

STREAMING SERVICES AND THE COMPETITIVENESS OF THE EUROPEAN FILM INDUSTRY IN EUROPE AND LATIN AMERICA

Context

Streaming services, including VOD (i.e. Netflix, Prime Video) and video-sharing service providers (i.e. YouTube), have become key gatekeepers in the international circulation of

audiovisual content, reshaping how films are produced, distributed, and consumed. Their rapid expansion poses significant governance challenges for European policy-makers, particularly regarding the competitiveness of the European Film Industry (EFI) and the achievement of EU cultural and industrial policy objectives.

Recent research shows that US-based VOD service providers, such as Netflix, Amazon and Disney, are reshaping national production cultures, funding models, and content circulation, with significant implications for the visibility of European works (Idiz, 2024; Lordache et al., 2022). Indeed, VOD services play a decisive role in determining the availability and discoverability of films, with certain titles receiving greater prominence than others (Lobato & Scarlata, 2022; Smits, 2022). Notwithstanding the fact that European films featured on these VOD services are predominantly from major production countries (namely the UK, France, Spain, Italy, and Germany), issues of visibility, prominence and discoverability have become central to recommending films to audiences and facilitating their circulation. As Alborno and Gallo (2024) note, VOD services determine not only which content is available, but also when and to whom. In this context, prominence and visibility have emerged as critical bottlenecks in contemporary film circulation.

Scholarship reveals that streaming services are transforming power relations across the production, distribution, and exhibition sectors. In other words, streaming services have created opportunities to potentially challenge the long-standing dominance of traditional Hollywood studios (Vlassis 2021a, Smits, 2024), where the release patterns of film, involving multiple exploitation windows, beginning with theatrical, home video (e.g. DVDs), pay-TV and broadcast has collapsed (Ulin, 2019; Chalaby, 2025).

Beyond the impact on the circulation of European content, the model applied by US VOD services when commissioning audiovisual works from local companies has altered the financing and production landscape. In particular, US VOD services typically demand all-encompassing rights, across formats and territories, which results in a de facto full transfer of intellectual property (IP) (Meir & Mitric, 2025; Chalaby, 2023; Doyle et al., 2021) that limits local producers' ability to profit from their own back catalogues or build long-term value.

The growing influence of these streaming services is transforming established industry practices and putting existing regulatory frameworks under pressure (García Leiva & Alborno, 2020; Chalaby, 2025). While scholarly interest in the topic is growing, there remains a lack of empirical evidence on how film professionals experience and perceive the influence of predominantly US-based streamers. As the EU revises and implements the Audiovisual Media Services Directive (AVMSD), understanding the perspectives of European film professionals becomes crucial (Vlassis 2023, García Leiva, 2025). Equally important are

the perceptions of non-European professionals, which shed light on how European cinema is received and circulated beyond the EU.

Indeed, reinforcing the role of the EU as a global actor in a sustainable manner requires ensuring that the views and the needs of non-European actors are understood and taken into account in policymaking. Such a stance can be described as a decentering EU film policy . Simultaneously, it is necessary to contribute in an evidence-based manner to current debates regarding the EU's global audiovisual policy. The EU has long positioned itself as a global normative actor in the cultural field (Dâmaso, 2025) and this approach was reinforced with the adoption of the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, through which the EU seeks to embed cultural norms and audiovisual cooperation within broader economic and political frameworks ([Vlassis, 2021b](#)). Among non-European markets, Latin America emerges as a particularly significant case. It has long been a key destination for European films and has often paid attention to European audiovisual policy models when shaping its own frameworks (Vlassis 2016, Fernandes, 2023). Yet, VOD services in the region remain largely unregulated, raising important concerns about access, visibility, and policy leverage in the global media landscape . At the same time, the EU's earlier normative influence in regional policy debates diminished (Fernandes, 2022), as global VOD services increasingly shape regulatory agendas across Latin America (Fernandes & Albornoz, 2023). Current debates in Brazil over the regulation of streaming services illustrate these tensions. The independent production sector has been pushing for an ambitious regulatory framework, and this position has received explicit support from European independent production associations. The European Producers Club and the European Audiovisual Production Association publicly endorsed the efforts of Brazilian independent producers to advance a balanced and effective regulatory model for streaming services (European Producers Club & CEPI, 2024). At the same time, the growing influence of global streaming platforms in the policy process has raised concerns, with industry stakeholders noting that these services are exerting increasing pressure to shape the proposed legislation.

