

TOWARDS A UNIFIED EUROPEAN POLICY FRAMEWORK FOR CINEMA/XR' HYBRIDIZATION

Introduction

Within the last 20 years, the audiovisual and film landscape worldwide has changed dramatically: once dominated by theatrical releases and a limited number of national film industries, cinema has evolved and reinvented itself to accommodate more interactive viewing experiences. Traditional film production, distribution and consumption are all undergoing major transformations with the advent of streaming and regional platforms, mobile devices and interactive media that have transformed film distribution, connection and interaction with audiences worldwide.

European cinema holds a distinctive position within this evolving environment. Historically, extensive public policy frameworks supported cultural diversity, national identities and linguistic plurality against the homogenizing market forces of globalization. Despite Hollywood's competition and international streaming platforms' challenges, Europe's policy frameworks-which are based on state subsidies, cultural exception principles, and co-production strategies-have allowed the European audiovisual industry to retain its strength.

The advent of Extended Reality (XR), which is an emerging umbrella term for all immersive technologies encompassing Virtual Reality (VR), Mixed Reality (MR) and Augmented Reality (AR) technologies, has marked a major change in contemporary media practices. XR technologies are not only revolutionizing the media landscape, but also the way in which people experience and create narratives. Regarding the film industry, XR opens countless new possibilities for film producers. It introduces a qualitative shift in audience behavior: from front-facing, mono-screen viewing to an experience that is more like an interactive and spatial one.

This policy brief argues that the hybridization of cinema and XR is a strategic opportunity for Europe, which is not yet sufficiently addressed by the existing policy frameworks. Although artistic experimentation and institutional recognition for emerging artists have increased, most public funding schemes and governance infrastructures continue to prioritize linear, screen-based film productions. Grounded in empirical research carried out by the REBOOT project, this work highlights the fragmentation, misalignment and imbalance of the European approach to cinema/XR hybridization in relation to existing eligibility criteria, cultural tests and mainstream funding schemes across diverse European countries. On an international level, Canada and South Korea make use of more coherent cultural and technological policy frameworks and integrate XR technologies into their national innovation programs. This policy brief supports an integrated European policy framework that fosters cinema/XR

hybridization and frames it as a key cultural priority as well as a catalyst for future economic competitiveness.

What Is Cinema/XR Hybridization and why is it important?

Cinema-XR hybridization is a specific form of media convergence where traditional film forms and techniques are combined with XR technologies to create an experience that is both interactive and multisensory. This blending of classic and immersive media attempts to transcend the passive nature of linear single-screen film experiences and expand films into spatial realms where cinematic aesthetics integrate with virtual environments, participatory engagement between creators and audiences and interactivity.

Historically, cinema has continually re-invented itself, reflecting technological advancements and societal changes. The journey of cinema began in the late 19th century with the introduction of narrative storytelling in films. The advent of sound in the 1920s has then transformed the entire production landscape which was then influenced by the emergence of color in films and their international expansion. Initial attempts of hybridization were then observable both through the development of innovative technologies in their prototype forms and through experimental practices within cinematic production. However, the materialization of early hybridization became more visible in the early 2000s with the development of industrial exhibition formats. Furthermore, the widespread adoption of Video on Demand (VOD) services since 2007, propelled by the ascendancy of major streaming platforms, has significantly contributed to the desertion of classical cinemas by audiences. This shift has been compounded by the fact that cinemas frequently find it challenging to offer a viewing experience that can adequately compete with the privacy and convenience afforded by home-based media consumption. Consequently, the cinematic landscape-and, more specifically, the processes of hybridization between cinema and XR technologies-has become increasingly fragmented and differentiated across countries. Contemporary manifestations of cinema/XR hybridization include 360° and spherical video works, immersive VR films, interactive cinematic narratives inspired by video game mechanics, and multisensory installations combining image, spatialized sound, vibration, haptics, and sometimes olfactory stimuli. Hybridization nowadays extends to immersive domes, XR-enhanced theatres, and mixed-reality performance spaces, where physical and virtual environments coexist.

