

REBOOT

EUROPEAN FILM COMPETITIVENESS

WP4 – The Framings and Strategies of Cinema Professionals

REPORT on “International Market” in the European Film Industry

Project: Reviving, Boosting, Optimising and Transforming European Film Competitiveness – REBOOT

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List of main abbreviations

AI	Artificial Intelligence
CNC	Centre national du cinéma et de l'image animée (France)
EBU	European Broadcasting Union
EFI	European Film Industry
EU	European Union
SVOD	Subscription Video-on-Demand
VOD	Video-on-Demand



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Executive summary

In the current global audiovisual landscape, the concept of competitiveness has gained growing prominence in European policy agendas. Competitiveness is often invoked as a guiding principle for funding schemes, international promotion strategies, and industrial frameworks. However, definitions of what makes the European Film Industry (EFI) competitive remain ambiguous and contested. At the same time, intensified global circulation of content and shifting market approaches – particularly the growing influence of international co-productions, transnational VOD platforms, and emerging technologies like Artificial Intelligence (AI) – have reshaped the terrain in which the EFI operates. These developments make it increasingly necessary to understand how the international market is understood and negotiated by professionals working within the EFI and how these perceptions influence their strategies. This REBOOT report responds to that need, by offering a bottom-up analysis of how film professionals conceptualise competitiveness, engage with the international market, and perceive the main opportunities and structural challenges confronting the sector.

To address these questions, the study adopts a political-sociological approach, which treats policy and industry dynamics as socially and politically embedded processes shaped by competing interests, values, and institutional contexts. The study combines quantitative and qualitative methods: a pan-European survey (n = 432) conducted between November 2024 and February 2025, and 37 in-depth semi-structured interviews carried out from January to August 2024. Interviewees included producers, distributors, VOD professionals, sales agents, public officials, and other key stakeholders. The research also incorporated participant observation during the 2024 Locarno Film Festival's professional programme, Locarno Pro, with a focus on debates around AI, co-production, and independent financing. This mixed-method design enables a comprehensive account of how professionals understand, navigate, and shape the changing dynamics of the EFI.

The findings reveal that film professionals do not define EFI competitiveness solely in economic terms. While acknowledging the importance of international visibility and a stronger market share, they consistently highlight how other fundamental dimensions, such as cultural diversity, public support, artistic freedom, and collaboration, are core to the EFI's identity and strength. This broader understanding of competitiveness diverges from dominant policy frameworks and underlines the need to integrate bottom-up perspectives into future strategies.



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Regarding the international market, the data we gathered point to a fragmented and uneven landscape. Distribution and promotion remain persistent challenging points, with many film professionals calling for stronger coordination across national markets and earlier integration of international strategies during production. Despite existing EU initiatives, access to international audiences continues to depend heavily on festivals, co-production networks, and individual efforts.

Co-productions are widely perceived as both a necessity and a strategic asset. They are valued not only for pooling financial resources and expanding distribution opportunities, but also for fostering creative exchange and professional networks within Europe. In practice, the typology of co-productions, such as creative, finance-driven, or capital-driven, is often fluid.

VOD platforms, especially global streaming services, are seen as double-edged. During the COVID-19 pandemic, these platforms played a prominent role in sustaining production and visibility. However, many film professionals now perceive a decline in investment in these platforms. They are also concerned about their opaque, centralised decision-making structures and business models that concentrate intellectual property rights, consumer data collection, and content discoverability outside Europe. There is broad agreement that global platforms do not align with the long-term goals of the EFI, such as fostering independent production and cultural diversity.

AI is an emerging area of debate, with most film professionals still in the early stages of experimentation with this technology. Optimism surrounds AI's potential to enhance workflow efficiency across the production chain. However, concerns were raised about job losses, narrative homogenisation, and the risk of reinforcing commercial formulas at the expense of creative diversity. Some stakeholders advocated for the development of European AI infrastructures aligned with the EFI's values.

The findings of this research provide valuable insights into how competitiveness and the international market are conceptualised, operationalised, and experienced by professionals across the EFI. A key conclusion is the persistent disconnect between how competitiveness is understood by film professionals and how it is typically framed in EU policy debates and business literature. Whereas in the literature competitiveness is often approached through a narrow economic lens, focusing on growth, scale, market expansion, and financial returns, industry professionals tend to conceptualise competitiveness in cultural, symbolic, and political terms. The research results suggest that the very definition of the EFI and the values it represents must be central to any conversation about competitiveness. Competitiveness, as understood by industry professionals, is



not a function of financial returns alone. Rather, it is linked to the ability to maintain a distinctive cultural identity, to produce diverse and meaningful content, and to operate within a framework that supports democratic principles, diversity and artistic freedom. This implies a broader redefinition of what it means for the EFI to be competitive in the international markets, one that reconciles industrial goals with cultural imperatives, and economic logic with public interest. Crucially, this redefinition of competitiveness for the EFI demands a closer alignment between top-down policy visions and bottom-up professional practices. As long as competitiveness in Europe's film industry is measured only by economic indicators, there will remain a fundamental mismatch between institutional agendas and the lived realities of those working within the sector. Policies that ignore the cultural, social and political nature of the EFI could undermine its legitimacy, effectiveness, and resilience.

As such, by addressing a critical gap in the existing literature and policy discourse, the study highlights bottom-up perspectives, offering a more nuanced and grounded understanding of how film professionals navigate international markets, negotiate co-productions, engage with VOD platforms, and respond to emerging technologies such as AI. The report suggests that redefining competitiveness in the EFI requires a broader, more inclusive framework that moves beyond purely economic metrics. In doing so, the study offers a valuable evidence base to inform European policy responses.



1. INTRODUCTION

1.1 Overall scope

In recent years, the concept of competitiveness has gained increasing traction in European audiovisual policy (Psychogiopoulou et al., 2024). It has been invoked as a guiding objective in funding schemes, industrial strategies, and frameworks for international cultural cooperation. From the Creative Europe programme to national and regional film funds, and economic recovery instruments, competitiveness has become a key reference point in discussions about how to strengthen the position of the European Film Industry (EFI) both within and beyond EU borders.

Academic scholarship has also paid significant attention to the determinants of competitiveness in the film industry, often adopting an economic or industrial lens. Much of this research has focused on national or regional film sectors as structured industrial chains, assessing their commercial performance and strategic capacities. Key features of competitiveness frequently studied include demand conditions, capital and facility resources, technological and human capacities, and market strategies (Howse & McLarney, 2006; Xian, 2022). Drawing on models such as Porter's competitive advantage framework, scholars have explored the dynamics between governments and firms, and the interlinkages among enterprises, suppliers, and support institutions (Moon & Yin, 2020; Parc et al., 2022; Sarikakis et al. 2025).

This approach has yielded valuable insights into the conditions that enable film industry revitalisation, such as the success stories of South Korea (Parc & Moon, 2013) and China (Moon & Yin, 2020) and has helped explain the sustained dominance of Hollywood in the global audiovisual economy (Crane, 2014). However, these analyses tend to be grounded in business-oriented assumptions, prioritising metrics such as market share, growth potential, and international reach (Ranger, 2020). As a result, the global conversation around competitiveness has largely been shaped by frameworks tailored to contexts where industrial scale, strong capitalisation, and centralised financial structures are prevalent.

This poses a challenge for understanding the European context, where the audiovisual landscape is defined by linguistic diversity, cultural policy interventions, and a wide set of small and medium-sized production companies. The EFI is not a single and homogenous entity, but rather a network of national and regional sectors, supported by public funding, private partnerships and transnational cooperation mechanisms (Nistoreanu et al., 2022, Albornoz & Garcia Leiva, 2019).



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The EFI emerged as a political and economic project, shaped by the broader objectives of the European integration process. In the late 1980s, EU Member States reached a consensus that their interests in the audiovisual sector, long challenged by the dominance of US-based conglomerates, would be better served through collective action at the European/supranational level (Depétris, 2008; Vlassis, 2015). The creation of an internal audiovisual market aimed to eliminate intra-European barriers, enhance the circulation of regional content, and strengthen local industries to compete more effectively on the global stage. This vision aimed not only to strengthen regional players and eliminate internal market barriers, but also to counterbalance the dominance of Hollywood and assert and consolidate a distinct European identity through film and audiovisual expressions.

While scholars have emphasised the importance of economic drivers, such as market integration, the free circulation of audiovisual goods and services, and enhanced competitiveness (Garrett, 1995; Harcourt, 2007; Donders & Pauwels, 2008), the protection and promotion of cultural diversity have remained central principles of the EU audiovisual policy. These dual objectives are reflected in a range of initiatives, including the MEDIA Programme, the EU's leading role in advocating for the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, plus the adoption of the Audiovisual Media Services Directive including local content quotas and investment obligations towards VOD platforms (Pauwels & Loisen, 2016; Vlassis, 2016; Albornoz & Garcia Leiva, 2019). From its inception, the EFI has been defined by this cultural-economic nexus (Vlassis, 2015; Richieri Hanania, 2020), with a longstanding recognition that the circulation of European films and the promotion of cultural diversity require targeted policy mechanisms and sustained public support. Moreover, this model has had a normative influence beyond the EU, inspiring similar frameworks for audiovisual policy in other world regions, such as Latin America (Fernandes, 2023; Fernandes, 2025).

In this fragmented landscape, access to international markets has become both a strategic priority and a persistent challenge for the EFI (Dâmaso et al, 2025). Competitiveness is often associated with the ability to circulate content beyond domestic borders. But structural limitations, such as linguistic fragmentation, cultural heterogeneity, and uneven production capacities, continue to hinder the pan-European and global reach of European films (Crane, 2014; Vlassis, 2022). Cultural and linguistic barriers significantly constrain intra-European circulation, contributing to the predominance of national markets (Poort & Van Tijn, 2020). In 2023, 68% of total admissions for European films originated in their domestic markets, with only 23% stemming from other EU countries. These figures



highlight a continued reliance on local audiences and the limited success of cross-border distribution within the EU (Fioroni, 2024).

Beyond the European Union, the presence of European films in international markets remains a challenge for various stakeholders. On the one hand, studies point to persistent difficulties in gaining visibility and securing market share globally, with only a few titles achieving widespread recognition (Sanz Lara et al., 2022). Scholars have highlighted that these challenges stem not only from the linguistic and cultural specificities of European films, but also from structural imbalances in promotional capacity and distribution infrastructure (Poort & van Tijn, 2020). On the other hand, the EU is recognised as one of a selected group of global centres for motion picture production (see Figures 50 and 51 in the Annexe), alongside countries such as the United States, China, India, South Korea, and Japan, all of which achieve high levels of annual film output (Vlassis, 2025a).

At the same time, public funding and regulatory measures within the EU have successfully supported the development of strong national film industries in several Member States, including France, Spain, and Germany. These policies contribute to a rich offering of cultural diversity and help ensure that certain EU films achieve geographically diverse international reach (Vlassis, 2025a). Overall, the international market is characterised by strong asymmetries, where global players benefit from consolidated networks, extensive promotional budgets, and centralised control over data and distribution channels (Micova & Jacques, 2020). As a result, Nistoreanu et al. (2022) highlight the importance of long-term investment in film promotion, as a crucial element to enhance the visibility and international circulation of European productions.

Co-productions offer a major advantage in the European context, as they tend to generate three times more admissions than purely national productions and they circulate twice as widely across the EU (Talavera, 2018a). This growing reliance on international co-productions has become a central feature of the European and global audiovisual landscape, challenging efforts to assess the EFI's position and performance through traditional, nationally anchored metrics. In Europe, co-productions are supported by a dense network of bilateral agreements, regional funding instruments, and supranational programmes such as Eurimages, which facilitate cross-border collaboration and resource sharing (Naarajärvi, 2011).

Morawetz et al. (2007) propose a typology that distinguishes between creative co-productions driven by intercultural narratives or shared artistic goals; financially motivated projects that seek to pool diverse funding sources; and industry-driven arrangements aimed at maximising tax incentives and



budgetary scale. Subsequent research (Jones, 2016; Parc, 2020) confirmed that the majority of co-productions tend to be financially driven, as producers leverage various national and supranational funding mechanisms to reduce risk and increase budget capacity. In this sense, co-productions are also considered as a strategic tool to compete with larger film industries, particularly Hollywood/the United States, by enabling access to higher production values and broader markets (Romero-Gonzalez & Palma-Martos, 2019).

Besides production financing, co-productions also influence the dynamics of film circulation and market reach. Because each participating country generally ensures domestic distribution, co-productions can facilitate broader geographic dissemination. This is particularly relevant in a fragmented European market where language, audience size, and infrastructure vary widely. Some studies suggest that co-productions enhance a film's chances of securing international distribution, by increasing its market relevance across national contexts and enabling shared marketing strategies (Talavera, 2018b; Yin, 2019). Nonetheless, co-productions entail substantial coordination challenges. They require alignment across different legal, administrative, and linguistic systems, and often lead to increased production costs associated with travel, translation, and contractual complexity (Romero-Gonzalez & Palma-Martos, 2019).

The expansion of transnational VOD platforms, particularly US-based global players, has disrupted traditional distribution models while introducing new gatekeeping structures, often outside European regulatory frameworks. These platforms have emerged as dominant actors in the audiovisual industries, reshaping the audiovisual media landscape through their infrastructural power and scale (Albornoz & Leiva, 2019; Evens & Donders, 2018; Lobato, 2018). Their algorithmic systems, recommendation engines, and global catalogues grant them gatekeeping power, thus influencing what content becomes visible, discoverable, and marketable across national boundaries (Lobato, 2019; Johnson, 2019; Frey, 2021; Ranaivoson, 2019). This shift raises issues about cultural representation and identity, as algorithmic curation tends to favour content with universal appeal over more localised or culturally specific narratives. Moreover, the rise of VOD platforms as both distributors and producers has altered traditional models of content financing, commissioning, and copyright ownership, thereby disrupting longstanding production ecosystems and their ability to regenerate, and challenging the sovereignty of national and regional audiovisual sectors (Jenner, 2018; Wayne, 2018; Lacourt et al., 2023; Dâmaso & Rex, 2025).



This new configuration has generated substantial policy and governance challenges for European institutions. Scholars have highlighted concerns about the extent to which global VOD platforms align with or undermine the EU's sociocultural goals, such as promoting cultural diversity, fostering a European identity, and ensuring pluralism in media access (Kalimo & Pauwels, 2009; Vlassis et al., 2020; Fernandes & Albornoz, 2023). The limited transparency regarding viewership data and algorithmic operations further complicates public policy intervention and evaluation (Micova & Jacques, 2020; Idiz et al., 2021; Idiz & Poell, 2024). Besides, the contractual arrangements typically imposed by platforms, often resulting in exclusive rights retention and lack of long-term access to content performance data, have raised concerns about the sustainability of local production ecosystems and the ownership of intellectual property (Iordache, 2022; Idiz et al., 2021).

At the same time, Artificial Intelligence (AI) is increasingly reshaping every stage of the film production process, presenting new challenges and opportunities (Cappello, 2024). On the one hand, AI offers tools that can assist with script development, visual planning, real-time production support, post-production editing, and even promotional strategies that can enhance efficiency and enable creative experimentation (Swarnakar, 2024; Sun, 2024; Pradeep et al., 2024). On the other hand, AI's growing role raises concerns about narrative standardisation, loss of artistic identity, and diminished human authorship, as AI systems may prioritise conventional formats over originality and emotional depth (Karpouzis, 2024; Halperin & Rosner, 2025). Moreover, questions of transparency, bias, and ethical data use have become increasingly urgent. Most AI systems are trained on datasets developed outside Europe, posing the risk of cultural homogenisation and the reinforcement of non-European aesthetic standards (EBU, 2024; CNC & Bearing Point, 2024).

1.2 Research design & methodology

In this context, we urgently need a deeper understanding of how competitiveness is perceived and enacted by a diverse set of professionals working within the EFI. While top-down policy discourses may promote competitiveness as an industrial imperative, it remains unclear how these priorities align with the day-to-day realities, strategic choices, constraints, and normative frameworks of those active in the sector. A bottom-up perspective is therefore essential. Not only to interrogate existing assumptions, but also to inform more effective and context-sensitive policy design. This report seeks to contribute to this effort, by examining how professionals across the EFI understand competitiveness, navigate internationalisation, and assess the tools and conditions that shape their engagement across national film markets.



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In addition to questioning how competitiveness is understood, this report seeks to explore the ways in which professionals involved in the EFI understand and engage with the notion of the 'international market'. While 'internationalisation' is frequently cited as both a goal and a solution, its meaning is far from settled in practice. The report investigates how film professionals define this term, how they prioritise markets, and what forms of international engagement they consider meaningful or viable. Within this broader framework, special attention is given to the role of co-productions and VOD platforms – two central mechanisms through which the EFI connects with transnational circulation. The report examines how these instruments shape not only the strategic practices of professionals, but also their underlying assumptions about what the EFI is, and what it can or should become in a rapidly changing global audiovisual media environment.

In doing so, the report aims to identify both consensual and conflicting views across the sector and to understand how/if professional understandings correspond to institutional agendas. Rather than offering a singular definition of competitiveness or internationalisation, the report maps the complex ways in which these concepts are interpreted and enacted on the ground, and how they are influenced by evolving structures such as co-production networks, the increasing presence of transnational VOD platforms, and the emergence of new technologies like Artificial Intelligence. As a result, the report contributes to the broader aim of developing policy tools and strategic frameworks that reflect the realities of the sector and support its sustainability in a globalised environment.

This report adopts a political-sociological approach to explore how the notion of competitiveness is understood, constructed, and operationalised within the EFI. Rather than treating competitiveness as a neutral or economically fixed indicator, competitiveness is analysed here as a dynamic and context-dependent concept, which is negotiated among professionals, institutions, and policy-makers through processes shaped by political, cultural, and market forces (Saurugger, 2013; Puppis, 2010; Vlassis, 2022). Building on scholarship that conceptualises policy-making as a site of negotiation among diverse stakeholders (Béland, 2009; Steemers, 2017; Fernandes et al., 2022), this approach emphasises the interplay of competing worldviews, values, and institutional logics that shape how competitiveness is framed and enacted in practice.

The report also draws on ideational and discursive institutionalism (Schmidt, 2008; Béland & Cox, 2011; Carstensen & Schmidt, 2015), recognising that understandings of the EFI competitiveness are embedded in broader normative structures and shaped by actors' interpretations of what constitutes value, success, and legitimacy. In this context, the notion of competitiveness is not only



a policy goal but also a site of meaning-making, one that is linked to evolving ideas about cultural identity, public interest, and economic performance. By examining how professionals engage with these dynamics in their daily practices and strategic decisions, a more nuanced understanding can be gained of how competitiveness is governed and contested in situ (Guiraudon, 2000).

Thanks to this analytical perspective, the report goes beyond top-down definitions. It also examines how bottom-up professional perspectives are shaping, resisting, or reframing dominant competitiveness agendas within the EFI, especially in light of co-productions, the expansion of transnational US-based VOD platforms, plus persistent challenges around distribution and visibility.

The study employs a mixed-method approach, combining quantitative and qualitative tools to examine how professionals across the EFI define, experience, and respond to the notion of competitiveness. The study's first component involved a cross-national online survey, which gathered responses from over 400 professionals working across the European audiovisual value chain. The survey explored key themes including perceptions of the EFI's strengths and weaknesses, priorities for international competitiveness, and the role of co-productions, VOD platforms, and new technologies. The second component consisted of 37 semi-structured interviews with film professionals from a range of countries, sectors, and roles, including producers, directors, screenwriters, sales agents, public fund representatives, and international distributors. These interviews allowed for in-depth exploration of professionals' experiences, values, and critical reflections on current policies and industry dynamics.

Together, the survey and interview data offer a cross-level analysis that combines a sector-wide overview with grounded, actor-centred insights. This dual-method approach provides a deeper understanding of how competitiveness is conceptualised and enacted within the EFI, while also identifying tensions between top-down industrial agendas and bottom-up professional perspectives. Moreover, this approach enables the report to interrogate the institutional, political, and market conditions that affect the EFI's positioning internationally, while also recognising the centrality of cultural value, creative freedom, and public support in shaping its perceived strengths.

In addition, the Annexe of the report provides a comprehensive market overview of the European Film Industry. This includes: market share data by origin of films in the period 2012-2024; data on the number of feature films produced in the European Union in the period 2012-2024; a Top 60 of European films by admissions in the EU/GB (2013-2024); the revenue performance of the Top 60 European films across top 10 film markets; and data on the countries with the highest number of



IMDb (Internet Movie Database) voters for the Top 60 European films by admissions. The market overview data is based on the Focus-World Film Market Trends Reports ([European Audiovisual Observatory, 2013-2024](#)), the Mojo Box-Office database and the IMDb database. This additional market data provides valuable statistical context, supporting the findings of the study derived from both the survey and semi-structured interviews.

The report is organised as follows: Chapter 2 presents an analysis of the survey data, structured around six key areas reflecting the survey's thematic focus. Chapter 3 examines the qualitative insights from the interviews, organised according to themes informed by the literature and emerging from the data. These sections provide a detailed account of how professionals across different sectors of the industry understand and engage with the notions of competitiveness and the international market. Chapter 4 brings together findings from both the survey and the interviews in an integrated discussion, linking them to broader scholarly and policy debates. Finally, Chapter 5 offers concluding reflections on the implications of the study. Together, these chapters provide a comprehensive account of industry perspectives, thus laying the groundwork for a more inclusive and context-sensitive discussion of competitiveness in the EFI.



2. SURVEY

2.1. Introduction

The study employs a mixed-method approach, integrating both qualitative and quantitative data collection. A survey was distributed across several European countries, to gather insights from film industry professionals.

The survey was available in nine languages: English, French, German, Finnish, Portuguese, Polish, Italian, Greek, and Spanish. A total of 432 participants completed all of the attitude-, sociodemographic-, geographic-, and professional-related questions and were included in the final dataset for multivariate analysis. The complete questionnaire is available in Annexe I. Participants in this survey were randomly selected from open-access databases.

The survey was active from the end of November 2024 to the end of February 2025. The REBOOT team collected email addresses using the Cinando database and the project's network. It distributed over 3,500 questionnaires via email and through various film industry associations, such as Europa Distribution, Europa International, and Eurocinema. Each questionnaire included a consent form, inviting recipients to participate in the study. Some responses were not recorded in the dataset, as they did not meet the eligibility criterion of providing sufficient demographic information.

The sample is representative in terms of gender, age, and professional role; it also represents more than 25 European nationalities, thus contributing to a broad and diverse dataset. The data was managed and recorded in Qualtrics. The survey explores the competitiveness of the EFI in the international market. It includes questions on the obstacles of reaching a broad audience, the impact of VOD, AI and the COVID-19 pandemic, as well as possible policy solutions. When necessary, the survey results also consider variations in responses across different demographic categories, such as gender and age, to better understand the diversity of perspectives within the industry.



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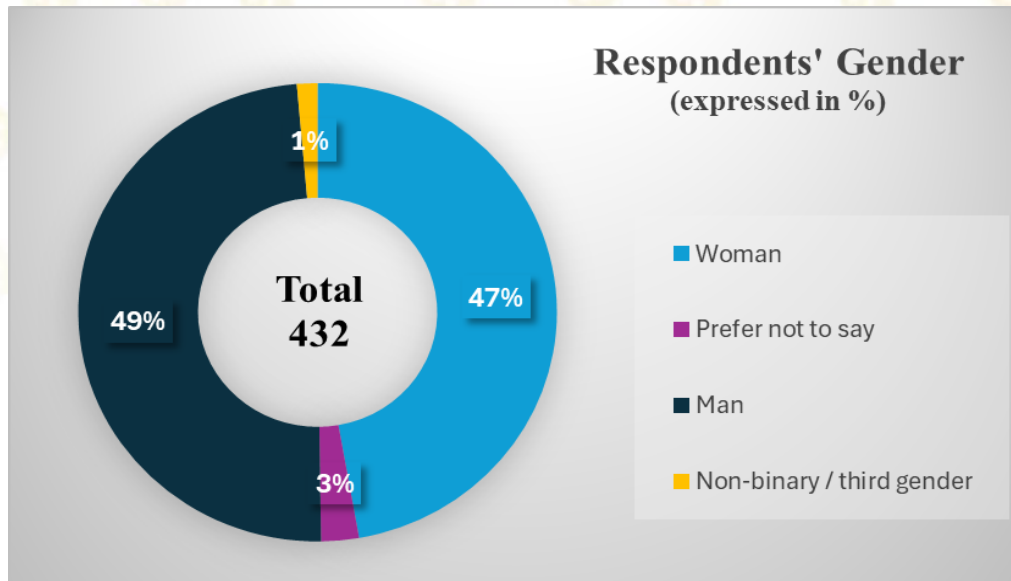


Figure 1 – Respondents' gender

Figure 1 shows the gender balance of the respondents: 49% of responses were from men, 47% from women.

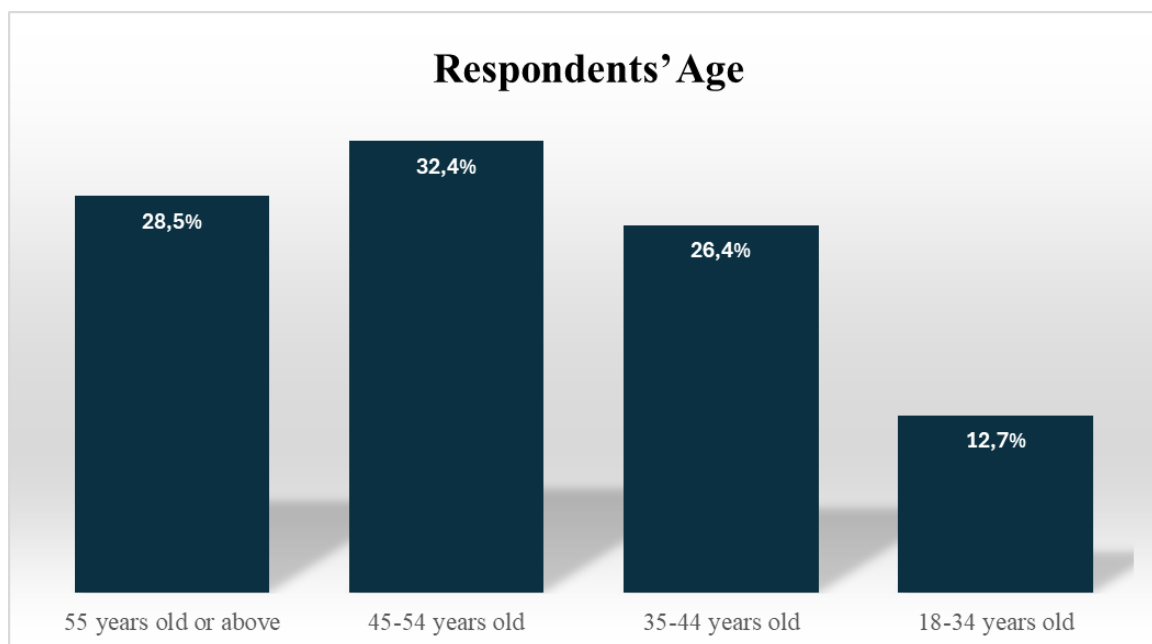


Figure 2 – Respondents' age

The age distribution of the survey respondents, as shown in Figure 2, reflects a balanced representation across different age categories and stages of professional experience.