To explore these dynamics, this policy brief combines qualitative and quantitative data collected by ULIEGE, EUR, and IUCE-UC3M in two REBOOT tasks: 4.1 focused on European film professionals (Fernandes et al. 2025), and 4.3, on non-European professionals (Dâmaso et al, 2025). The data includes 37 interviews with European film professionals and a pan-European survey of over 400 respondents, with 47 interviews with Latin American film professionals and a survey of over 197 respondents in the three biggest markets in Latin America, Argentina, Brazil, and México. In doing so, it offers evidence-based recommendations to strengthen the long-term competitiveness of the EFI in the

evolving VOD landscape. Particular attention is given to the tensions and conflicts that arise when European and non-European film professionals engage with global VOD services, how EU policy can respond to these dynamics to support a more competitive and resilient film sector, and what this implies for future cultural and policy exchanges between the regions.

Discussion

The findings revealed that film professionals view VOD service providers as central yet problematic actors in the contemporary audiovisual landscape. While non-EU film professionals highlighted the role of streaming services, particularly MUBI and Netflix, in supporting the global circulation of European films, EFI professionals emphasised that, despite this increased reach, the know-how and infrastructure continue to be concentrated within US-based global players. Moreover, respondents agree that releasing films in cinemas continues to be an important strategy to support the dissemination of European film. While VOD opened up new opportunities to reach audiences, when asked about the main obstacles to the international distribution of European film, all case studies identified competition from Hollywood productions. That is, despite the opportunities created by streaming services to transform power relations, Hollywood players have tended to dominate even in this new market.

In the European context, while recognising the role of VOD services in expanding access to European content, participants highlighted several interconnected challenges affecting the EFI's competitiveness. A central concern is the concentration of market power in US-based companies, which increasingly set the terms of collaboration and limit the creative and contractual autonomy of European producers. Interviewees described a widening gap in bargaining power, noting that negotiations with VOD services often lack transparency and leave producers with little room to negotiate favourable conditions or retain control over their works.

The findings show that the benefits of VOD services in Europe are uneven across countries, markets, professions, and segments of the value chain, with directors, distributors, the animation sector and professionals in smaller or lower-capacity markets benefiting far less. Respondents also highlighted that the current environment tends to weaken SMEs, which face growing difficulties in maintaining visibility, securing fair deals, and sustaining independent production.

These challenges are intensified by the lack of transparency, particularly regarding how VOD services collect and use audience data and how they recommend content. Professionals reported that this opacity prevents producers and public institutions from understanding the performance of European works and from making informed decisions. They are further

compounded by the limited discoverability of European content on VOD services and the increasing dependence on US-based private companies that are not structurally committed to the long-term development of the EFI. Professionals argue that these VOD service providers profit from the creative talent, production capacity and infrastructure built over decades through European public investment, yet do not sufficiently reinvest in the sector or contribute to its structural development. As a result, concerns emerge regarding the long-term sustainability of EFI, the preservation of cultural diversity, and Europe's capacity to retain control over its cultural assets.

In Latin America, the introduction of VOD services has been seen as an opportunity to showcase certain productions that otherwise would not have a window of exhibition, but it has also brought its own set of challenges. For local distributors, VOD services have reduced revenue that could be generated by films, bypassing local intermediaries, preferring instead to secure global or at least regional rights directly from international sales agents. It has also contributed to the marginalisation of physical media formats, such as DVDs and Blu-rays, heightening the financial risks for independent film distributors, particularly given the limited promotional resources available to these smaller actors, making profitability difficult.

Regarding production, US-based global VOD service providers' investments and guaranteed international work distribution have expanded creative and funding opportunities, challenging the long-standing dominance of legacy broadcasters and theatrical circuits. However, it has also increased concerns among local producers when it comes to retaining IP rights and prompted discussions among film professionals regarding its regulation, particularly concerning quotas for domestic content, similar to the EU model.