Thus, cinema/XR hybridization is important for the film industry because firstly, it operates as a vehicle for the dissemination of widely distributed major productions, while not supplanting screen-based cinematic formats. In multiplexes constructed over the past decade, theatres employing hybrid formats coexist alongside those maintaining conventional projection

methods. This coexistence contributes to the emergence of diverse viewing options, in which classical cinema screenings, interactive installations, and individual XR experiences all exist side-by-side. Secondly, cinema/XR hybridization transforms how audiences consume media and navigate across multiple platforms and screens, blurring the boundaries between reality, cinema and immersive environments. In this context, audience attention and engagement are no longer defined solely by frontal framing and linear montage but are increasingly shaped by spatialized sound and user interactivity. These developments align cinema/XR hybridization with wider shifts affecting the global audiovisual ecosystem.

Therefore, understanding the dynamics of cinema/XR hybridization is of significant practical and policy relevance. European Union policies acknowledge the importance of immersive technologies within the cultural and creative industries through a range of frameworks aimed at strengthening innovation capacity, safeguarding cultural diversity, and reinforcing technological autonomy. Programs such as Creative Europe support the audiovisual sector's collaboration and exchange of knowledge among cultural institutions and artists across Europe and beyond, promote competitiveness, innovation, and sustainability. In parallel, policy initiatives related to Web 4.0 and Virtual Worlds, informed by the work of the European Virtual and Augmented Reality Industrial Coalition and the Action Plan for Media and Audiovisual, explicitly recognize immersive technologies as new ways of storytelling and as key factors in establishing competitiveness and technological sovereignty within Europe. As a result, immersive technologies increasingly feature in strategic policy narratives related to digital transition, competitiveness, and innovation. However, operational support remains dispersed across multiple programs and policy domains, with limited integration into core film funding structures. This work underlines the uneven and fragmented funding schemes of EU member-states and stresses the need for a more cohesive and harmonized policy approach. These arguments will be developed in the following sections.

Empirical Analysis: Evidence from the REBOOT Project

The empirical foundation of this policy brief is drawn from a multiscale comparative study aimed at identifying patterns, similarities, and differences across diverse national contexts, and at generating insights into how state aid has influenced the hybridization of cinema and XR technologies across regions. The analysis is based on a documentary review of state-aid schemes and policy instruments in five European Union member states (Belgium, France, Germany, Italy, and Luxembourg). Within Europe, Belgium and Luxembourg are notable for their exceptionally high rates of international co-productions, which make them central nodes in the networked structure of European film production. Their funding mechanisms and policy frameworks provide critical insight into the ways in which smaller countries can use cooperation and cross-border initiatives to stay competitive. Meanwhile, France, Germany

and Italy are historically and structurally among one of the strongest film industries in Europe. As founding members of the EU, they have a mature and highly developed audiovisual sector, which is a traditional core of European film culture and political leadership. Studies reveal how large, influential players adapt to-or sometimes-resist, emerging technological shifts such as XR. The analysis of the above countries provides a solid basis for examining the commonalities, correlations, and links between state aid in these regions.

The main funding bodies in the five EU member states are presented in Table 1. In Belgium, the *Centre du Cinéma et de l'Audiovisuel* (CCA) works along with regional organizations such as *screen.brussels* in providing film policy and funding. In France, the *Centre National du Cinéma et de l'Image Animée* (CNC) is responsible for the management of film, audiovisual and immersive production funding and support; in Germany, the *Federal Film Board* (FFA) offers funding at the federal level, complemented by a number of successful regional programs such as *Medienboard Berlin-Brandenburg* (MBB) promoting the regional film culture and industry. Italy has historically relied heavily on the *Ministry of Culture*, which is the principal funding institution supporting cinema and digital media; immersive projects gain visibility mainly through festival-based initiatives. In Luxembourg, the *Luxembourg Film Fund* plays a central role in supporting the industry's development by allocating financial aid across various stages of the creative process while in recent years, the Fund has notably intensified its support for animated films and extended reality (XR) projects, seeking to establish Luxembourg as a leader in immersive storytelling.