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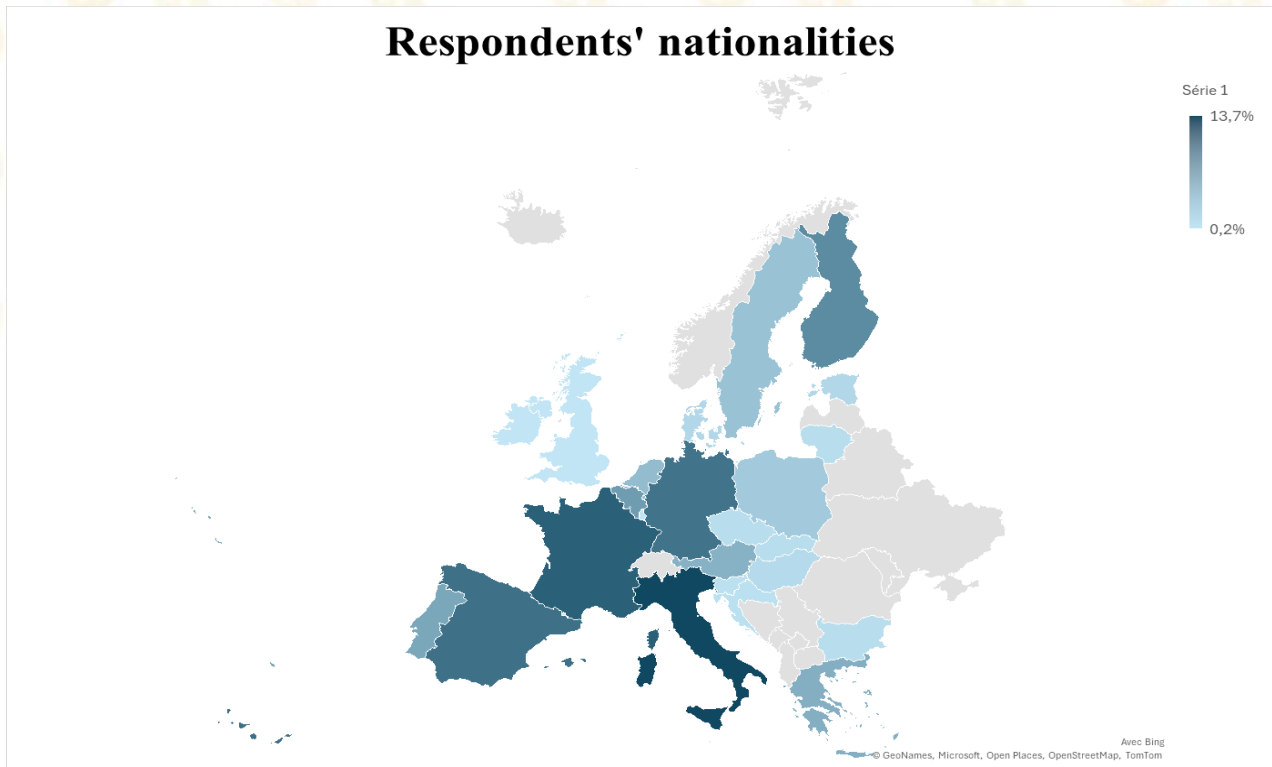


Figure 3 – Respondents' nationalities

As illustrated in Figure 3, respondents from a wide array of countries participated in the survey, totalling representation from more than 24 European nationalities. Italy had the highest representation (13,7%), followed by France (11,6%), Spain (10,2%), Germany (10%), Finland (7,9%), and Belgium (6,5%). An additional 6% selected 'others', including North Macedonia, Switzerland, Norway and the US.

This diverse representation highlights the broad geographic reach of the survey within the EFI, encompassing Southern and Northern Europe, Western Europe, Central and Eastern Europe, as well as large, medium, and small film markets.



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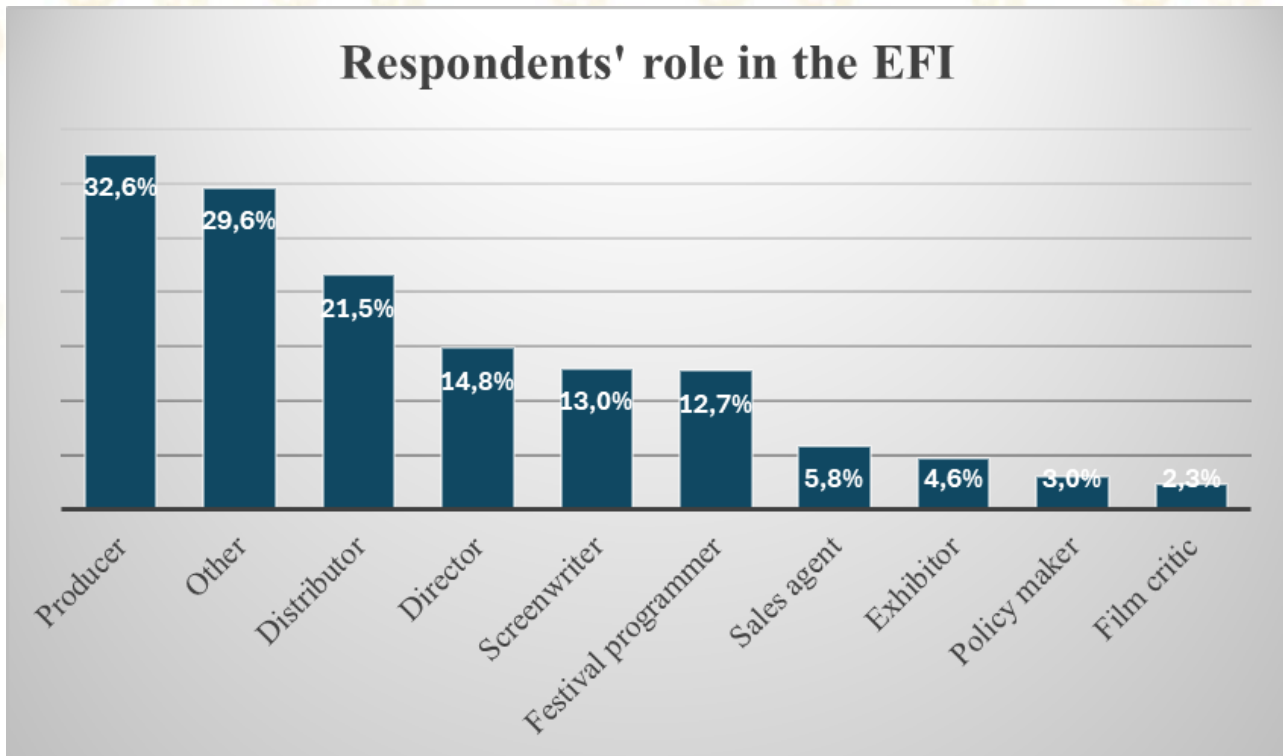


Figure 4 – Respondents' role in the EFI

The survey targeted a wide range of professionals working across different segments of the film industry, aiming to reflect the sector's structural and functional diversity. To capture this breadth, respondents were asked to indicate their professional roles through a multiple-choice question. A majority (32,6%) identified as producers, followed by a heterogeneous group (29,6%) who selected 'Other', which included roles such as directors of photography, assistants, film commissioners, and others. The high percentage in the 'Other' category reflects the fact that many respondents selected multiple roles and used this open field to specify professional functions not explicitly listed.

Among the predefined categories, distributors accounted for 21.5% of responses, followed by directors (14,8%), screenwriters (13%), festival programmers (12,7%), sales agents (5,8%), exhibitors (4,6%), policy-makers (3%), and film critics (2,3%). This distribution underscores the diversity of perspectives captured by the REBOOT survey and provides a solid basis for analysing how different professional roles shape understandings of competitiveness within the European Film Industry.



2.2. EFI Identity

To assess perceptions of the EFI, respondents were asked to select up to three terms they associate with it from a predefined list of 12 options, with the possibility of adding their own under the category 'Other'. Figure 5 presents the most frequently selected associations.

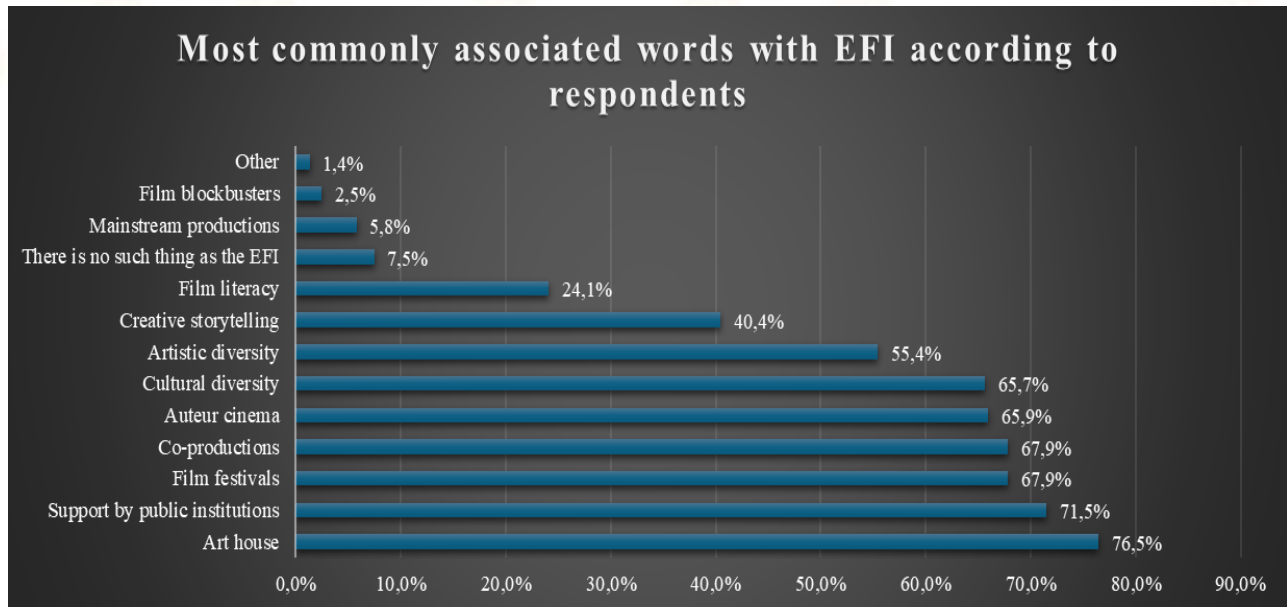


Figure 5 – Most commonly associated words with EFI according to respondents (general overview)

The results (n = 361) indicate a strong identification of EFI with 'art house' cinema (76,5%) and 'support by public institutions' (71,5%), both of which reflect a widely held view of the EFI as culturally oriented and reliant on public funding mechanisms. Film festivals and co-production were each selected by 67,9% of respondents, underlining the importance of these mechanisms for the EFI.



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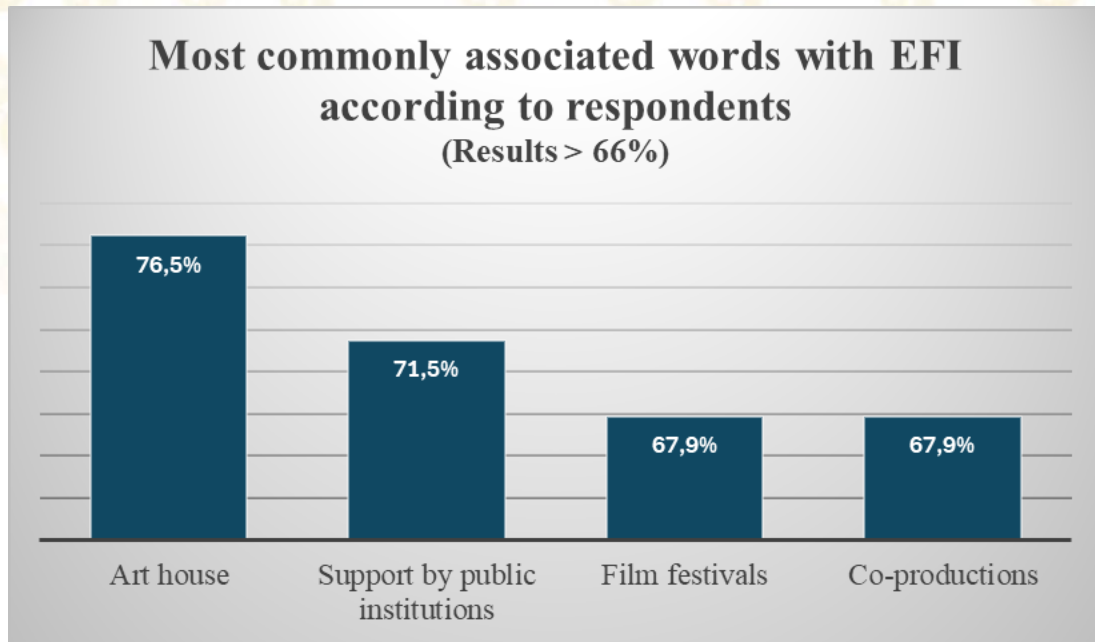


Figure 6 – Most commonly associated words with EFI according to respondents (I)

‘Auteur cinema’ and ‘cultural diversity’ were also prominent, each chosen by 65,9% of participants, suggesting that personal creative vision and the representation of diverse cultures remain key elements in how the EFI is perceived. These were followed by ‘artistic diversity’ (55,4%) and ‘creative storytelling’ (40,4%), reinforcing the notion of the EFI as a space for film experimentation and narrative originality.

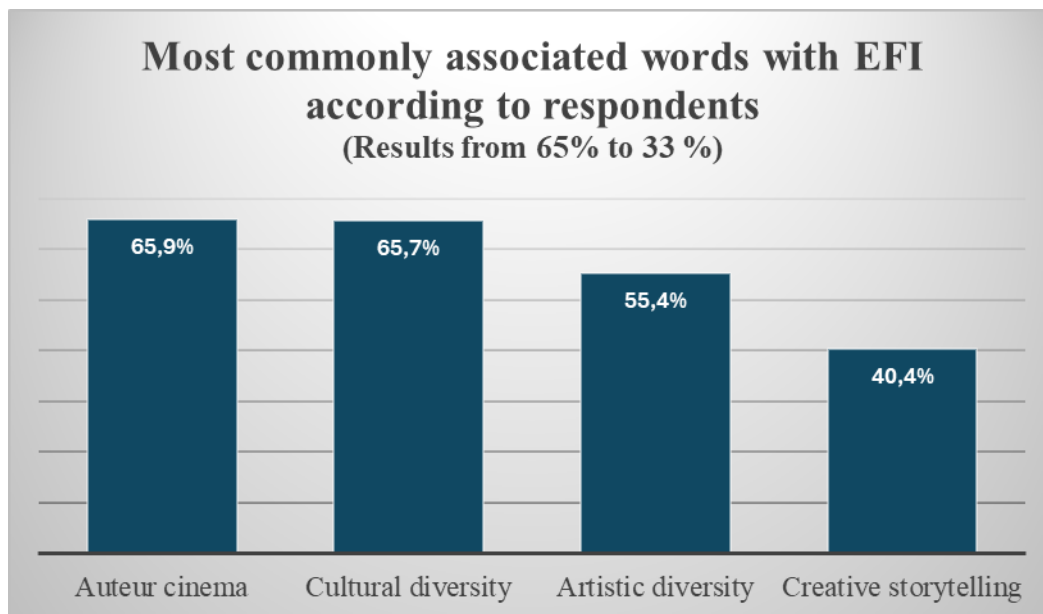


Figure 7 – Most commonly associated words with EFI according to respondents (II)



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In contrast, Figure 8 also highlights the terms least associated with the EFI. Only 24,1% selected 'film literacy', and notably, 7,5% of respondents indicated that they do not believe the EFI exists: this underlines a low level of scepticism or ambiguity regarding the EFI's identity. Significantly, the associations with 'mainstream productions' (5,8%) and 'film blockbusters' (2,5%) were minimal, further reinforcing the perception that the EFI operates largely on its own commercial standards, outside of purely mainstream paradigms.

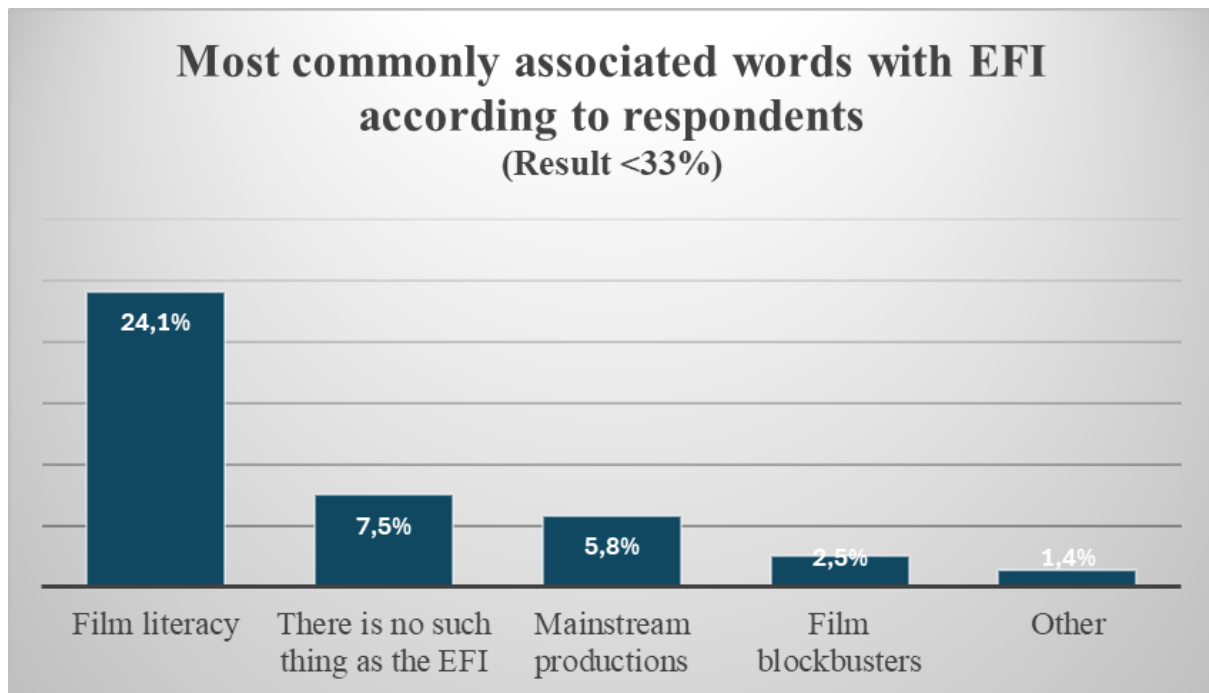


Figure 8 – Most commonly associated words with EFI according to respondents (III)

To further investigate how film professionals perceive the EFI, respondents were asked to assess the extent to which it differs from Hollywood across several dimensions. As illustrated in Figure 9, the most pronounced difference was observed in relation to content: 43,1% strongly agreed and 50,5% agreed that the EFI and Hollywood differ in this regard. Profitability emerged as the second area of divergence, with 39,8% strongly agreeing and 44% agreeing that the two industries operate with different levels or notions of profitability.



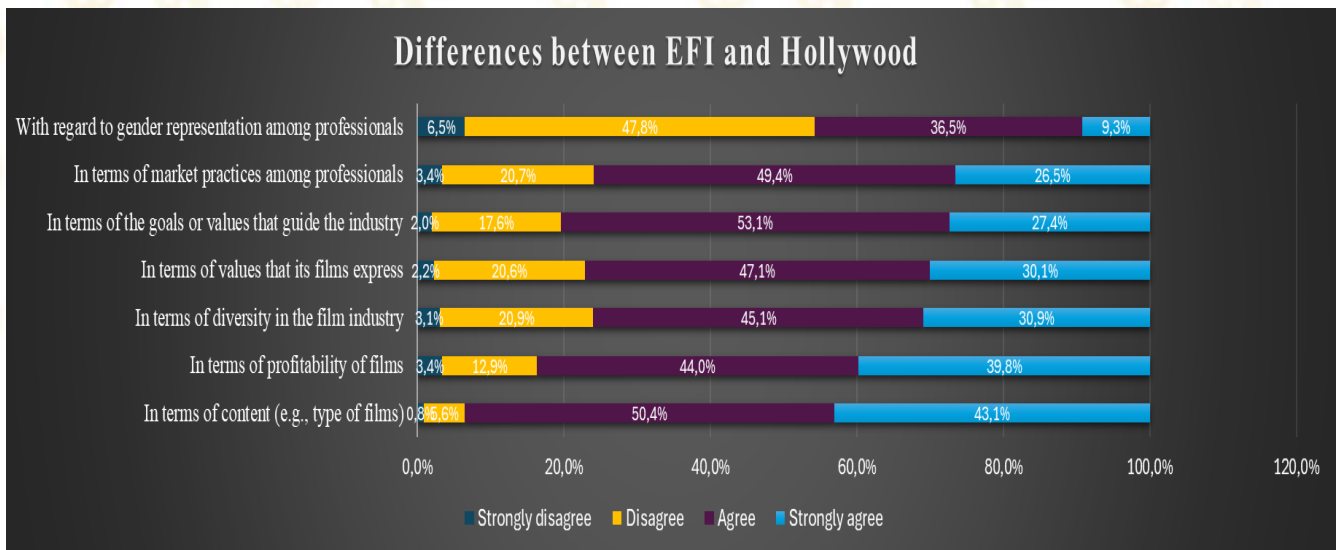


Figure 9 – Differences between EFI and Hollywood

Perceptions of diversity also revealed a significant contrast: 74,9% of respondents agreed or strongly agreed that the EFI and Hollywood differ in this area. Similarly, 67,7% perceived a difference in the values expressed through films, suggesting that audiences and professionals associate each industry with distinct cultural or ideological orientations. Even more striking was the perception of divergence in the broader values that guide each industry, where 80,5% of respondents agreed or strongly agreed. Market practices among professionals also stood out, with 75,9% acknowledging differences, thus pointing to distinct operational cultures.

However, when it comes to gender representation among professionals, the responses diverged. A majority of 54,3% disagreed or strongly disagreed that the EFI differs from Hollywood in this area. While the survey does not allow for general conclusions about actual practices or outcomes, this result suggests that many professionals do not perceive the EFI as significantly more advanced in terms of gender representation among professionals. Rather than viewing it as a distinguishing feature, respondents seem to regard gender inequality as a shared concern across both European and US film industries.

2.3. Perceptions of competitiveness

The first section of the survey examined how film industry professionals understand and assess competitiveness within the sector, including the concepts they associate with it and the perceived influence of VOD platforms. The objective was to gain insight into how stakeholders conceptualise and experience competitiveness in the context of the EFI.



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To begin, respondents were asked to rate the EFI's competitiveness on a scale from 1 to 5, based on the EFI's ability to create and implement competitive strategies and sustainably maintain and/or increase its market share. The findings reveal that the majority of respondents (n=401) rated the EFI at level 3, suggesting a moderate view: the EFI is seen as having some competitive tools and practices in place, but also as facing significant limitations. This middle-ground perception indicates an awareness of both potential and structural challenges in advancing the EFI's position within an increasingly globalised and platform-driven market.

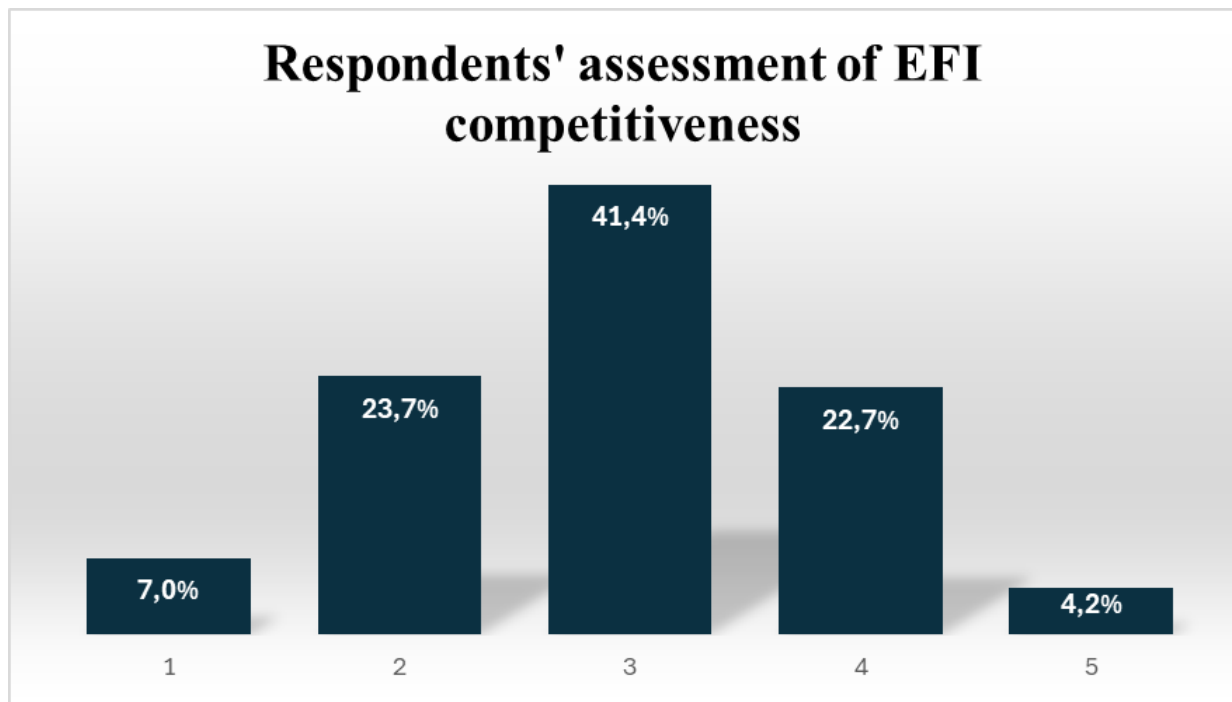


Figure 10 – Respondents' assessment of EFI competitiveness

To better understand the elements associated with competitiveness, respondents were asked to select the current aspects they perceive best demonstrate the EFI's competitive strengths, as shown in Figure 11.



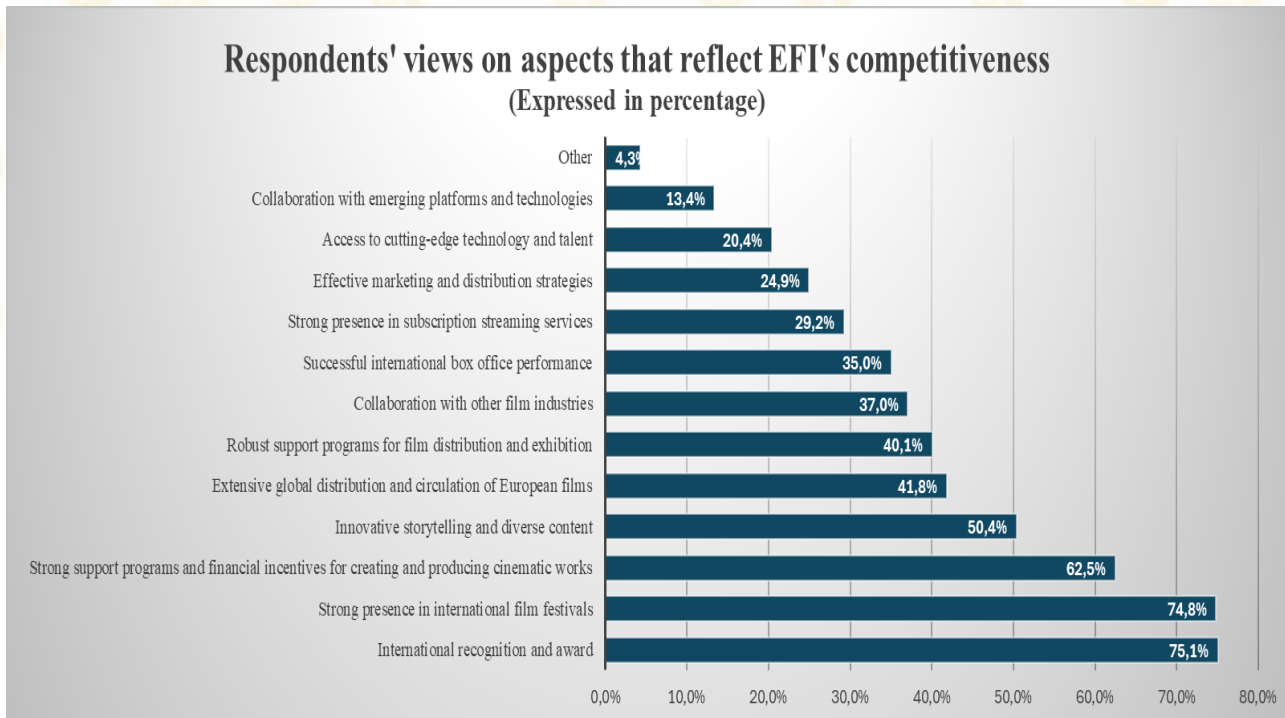


Figure 11 – Respondents' views on aspects that reflect EFI's competitiveness (general overview)

The results shown in Figure 11 reveal that the most frequently cited indicators ($n = 397$) were international recognition and awards (75,1%) plus participation in international film festivals (74,8%). This strong agreement points to a perception of the EFI as culturally driven, and a sector whose global visibility and critical acclaim are central to its perceived competitiveness. It also revealed the perception of the importance of film festivals and awards in promoting films and impacting their market performance (Damien & De Valck, 2023; Rüling & Pedersen, 2010)

Strong support for production (62,4%) also ranked highly, suggesting that institutional backing – likely through national, regional, and EU-level funding mechanisms – is currently recognised as a core pillar of the EFI's sustainability. Notably, half of respondents (50,4%) also identified innovative storytelling and diverse content as key strengths. This indicates that the EFI's artistic identity, grounded in narrative experimentation and cultural pluralism, is seen as a competitive advantage in global markets that increasingly value originality and representation.