When asked about the challenges faced by their local markets, Argentinian interviewees highlighted the need to regulate streaming services as a key concern. Despite acknowledging that the arrival of US-based VOD services expanded private investment opportunities and broadened the audience for local productions, interviewees also foregrounded their introduction of a new set of challenges around IP rights and creative control of the works. Similarly, many of the same challenges encountered in the Argentinian case are also present in Brazil, such as a lack of exhibition space for independent films (including European) and the need for better support for distribution and promotion. The need to regulate streaming services was also among the most frequently cited challenges by film professionals in Argentina and Brazil. As per Mexico, several recurrent challenges shape the current landscape of its film industry. While also acknowledging the widespread dominance of Hollywood at the box office, most interviewees pointed to deeper structural

issues in terms of distribution, promotion, and exhibition. Particularly, some participants highlighted the urgent need for an independent exhibition circuit.

Overall, the study shows strong support among professionals for reinforcing and expanding regulation on streaming services, whether in the EU or Latin America. Building on these insights, the policy recommendations outlined below identify areas where coordinated action at the European level could strengthen the EFI's competitiveness. They reflect professionals' calls for more robust VOD regulation, ensuring that creative freedom and cultural diversity remain central to the EFI.

Policy Recommendations

Support EFI competitiveness

- **Reinforce control over Intellectual Property (IP) (long-term)**

Rationale: The findings show that professionals across the EFI perceive loss of IP control as one of the most critical threats to long-term competitiveness. Interviewees consistently described how global VOD service providers acquire exclusive rights, often preventing European producers from monetising further or re-exploiting their own works. These arrangements often resemble “work-for-hire” contracts rather than genuine co-productions, meaning that public investment and European talent contribute to global content portfolios without generating lasting assets for the EFI. Strengthening IP control is therefore essential for securing sustainable business models and ensuring that European audiovisual content remains a source of cultural and economic value within Europe.

Recommendation: Introduce stronger safeguards ensuring that European producers and creators retain ownership of intellectual property. This may include linking public funding and VOD investment obligations to IP retention, restricting exclusive buy-out practices, and promoting contract standards that guarantee European control over exploitation rights and future revenues.

- **Increase support for the independent audiovisual sector (medium-term)**

Rationale: According to European professionals, SMEs across the EFI face limited negotiation power and reduced creative control when working with global VOD service providers. These players follow business models that differ from the European ecosystem and often constrain producers' autonomy. Professionals warned that budget inflation and VOD commissioning are creating a divide within the EFI between high-budget, VOD-oriented productions and smaller independent works that struggle to compete. They also expressed concern about the sector's growing dependency on US-based companies, which profit from European talent and

infrastructures developed through public investment but remain uncommitted to the EFI's long-term sustainability.

Recommendation: Reinforce public support for SMEs and independent producers to counterbalance the dominance of US-based VOD service providers. Dedicate part of VOD investment obligations or levies to dedicated funds designed to support all segments of the audiovisual sector, extending beyond production.

- **Strengthening regulation towards streaming services (medium-term)**

Rationale: Film professionals demonstrate broad and consistent support for strong regulation towards streaming platforms, including VOD services and video-sharing platforms, and explicit recognition of the AVMSD's importance as a policy instrument. Professionals identify quotas and investment obligations as essential for guaranteeing the presence of European works, particularly in small-language and low-capacity markets. Professionals emphasised that the current framework does not adequately address imbalances across EU countries, sectors, and stages of the value chain. The findings highlight that VOD benefits tend to concentrate in a few countries and production-heavy segments, while sectors such as distribution and animation receive limited support.

Recommendation: Strengthen the AVMSD by refining and expanding its existing mechanisms. Introduce sub-quotas for animation, promote harmonisation of investment obligations across member states, and establish targeted measures that ensure regulatory benefits extend to the entire audiovisual value chain, including distributors and other underrepresented sectors. Such adjustments would enhance the Directive's effectiveness, reduce internal asymmetries, and ensure that regulation towards streaming providers, including VOD services and video-sharing platforms, contributes meaningfully to the sustainability and competitiveness of the EFI as a whole.

