such as CNN and Eurosport, which will be spun off from the Netflix deal as part of a separate entity called Discovery Global (BBC). This move could reduce antitrust scrutiny in Europe, as Netflix would not be able to take control of important sports broadcasting rights and cable channels associated with that brand.

Impact on the cinema sector

The possible deal also raises concerns in other areas, such as consumer rights in the face of Netflix's dominant position. Another aspect is that of film distribution rights, the famous "windows" which have been drastically changed after the impact of the COVID'19 pandemic.

In this sense, "the International Union of Cinemas (UNIC) - which held a meeting with the European Commission's competition department last week - namechecked theatrical release schedules as a "key principle" that had to be protected in any deal in a statement", according to information from Politico.eu.

In short, the success of the deal in Europe will depend on whether Netflix can convince regulators that it competes in a much broader entertainment market than streaming and that the exclusion of assets such as Eurosport ensures a fair competitive environment.

Another research project similar to REBOOT would be more than welcomed to analyze the transformations ahead of us in the next 10 years.

THE REBOOT PROJECT TEAM

UNIVERSITY OF VIENNA, AUSTRIA

Katharine Sarikakis – Professor & Leader REBOOT consortium

Angeliki Chatziefrimidou – Predoctoral researcher

Gentiana Ramadani – Predoctoral researcher

Yves Saint Clair Zogo – Research project assistant

Simon Haslauer – Research project assistant

Sarah Baumgartner – Research project assistant

SCUOLA SUPERIORE SANT'ANNA, ITALY

Caterina Sganga - Full Professor of Comparative Private Law

Denise Amram - Senior Assistant Professor of Comparative Private Law

Pelin Turan - Postdoctoral Research Fellow

Arianna Martinelli - Associate Professor

Piergiorgio Pilo - Postdoctoral Research Fellow

UNIVERSITÉ DE LIÈGE, BELGIUM

Antonios Vlassis – Assistant Professor

Marina Rossato Fernandes – Researcher

Camille Schmitz – Postdoctoral researcher

Pauline Bissot – Junior Researcher

Solenn Houard – Junior Researcher

ERASMUS UNIVERSITY ROTTERDAM, NETHERLANDS

Mafalda Dâmaso – Researcher

Anna Niutta – Junior Lecturer

UNIVERSITEIT GENT, BELGIUM

Daniel Biltereyst – Professor

Jens Van Landschoot – PhD Student

UNIVERSITY OF WARSAW, POLAND

Michał Głowacki – Associate Professor

Alicja Waszkiewicz-Raviv – Associate Professor

Jacek Mikucki – Assistant Professor

Anita Zawisza – Assistant Professor

UNIVERSITY OF JYVÄSKYLÄ, FINLAND

Tuuli Lähdesmäki – Professor

Kaisa Hiltunen – Senior Researcher

UNIVERSIDAD COMPLUTENSE DE MADRID, SPAIN

Fernando Ramos – Associate Professor

Loreto Corredoira – Associate Professor

Samia Benaissa – Senior Researcher

Jorge Marrero – PhD Student

UNIVERSITÉ CÔTE D'AZUR, FRANCE

Jean-François Trubert – Professor

Julie Mansion-Vaquié – Associate Professor

Marcin Sobieszczanski – Senior Lecturer

Charline Callet – Researcher

UNIVERSIDAD CARLOS III DE MADRID, SPAIN

Luis Albornoz – Professor

María Trinidad García Leiva – Associate Professor

Isabela Vargas Miranda – Research Assistant and PhD Student

ELIAMEP, GREECE

Evangelia Psychogiopoulou – Assistant Professor

Eirini Sifaki – Associate Professor

Irene Andriopoulou – Research Fellow

Anna Kandyla – Research Fellow

Apostolos Samaras – Research Fellow

Laia Comerma – PhD Student

Alexia Mitsikostas – Project Manager

KADIR HAS ÜNİVERSİTESİ, TURKEY

Melis Behlil – Professor

Elif Akçalı – Associate Professor

Ruken Doğu Erdede - PhD Candidate

Disclaimer: This newsletter is part of the 'Dissemination, Outreach, and Engagement activities organized under Work Package 7 of the **REBOOT: Reviving, Boosting, Optimizing, and Transforming European Film Competitiveness** project. This project has received funding from the Horizon Europe program of the European Union under the Grant Agreement No 101094769. It does not reflect the views of the European Union and is a publication encapsulated within the project.