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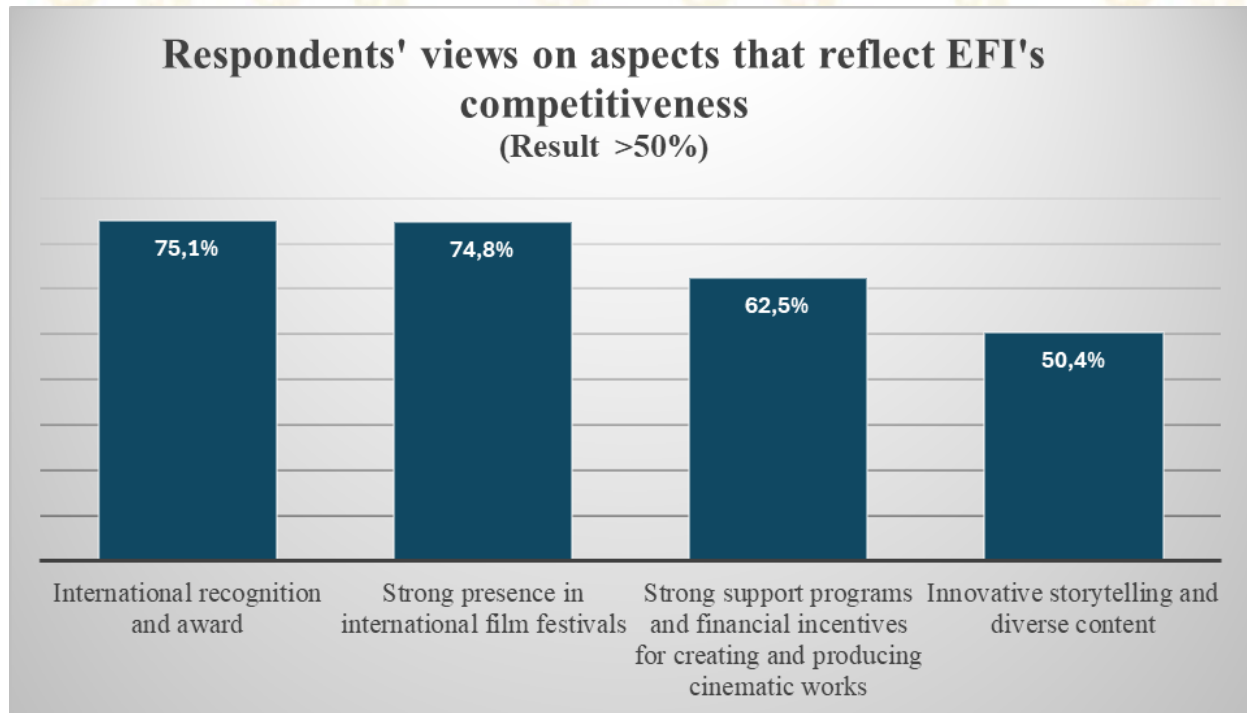


Figure 12 – Respondents' views on aspects that reflect EFI's competitiveness (I)

Meanwhile, broader structural and institutional assets were recognised by a substantial share of respondents, though to a lesser extent. These assets include global distribution networks (41,8%) and support schemes for distribution and exhibition (40,1%), which suggest moderate confidence in the reach and infrastructure of the EFI. These were followed by collaboration with other film industries (37%) and successful international office performance (35%) as shown in Figure 13. Although international collaboration was perceived as central by only 37% of respondents, the analysis of the Top 60 European films by admissions between 2013 and 2024 (see Figure 53 in the Annexe) reveals that 16 of these films involve a US company as part of the co-production. This underscores the longstanding collaborative ties between European and US film professionals and reflects the international nature of many high-performing productions. However, the survey findings suggest a more nuanced view among European professionals, who do not perceive international collaboration as central to the EFI's competitiveness.



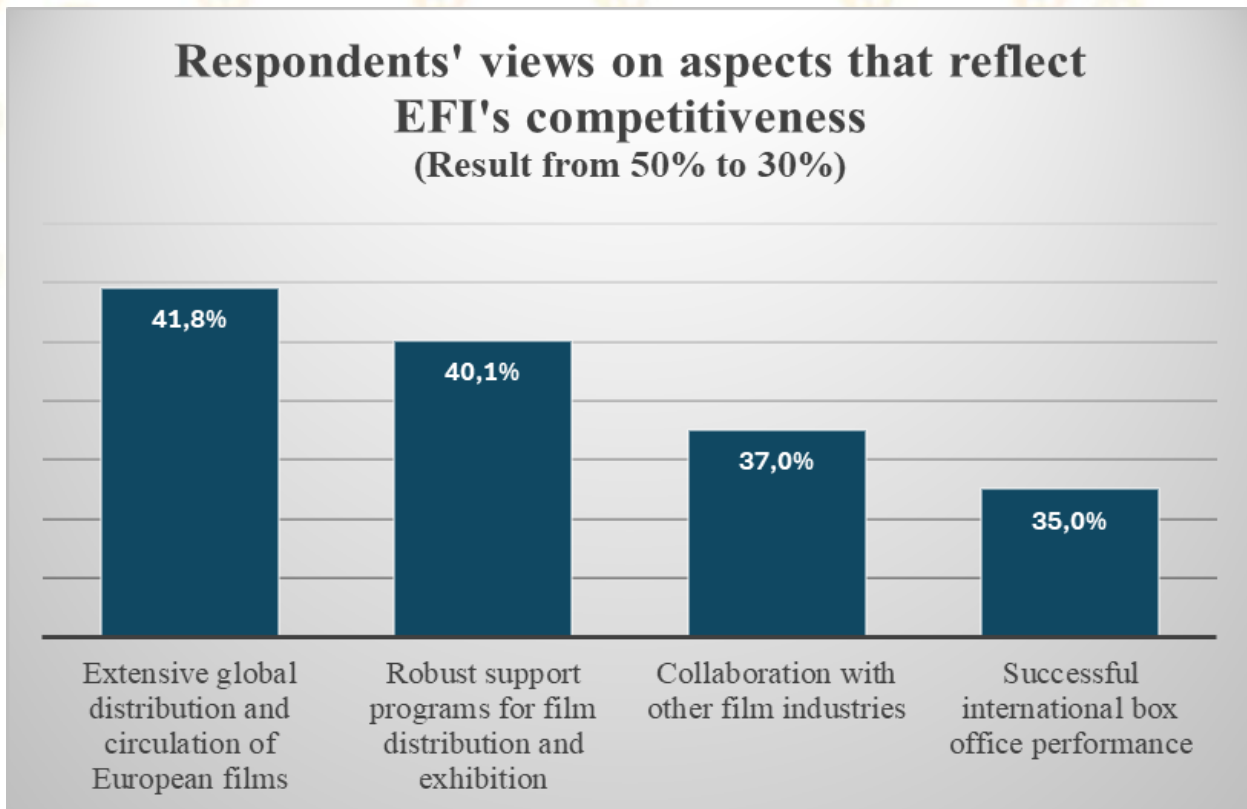


Figure 13 – Respondents' views on aspects that reflect EFI's competitiveness (II)

Conversely, Figure 11 also highlights perceived weaknesses in the EFI's competitive profile. Only 29,2% viewed the EFI as having a strong presence in subscription-based VOD platforms (SVOD), while just 24,9% identified effective marketing and distribution strategies. Even fewer associated the EFI's competitiveness with access to cutting-edge technology and talent (20,4%) or collaboration with emerging platforms and technologies (13,4%). These findings point to persistent gaps in digital integration, technological innovation, and audience expansion.

Respondents were also asked to assess the importance of various factors in contributing to the EFI's competitiveness. As illustrated in Figure 14, elements related to cultural value and public policy support were rated highest. Governmental financial support stood out as the most critical feature, with 47.1% considering it *extremely important* and 42.9% as *very important*. Similarly, a diverse cultural offer was rated *very* or *extremely important* by 80.6% of respondents, confirming that cultural richness is widely viewed as a cornerstone of the EFI's identity and competitive positioning.



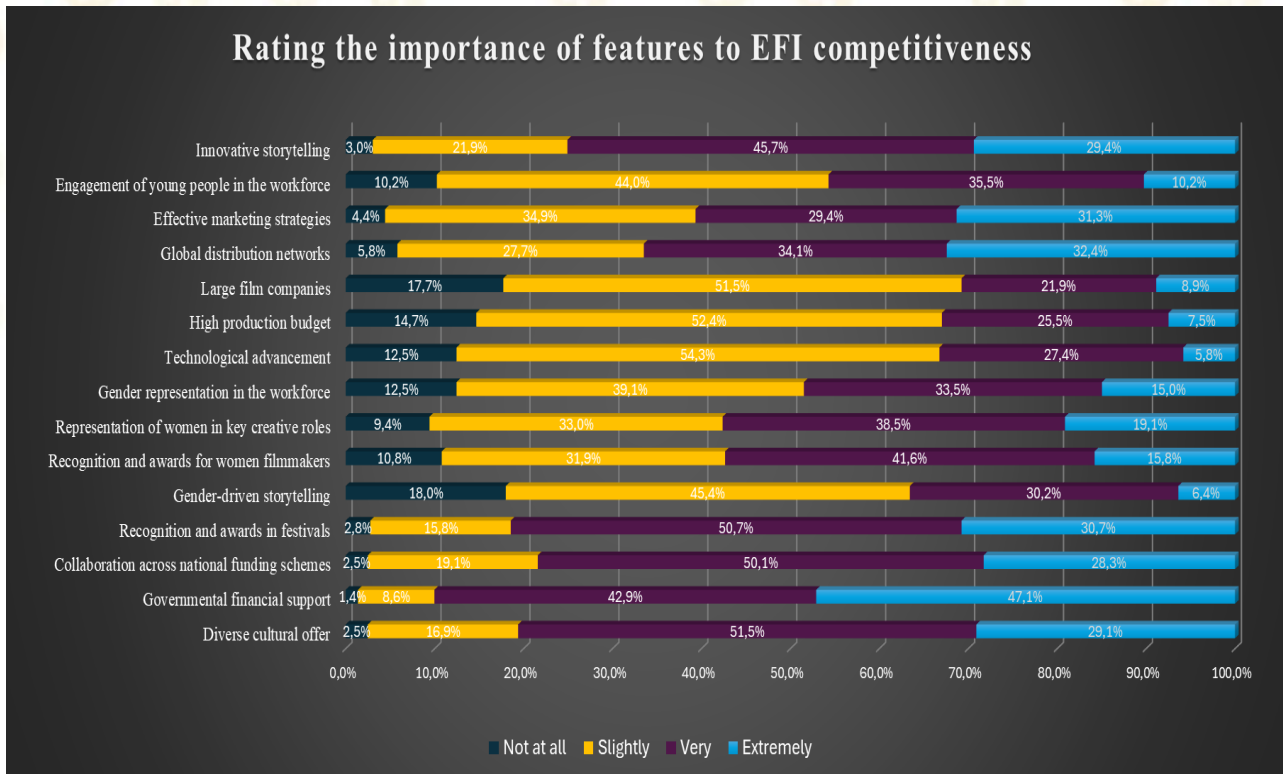


Figure 14 – Rating the importance of features to EFI competitiveness (general overview)

Collaboration across national funding schemes was also highly valued (78,4% *very or extremely important*), reinforcing the idea that transnational co-financing mechanisms are central to the EFI's functioning. Recognition and awards at international festivals were rated *very or extremely important* by 81,4%, again reflecting the role of symbolic capital in reinforcing the EFI's global visibility and perceived quality.



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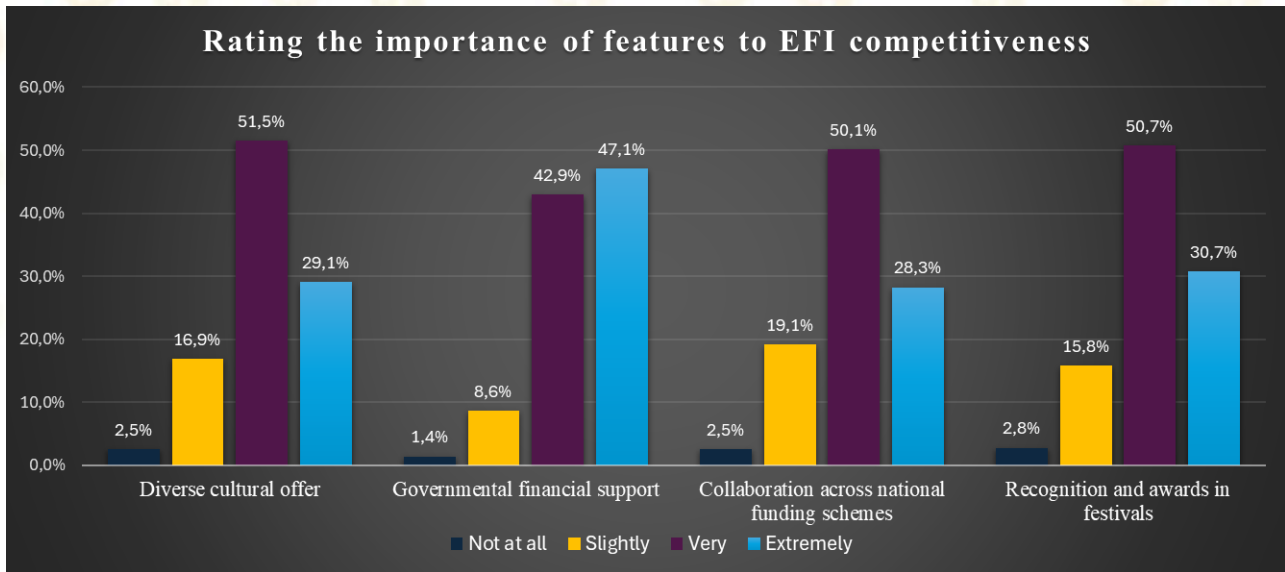


Figure 15 – Rating the importance of features to EFI competitiveness (I)

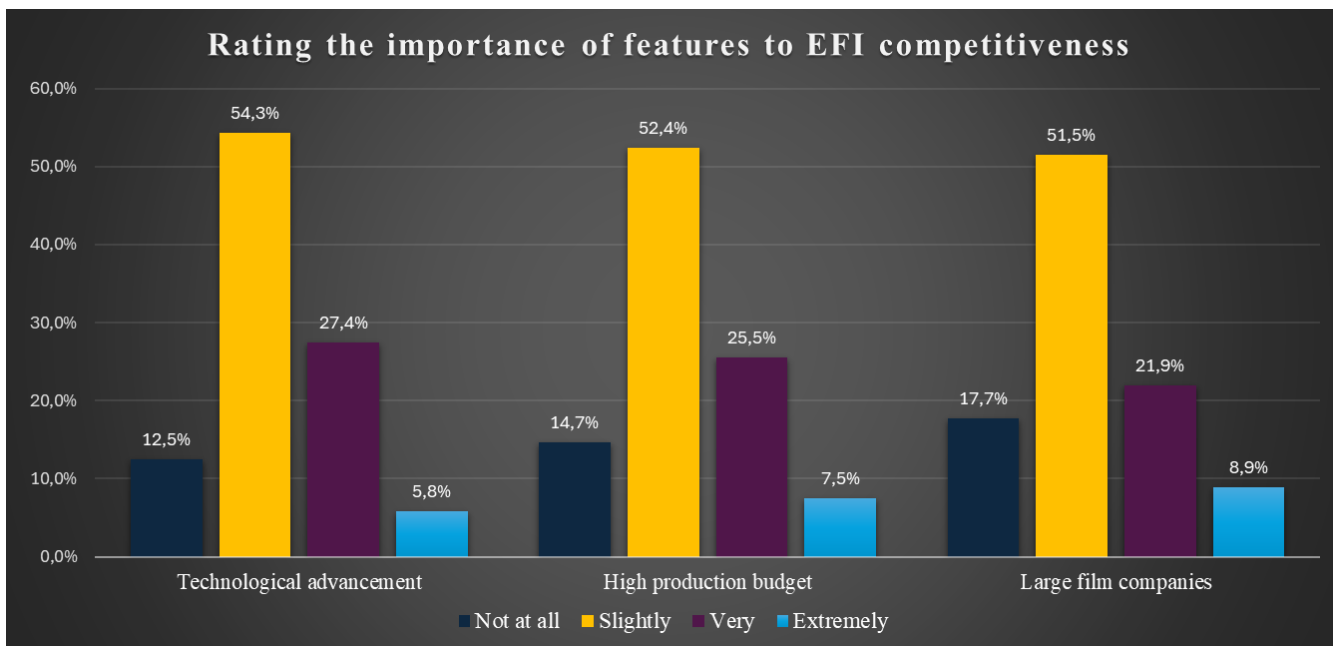


Figure 16 – Rating the importance of features to EFI competitiveness (II)

Interestingly, as shown in Figure 16, features more closely linked to market dynamics and industrial scale were ranked considerably lower. Technological advancement was considered *slightly important* by a majority (54,3%), with only 33,2% rating it *very* or *extremely important*. A similar pattern emerged in relation to high production budgets, seen as *slightly important* by 52,4% of respondents, and as *very* or *extremely important* by just 33%. Notably, 14,7% viewed it as *not at all important*. The perception of large film companies was even more critical: over half (51,5%) considered them only *slightly important* for EFI competitiveness, while 17,7% regarded them as *not*



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at all important, and just 8,9% saw them as *extremely important*. These findings suggest a prevailing belief among professionals that the EFI's competitiveness does not rely on specific industrial-scale or purely market-driven strategies, but rather on features related to extensive cooperation, targeted public support, cultural diversity, and symbolic recognition.

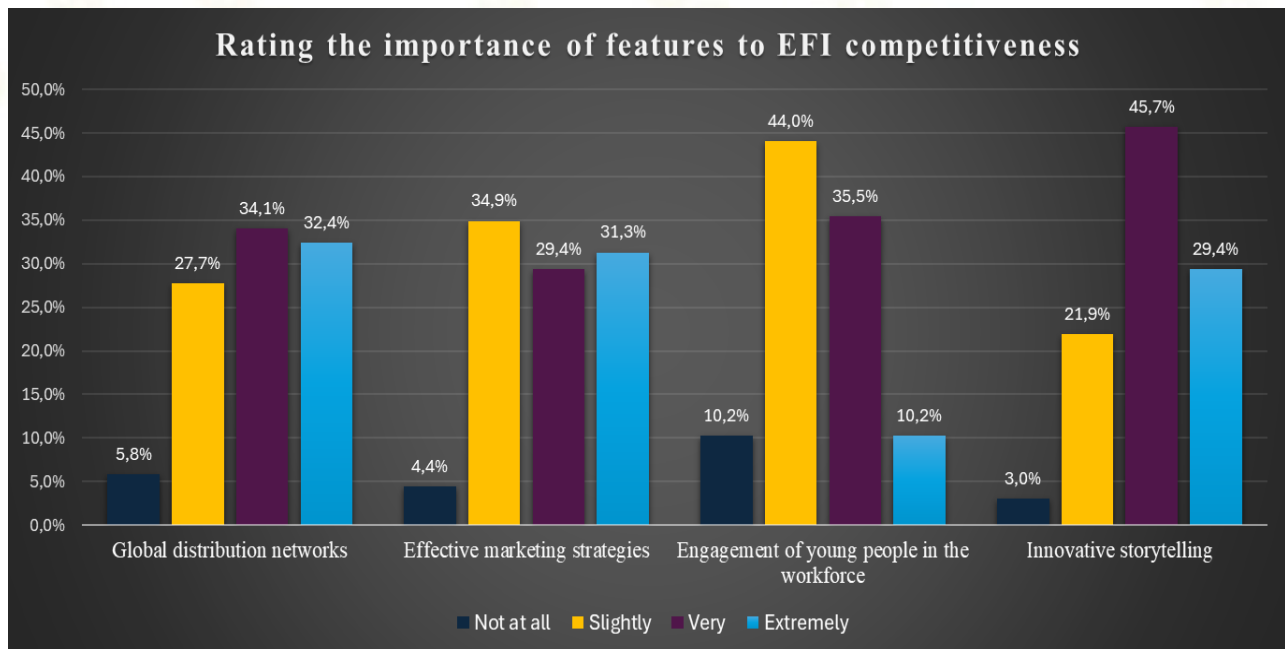


Figure 17 – Rating the importance of features to EFI competitiveness (III)

Perceptions regarding the importance of global distribution networks and marketing strategies in enhancing the EFI's competitiveness were somewhat divided. A majority considered global distribution networks to be either *extremely important* (32,4%) or *very important* (34,1%), suggesting a broad recognition of the value of international reach. Similarly, effective marketing strategies were rated as *extremely* (31,3%) or *very important* (29,4%) by a significant share of respondents. However, 34,9% viewed marketing as only *slightly important*, indicating a lack of consensus and revealing an ambivalent attitude toward the strategic role of marketing in the EFI context.

Engaging young professionals in the workforce was perceived as *slightly important* by 44% of respondents, indicating that while this issue is recognised, it is not yet viewed as a priority in relation to the EFI's competitiveness. This may reflect a perception that generational renewal, while relevant, is secondary to other structural or creative factors. By contrast, innovative storytelling was clearly valued, with 45,7% rating it as *very important*. This result underscores the ongoing emphasis placed on originality and creativity as central components of the EFI's competitive edge.



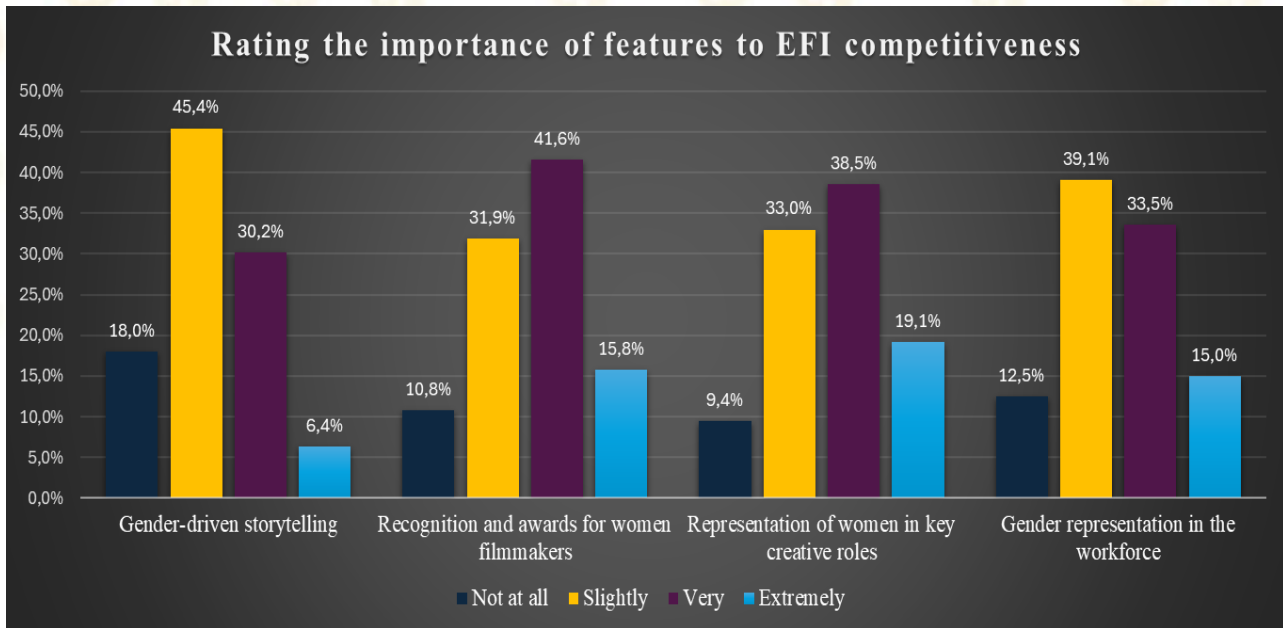


Figure 18 – Rating the importance of features to EFI competitiveness (IV)

Figure 18 also presents results related to gender perspectives in the EFI. Gender-driven storytelling was seen as only *slightly important* by 45.4% of respondents, while 18% considered it *not at all important*, pointing to a limited perceived connection between gender-inclusive narratives and competitiveness. Recognition and awards for women filmmakers, however, were rated as *very important* by 41,6%, once again underscoring the symbolic value of festival recognition. Perceptions of gender representation in the workforce were divided: 39,1% viewed it as *slightly important*, while 33% rated it as *very important*. Similarly, the representation of women in key creative roles drew a mixed response – 34,9% considered it *very important*, 19,1% *extremely important*, and 33% only *slightly important*.

Taken together, these results reflect a fragmented understanding of the role of gender equality in enhancing the EFI's competitiveness. While there is support for visibility and recognition of women in the industry, structural dimensions, such as representation in creative leadership or workforce equity, are not yet widely perceived as critical drivers of competitiveness.

2.4. International market

To identify the perceived barriers preventing European films from reaching wider audiences across the continent, respondents (n = 355) were asked to select multiple obstacles from a predefined list, as shown in Figure 19.



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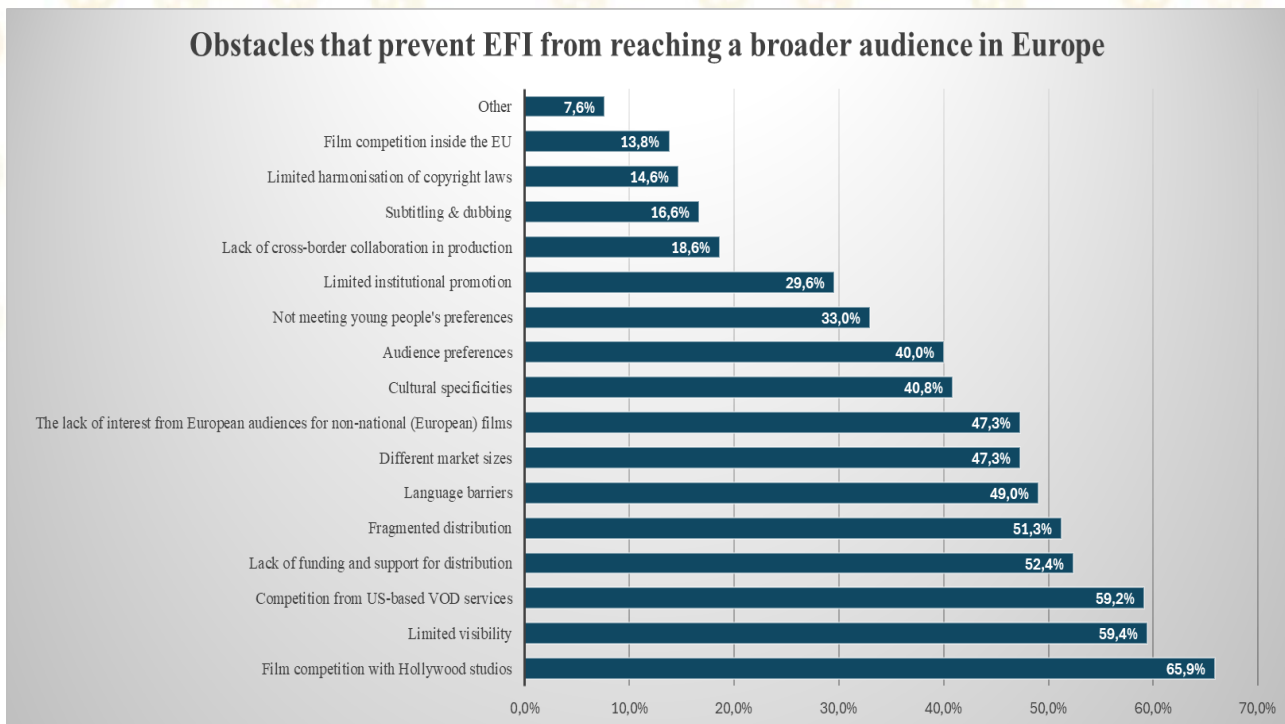


Figure 19 – Obstacles that prevent EFI from reaching a broader audience in Europe (general overview)

The results, shown in Figure 20, reveal a clear emphasis on external competitive pressures. The most frequently cited obstacle was competition from Hollywood studios, selected by 65,9% of respondents, followed closely by limited visibility (59,4%) and competition from US-based VOD platforms (59,2%). These findings suggest that professionals primarily view structural imbalances in the global audiovisual market as major hindrances to the EFI's outreach.