Transparency and Prominence

- **Promote Data Transparency and Algorithmic Accountability in Operations of Streaming Services (medium-term)**

Rationale: The findings highlight that limited access to viewership and algorithmic data from global streaming service providers poses a major challenge for the EFI. Without reliable data, producers and public agencies cannot accurately assess the audience reach and impact of European works. This undermines evidence-based policymaking and weakens the capacity of European institutions to evaluate and adjust existing measures. The opacity of data practices also creates structural imbalances in the sector: while other audiovisual players are obliged to report

performance data, global streaming service providers are not. As a result, European producers lack crucial knowledge about how their content performs, information essential for improving future production, marketing, and investment strategies.

Recommendation: Establish EU-wide obligations for streaming service providers, including VOD services and video-sharing platforms, to share audience, performance, and algorithmic data on European productions. Require transparency regarding how recommendation systems rank European works, and implement auditing mechanisms.

- **Provide a clear definition and enforcement of prominence (medium-term)**

Rationale: Respondents stressed that inclusion in VOD catalogues is not sufficient if European content remains difficult to find, poorly ranked, or overshadowed by promotional strategies. A well-defined and enforceable concept of prominence is therefore essential to ensure that European works are not merely present but effectively visible within the digital environment. Professionals also emphasised the need for accurate and consistent attribution of production companies.

Recommendation: Provide a clear definition of the prominence of European works and introduce mandatory discoverability rules for European content on streaming services, including VOD platforms and video-sharing providers, and mechanisms to monitor it. Ensure transparent and consistent attribution of European production companies in all European works available on these services.

International cooperation

- **Strengthen initiatives to support digital distribution in international markets (medium-term)**

Rationale: Latin American industry stakeholders indicate that the exhibitor and distributor sector is highly concentrated in all three Latin American countries studied and while European films are present in streaming services, the majority of the films that reach these services are from the main producing countries: United Kingdom, France, Spain, Italy, and Germany. Although there are existing support programs from certain countries to support the circulation of their own films, these programs do not focus on digital distribution.

Recommendation: Considering the difficulties outlined by interviewees, the EU should consider establishing an overarching program to support the international distribution of European films that includes support for distribution through digital outlets. This would give films from smaller countries, which currently lack distribution support programs, a better chance to reach international audiences while

simultaneously broadening the reach of films from countries that provide distribution support beyond theatrical exhibition

- **Leverage partnerships with streaming services (short-term)**

Rationale: The Latin American market for streaming services is strong and growing, and US-based global VOD service providers maintain a dominant position in the VOD sector. Additionally, the majority of the content offered in these services originates from the United States.

Recommendation: Given the growing importance of VOD services in the international circulation of films and the fact that Latin America has an avid consumer base for these services, it could be interesting to leverage partnerships with public VOD services such as CineAR Play (Argentina) or Nuestro Cine MX (Mexico) to facilitate the exchange of audiovisual content, providing an additional exhibition window for European films while potentially creating opportunities for Latin American productions within the EU market. In addition, a targeted program for local or regional VOD services with a focus on niche and curated cinema, interested in acquiring and showcasing European films in non-EU markets after their theatrical release should be considered. The program could offer financial incentives, rightsclearing assistance, support with dubbing or subtitling, or even curated catalogues to make European films more easily accessible.

- **Promote EU–Latin America dialogue on VOD regulation (short-term)**

Rationale: Latin America remains an important market for European works, yet streaming services, including VOD providers and video-sharing platforms in the region, operate with limited regulatory oversight. The study indicates that Latin American professionals broadly support regulation towards streaming services and share challenges similar to their European counterparts regarding visibility and the sustainability of independent production. At the same time, the EU's previous normative influence in regional audiovisual policy debates is weakening, as global VOD services increasingly shape regulatory agendas.

Recommendation: Promote structured dialogue and cooperation between the EU and Latin America on regulatory approaches to streaming services. Encourage exchanges among film professionals, associations, regulatory bodies, and public institutions to debate policy options, share experiences, and discuss regulatory practices.

- **Update co-production agreements (long-term)**

Rationale: Latin American film professionals highlighted the importance of co-production agreements between Latin American and European countries not only to pool financial, technical, and creative resources, but also to potentially increase

access to audiences and opportunities for festival circulation. Coproductions also benefit from policy instruments that foster the exhibition of domestic films across both regions.

Recommendation: Update coproductions agreements to explicitly include provisions for digital distribution and online promotion, enhancing the digital circulation of coproductions in streaming services.

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