Policy Brief

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Public value as a factor of competitiveness of the European film industry: insights from six European markets

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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).

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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 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.

[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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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. 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, Chatziefraimidou, Juengst, 2024).

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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

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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 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.

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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 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).

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

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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.

[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.

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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.

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

[4] Flanders Audiovisual Fund (VAF). (2024). https://www.vaf.be/
[5] Ministerio de Cultura y Deporte
[6] Acción Cultural Española, 2024; Spain Audiovisual Hub, 2023

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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.
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.

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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.

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