Internal challenges were also noted, particularly those linked to distribution. Over half of respondents identified a lack of funding and support for distribution (52,4%) and the fragmented nature of the EFI's distribution landscape (51,3%) as key constraints. This indicates a strong perception that, despite the quality of European productions, internal systemic weaknesses – especially in circulation and accessibility – continue to limit their reach. When isolating responses from producers, limited visibility emerged as the most critical barrier, followed by competition from Hollywood and fragmented distribution: this reinforces the key importance of distribution-related issues, in the professional experience of those directly involved in film production.



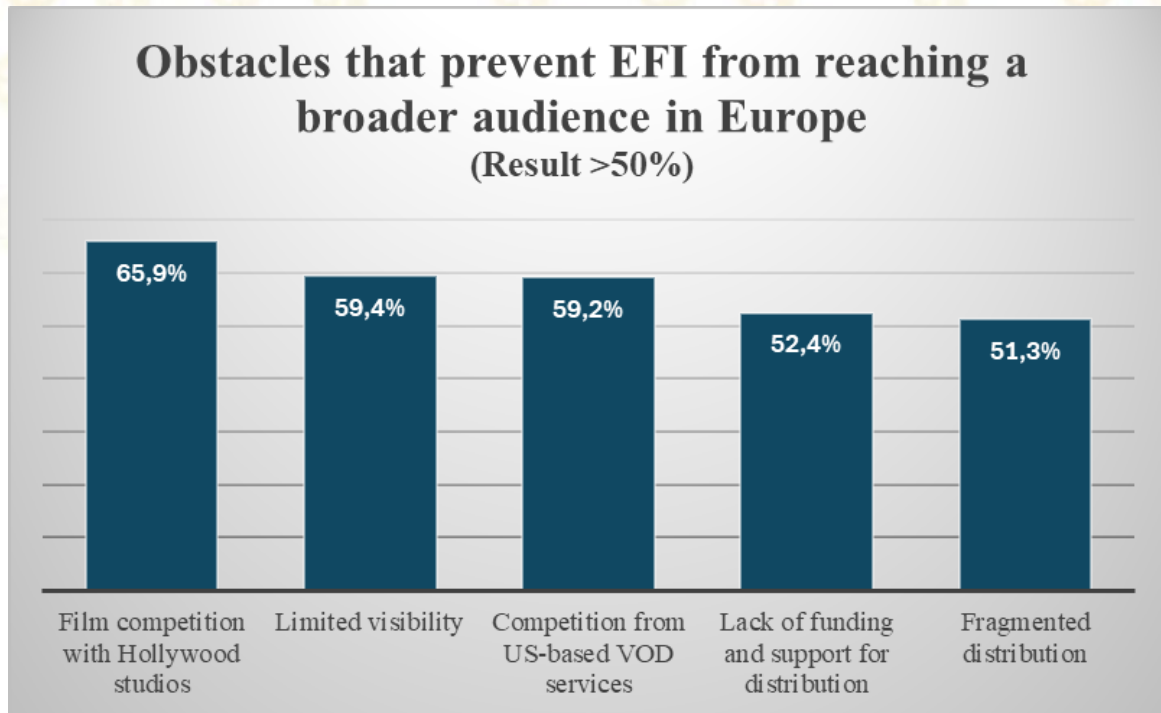


Figure 20 – Obstacles that prevent EFI from reaching a broader audience in Europe (I)

A second cluster of perceived barriers relates to the structural fragmentation of the EFI itself. Language differences (49%), disparities in market size (47,3%), low audience interest (47,3%), and cultural specificities (40,8%) were all frequently cited, thus highlighting the ongoing challenges of operating in a linguistically and culturally diverse region.

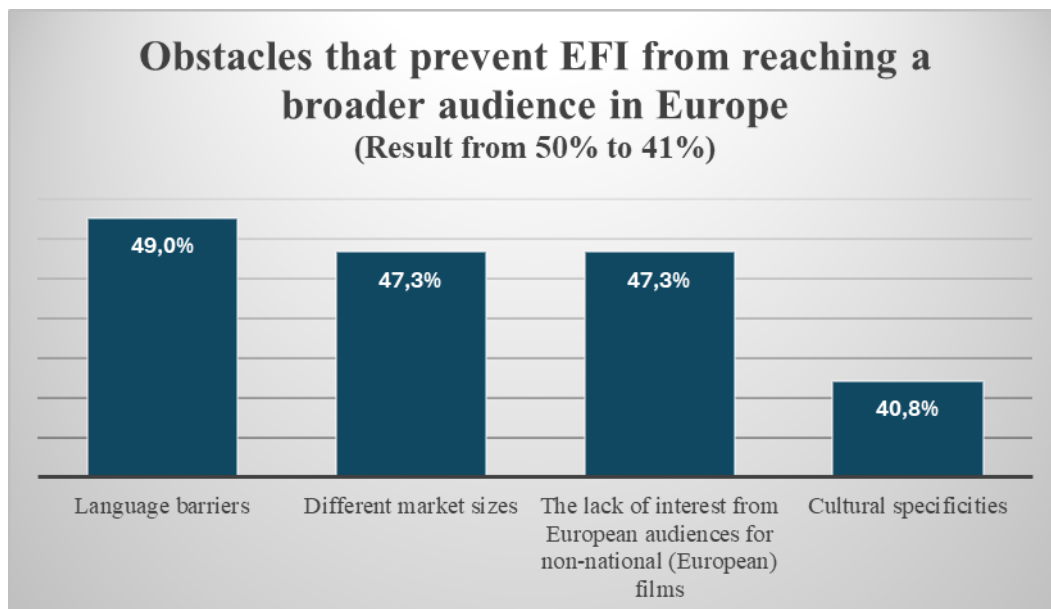


Figure 21 – Obstacles that prevent EFI from reaching a broader audience in Europe (II)



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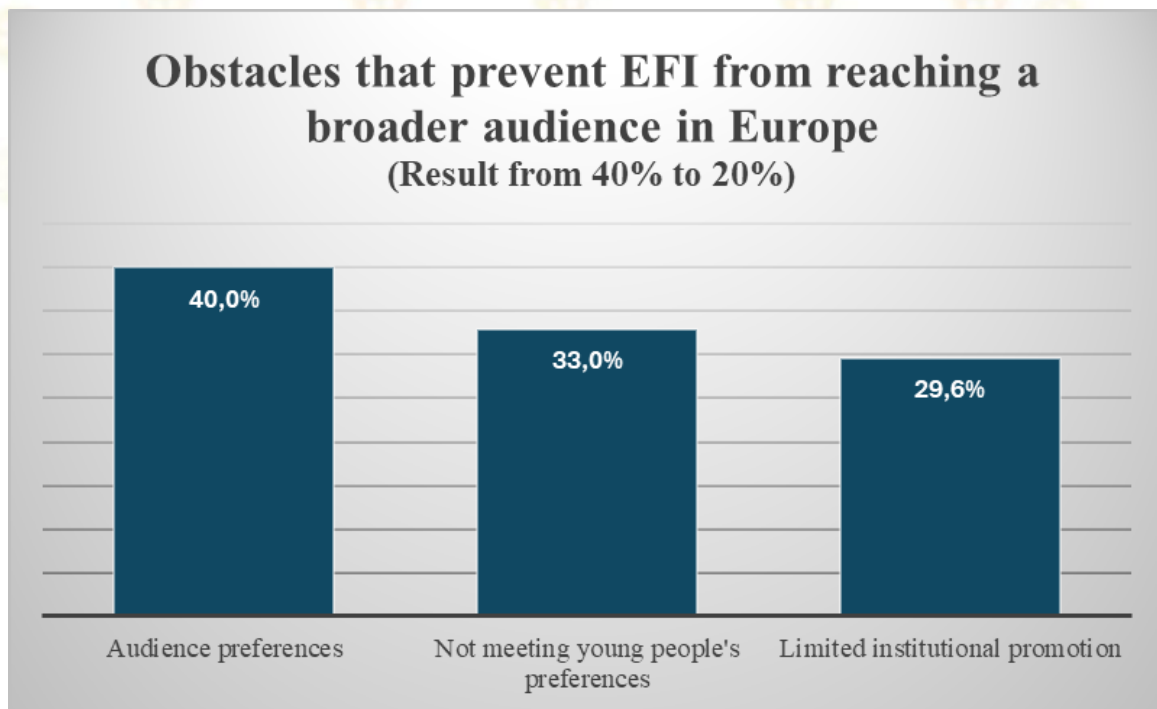


Figure 22 – Obstacles that prevent EFI from reaching a broader audience in Europe (III)

Audience preferences were also seen as a relevant factor: 40% of respondents pointed to general audience tastes as a barrier, and 33% specifically noted a mismatch with young people's preferences. These concerns point to potential issues in content relevance and generational engagement. Meanwhile, limited institutional promotion (29.6%) was perceived as less critical, suggesting a relatively lower concern regarding the visibility efforts of public bodies.



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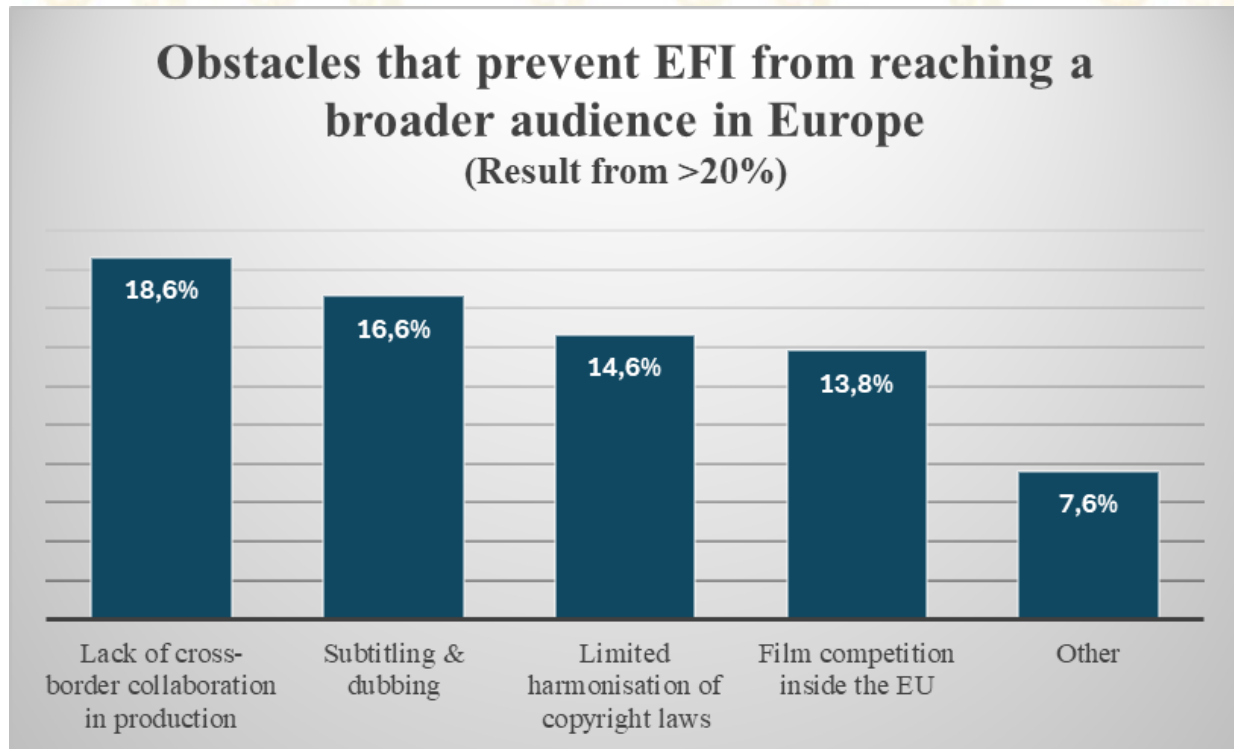


Figure 23 – Obstacles that prevent EFI from reaching a broader audience in Europe (IV)

Finally, obstacles related to the production stage received the least emphasis. Lack of cross-border collaboration in production (18,6%), issues with subtitling and dubbing (16,6%), limited harmonisation of copyright laws (14,6%), and intra-EU film competition (13,8%) were cited by a minority of respondents. This indicates that film professionals perceive the main bottlenecks not in the creation of content, but in its circulation, visibility, and competitiveness within a globalised audiovisual media landscape.

When asked about the main obstacles preventing the EFI from expanding more significantly into the global film market, respondents overwhelmingly identified Hollywood's dominance as the primary barrier (74,6%). This confirms earlier findings and reinforces the perception that the EFI's global positioning is constrained by structural asymmetries in the international audiovisual ecosystem.



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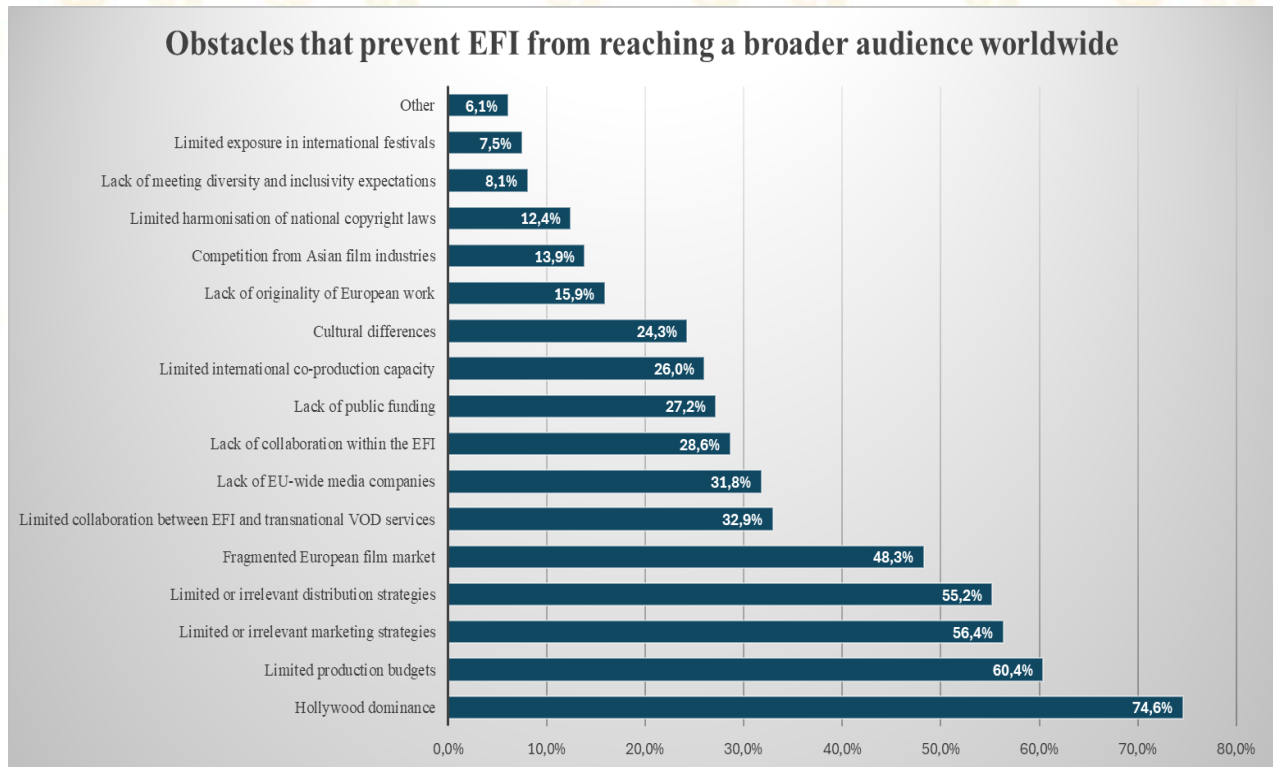


Figure 24 – Obstacles that prevent EFI from reaching a broader audience worldwide (general overview)

Notably, internal industry limitations were also strongly acknowledged. A limited production budget was cited by 60,4% of respondents, highlighting the perceived difficulty of competing internationally with higher-budget productions. Similarly, weaknesses in marketing (56,4%) and distribution strategies (55,2%) were seen as significant barriers, suggesting that the EFI's capacity to reach global audiences is hindered not only by external competition but also by under-resourced promotional infrastructures.



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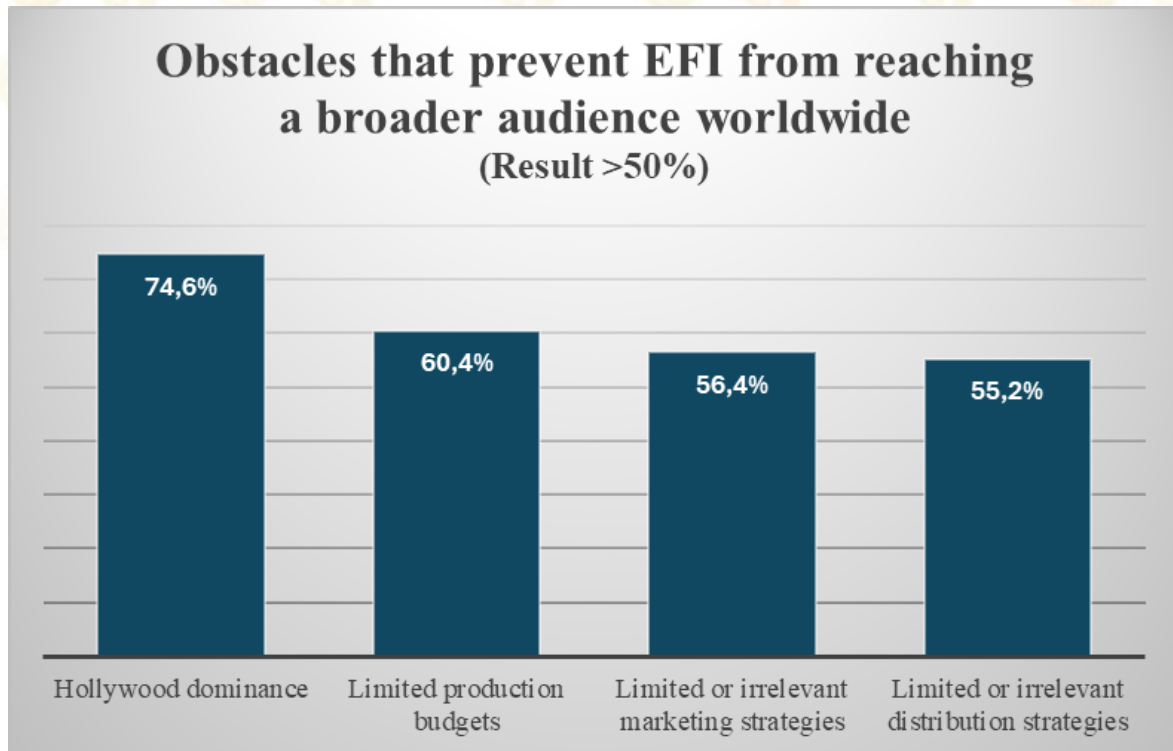


Figure 25 – Obstacles that prevent EFI from reaching a broader audience worldwide (I)

A fragmented European market (48,3%) also emerged as a key challenge, pointing to a lack of coherence in the industry's transnational efforts. Interestingly, while competition from VOD platforms was highlighted as a major obstacle to European audience reach in the previous question, in this context, the limited collaboration between the EFI and transnational VOD services was not perceived as a major barrier to global expansion. This suggests that a large majority of film professionals do not see missed opportunities, when forming strategic partnerships with globally dominant streaming platforms. In a similar vein, the absence of strong, EU-wide media companies was listed by 31,8%, revealing that this is not perceived as a central element.



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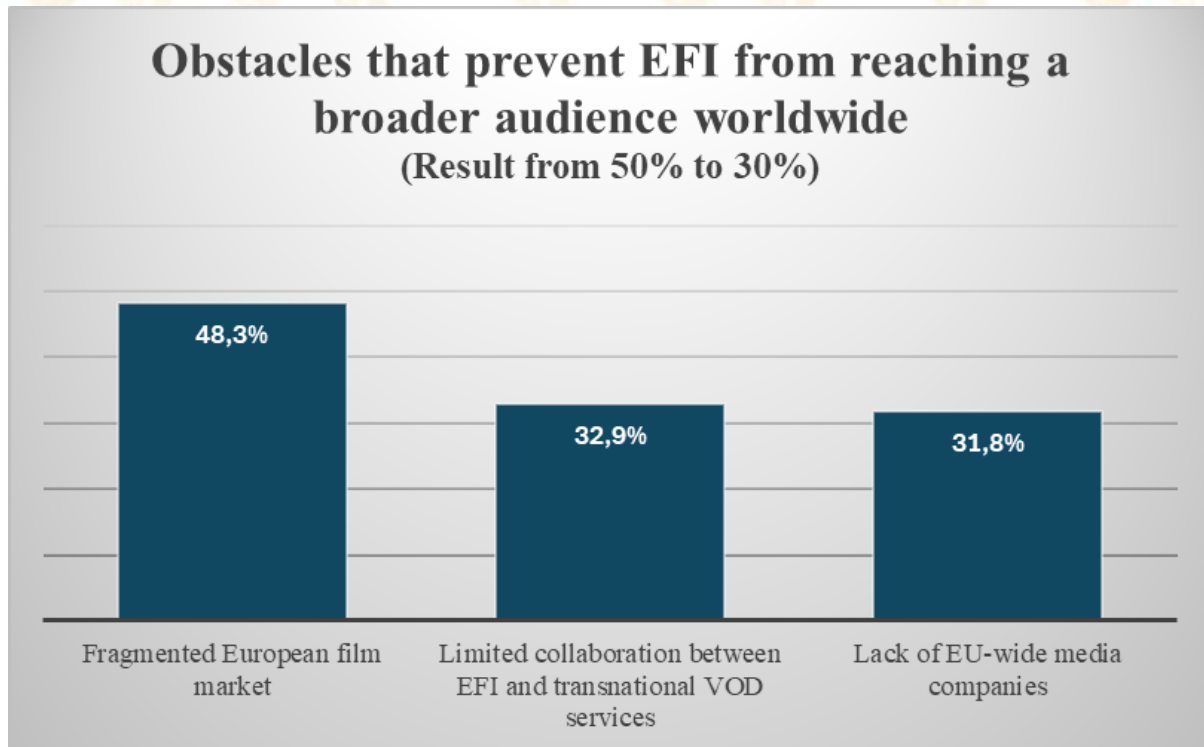


Figure 26 – Obstacles that prevent EFI from reaching a broader audience worldwide (II)

Less frequently mentioned obstacles include a lack of internal collaboration within the EFI (28,6%), insufficient public funding (27,2%), limited international co-production capacity (26%), and cultural differences (24,3%). Only 15,9% of respondents viewed a lack of originality in European works as a barrier, indicating that creativity is not widely perceived as a weak point.



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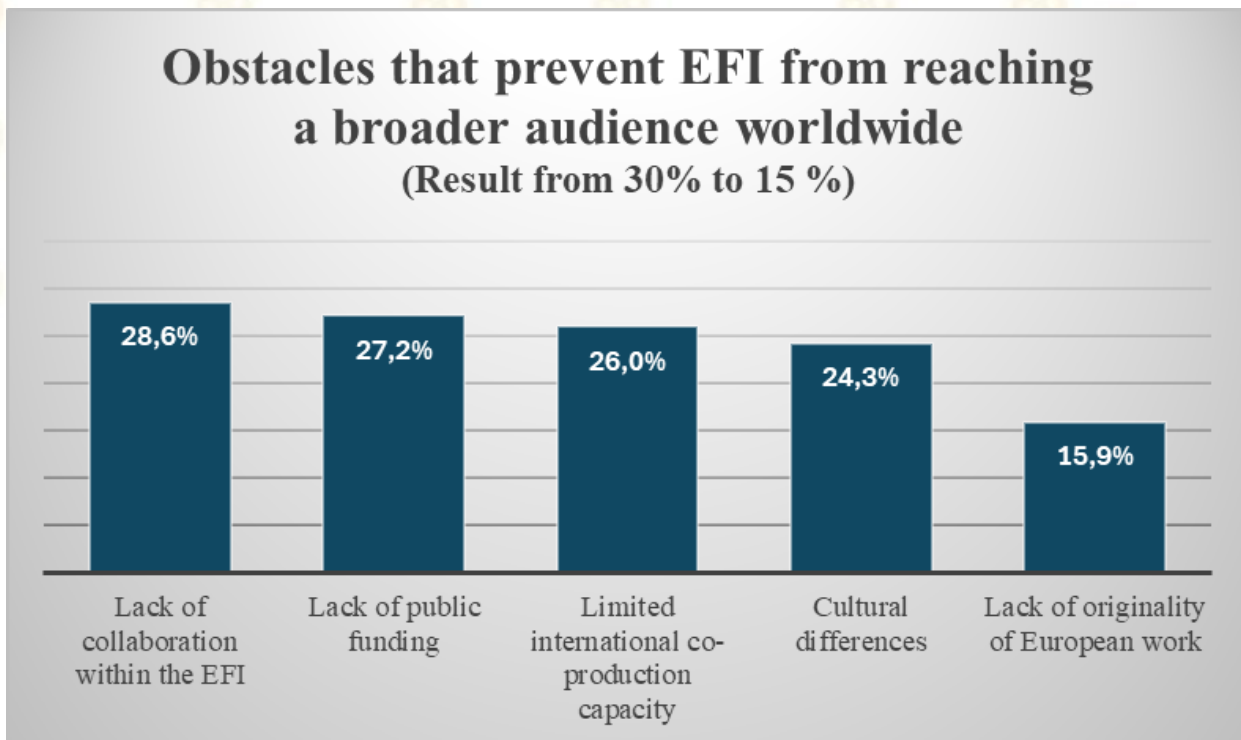


Figure 27 – Obstacles that prevent EFI from reaching a broader audience worldwide (III)

The least frequently selected barriers further underscore the focus on Hollywood as the EFI's principal competitor. Only 13,9% identified competition from Asian film industries as an issue. Limited harmonisation of copyright law (12,4%) was not viewed as a significant constraint, and even fewer respondents cited failure to meet diversity and inclusivity expectations (8,1%) or limited exposure in international festivals (7,5%). These latter figures suggest that the EFI is generally perceived as strong, in terms of commitment to inclusion and visibility in the global film festival circuits.