Country	Funding body	Policy emphasis	Structural limitations
Belgium	CCA / screen.brussels	Openness to innovation within general funding schemes	XR projects remain underrepresented and marginal
France	CNC	Dedicated support for immersive projects across development stages	Funding remains modest compared to mainstream cinema
Germany	FFA / MBB	Targeted support for innovative audiovisual and XR projects	Strong regional presence, fragmented national coordination
Italy	Ministry of Culture	Festival-based initiatives recognizing immersive works	Lack of dedicated national funding and centralized data
Luxembourg	Film Fund Luxembourg	Diversified portfolio including XR projects	Small-scale productions shaped by national

			priorities
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Table 1: Selected national policies and initiatives facilitating the hybridization of cinema and XR examined in the REBOOT project.

The comparative analysis reveals a high degree of similarity in the structure of film funding schemes across the European states analyzed-particularly in their use of direct subsidies (national/federal versus regional/community and automatic versus selective funds) and fiscal incentives (Table 2). However, important divergences emerge in terms of strategic emphasis and policy priorities. Certain states place greater focus on territoriality, using funding mechanisms to anchor production activities within national or regional borders, whether through inward investment conditions or local spending requirements. Others foreground the cultural dimensions of funded projects, incorporating criteria related to language, national identity, or gender equity. Most of the EU states under research assess film projects through structured cultural tests and eligibility criteria, which play a central role in determining eligibility for public funding. Cultural tests evaluate either the cultural content of the production or co-production, or the geographical location, the nationality of the producer, the language of the film or the professional basis of the producer being located in the respected countries.

Country	Funding body	Direct public funding	Indirect public funding (fiscal incentives)
Belgium	Centre du Cinéma et de l'Audiovisuel (CCA)	Yes	Tax Shelter
Germany	Filmförderungsanstalt (FFA)	Yes	German Federal Film Fund (DFFF – rebate)
France	Centre national du cinéma et de l'image animée (CNC)	Yes	SOFICA; Crédit d'Impôt Cinéma; Crédit d'Impôt Audiovisuel
Italy	Ministry of Culture	Yes	External Tax Credit; Producers' Tax Credit; International Tax Credit
Luxembourg	Film Fund Luxembourg	Yes	Audiovisual investment certificates / tax benefit allowing reduction of taxable income (CIAV-type regime)

Table 2: Selected EU-level audiovisual and digital policies pertinent to cinema/XR hybridization examined in the REBOOT project.

Regarding the investment in XR projects, this work additionally reveals a fragmented and polarized funding scheme across Europe. While countries such as Belgium

(screen.brussels), France (CNC), Germany (via MBB), and Luxembourg (Luxembourg Film Fund) have established dedicated mechanisms to support immersive content, others-such as Italy-continue to concentrate predominantly on traditional film and television formats through institutions like the *Ministry of Culture*. The data shown in Table 3 reveals a marked asymmetry between EU member states. Disparities are evident both in terms of total financial support allocated (in euros) and the number of funded projects, with significant variation in scale and intensity across national funding systems. For *Brussels*, data notably demonstrate out of a total of 29 projects granted funding in 2023 only 3 were VR productions. While immersive productions are present in the Brussels-capital region, they remain significantly underrepresented when compared to more traditional formats (14 feature films, 8 documentaries, 4 animations and 3 live action series). In *France*, the amount dedicated to immersive creation was €3.6 million for a total of 103 projects. Even though the funds are enough, they remain relatively modest when compared to the budget for a single large-scale film production (€5-10 million). According to the annual activity report of MBB in *Germany*, the region of Berlin funded a total of 21 XR/IAC (Innovative Audiovisual Content) projects, allocating €2.5 million to immersive and interactive works. This included €1.1 million for 6 XR games and €1.4 million for 15 innovative audiovisual content projects. The funded works were actively represented at major international film festivals, including Cannes and Venice, underlining both the artistic caliber and the global visibility of Germany's immersive sector.