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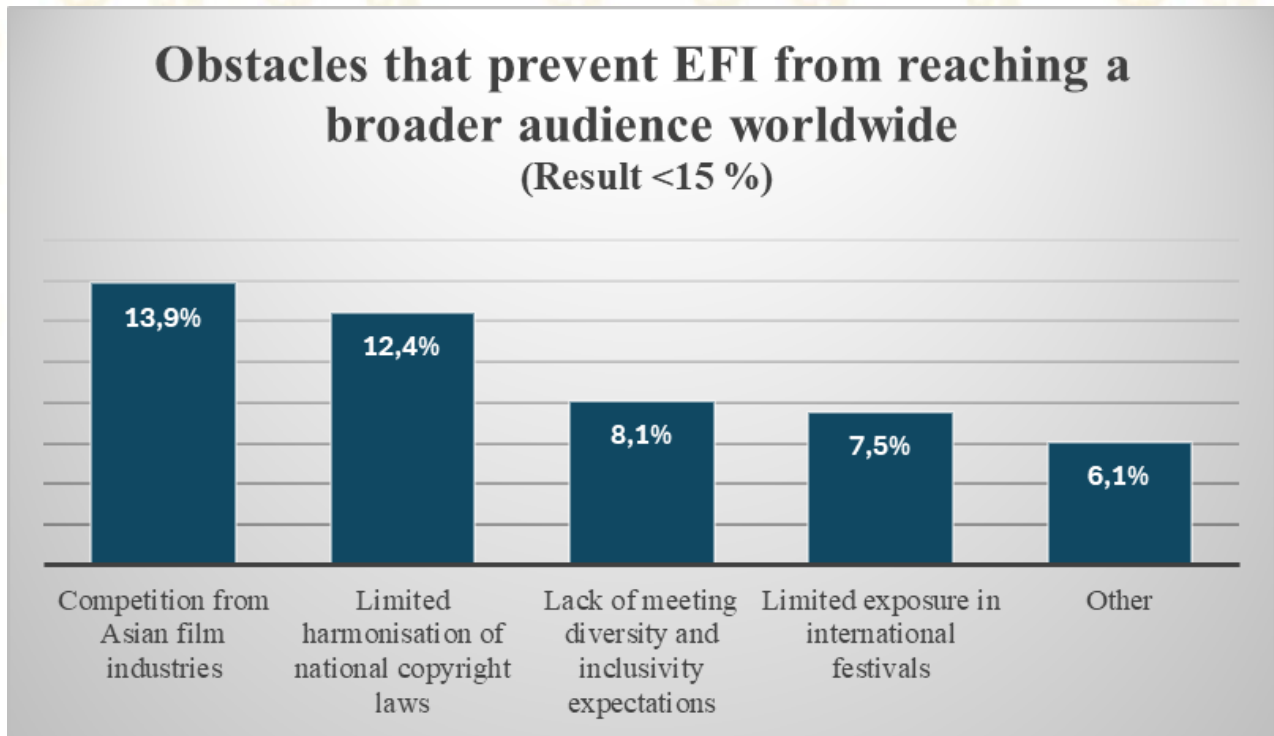


Figure 28 – Obstacles that prevent EFI from reaching a broader audience worldwide (IV)

2.5. VOD platforms

The growing influence of global VOD platforms has introduced new dynamics into the EFI, reshaping traditional production, distribution, and consumption models. These platforms have become key players in the audiovisual ecosystem, altering how European content reaches audiences and how professionals engage with market structures (Mitric, 2024). Their presence raises both opportunities, such as broader international exposure and enhanced consumer welfare resulting from the wider accessibility of cultural content, and critical challenges linked to capacity for market dominance, intellectual property, consumer data collection and cultural discoverability (Nieborg & Poell 2018; García-Leiva, 2020; Vlassis 2023). This section explores how professionals working within the EFI perceive the impact of VOD platforms on their practices and on the competitiveness of the sector more broadly.



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In the question regarding professionals' perception of the strategies of US-based VOD platforms, responses revealed a mix of cautious recognition and strong concerns.

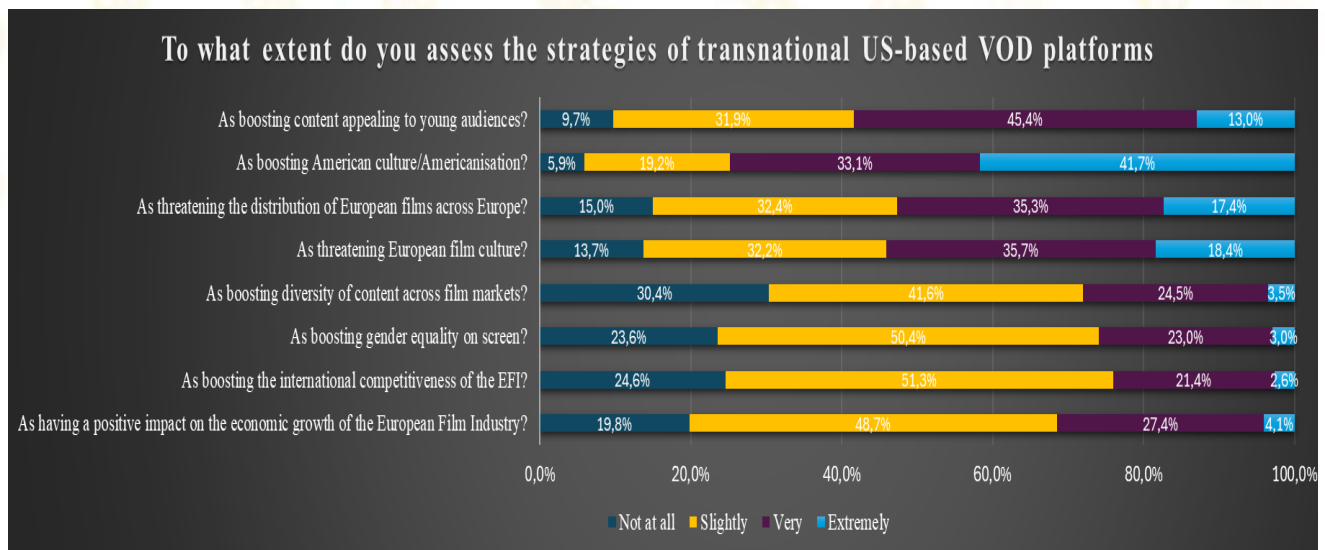


Figure 29 – Respondents' perception of the strategies of US-based VOD platforms (I)

On the positive side, over 55% of respondents acknowledged that US-based VOD platforms significantly enhance the appeal of content for younger audiences. This suggests that professionals recognise the capacity of these platforms to engage new generations, through accessible formats and targeted programming.

However, perceptions were more divided regarding the broader cultural and market implications of these US-based platforms. Respondents were split on whether these platforms represent a threat to European film culture or hinder the distribution of European films across the continent this points to a nuanced and possibly context-dependent evaluation of their influence.



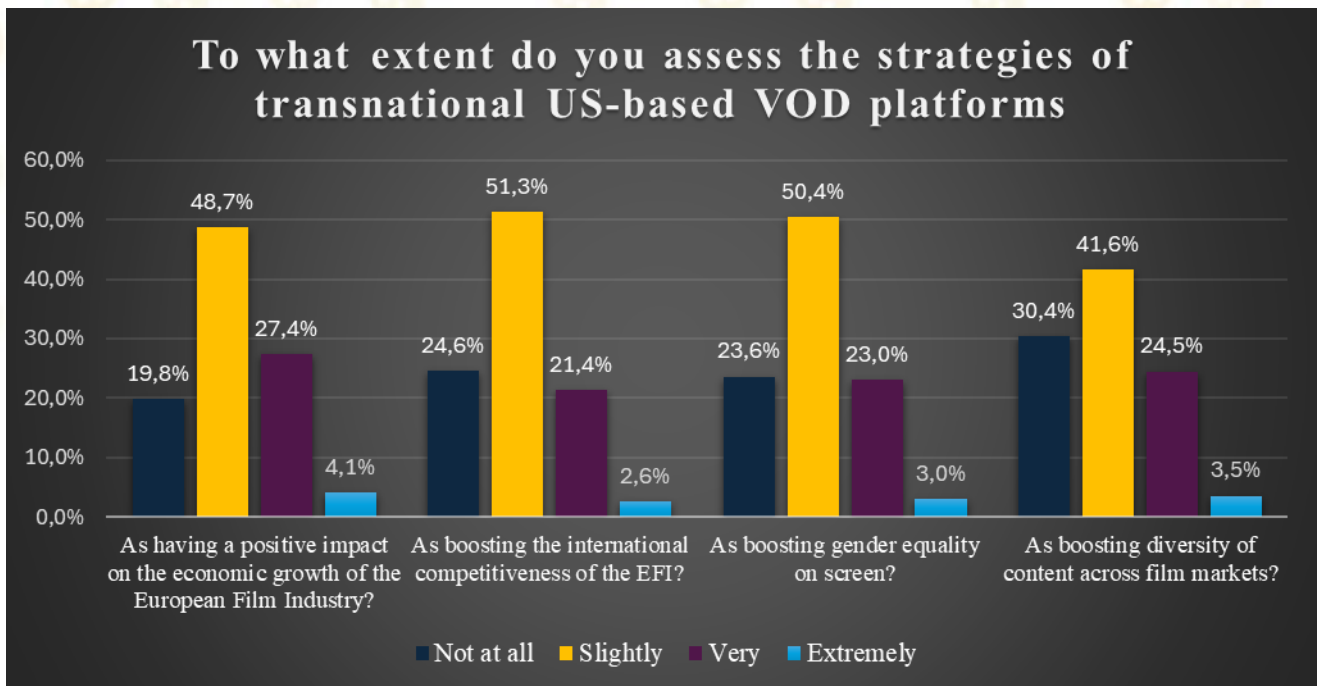


Figure 30 – Respondents' perception of the strategies of US-based VOD platforms (II)

From a critical perspective, more than 70% of respondents believed that these platforms do not meaningfully contribute to the international competitiveness of the EFI. A similar proportion felt that they have little to no positive impact on the EFI's economic growth, nor do they significantly promote diversity across film markets. These results indicate a prevailing concern that while US-based VOD platforms may facilitate access, they do not align with the structural and cultural needs of the European industry.

Importantly, over 75% of respondents perceived that US-based VOD services primarily serve to promote American culture, thus contributing to 'Americanisation' processes. This reinforces the view that these platforms act as vehicles of US soft power, potentially displacing or overshadowing local and regional narratives within the European audiovisual space.



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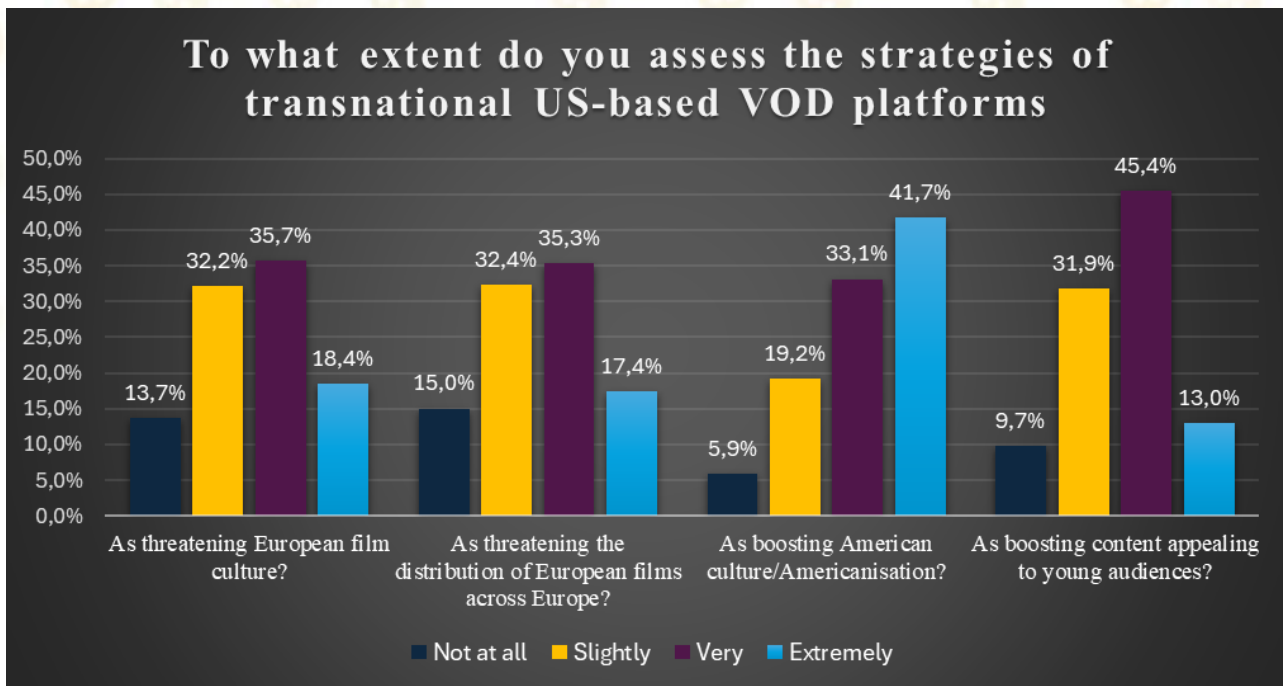


Figure 31 – Respondents' perception of the strategies of US-based VOD platforms (III)

The survey also examined perceptions of EU-based VOD platforms, such as Viaplay, Cinobo, Cinesquare, Filmin, and Sooner as well as their contribution to various dimensions of the EFI. Overall, their impact is seen as limited, across most areas.

Their most positively perceived contributions relate to cultural visibility. Specifically, 44.3% of respondents rated EU-based VOD platforms as *very* or *extremely* important in promoting European films and European culture. Similarly, 40.8% considered them effective in making European film productions more discoverable. These responses suggest that while the platforms may lack scale, they are nonetheless valued for their role in enhancing the circulation of European audiovisual works. In terms of promoting diversity of content across film markets, 39.5% also viewed EU-based VOD platforms' contribution as *very* or *extremely important*, pointing to a modest but visible role in supporting a more pluralistic audiovisual landscape.

However, the perceived impact of EU-based VOD platforms on competitiveness is considerably low. When asked about their role in strengthening the EFI's competitiveness across Europe, 17.3% of respondents said they contribute *not at all*, and 50.3% described their impact as only *slight*. Even less influence was attributed to their ability to engage younger audiences: 20.4% stated that EU-based VOD platforms do *not at all* contribute to this goal, making it the least impactful dimension evaluated.



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These findings suggest that while EU-based platforms are appreciated for supporting cultural visibility and diversity, they are not yet seen as significant drivers of competitiveness or generational outreach within the European film ecosystem.

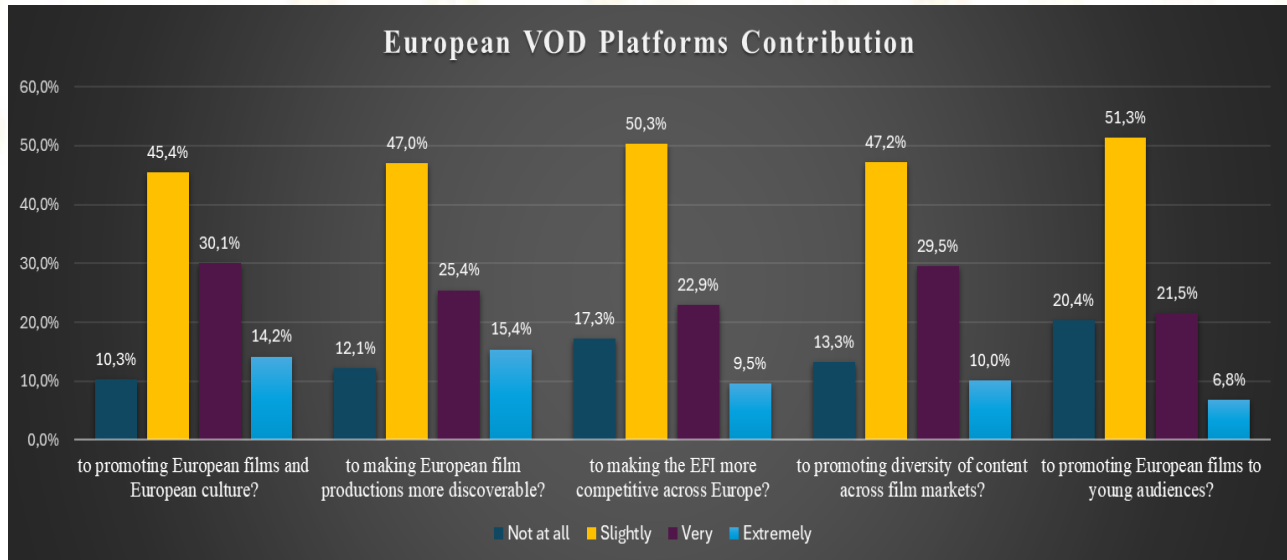


Figure 32 – Respondents' views on EU VOD platforms' contribution

2.6. Challenges and policies

To understand the policy preferences among film professionals, respondents were asked where the international promotion of the EFI should focus, whether on cultural, linguistic, economic, or geographical aspects. As shown in Figure 33, there is limited support for targeting specific areas, with none emerging as a clear strategic priority. Cultural focus received the most acceptance, yet only 33,5% of respondents supported it, suggesting that even this option does not garner strong consensus. The relatively high number of 'don't know' responses further indicates uncertainty or a lack of clear understanding among professionals about effective promotional strategies for the EFI at the international level.



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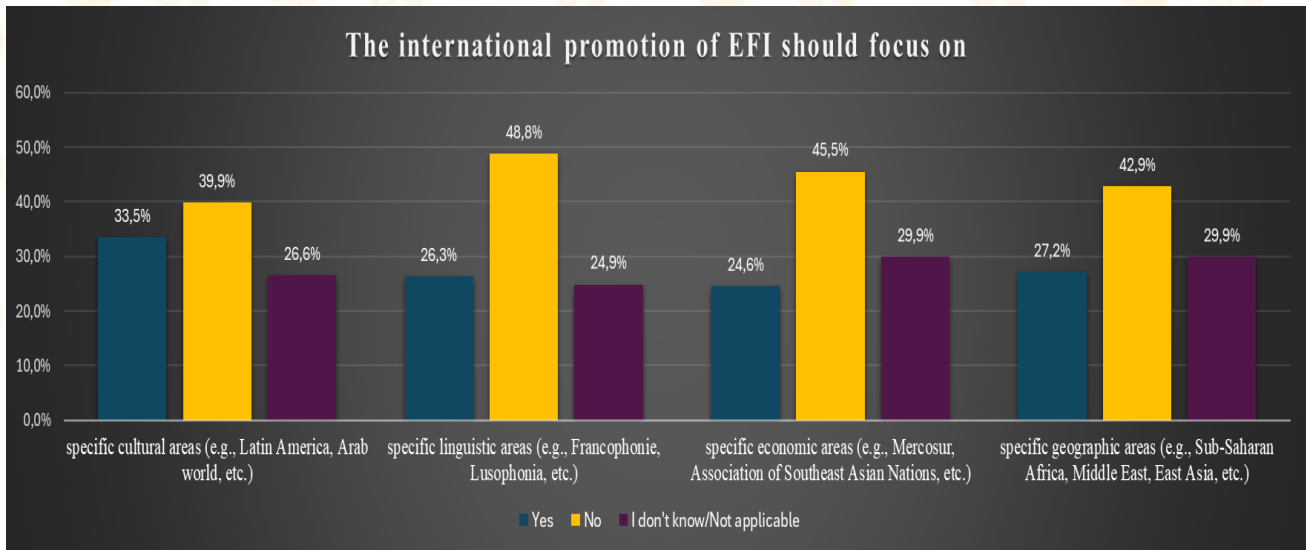


Figure 33 – Respondents' views on which aspects the international promotion of EFI should focus

Respondents were also asked about the relevance of content quotas for European works in the VOD context. As shown in Figure 34, a majority agreed that quotas play a meaningful role in supporting the EFI and enhancing its competitiveness. However, the findings also point to notable scepticism: over 35% of respondents expressed doubts about the effectiveness of quotas. This mixed view reflects a broader tension in the field, because while quotas are seen as useful tools for visibility and market access, they are not universally regarded as sufficient for improving the structural competitiveness of European films.

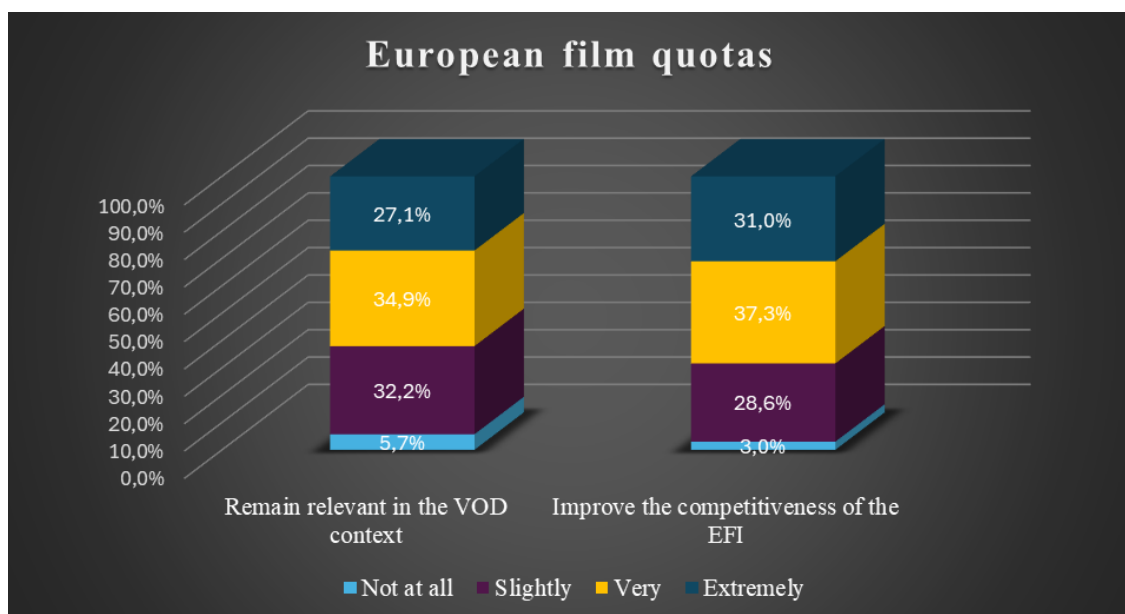


Figure 34 – European film quotas



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To identify policy priorities for strengthening the EFI's position in the international market, respondents were asked to indicate the most important measures that should be adopted. The results highlight a strong consensus around the need to address distribution weaknesses.

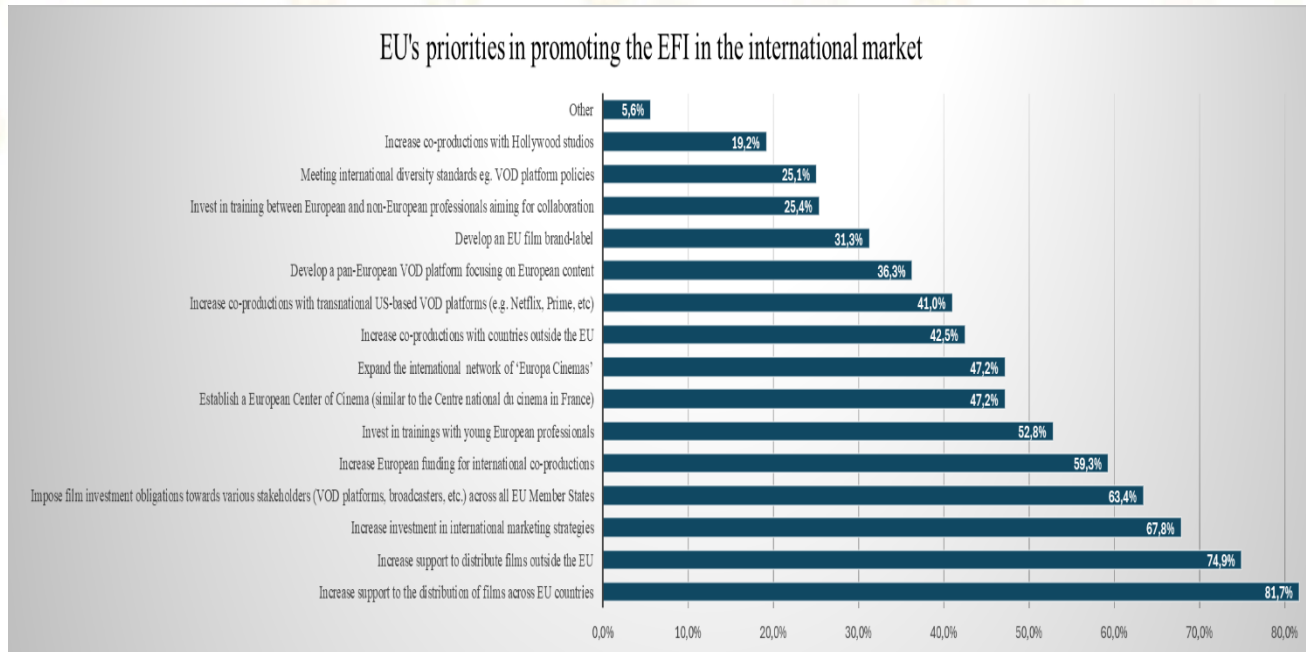


Figure 35 – EU's priorities in promoting the EFI in the international market (general overview)

Increasing support for distribution within the EU was identified as the top priority (81,7%), closely followed by enhanced support for distribution outside the EU (74,9%). These findings reinforce the perception that the EFI's global expansion is limited less by content quality and more by structural barriers to circulation. A significant majority (67,8%) also emphasised the importance of increased investment in international marketing strategies, underlining the need for greater visibility and audience engagement beyond Europe. In a related vein, 63,4% of respondents supported imposing investment obligations on key industry stakeholders, such as VOD platforms and broadcasters, signalling support for regulatory measures to strengthen the position of European content in an increasingly competitive global environment.



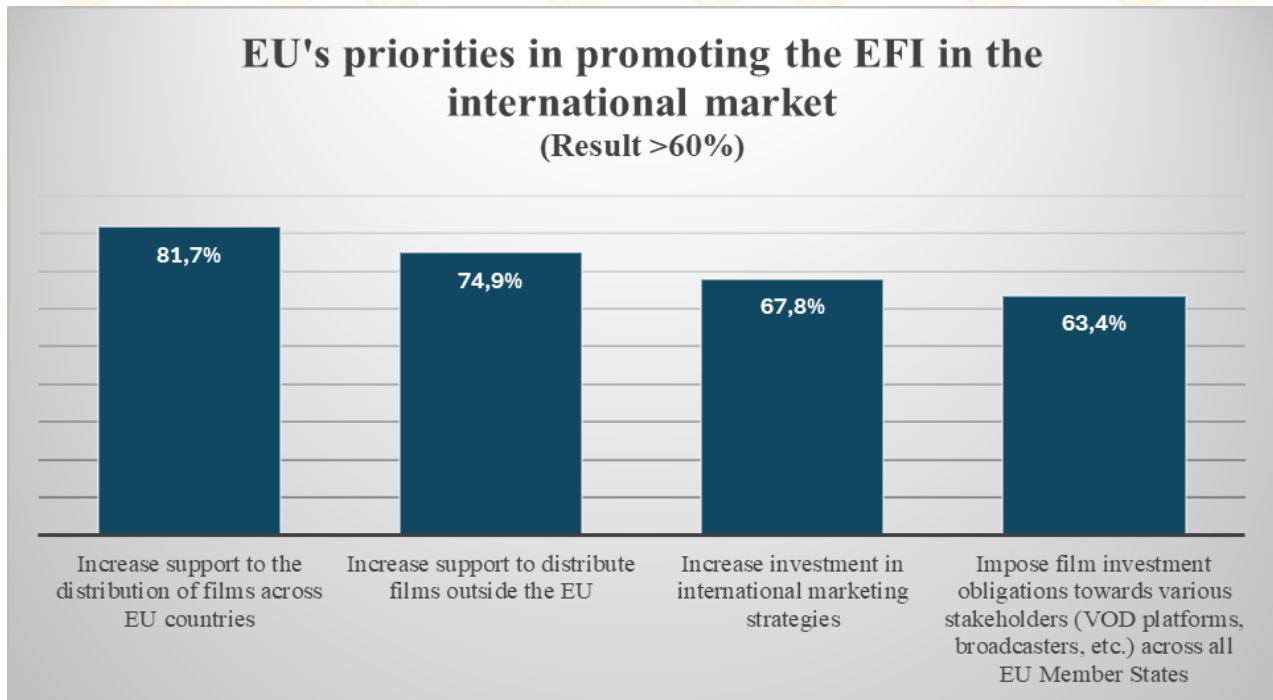


Figure 36 – EU's priorities in promoting the EFI in the international market (I)

Other recommended actions included increasing European funding for international co-productions (59,3%) and investing in training programmes for young European professionals (52,8%). Institutional initiatives, such as establishing a European Cinema Centre and expanding the international network of Europa cinemas, were supported by 47,2% of respondents. This underlines a desire for greater strategic coordination and visibility of EFI abroad.



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EU's priorities in promoting the EFI in the international market (Result from 60% to 46%)

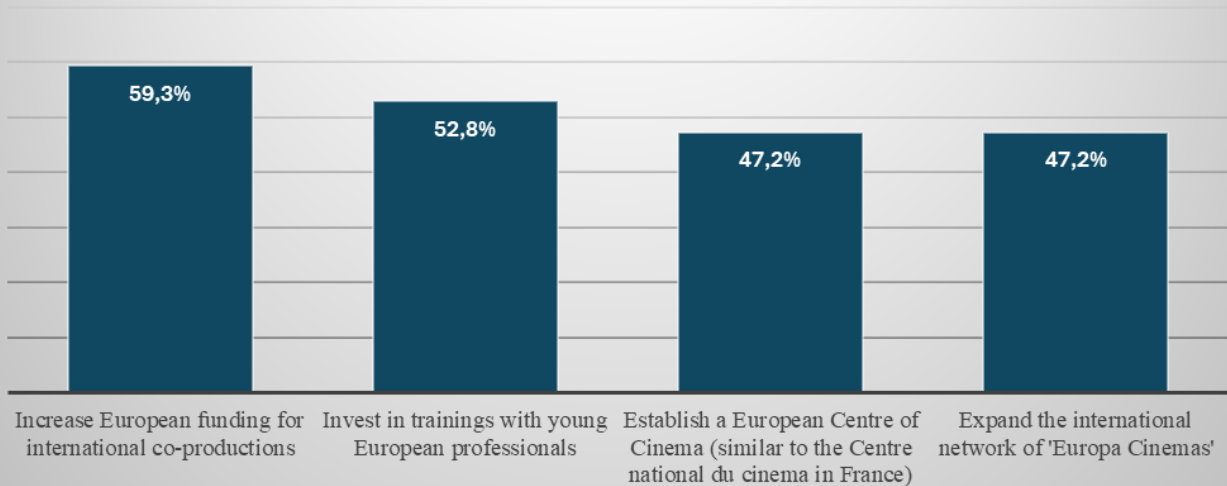


Figure 37 – EU's priorities in promoting the EFI in the international market (II)

EU's priorities in promoting the EFI in the international market (Result from 45% to 30%)

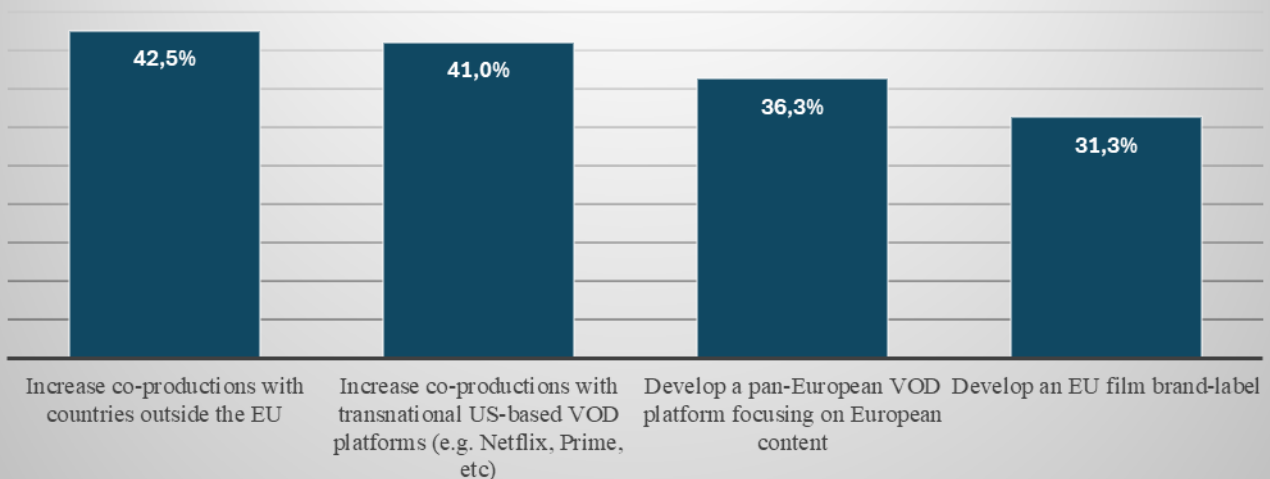


Figure 38 – EU's priorities in promoting the EFI in the international market (III)

A second tier of recommendations received moderate support, with 42,5% in favour of expanding co-productions with countries outside the EU, and 41% supporting increased co-productions with



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transnational, US-based VOD platforms. Notably, more respondents favoured collaboration with global platforms than developing a pan-European VOD service (36,3%), suggesting a pragmatic focus on leveraging existing global infrastructures. Similarly, the proposal to develop an EU film brand label received 31,3% support, indicating some interest in collective branding but not as a top priority.

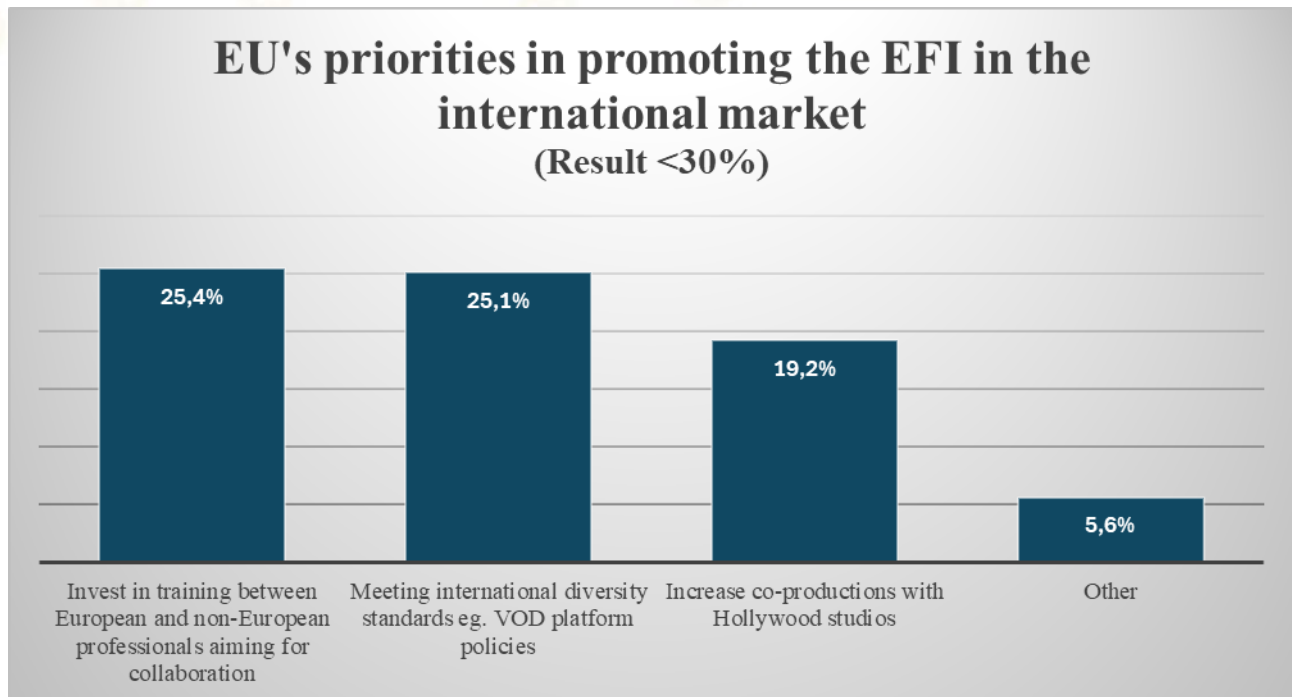


Figure 39 – EU's priorities in promoting the EFI in the international market (IV)

The least endorsed recommendations included investing in joint training initiatives between EU and non-EU professionals (25,4%), a significantly lower figure than support for training within the EU (52,8%), and meeting international diversity standards (25,1%), which continues to be perceived as a less pressing gap for the EFI. Finally, co-productions with Hollywood studios were the lowest-rated policy recommendation, with only 19,2% support. This reflects a broader scepticism about the strategic value of such partnerships and reaffirms Hollywood's status as a competitor, rather than a collaborative ally in the international audiovisual space.

To assess the lasting effects of the COVID-19 pandemic on the European film sector, respondents were asked to identify the challenges they believe have had a permanent impact. The most widely recognised issue was audience engagement, cited by 76,9% of respondents. This highlights a sustained concern about changing audience habits, reduced cinema attendance, and the ongoing difficulty of rebuilding a strong and consistent viewer base.



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Distribution challenges were also identified as a major long-term consequence (66,4%), reinforcing earlier findings that film circulation remains a structural vulnerability for the EFI. Financial constraints followed, with 58,6% of respondents viewing them as a lasting impact. This points to the strain on funding sources and revenue models triggered or intensified by the pandemic.

By contrast, the production sector was perceived to have recovered more rapidly from the pandemic. Only 16,9% of respondents considered production disruptions a long-term issue, suggesting that while initial shutdowns were significant, the sector demonstrated resilience in resuming operations. Similarly, gender disparities were not perceived as a direct or lasting consequence of the pandemic, with just 14,2% identifying them as a post-pandemic challenge. This indicates that film professionals see the gender gap as a structural issue, rather than one exacerbated by the health crisis.

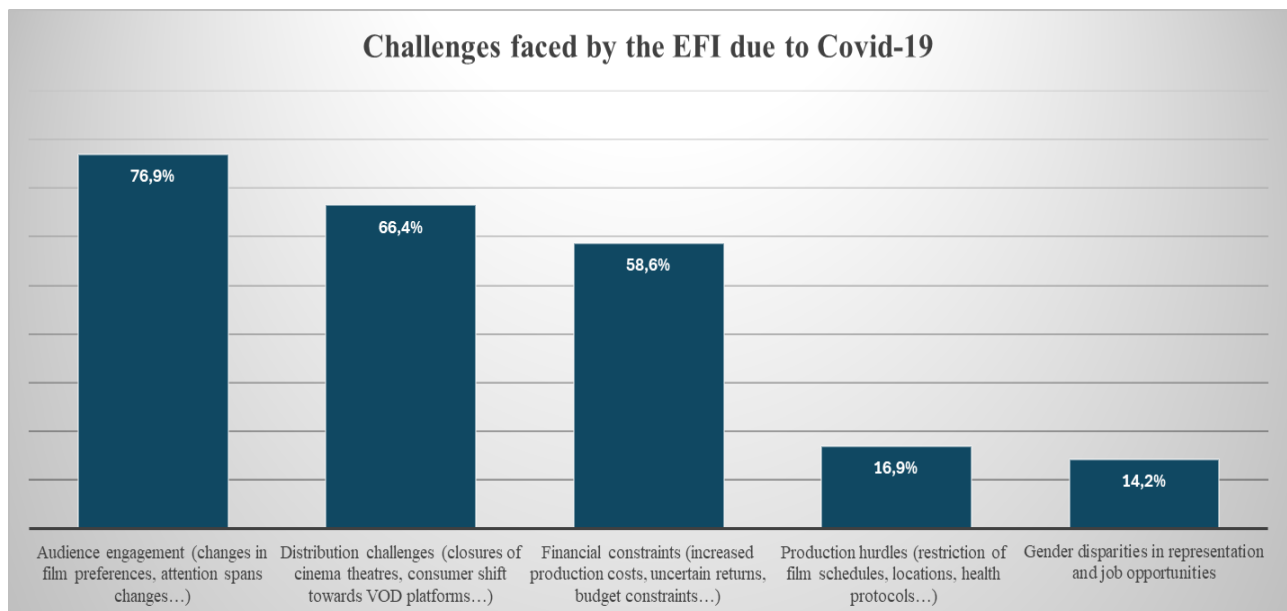


Figure 40 – Challenges faced by the EFI due to COVID-19



A recent area of both concern and interest, in the audiovisual sector, is the growing influence of AI. To assess how professionals perceive its impact on the EFI, a specific question was designed to capture perceived opportunities and risks.

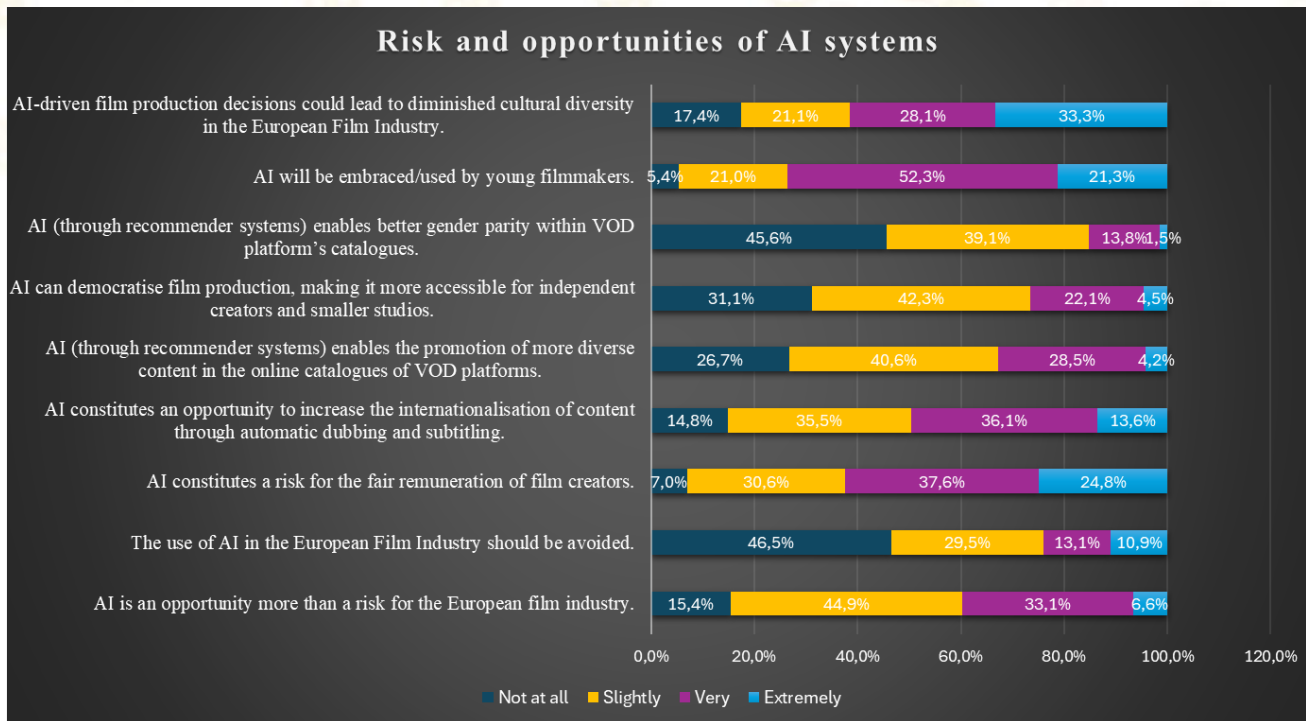


Figure 41 – Respondents' views on risks and opportunities of AI systems (I)



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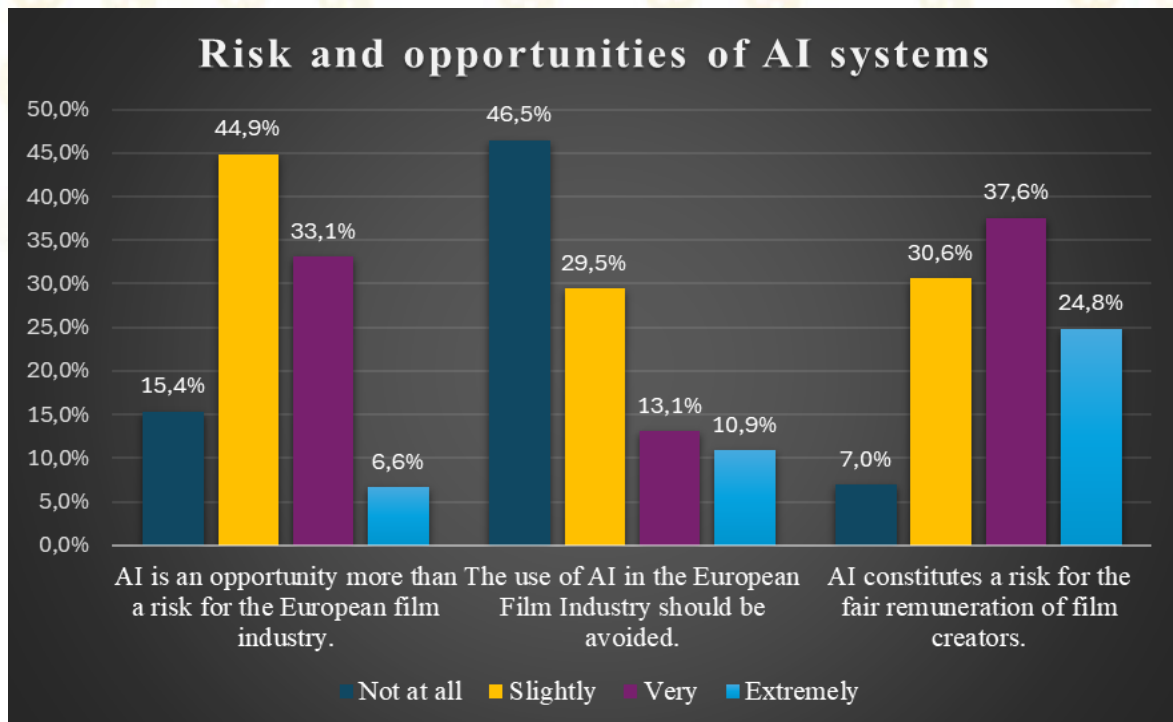


Figure 42 – Respondents' views on risks and opportunities of AI systems (II)

Overall, responses reveal a cautiously open attitude toward the integration of AI. A majority of respondents (46,5%) believe that the use of AI in EFI *should not be avoided*, and a further 29,5% think it *should be only slightly avoided*. This suggests that most professionals do not view AI as inherently harmful and are generally receptive to its potential role in the industry. Similarly, 44,9% of respondents considered AI a *slight opportunity*, while 6,6% viewed it as a *big opportunity*, indicating that nearly three-quarters of respondents see AI as offering some degree of potential benefit to the EFI. However, alongside this cautious optimism, professionals expressed substantial concerns. More than 60% considered AI to pose a *major risk* to the fair remuneration of creators, highlighting anxieties around ownership, authorship, and the value of human labour in the creative process.



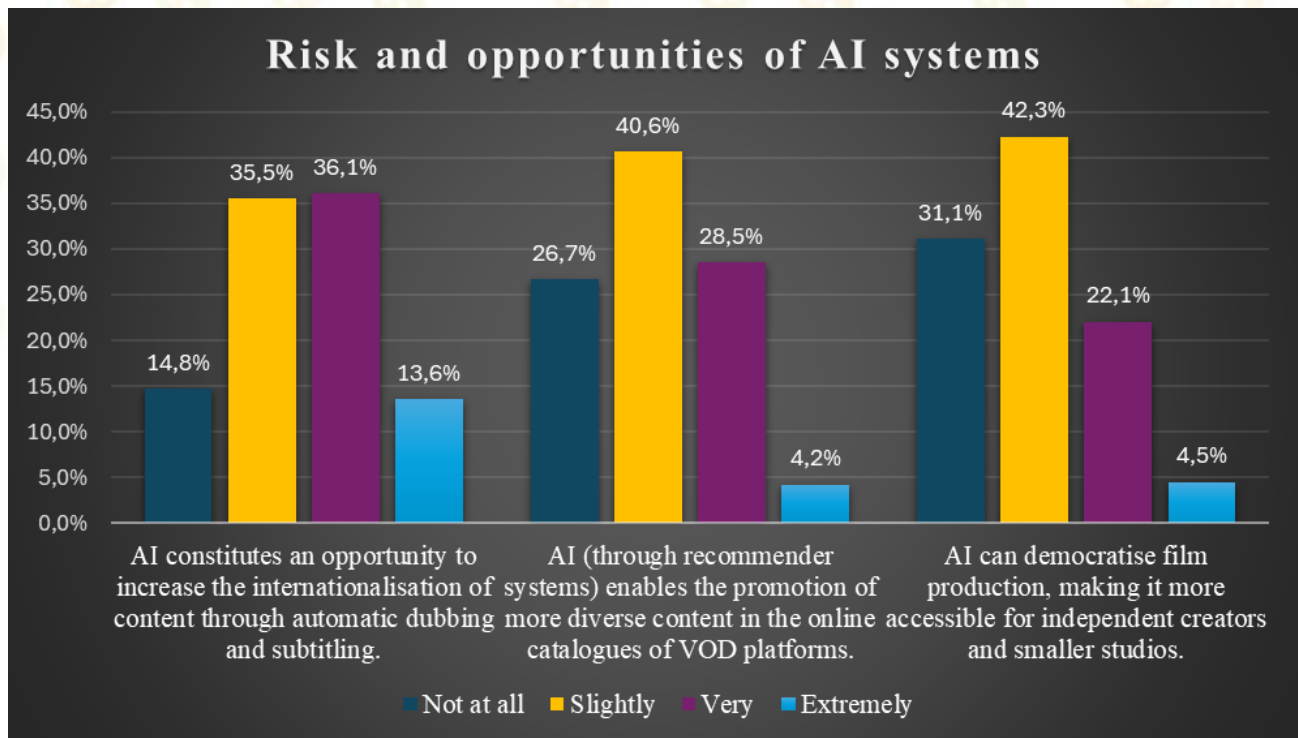


Figure 43 – Respondents' views on risks and opportunities of AI systems (III)

A significant portion of respondents view AI as offering practical advantages for content internationalisation: over 70% see automatic dubbing and subtitling as either slightly (35,5%) or very/extremely (36,1%) useful in facilitating access to broader audiences. Similarly, 71,2% believe AI recommender systems could contribute at least slightly to promoting more diverse content within VOD catalogues, although only 28,5% rate this impact as very or extremely relevant, indicating cautious optimism. Notably, 42,3% consider AI a way to democratise film production, making it more accessible for independent creators and smaller studios.



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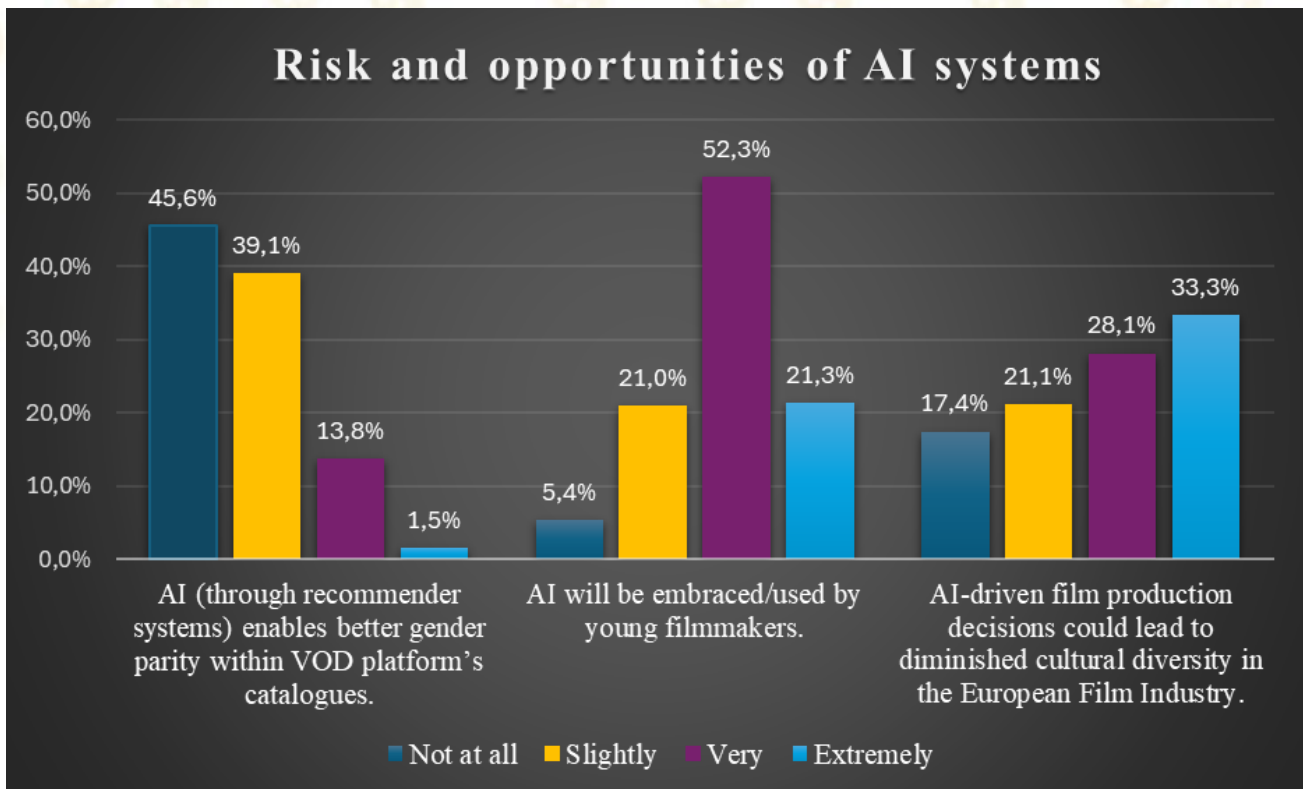


Figure 44 – Respondents' views on risks and opportunities of AI systems (IV)

However, perceptions of AI's social impact are more mixed. Regarding gender parity in VOD catalogues, 45,6% of respondents believe AI offers no contribution at all, while only 15,3% rate its impact as very or extremely positive. In contrast, expectations around generational adoption are high: over half of respondents (52,3%) believe AI will be embraced or used by young filmmakers, suggesting a belief in generational adaptability to technological tools. At the same time, professionals express concern about cultural risks: 61,4% perceive that AI-driven film production decisions could lead to diminished cultural diversity in the EFI, with 33,3% identifying this as an extreme risk. These results reflect a tension between optimism about AI's enabling potential and concern over its possible homogenising effects, especially when guided by opaque algorithms and commercial notions.

Interestingly, perceptions of AI within the EFI vary significantly by professional role. Producers, in particular, appear more optimistic about its potential impact compared to other groups. As illustrated in Figure 45, producers (represented in dark colours) are more likely to view AI as an opportunity rather than a risk, they are 1,9% more likely to describe AI as 'extremely' an opportunity and 1,4% more likely to describe it as 'very much' an opportunity, while 7,8% fewer producers consider it 'not at all' an opportunity. Producers are also far more likely to reject the idea that AI should be avoided,



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with 17,6% more of them selecting 'not at all' in response to that proposition. Regarding the potential negative impact of AI on fair remuneration, producers are again less concerned, with 4,5% more of them considering this 'not at all' a risk. Their optimism extends to cultural dimensions as well: producers are 3,2% more likely to believe AI can 'extremely' enable the promotion of diverse content on VOD platforms, and 10,9% more likely to believe it can 'very' much do so. These patterns suggest that producers may be more open to exploring AI's potential benefits across the value chain, while other professional categories remain more cautious or critical.