For the case of *Italy*, the Ministry of Culture does not provide comprehensive or publicly accessible data. However, more detailed insights are available through the *Venice Gap-Financing Market*, an initiative organized under the *Biennale di Venezia* as part of the *Venice Production Bridge*. In 2023, this platform reported support for 14 immersive works, several of which were structured as international co-productions, notably involving partners from Germany and Quebec. To conclude, *Luxembourg's* investment in immersive technologies (8 XR projects in 2023) illustrates a clear ambition to position itself as a competitive player in the evolving global content market. Through financial support for XR initiatives, the country is fostering a dynamic and sustainable audiovisual sector capable of adapting to the challenges of the global film economy. Its strategy reflects a broader European tendency to integrate technological innovation into cultural production, with a focus on audience engagement and new forms of storytelling.

Country	Funding body	Immersive projects funded	Allocation
Belgium	Screen.brussels	3 VR projects	No data
France	CNC	103 immersive	€3.6

		creation projects	million
Germany	Medienboard Berlin-Brandenburg (MBB)	21 XR/AI projects (6 XR, 15 AI)	€2.5 million
Italy	Ministry of Culture	No data	No data
Italy	Biennale di Venezia	14 XR projects	No data
Italy	Ministry of General Contemporary Creativity (Digital & Green Investment)	1,860 projects	€108 million
Luxembourg	Film Fund Luxembourg	8 XR projects	No data

Table 3: Selected financial assistance and financed immersive initiatives examined in the REBOOT project.

When comparing XR production trends between Northern and Southern European member states, a notable distinction emerges: Northern countries—including Germany, France, Belgium, and Luxembourg—have established robust, often well-funded ecosystems for immersive content development. These nations benefit from a combination of long-standing cultural funding policies, strong digital infrastructures, international networking capacity, and dedicated XR funding lines (e.g. *screen.brussels*, *Medienboard Berlin-Brandenburg*, CNC, and Luxembourg Film Fund). These structures allow for experimentation and early adoption of immersive technologies, reinforced by access to EU-level instruments such as *Creative Europe MEDIA* and collaborations with global partners. By contrast, Southern European countries—with the Italian case as a core example—have tended to prioritize more traditional film and television formats in their national funding agendas. While there are emerging efforts to embrace digital and green transitions (based on the data by the *Ministry of General Contemporary Creativity*), immersive projects still represent a marginal share of the total audiovisual output. Limited institutional specialization, fragmented data collection, and a slower integration of XR-specific funding mechanisms contribute to this disparity. This North-South divide reflects broader asymmetries in technological infrastructure, institutional agility, and access to innovation funding. It also mirrors discrepancies in how cultural innovation is positioned within national development strategies. While Northern states increasingly frame XR as a pillar of digital sovereignty and soft power, Southern states are still consolidating their foundational support systems before fully embracing immersive formats.

The Case for a Unified Policy Framework for Cinema/XR Hybridization in Europe

Addressing the imbalances outlined above will require considerably more than just isolated investments. The European Union must act as a whole to realign EU policies and establish a unified and cohesive European policy framework for cinema/XR hybridization. Such a framework should not be interpreted as being about increasing the degree of centralization or homogenizing existing national policies. It is rather about the degree to which national

policies can be aligned to each other (existing national systems), coordinating the various levels of governance (national and regional), and modernizing the tools of policymaking so that they reflect today's reality of the audiovisual sector.

There are countries that have established successful models of integrating cultural/technological policymaking from which the European Union can learn important lessons. Canada for instance has developed a significantly integrated strategy. Canadian policies explicitly support XR production as part of broader national objectives for competitiveness agendas, with substantial public investment not only in content creation but also in infrastructure, research, and international market expansion. Through federal and provincial initiatives such as Telefilm Canada and the Canada Media Fund, funding is allocated to projects that explore interactive narratives and technological innovation. Critically, Canadian policymakers do not perceive XR as a niche creative sector, but rather as an essential component of a wider digital strategy closely aligned with economic growth, cultural diplomacy, and technological sovereignty.