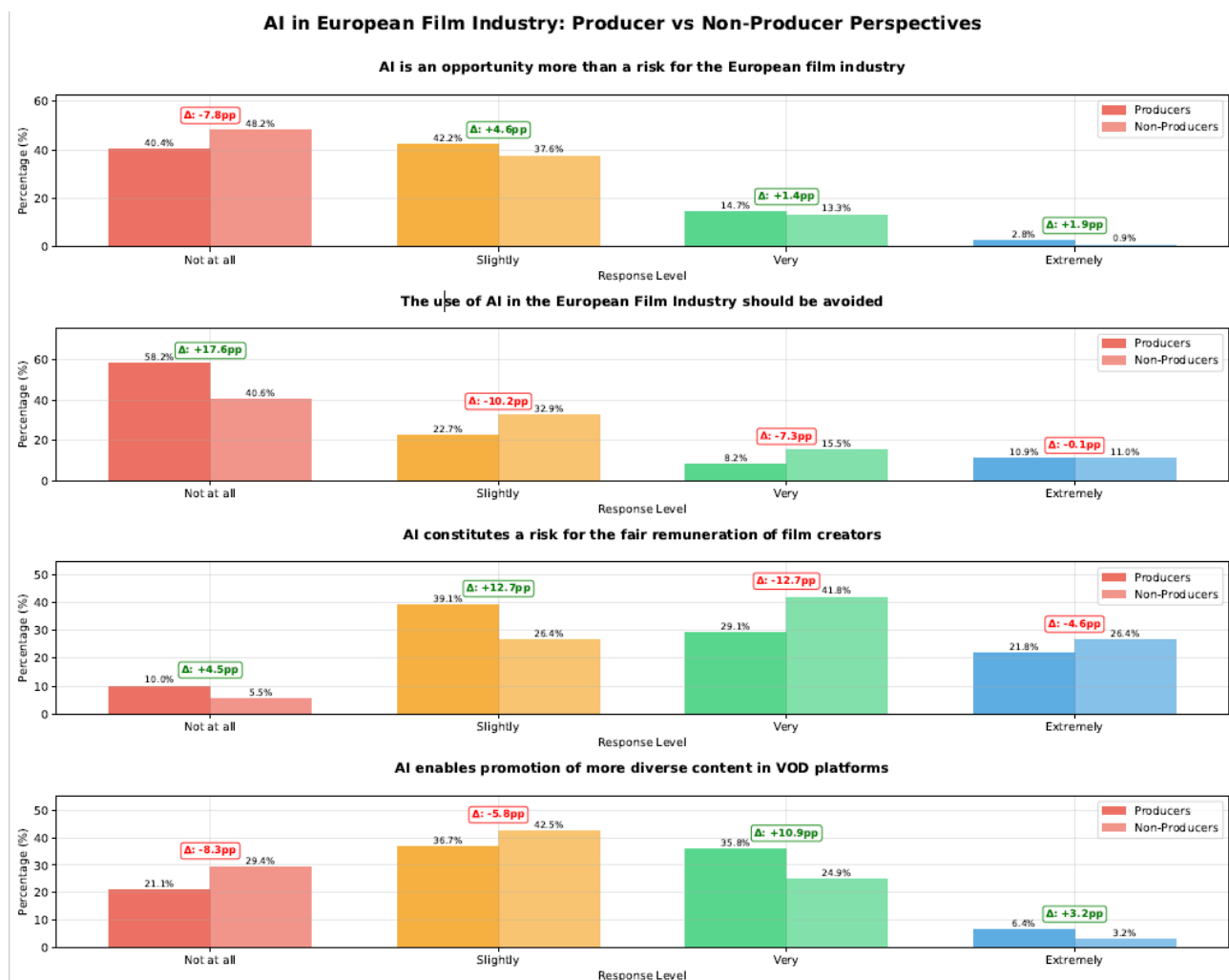


Figure 45 – Impact of producer inclusion on perceptions of AI risks and opportunities (I)



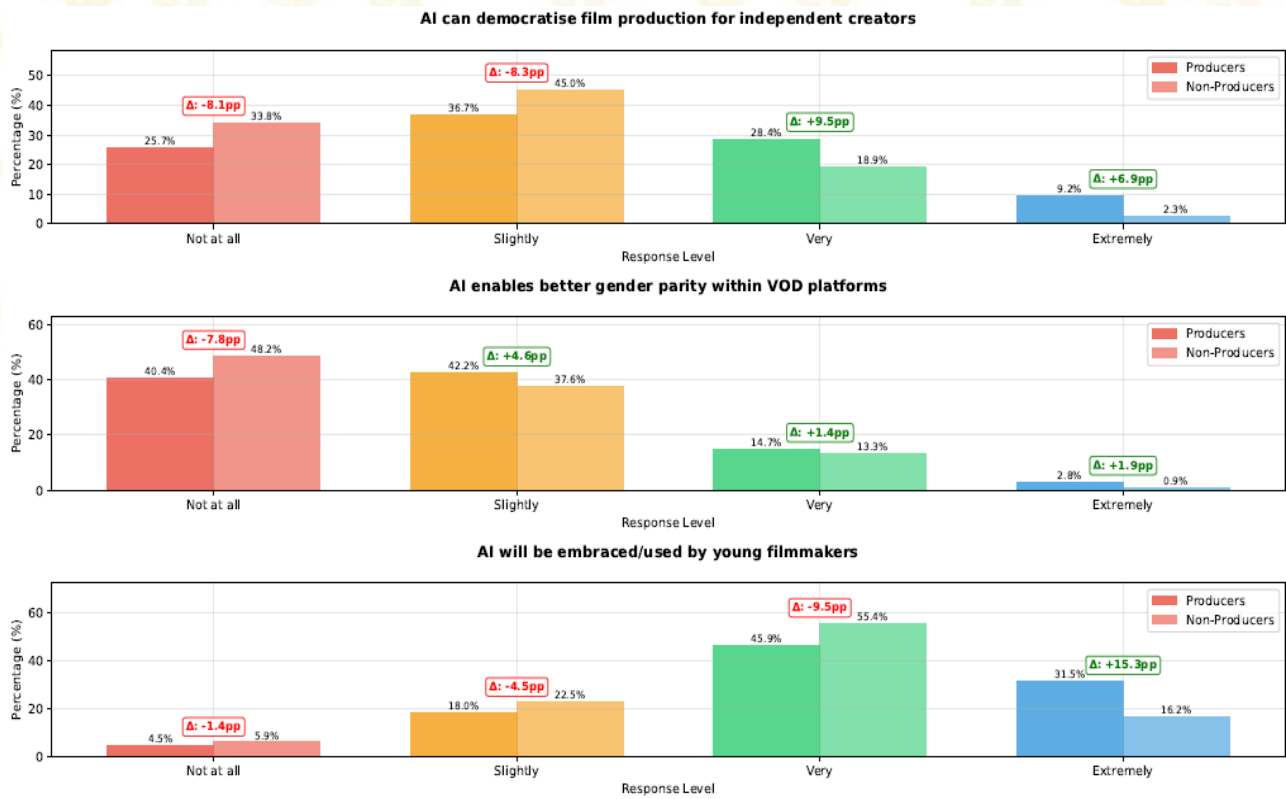


Figure 46 – Impact of producer inclusion on perceptions of AI risks and opportunities (II)



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3. INTERVIEWS

3.1. Introduction

Chapter 3 delves into the findings of the qualitative interviews conducted with stakeholders across the film industry. It involves 37 in-depth, semi-structured interviews with a diverse group of stakeholders in the film industry. Most participants represent pan-European associations and organisations active across various segments of the EFI. The sample was constructed using a combination of purposive and snowball sampling. Initial interviewees were selected based on their institutional relevance and expertise. These participants were then asked to recommend additional stakeholders, allowing the research to broaden and include voices with recognised knowledge. This snowball approach proved particularly effective in accessing a diverse set of interviewees.

Interviews were conducted in English, both in person and online, from January 2024 to August 2024. Interviewees could choose different levels of disclosure, allowing them to express their views more freely. To maintain equal representation and assure confidentiality, we anonymised all interviewees and categorised them into 11 distinctive groups:

Producer: individual producer and association and groups representing producers.

Distributor: individual distributor or sales agent and associations representing them.

Public institution: representatives from public fundings bodies and film commissions.

Exhibitor: representatives from cinema theatres.

VOD: representatives from VOD services.

PSB: public service broadcaster.

Festivals: representatives working directly with film festivals, such as programmers, and responsible for the industry section in a festival.

Author: screenwriter, director.

Promotion: private and public institutions focused on promotion of national, regional or European film content.



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Non-EU association: trade association of non-Europe-based film industry players.

Data analyst: market, audience and data analyst.

Table 1 Interviewees Overview

Category	Number of Interviewees	Code of Interviewee
Producer	10	4, 9, 11, 12, 15, 17, 19, 23, 33, 37
Distributor	4	3, 5, 7, 29
Public institution	6	10, 20, 21, 22, 25, 26
Exhibitor	1	6
VOD	2	2, 36
PSB	1	8
Festivals	4	13, 18, 27, 30
Author	3	32, 34, 35
Promotion	4	1, 14, 24, 28
Non-EU association	1	16
Data analyst	1	31

Table 1 above presents the number of interviewees per professional category, offering an overview of the representation across key segments of the EFI. The interviews, each averaging approximately 60 minutes in length, included 20 female and 17 male participants. A total of 538 pages of transcribed interviews were generated and systematically analysed using NVivo software. Through a combination of thematic and content analysis, these interviews revealed underlying values, priorities, and diverging interpretations of core concepts: this provided valuable insights into the diversity of perspectives across sub-sectors and roles.



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In addition to the survey and interviews, this research included participant observation conducted during the 2024 Locarno Film Festival, specifically within the Locarno Pro industry programme. With an industry accreditation, the researcher Marina Rossato Fernandes attended key professional events from 8 to 11 August 2024 in Locarno, Switzerland. Particular attention was given to StepIn, a closed-door think tank initiative that brings together a curated group of international industry professionals to discuss critical challenges and transformations affecting the global audiovisual sector. In 2024, StepIn focused on the implications of Artificial Intelligence for the film industry, and the researcher observed a keynote speech and two dedicated panels addressing this theme. In addition, three public panels were attended: a masterclass session; a presentation on Eurimages' new Film Marketing & Audience Development Support scheme; and a roundtable on independent film production in Europe, exploring alternative and private funding models. These sessions offered valuable insights into emerging industry dynamics, stakeholder concerns, and policy developments directly relevant to the themes explored in this report.

This chapter is structured around the main themes that emerged from the literature review and were further developed through the qualitative analysis of the interview data. These themes reflect the range of professional viewpoints encountered in the field and encompass 11 distinct professional categories. Each subchapter addresses one of these core themes, presenting the insights and positions expressed by interviewees. While the themes are interrelated, they are organised to ensure analytical clarity and to guide the reader through the complex dimensions of competitiveness in the European Film Industry.

Chapter 3 is organised into six subchapters. It begins by examining how professionals define the EFI and how they perceive its relationship with audiences. The second subchapter explores understandings and practices related to the international market. The third focuses on co-production, analysing its strategic and multifaceted role within the EFI. This is followed by a discussion of VOD, with particular attention given to the impact of transnational streaming services on European markets and professional practices. The fifth subchapter addresses the differing visions of competitiveness within the EFI. Finally, the sixth subchapter concludes with an overview of key challenges and policy recommendations.

The next section addresses how industry professionals conceptualise competitiveness itself, drawing on the insights developed throughout the previous subchapters. Chapter 3 concludes with a final section on challenges and policy orientations. This includes reflections on the enduring effects



of the COVID-19 pandemic, current obstacles to EFI competitiveness, the perceived impact of AI, and the policy solutions that professionals recommend to address these issues.

This structure provides a comprehensive analytical framework for understanding the multifaceted perspectives and strategic priorities that shape current debates around competitiveness in the European Film Industry.

3.2. Defining the European Film Industry: core values and key concepts

To initiate the analysis of interviews conducted within Task 4.1, we first examine how professionals define the EFI and the core values and concepts they associate with it. Understanding these definitions and associations is crucial to contextualising the perspectives of industry stakeholders.

An overwhelming majority of interviewees associate cultural diversity with the core of the EFI, with 19 respondents explicitly referring to it while others referred to it implicitly. This diversity is understood in multiple ways: as a reflection of the variety of cultures within the EU, as a multiplicity of stories and narratives, and as a richness in production approaches. As one interviewee explains, "I think that one of the most important things is that Europe brings diversity. So really, diversity. Diversity in the broadest vision. (In) way of thinking, language, landscapes, traditions. So diversity would be one word even to explain what European film is" (9). The diversity is perceived as a competitive advantage, since it fosters creativity and diversifies production: "because then you can reach different audiences here with different kinds of products. And I think that's actually the best value of it" (19).

For several respondents, this diversity is intrinsically linked to the freedom of creation (3, 4, 5, 15, 32), shaping how films are produced, financed, and distributed. As a production representative explained: "That means that (the) producer is the one that has the control on the film. That's kind of the first step to being independent." (4).

The diversity of the EFI is not limited to the stories it tells but also extends to the ways in which films are produced, financed, and distributed across Europe. The coexistence of multiple national industries, each with its own structures and creative traditions, shapes this complexity. As one professional noted, "That's what I mean by diversity. By freedom, it's the freedom of these actors to decide how much, how to release their films, what ideas to put in their script, how to release their films, so diverse distribution strategies, diverse ways of producing, different modes of financing a film. And also, fundamentally, we have to remember that the European Union is made of 27



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countries, all of which have different languages, different histories, and this is reflected in the diversity of companies and individuals working in the sector. So its competitiveness, diversity, and contractual freedom, I'd say, (are the) three defining aspects of the film sector in Europe" (5).

Therefore, diversity is understood in a broader sense, encompassing not only the content being produced but also the varied approaches to production itself. This is closely linked to the cultural foundations of the EFI, as another interviewee stressed: "What is very important is that we keep in mind the cultural roots of the audiovisual sector in Europe, the cultural dimension for us. So the audiovisual industry is not just an industry, it conveys the cultural expression and the artistic expression of their creators" (34).

At the same time, the EFI remains distinct from other film industries because of its ability to operate outside the sole rationale of market forces. As one professional explained, "We're not eaten by the market, we don't live under the rules of the market, even though the market is pushing and is trying hard to push this agenda. And it's of course political, but I really believe that the very unique specificity of European cinema is not in the market, it is in the content and in the protection of a certain model" (32).

Despite this diversity, many respondents associated the EFI with art house cinema (11, 14, 30), often describing it as distinguished by a particular approach to storytelling (8, 14, 21, 22, 24, 26, 27, 37), an emphasis on inventiveness (2, 24, 35, 36), and the ability to create an impact on audiences. This perspective was also evidenced in the survey, where 'art house', 'support by public institutions', and 'film festivals' were the words mostly associated with the EFI. Unlike mainstream commercial productions, EFI films are perceived as engaging audiences beyond entertainment alone: "It's not limiting itself to entertaining, probably. So even if it's a comedy, there is always some kind of substance that can be subject to, you know, discussing with your friend around the table or arguing with someone about it" (25). This view was further reinforced by the idea that European cinema carries significant cultural value: "Cultural significance and cultural value and creating content and creating films for European audiences that speak to them about their lives and their realities" (12). One respondent summarised this distinction by stating: "I see European cinema more as the independent cinema which embraces culture and not so much the very commercial cinema" (17).

Some interviewees associate the identity of the EFI as bringing life to human narratives, portraying the human experience in ways that resonate across national and cultural differences. One respondent explained: "In most of the cases, you know, telling stories about the human side of life



(...). It's more about this life we're living. We're living here and now, what it means to be human in the society we're living in. Now, despite the cultural differences of being Greek, French, or Italian or whatever. What it means to form a life in our times today. I think this is an element I see out of all the frames" (20). Others framed the EFI as a space for artistic voices to tell authentic stories: "an artistic voice who tells stories about humans that feel real" (30).

Collaboration also emerged as a defining characteristic of the EFI (8, 22, 33). Many interviewees noted that filmmaking in Europe is inherently a collective effort, both within individual productions and at the broader industry level. "The people working here in this industry creating successful projects... it's not an individual genius who can do it. It's very much a teamwork-based industry" (33). Others emphasised that this spirit of collaboration goes beyond technical or financial arrangements, shaping the very identity of the European industry through its creative and cultural depth: "(this) is what Europe has brought to our sector, the culture of collaboration, which is actually quite deep, not only technical and economic but also creative and cultural, which is quite an asset" (35).

This collaborative approach extends beyond Europe, with some respondents noting the support the EFI provides to artists from other parts of the world (4). As one professional put it, this cooperative model is not only central to the European industry, but vital to global cinema as well: "Because I'm sure without Europe and everything that it brings – like festivals, co-productions (...) – without this European meaning of cinema, also intellectual cinema outside of Europe would collapse" (15).

However, some called for a stronger international engagement from Europe, particularly in supporting content creation in emerging markets: "I think Europe should be a continent that helps different actors of the world to develop their own Intellectual property. So it's kind of ironic or paradoxical that right now it's more the US streamers that help countries like Brazil to develop their own stories, when, for example, France is investing very little in emerging markets. Like Southeast Asia is a place where there's a need for investment, and also it could be financially valuable, but Europe is not investing that much" (23).

The role of public support was widely recognised as an enabler of this diversity (8, 10, 14, 23, 28), ensuring that challenging artistic projects could be realised despite commercial constraints. This finding reinforces the survey results where public support is associated with the EFI by 71,5% of respondents. Several respondents highlighted how public funding allows for greater artistic ambition: "I'm not saying we shouldn't do commercial things because it's also good that we have a powerful



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private, let's say, market with commercial films also, but I think what is really unique and specific about Europe is the possibility of getting from the challenging projects, teams that are not audience pleasers, in this way that are reaching artistically and content-wise and political content that the regular market would not allow" (32). Another respondent reinforced this point, emphasising the connection between public funding and art house cinema: "The value of the art house cinema (...). And the second thing which is my immediate thought after this, it's the public funding that is available, which makes especially art house films possible" (14).

More broadly, public funding was framed as a fundamental component of the EFI's structure, safeguarding artistic freedom and diversity: "What is very unique in Europe is that you don't have one player. You have a multiplicity of players and financing sources. Most of them are state funding sources, which actually, the amount of those players sort of protects the talent, directors, authors, producers and sort of guarantees them a certain freedom. It would be a certain freedom, maybe the European way of making. A freedom of creation, a sense of (...) reaching and trying to find something original artistically" (32).

EFI versus Hollywood

The opposition to the North American model is frequently invoked by industry professionals, when defining the identity of the EFI. This contrast serves as a means of articulating what makes the EFI distinct, particularly in terms of values, production models, and cultural orientation. This distinction is also evidenced in the survey, where respondents indicate that the EFI differs from Hollywood mainly in terms of diversity and values.

The primary point of differentiation concerns the way film is perceived: in Europe, film is largely viewed as a cultural good, while in the United States, it is often treated primarily as a commercial product. As one professional explained, there is a fundamental "difference between the American point of view, where they see it as a product, as every car, as every, you know, other things, while we see it as a culture. And this is a difference we have to undertake and keep" (15). Echoing this, another respondent noted "It's just like a huge business and, therefore, they're investing promotion-wise a huge amount of money to sell their films. And this is where Europe has a totally different approach. Europe comes more from the cultural side. It becomes (focused on) the films. As I said in the beginning, it's this spirit of the films which makes European cinema interesting" (1).

A second major distinction lies in the financial scale of both industries, particularly when it comes to marketing. Professionals consistently emphasise that European productions cannot compete with



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the promotional budgets of American films: “A blockbuster coming from the US or even [an] important film – they will invest 25% of their budget on the marketing, and you will never see it at the European levels” (14). This financial asymmetry reinforces a broader cultural difference: whereas American cinema is structured around a commercial notion, the European model is rooted in a complex landscape of national support schemes and collaborative funding.

The third key area of divergence relates to the way that productions are organised. European filmmaking is often fragmented across national lines, with funding mechanisms tied to specific countries, and this directly influences the creative process: “There is also a big difference between the European way of doing. In the US there is a pot of money, a big pot of money where you as a producer can go (...). In Europe... you have it country per country and this makes a difference... And this is also a reason why we are so desperate to keep geo-blocking because the way in which we produce is directly connected to the national way of understanding the film industry” (9).

This model also depends heavily on collaboration, with producers and creatives needing to understand and navigate different cultural and institutional environments: “If you want to produce a feature film or a drama series, it’s a lot of collaborating with other countries, and there needs to be an understanding of our different cultures (...) We have a very different system, and I think these bigger entities are also realising that the way they work, it’s difficult to fully implement here in Europe because there’s a different mentality” (17). This collaborative, open approach contrasts with the confidentiality that is typical of North American studios. “It’s all about openness. It’s all about sharing (...) in the European film industry, we’re actually quite a lot about sharing information” (17).

Professionals broadly perceive the US as representing a distinct model of filmmaking, one oriented more toward commerce than culture. At the same time, some acknowledged that this mentality is not exclusive to any one geography: “I think that this is just models because in the US you have people that feel in the European way, or in Europe you have people [who] feel in the American way” (23). Nonetheless, there was strong consensus that the EFI should preserve its own approach: “I don’t see a point [in copying them] because they do what they do and they have their specific way of making films. Why would we want to copy them? They do it brilliantly. We don’t. No, because I think we should differentiate from that” (17). As another respondent put it, “We must not focus on the comparison with what the Americans are doing, because we’re not doing the same thing – it’s just not the same business” (4).



Some interviewees connected the EFI to the dissemination of democratic values, framing it as an essential vehicle for cultural exchange and dialogue: "There's a lot of cultural interest and the democracy interest and the diffusion of values that are important for society" (24). Another shared that "on the political level, I believe that the European film is a fundamental factor for what we call Europe. Despite the fact that you have to be honest that it's marginalised in a lot of the national policy levels" (26). Within this perspective, the EFI is not simply an industry but a space where narratives can shape public discourse, challenge dominant ideologies, and reflect the evolving political landscape of Europe. The role of independent producers was also highlighted as a crucial factor in maintaining this democratic and pluralistic approach to filmmaking. As one professional explained, "We are bringing the capacity we have as a production company to the series because we believe that then we can control the message. We can articulate the message, which is independent. Which is, in our opinion, a duty of independent producers to expand. To extend democracy. An expression of the free voice of artists" (15). This notion reinforces the idea that cinema is not only a means of artistic expression but also a political tool, allowing filmmakers to engage with pressing social issues and shape narratives that might not otherwise find space in mainstream, commercially-driven industries.

Taken together, these perspectives highlight the inherently political nature of the EFI, not only in terms of how it is funded and supported but also in how it operates as a space for artistic and ideological expression. Whether it be through the diversity of its narratives, its commitment to democratic values, or its ability to resist the pressures of market-driven homogenisation, the EFI is perceived as a cultural and political project.

Connecting EFI identity with audiences

The question of whether a distinct European cinematic identity exists has long been debated in film scholarship (Bergfelder, 2005; Elsaesser, 2012), particularly in relation to the diversity of languages, histories, and aesthetic traditions across the continent. Some interviewees expressed scepticism about the existence of a unified European cinematic identity. Some highlighted the lack of a singular artistic or narrative signature, arguing that the EFI is shaped by the diversity of its constituent cultures rather than a common aesthetic: "I don't think there's a very distinct signature of an overall overarching European cinema, I don't see that" (22). Others emphasised that Europe does not function as a unified cultural entity, which complicates efforts to define its cinema: "I don't think there is such a thing as European cinema because Europe is not a cultural entity, it's made of the diversity of the different cultures" (34).



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Nonetheless, some professionals pointed to distinct cinematic traditions that can be identified in different parts of Europe, even if these do not amount to a singular identity: "I don't think we have a stronger pan-European identity in our storytelling or filmmaking, but with that said, still I think it's possible to identify traditions in different parts of Europe" (21). As one respondent vividly described, "European cinema is like a Rubik's cube, you know, European cinema consists of many different cinemas" (15).

Rather than being a limitation, this diversity is widely perceived as one of the EFI's greatest strengths, fostering a broad spectrum of storytelling approaches, production models, and artistic expressions. This variety is often contrasted with the more commercially-driven, standardised narratives of Hollywood: this reinforces the idea that the EFI is deeply tied to cultural and artistic value rather than purely market-driven considerations: "Cultural significance and cultural value and creating content and creating films for European audiences that speak to them about their lives and their realities" (12).

This distinctiveness, however, does not exist independently of policy decisions. Many interviewees explicitly recognised that defining and sustaining the EFI is not just a descriptive exercise but a political act. As one respondent remarked, "What kind of stories we want to tell ourselves and with which aim. If the European Union is, or the European ID is a political ideology, I mean as much as it hurts for me to say it, it completely failed itself because there's very few people that relate to this community. So the European film industry by no means has managed to create a sense of European identity" (23). Others underscored that European unity is not necessarily achieved through a single, cohesive narrative but rather through an openness to multiple, distinct voices – "because they wanted elements that would unite us all. Finally, the union does not come from the elements that unite, but from the stories that tell the truth of each of us (...). We don't expect to see a European story coming from this, but we want the real story" (26).

Despite these challenges, several professionals maintained that the EFI remains a fundamental space for democratic expression. As one interviewee put it, "We have different concepts compared to Americans. You know, we are culture. Not only an individual product. And we want to preserve it and we expect the European Commission to help us to preserve it because we find independent production as a limit of democracy, an element of diversity of all the countries. Having European identity. That's what we are doing as a political representation, political, economic, you know, and also we facilitate cooperation between our members" (15).



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While the EFI is recognised within the industry as culturally diverse and distinct from Hollywood, most professionals believe that European audiences do not connect with European cinema as an idea. Instead, audiences are more likely to associate films with their national origins rather than with a broader European identity. As one interviewee explains, "I would guess that Europeans outside the industry perceive films rather by nationality (French, German, Italian, etc.) than as 'European'. This might be slightly, but not entirely different for an international non-European audience" (37). Others suggest that audiences do not actively engage with the idea of a film's European identity at all, focusing instead on the content itself: "I think the audience doesn't care. No, I think the audience wants to see a movie and an interesting movie" (25).

Outside Europe, opinions differ on how distinctly European cinema is perceived. While some professionals believe that it holds a recognisable identity, the prevailing view is that it lacks clear visibility as a unified industry: "Outside of Europe, I think you have a clear definition because there are not that many movies making it outside Europe, and these are really mostly clear art house productions" (28).

Instead of being identified as a cohesive cinematic entity, European films are often categorised under 'world cinema' and primarily associated with the art house sector: "Outside Europe, it's all world cinema. Then we end up in that bucket of like... then we're all art house, basically. And then what happens when you're in the art house? Then you look at every film as its own individual work, and you're expecting it to be challenging or different or new in some way" (30). This perception indicates that while European films can achieve international recognition, they are rarely marketed under a collective European label, raising questions about whether developing an EU film brand could strengthen their visibility.

The lack of brand recognition at the production level also contributes to this challenge. While European actors may be well known, production companies rarely gain international visibility. As one professional pointed out, "Even if you do the whole production, the name of the production company is always hidden, and (...) you would find the name of Penélope Cruz very big in a film produced by a European and sold in the US. But you would never find the name of the production company" (9).

Developing an EU brand for the EFI

The idea of promoting European cinema under a common EU brand remains a debated topic among industry professionals. Some point to the success of branding efforts at the national level, where



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distinct cinematic identities have been established: "French comedy is definitely something that people understand. Greeks, new wave. I think people understand what it is. You know, Scandinavian dark thrillers? Everyone understands what it is, so there is some branding, much more local branding within European cinema itself" (14). National agencies, such as Unifrance, have successfully promoted their films internationally, but always under a national rather than a European label: "Unifrance, for example, was created to export French films, and they've been very successful. They're not saying this is a European film, they think this is a French film. And it has that kind of appeal, same for Italian films and for Polish films. I think we still tend to give it a country label more than a European label once we're out of the EU" (6).

At the European level, there is no equivalent branding initiative for the EFI, although some professionals acknowledge the valuable work of European Film Promotion (EFP), a network of 38 national institutes, financially supported by the MEDIA programme, with the aim to promote the visibility of European cinema outside Europe: "(It's) easier not to go into the different booths, national booths, or individual booths from sales, but just like, you go there [to the EFP], you meet them" (1).

However, the lack of strong EU competence in cultural matters at the European level is seen as a barrier to developing a cohesive European film policy: "Outside Europe, do we speak about French, American, Spanish films? I don't think that the concept of European film exists in reality. The thing is that, as I told you before, there is no competence of the EU on cultural matters. Each country has its own cultural policy" (4). Although that statement is not entirely accurate, since the EU holds competences to 'support, coordinate or supplement' (European Union, 2008, Art. 6 of the Treaty on the Functioning of the European Union) Member States' activities in the cultural sector, the interviewee expressed dissatisfaction with what they perceived as limited action.