Similarly, the European Union can learn much from the South Korean case in developing and implementing a national vision linking culture, technology and global competitiveness. Through state-supported initiatives such as the Korean Film Council (KOFIC) and the Korea Film Commission and Industry Network (KFCIN), the country has actively integrated XR and immersive media into its mainstream audiovisual policies. National strategies explicitly support the production of VR, AR, and XR content through direct grants, equipment subsidies, and the development of XR infrastructures, including immersive theatres and specialized creative hubs. Furthermore, South Korea's cultural policy adopts a holistic approach, integrating cinema, gaming, and interactive media, and recognizing that the future of storytelling will be inherently hybrid and multi-platform. Unlike the fragmented national funding systems observed in Europe, South Korea's approach is nationally coordinated and globally oriented, thereby securing a leading position in the evolution of the global audiovisual ecosystem.

Drawing on these examples, a coordinated and unified European strategy could consolidate existing fragmented approaches by combining key elements of all the current EU policies (cultural, digital, innovation) into a single cohesive framework. By integrating cultural and innovative strategies, promoting cross-border collaboration, and by coordinating funding and governance efforts, this framework could produce synergies among objectives that are currently pursued independently. An integrated strategy of this type would provide several benefits-it would facilitate collaboration easier, promote more effective use of public funds, and enable the European Union to position itself as a global leader in the XR film industry in

cinema/XR hybridization by leveraging its cultural diversity, public funding capacity, and creative talent base.

Conclusion and Recommendations

As stated, the European Union has prioritized the promotion of emerging technologies and the advancement of innovation within its cultural and creative industries. However, this study has demonstrated clear disparities in both the accessibility and implementation of VR/AR/XR technologies across the European continent. To foster a more coherent cinema-XR hybridization and to align state and private support policies, the following recommendations are proposed:

Firstly, it is imperative to increase the overall volume of XR funding, with the explicit aim of enabling the coexistence of traditional and immersive technologies within audiovisual production. Enhanced funding would foster experimentation, encourage technological integration, and support creators working across multiple formats. At present, significant disparities exist among EU member states: while countries such as Germany and France offer relatively well-structured programs (characterized by high production quality but limited in financial scope), others such as Belgium and Italy lag in terms of systemic support for immersive works. A coordinated pan-European effort is therefore necessary to ensure that creators in all member states can access the financial and technical resources required to innovate in this field.

Secondly, there is an urgent need to standardize and harmonize public and private funding frameworks for immersive and XR projects across Europe. A more unified regulatory and financial structure would not only simplify the application process and increase transparency for creators but also reduce the funding inequalities that currently separate well-resourced countries from those with minimal XR investment. Harmonization would also facilitate cross-border collaborations, creating an environment where European creators can cooperate more easily and benefit from shared infrastructures and joint financing mechanisms.

Lastly, the study considers the fact that younger creators are often more receptive to immersive technologies, and thus emerging technologies should be integrated into higher education curricula. Universities and film schools must play a key role in shaping a skilled and adaptable workforce, capable of navigating and innovating within a rapidly evolving audiovisual landscape. By investing in technological literacy, interdisciplinary training, and production-oriented education, Europe can position itself as a global leader in the XR film industry, ensuring that future generations of filmmakers are not only technologically proficient, but also creatively empowered.

Taken together, these measures outline a vision in which cinema/XR hybridization is not treated as a peripheral innovation, but as an integral component of Europe's audiovisual future. By adopting a unified and cohesive policy framework, Europe can transform current challenges into opportunities, fostering a cinema that is technologically adaptive, culturally grounded, and capable of sustaining its relevance in a rapidly changing global media landscape.

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