While some professionals support the idea of an EU film brand, others remain cautious about its implications. A key concern is ensuring that any European initiative remains inclusive of smaller countries and does not disproportionately benefit larger film industries: "Any European initiative would have to make sure that it included everyone in Europe, including lower-capacity countries. I think that'll be a challenge" (12). Others stress that while a unified market could strengthen the EFI's global position, it should not come at the cost of national and cultural diversity: "I understand the idea of a single market or one big market, it helps, it strengthens us, but we cannot forget the diversity and the cultural differences, which make us also strong and more interesting in the eyes of the international market" (13).



Concerns about the risk of reinforcing imbalances within the EFI, where some EU Member States dominate to the detriment of smaller markets are further illuminated by the analysis of box office data (see Figure 53 in the Annexe). The prominence of countries such as France, Germany, Italy, and Spain is striking. Among the Top 60 European films by admissions, these countries appear most frequently. And when the UK is also considered, only three films in the dataset were produced without the involvement of at least one of these five countries. This concentration highlights the structural asymmetries that persist within the EFI and raises questions about equitable representation and support across Member States.

Some film professionals see the idea of a European brand as an impossible mission, given the diversity of its industries and policies: "Even for countries like France, it's difficult to have one integrated policy on how you will support French films. So it's really impossible to do it at the European level. I mean, what would you promote?" (23). Others question how audiences would perceive such a brand: "I would find it extremely difficult and challenging. I think for a lot of the audience, they would have... what's a European film? What kind of images does it create in their minds as an audience?" (6).

Scepticism also stems from broader criticisms of how Europe itself is perceived, with some arguing that the idea of a unified European identity is too contested to function as a strong cultural brand: "There are so many criticisms about Europe and the image of what would be European. It's so criticised by a lot of communities... It's hard to make Europe a brand, you know?" (2). Others question whether branding films as European would add any real value for audiences: "If this has some extra value to the content from the point of view of the audience, from our perspective as producers, yes, it's like a brand, like hey, this is done here... So I'm not sure this adds something extra" (19).

Despite these concerns, some professionals believe that an EU film brand could enhance the EFI's competitiveness and visibility: "If you think as European cinema, it's going to be much more competitive than the cinema of a specific European country" (29). This approach could provide advantages in various industry contexts, including festival representation: "It's also easier to reach, for example, the voice within festivals abroad if you're standing for European cinema" (28). Others suggest that branding could also be useful in a VOD context: "If we were talking about labelling films as European, I think there are plenty of ways to do that. I think it's totally possible, I think it would be useful because it could be very useful that on platforms, for example, there is a way to search for



European films and that there are some that are commonly shared, and it should not be the platform's decision on that" (34).

Another argument in favour of developing a European brand is that audiences in other regions already perceive cinema in continental terms, rather than as associated with individual countries: "I think most Europeans, unless they're in the cinema industry, cannot really say, identify themselves. But what they say is South America, and then they have an idea of what they think that means. And I think this is also what we have to work for, for Europe. And again, that's where European soft power and the European Commission have a role to play because coming as Denmark or as, I don't know, Estonia, or Belgium and wanting to have a brand in India or Japan is just very difficult. So it would be much better if we could have a European kind of promotion, a European brand" (10).

Ultimately, while some professionals support a more coordinated European film identity, the challenge remains in defining what elements should be promoted and how they should be curated: "But I think like it's always about curating and deciding, OK, we have this catalogue of European films. It cannot be everything" (10). Some suggest that a curated selection of films could strengthen European cinema's competitiveness: "We can make our competitiveness of European films stronger by selecting some. For instance, let's say if we trust that those films being selected for Cannes or Berlin Film Festival are something which could circulate, then we could support those films even more" (10). Others suggest focusing on films with a potential to reach a broader audience: "I'm sure if we will support the films which are the best in every country, films according to the film academies in our countries... they are much more audience friendly and they can be much more popular outside" (15). However, others stress that any branding effort should avoid being too prescriptive about artistic content: "The special feature is that they are made by European people in Europe. It's not an artistic feature, it's not about the stories that are told. This would be too arbitrary, I think" (34).

The question of whether the EFI should target specific geographical regions as part of a broader European branding strategy is met with skepticism by most industry professionals. While the idea of strengthening the global presence of European cinema is widely supported, many argue that selecting a single region or country for targeted promotion would not be an effective strategy. This view aligns with survey findings, where respondents did not express clear preferences for focusing on specific geographical, cultural, linguistic, or economic criteria highlighting the absence of consensus on regional targeting as a promotional approach.



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The diversity of European productions, both in content and market potential, makes it difficult to apply a uniform approach: "No, because I think we make lots of different works, and I know as well that sometimes there's a film which does really well in Latin America or certain Latin American territories, and a film that does really well in Japan. I don't think there should be a strategy of focusing on one territory" (17). This sentiment is reinforced by those who see international distribution as a highly case-specific process, where different films find success in different markets depending on a variety of factors: "It's a case-by-case scenario. I don't see how this kind of general policies would work" (19). Others highlight that market characteristics vary significantly, making a more flexible approach preferable: "I think it's good to have a holistic approach, because not everything that works in one place works in the other one" (24).

Despite these concerns, some professionals acknowledge the potential benefits of coordinated efforts to increase the EFI's global presence. While selecting a single region for promotion may not be feasible, strengthening European-level support for international distribution is seen as a worthwhile initiative: "It takes time to orient those policies because it's... what we talk about, politics, to legitimate, to get a more intensive distribution of our content in certain territories. It could be interesting to have a better involvement of decision-makers and to work on a European scale to reinforce the activity of European content in other countries, other regions of the world, certainly" (2).

Some also point out that similar initiatives are already being carried out at the national level through bilateral agreements (26). Additionally, film professionals note that some regions have stronger historical, cultural, or economic connections with Europe, which could serve as a basis for more strategic international outreach: "I think you need the geographical network of course, because you have, like with the policies, for example, different market characteristics. But you could also define different industries around kind of the shores" (28). However, rather than committing to a fixed regional focus, many suggest that international promotion should be guided by ongoing market analysis: "You can explore and see what would make sense instead of just picking one region and saying, 'That's it, we'll only focus on this'" (6).

3.3. International market

The way the EFI is positioned in the international market is shaped by the differing ambitions and perspectives of industry professionals, depending on their roles within the sector (1, 17, 12, 20, 23, 34). Stakeholders do not share a unified strategy, as their priorities vary based on their specific



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objectives, resources, and market positioning. While some professionals actively seek international expansion, others are primarily focused on sustaining their work within established networks. These differences influence how the international market is understood, with many viewing it primarily in relation to the European market rather than to a global one (1, 17, 13, 19). As one interviewee explained, "The biggest market for European films is inside of Europe, the neighbouring countries, the co-production countries" (1). The focus on the EU market is evident in the analysis of the global reach of the Top 60 European Films by admissions from 2013 to 2024 (see Figures 53 and 59 in the Annexe), where the EU countries emerge as primary markets for EU films.

As the EU internal market is widely regarded as the primary international market for the EFI, co-production stands out as a key strategy for expanding distribution across borders. By establishing partnerships at the early stages of development, producers can facilitate cross-border distribution and ensure films are tailored to multiple audiences. One professional explained this approach: "Strategies to achieve it are to co-develop, so, to start to look at content that starts with particular audiences from the very early stage; one strategy. Another strategy is to co-distribute, I would say, to find distribution models and networks that are crossing borders. It is a strategy that's slightly underused and underserved, but has great potential, specifically in Europe. The core strategy within Europe to reach an international market is to co-produce" (22). However, despite the opportunities offered by co-production, a lack of common industry-wide strategies persists, with many producers prioritising the completion of their films rather than actively planning of these films long-term success in international markets.

Some industry professionals recognise that producers do not always prioritise international market strategies during development, as their primary focus remains on completing the film (2, 22, 33). This approach is often linked to the nature of filmmaking itself, where creative and production concerns take precedence over commercial planning. As one interviewee explained, "When you develop a project, you don't think about it. It's not as a filmmaker or even as a producer, you just don't think about it. It's not possible. You don't make a film to reach a market. You make a film to reach an audience" (32).

At the same time, structural and financial constraints also shape how much consideration producers can realistically give to international strategies. Several interviewees pointed out that many production companies operate with limited resources, which makes long-term planning difficult: "Most companies are 'very small companies' most of the time and the main goal of these companies



is to produce and to complete the production, so having all this reflection that we would like to support with this new programme takes time. It takes resources and a lot of companies do not have these resources to do this. And it's not a critique, it's just a fact" (25). The survey results also endorsed this view, revealing that 60.4% of respondents identified limited budgets and 56.4% cited limited marketing strategies as key obstacles preventing the EFI from reaching international markets. This alignment between survey and interview data highlights the structural limitations that hinder more ambitious international strategies.

The complexity of financing in Europe further reinforces this dynamic, as securing funding within national and European systems already presents significant challenges: "I don't think producers have a full understanding of how they could exploit their works in those territories, because then you depend on your co-producer in those territories. We focus on how we finance films in Europe, which is already very complex, and how do we bring these films in the market?" (17).

Some interviewees argue that earlier involvement of key industry players, particularly international sales agents, could help bridge this gap. They highlight that strategic planning should begin in the early stages of development to ensure that films are positioned effectively for international distribution: "There should be many more strategies, budgets, reports in the beginning, in all the development phases of a project. I think as well on the marketing side and on the distribution side, it should be much more precise [regarding] what is the strategy that would be built when the film would be ready to be delivered. At this stage, many producers don't exactly know which would be their audiences" (2). These perspectives suggest that while many producers focus on the creative and production aspects of filmmaking, stronger collaboration with other industry players at an earlier stage could enhance the market reach of European films.

Many distributors remain primarily oriented towards their national markets, which limits their engagement with broader international strategies. As one professional observed, "Distributors, they are totally focused on their territory and they don't want to see anything else" (24). This localised approach means that even when opportunities exist for films to travel beyond their home markets, distributors may lack the incentive or resources to pursue them. Sales agents, on the other hand, operate internationally but often face competition among themselves, which can make collaboration more challenging. While they possess deep knowledge of different markets, some professionals believe they should expand their understanding of audiences rather than focusing solely on existing industry relationships: "The international sales agents, yes, they do travel everywhere. They know



a lot of particularities of the different markets (...), and they do have a lot of knowledge of that. But maybe they would need to get more savvy about the audiences themselves, not only the distributors, but actually to better understand the audiences. And there's a need to have more studies. That's also part of the solution, to have more audience-driven studies, not only figures, but also profiles of audiences that are interesting to tackle" (24).

Some film professionals point to the need for a more coordinated approach among sales agents, particularly in terms of market intelligence and industry representation. While they are often in competition for the same films, there is also recognition that they share common challenges and could benefit from a stronger collective presence: "They wanted to have a European representation, even though, of course, like..., companies are competitors because they're reaching out for the same films, but they have, like, some needs in common: to have a better knowledge of the marketplace, to reach out also to the European institutions or national organisations like institutions, to reach out to film markets" (3). However, the small scale of many sales agencies poses an additional challenge.

This dynamic also affects the involvement of sales agents in early-stage film development. Some professionals argue that sales agents should play a greater role in shaping projects from the outset, ensuring that films are positioned for success in international markets from the beginning: "There are key partners that should be probably involved more in the development of film projects, valid production. It's the international sales agents. From what I understood, they are not involved enough in the development of projects and well, they are also in competition between them" (2). At the same time, there is recognition that many industry players prefer to rely on familiar methods rather than exploring new models for distribution: "A lot of times people just keep it simple. You know, they don't want to waste time looking for new methods. They're using the ones they've done in the past" (11). These reflections suggest that while distributors and sales agents play essential roles in the circulation of European films, a more strategic and collaborative approach, particularly in terms of data collection, audience research, and early involvement in film development could enhance their impact in the international market.

Expanding the presence of European films in international markets faces several structural and practical challenges. Language remains a significant barrier, as European productions are often made in multiple languages, limiting their accessibility in markets dominated by English-speaking content (5, 14, 27, 30, 35). Cultural differences further complicate international distribution, as films



rooted in specific national contexts may struggle to resonate with audiences beyond their home territories (22, 27). Beyond linguistic and cultural barriers, professionals also highlight the need for greater investment to support international marketing and distribution efforts (25, 29, 6).

Without adequate resources, even films with strong international potential may fail to find their audience. As one interviewee noted, “I’ve been a little bit sad to see that like, that felt like an opportunity, then maybe the most commercial, the most publicly appealing but not too locally specific, (but some) European titles (...), like one or two or three films, maybe should have had a chance in the US market or in other countries. And I can’t think of an example where I’ve seen that, but and that I think is just like there are no sales structures and people don’t know how to sell them and people don’t know how to buy them for their local market. So, even when the cinemas would need them, then it’s the distributors who don’t have the networks and the skill sets to place that kind of film in a theatrical slate” (30).

This lack of established pathways for European films outside of the EU suggests that even when opportunities exist, the infrastructure to capitalise on them is often missing. As Figures 53 and 59 in the Annexe shows, the US and non-EU film market (UK, Russia, Turkey) represents important markets for European films. Additionally, other territories including China, Australia, Japan, South Korea, Brazil and Mexico suggest untapped potential for increased visibility and international distribution of EU productions, pointing to opportunities for expanding the global footprint of the EFI beyond its traditional core markets.

Another challenge is the absence of a unified European approach to international market expansion. While co-productions allow films to circulate across a few participating countries, there is no overarching European framework guiding distribution and promotion strategies on a global scale. One professional reflected on this issue: “The thing is that there are no stakeholders at the European level. I mean, we have European co-productions that gather a few countries, so it always comes from national stakeholders or national companies or national businesses” (34). Therefore, a “lack of European vision” (36) was identified as a key issue, suggesting that without a clearer strategy, efforts to expand the EFI’s international reach will continue to face structural limitations.

Several factors are identified by professionals as key drivers in expanding the international reach of European films. In particular, having an international cast is perceived as an advantage in making films more marketable and accessible to a wider audience (1, 6). However, beyond casting choices, content remains a crucial element in determining a film’s ability to resonate with international



audiences (11, 15, 18). The themes, storytelling approaches, and artistic vision of a film are also widely seen as shaping its potential for success beyond national markets.

Alongside strong content, professionals emphasise the importance of investing in marketing and audience engagement from the early stages of development: "Focus on marketing and audience design from early development of the film and [include] sufficient budget for development and PR" (37). Without well-planned promotional strategies, even films with international appeal may struggle to gain visibility.

Film festivals are widely regarded by professionals as a crucial mechanism for increasing the international reach of European films (5, 6, 7, 8, 10, 13, 18, 29). In addition to strong content and marketing strategies, selection for major festivals is perceived as a decisive factor in determining whether a film will secure international sales and broader visibility. As one interviewee put it, "What makes a successful film internationally is their selection into a Film Festival" (13). Festivals act as global showcases, creating pathways for distribution and exposure in other markets. Yet, as another professional noted, this visibility is not automatic, as budget constraints and the need for professional marketing remain essential even after selection. Although film festivals are described as "essential for art house, independent cinema... (they) also require a budget for marketing. If you have a film in Cannes or Berlin and do not have a publicist, your film does not exist" (29).

Additionally, film festivals are perceived as quality markers: "Festivals (are) a filter of quality that will give film a stamp of special films and will be the ones that international distributors will look [for] first" (29). This stamp of legitimacy often determines which films are considered for distribution, sales, or further investment, thus highlighting the central gatekeeping role that major festivals play in the film value chain: "But of course it's not every festival [that] has such a label for the main audience to bring people into cinema afterwards" (28). This raises concerns about the market and power concentration in some film festivals.

Interviewees also share critical reflections on the structural weight that festivals carry in the EFI. While festivals are widely recognised as crucial platforms for visibility and validation, as confirmed by the survey's results, some professionals noted that their dominance may influence funding priorities and content development strategies. "There is a mechanism I see for many years implemented in the whole European system of supporting which is targeting the biggest festivals. Because it keeps all of us going only in very niche productions," noted one interviewee, who further argued that "festival programmers have very special taste and they are programming their festivals



rightly for niche people and for niche audiences, and we leave a huge part of the European audience without films to be watched during the weekend, just to, you know, to go outside and to watch a film which is uplifting, still intelligent, still smart, but easier to accept" (15).

This critique finds resonance in the academic literature, which has identified the emergence of the festival film as a genre shaped by the expectations of festival programmers and juries (Vallejo, 2020). According to these studies, films are often tailored to fit a particular model to increase their chances of being selected and distributed through international festivals. This contributes to the standardisation of content, as producers and creators align their projects with perceived festival expectations in terms of narrative style, thematic focus, and aesthetic choices. As a result, while festivals play a crucial role in the international circulation of European films, they may also inadvertently limit the diversity of stories and forms that reach global audiences (Evans, 2007).

As noted in the literature, festivals therefore act as gatekeepers, deciding which films are worth seeing and which are not (Taillibert & Vinuela, 2020). This perspective aligns with concerns raised by industry stakeholders about the disproportionate influence that festivals have in shaping not only visibility and recognition but also access to funding and distribution opportunities. One stakeholder summarised the problem bluntly: "If they (films) are selected to the festival then the sales agent is appearing and then the distributor is appearing. If you don't have any success in Cannes or Berlin, you will not have any distribution. This is wrong... We shouldn't support distribution only after the festival accepts a film. We should create mechanisms of supporting the distribution of films which are audience-friendly" (15).

Besides these structural and financial strategies, professionals also point to the need for a more diverse and flexible approach to distribution: "Don't take just one way of showing the film and distributing the film. Make sure that you go diverse. You can combine film festivals, cinemas and streamers as well (...) But...make sure that you go on different types of media" (6). Exploring alternative partnerships, including collaborations with cinema chains outside the EU, is seen as another potential avenue to strengthen European films' presence in global markets: "I know that Europa Cinema's network used to have funding for the world, not just for the EU. So they were actually in partnership with cinemas all around the world that were committed to showing European films to the audience, but this is gone now. So this might be something that we could consider [doing again]. Could we find funding to do partnerships with cinemas located outside of the EU, for example?" (6). These reflections suggest that increasing the international presence of European



films requires not only strong content and co-production strategies, but also sustained efforts in marketing, distribution, and audience development.

Networking and industry relationships are widely regarded as essential in securing international distribution. Establishing strong connections with key players in different markets can determine whether a film reaches its intended audience: “The medium of the filmmakers is film, but the medium of the film industry is people, so very much is about relationships and understanding who can you communicate this thing you are selling to” (30). Here, film festivals appear as an important platform to connect talent with the industry (13, 18): “It’s also always very important to get professionals from these countries to Europe in order to expose them to a lot of films from here” (18).

Some professionals suggest that a more structured approach to industry collaboration could improve European cinema’s international presence: “I think there have been a few lately where (...) distributors, the national distributors, they just talk to each other and they share resources and they have like, ‘this is our research and we’re doing this on this date’ and (...) then you can share the cost of having talent too, you can do so many things just by communicating and working together. Because they’re not competing, they’re in different territories and they, just by synchronising their communication and sharing their assets and so on, they can actually help each other and make the film an international phenomenon which serves everybody” (30). This reflects a broader perspective that expanding the EFI’s global reach is not just about individual films, but also about creating stronger industry networks that facilitate knowledge-sharing and coordinated strategies.

In addition to industry cooperation, professionals highlight the importance of understanding global markets and learning from international counterparts: “We think it’s beneficial for European professionals to be able to network with extra-European professionals, because you need to learn, you need to understand the differences, you can have inspiration” (13). The ability to navigate international distribution landscapes requires both knowledge and access, with some interviewees stressing the importance of building the right connections: “You have to have enough contacts to get at least there to have a direct contact with people that make your film available worldwide, and this is through human touch” (13). These perspectives suggest that expanding the EFI’s international market presence requires a combination of strategic choices, such as casting and co-production, alongside structural improvements in marketing, networking, and distribution coordination.

Finally, some stakeholders question whether the EFI should prioritise global markets or focus primarily on strengthening its presence within Europe. Public funding for European cinema has



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traditionally been justified as a means of supporting local industries and ensuring that films are made for European audiences. One interviewee reflected on this, stating that “We have to remind ourselves the reason why we had public funding to start with is to actually make films also for our own industry, for our own citizens. And then, of course, if we can have them exported and (there are) other people who like to watch them, that would be fantastic” (10). This perspective suggests that, while international success is welcomed, it should not come at the expense of the EFI’s core mission of serving European cultural and artistic expression.

Some professionals argue that maintaining a strong European market should be the primary concern: “You have to ensure that you promote the European film industry within Europe to make sure it is competitive within Europe” (5), ensuring both competitiveness and cultural diversity within the continent before pursuing global ambitions. “(There are) two ground pillars, competitiveness and diversity, and I still think it’s important to secure this cultural diversity inside Europe, and that means that we need to be competitive in our own markets. And I think that’s, at least in my head, still the most important thing. And then, if we can, also be globally successful” (21). Others point out that not all films are suited for international distribution, as some are made with very local audiences in mind: “There’s also, dare I say, the consideration that some films are not meant to travel. Some films are made for very local audiences. And then you might be better off looking for a diaspora” (6).

Financial considerations further shape these perspectives, as expanding into global markets requires substantial investment in marketing and distribution, which may not always be justified by potential returns: “It’s also very much money motivated, right? Because to exhibit the film in that country, it requires having a marketing budget. We need to put that on a platform that also costs money, there’s personnel involved, and they’re just looking from [the viewpoint of], ‘OK, can we make money out of this or not?’” (11). This view is reinforced by the survey results, where a limited production budget (60.4%), along with weaknesses in marketing (56.4%) and distribution strategies (55.2%), were identified as major obstacles to the EFI’s international competitiveness.

The complexities of entering highly competitive global markets also contribute to the view that the EFI should not treat international expansion as a universal goal: “There’s something about how our national films move into this global marketplace where there are just [too] many hoops to jump and the competition is very high. And I think it’s also OK, like most of our titles don’t need to have international careers” (30). These perspectives highlight the balance between the drive for



competitiveness and the broader purpose of the EFI, which is largely perceived as culturally diverse and as playing a societal and democratic role, as discussed in the previous section.

3.4. Co-production: a key mechanism for the EFI

Co-production is unanimously viewed by industry professionals as a necessary and highly positive aspect of EFI. It is not only a financing tool but also a means of fostering collaboration, expanding professional networks, and ensuring that European films can be made and distributed beyond national borders. Across all interviews, co-production is described as an integral part of how European cinema operates, shaping the industry practices. Analysing the Top 60 European films by admissions from 2013 to 2024 (see Figure 53 in the Annexe), 29 titles were co-productions, most of them involving EU partners, and 15 included more than two countries in their production, revealing the central role of co-production at the EFI.

First of all, co-production is perceived as a need: "It's very often a necessity because you cannot raise enough finance in one country. In a very few countries, you can raise the finance for the project only in this country" (25). This necessity is even more pronounced in smaller markets, where financing an independent production without international collaboration would be nearly impossible: "For some producers in smaller territories, you have to [do co-production], otherwise, you will never find the financing for your film. And I think that's also what we as Europe embrace. So if you're from Bosnia, you will never be able to raise a million or something like that for a feature film. So I think that's the beauty that we also really try to help each other. And otherwise, these works would never be able to see the fruition of life" (17). Co-productions thus ensure that stories from all parts of Europe, not just those with stronger national industries, can be told.

Beyond its necessity for financing, co-production also provides an entry point for those starting in the industry. It allows emerging professionals to participate in larger projects, gain experience, and build relationships with international partners: "For those starting in the industry, co-production is a valuable way to enter bigger projects, develop relationships with other producers, and gain insights into different production models" (11). This reinforces the collaborative nature of the EFI, where co-production is a practice that connects producers with diverse profiles.

In addition to financing, co-production is perceived as facilitating the circulation of content. By involving multiple territories from the outset, co-productions create a natural distribution network, increasing the likelihood that a film will circulate beyond its country of origin: "When you do a co-



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production, immediately you have two territories that open up. Now the content you're producing is automatically, most likely, to be distributed in that place, in that territory. So there is an immediate advantage to that" (13). This built-in circulation also makes co-production a strategic tool for ensuring European films maintain a presence in global markets.

Many professionals also highlight how co-production enables higher production values by pooling resources from multiple countries. This, in turn, improves the overall quality of the films being made: "With co-productions, we can actually scale the budgets and make competitive movies" (28). However, while some link co-production to increasing competitiveness, others prefer to frame it in terms of creative and market access rather than direct competition: "Competitiveness is a word I don't like for this, because it comes from somebody who doesn't really understand the reason why we co-produce. Co-producing is a must. Co-producing internationally really opens doors because it is true that you would never go to the US market alone if it is not by co-producing with somebody there. But competitiveness is not connected to co-productions. I would not say it gives you competitiveness, it gives you entrance to markets you would never imagine. It really gives you talent. It gives you the possibility to test with other people, with other audiences, so it's a must" (9).

Co-production is also perceived as a means of protecting the independence of European producers. In a landscape where powerful broadcasters and global streaming platforms hold significant influence, smaller independent producers often struggle to maintain control over their projects. By co-producing with international partners, they can secure financing without fully depending on dominant industry players, an element perceived as the core of the EFI, as discussed in Section 3.2.: "The co-production is strengthening the independence of producers because if a producer is based in one country, he's always facing strong broadcasters. Broadcasters are stronger than us. Strong private and public broadcasters. Now [also] platforms, usually US-originated like Netflix, Amazon, Disney, Sky, Showtime, all of them. And usually, in every country, there is public funding. So the sources to finance are very limited, and they're always stronger than the independent producer, which is usually a medium or small enterprise. So-called co-production is a tool. Because then we contact independent producers from another country. He's based on his own sources. But because we share financing, the independent producer in a certain country can show to their stronger partner that he brings some money from outside. And then he's more respected, his voice is stronger, and he doesn't have to fulfil the requirements or expectations of the strong partners. But he also can keep the message he wants" (15). This ability to retain control over creative and financial



decisions is crucial for many independent producers: "Because co-production helps producers to... keep control of the rights, keep control of the story" (4).

Co-production as a tool for European integration

Besides financial and creative benefits, co-production is widely seen as a key mechanism for fostering European cooperation. The exchange of ideas, production practices, and aesthetic approaches strengthens cross-border collaboration and enhances the shared identity of EFI: "Which also serves, you know, in strengthening the European identity because we combine different understandings of different situations, of different values, of different qualities whether aesthetical, ethical, etc. So all together, in my opinion, because I've been doing co-production since 1995, almost 30 years, co-productions are the best cultural game to build European identity because there is cultural exchange in every production" (15).

This collaborative aspect extends beyond content creation, influencing professional practices across different markets: "There is also a question of, you know, standard-setting in a sense, or trying to exchange not really standard-setting, but also exchanging practices and having people working in the same ways or knowing about the practices of other countries. So it's really about trying to... not really creating a unified market, but enhancing the capacity of producers to work together in different countries" (25).

Despite the overwhelmingly positive perception of co-production, professionals acknowledge significant challenges, particularly related to bureaucracy and increased costs. For some professionals, this means that co-production should not be pursued purely as a means of securing funding, as the costs associated with international collaboration may outweigh the financial benefits: "Co-production is not the Holy Grail, and that is something you shouldn't only seek because sometimes it just inflates the budget, and you could make it only in your own territory, but it depends on the work" (17). This highlights the need for strategic decision-making when considering co-production, ensuring that the collaboration serves both financial and creative objectives rather than being pursued as an end in itself.

Several professionals also emphasise the importance of selecting co-production partners carefully, ensuring that the collaboration aligns with the specific needs of the project. While co-productions offer opportunities for artistic exchange and financial support, working with partners that do not share the same vision or production workflow can create additional challenges: "You need to find balance.



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You're probably doing that also to get some financial aid, but it needs to be coherent with the countries you're working with" (13).

Co-producing with partners outside Europe

While co-production within Europe is widely practised, partnerships with non-European countries present additional challenges. The absence of common funding frameworks, legal agreements, and established professional networks can make these collaborations more complex and resource-intensive. As one professional noted, "It really depends on if you know a producer and if an international co-production treaty is in place" (1). Without the legal infrastructure, projects with non-European partners often require bilateral agreements, if they exist: "If you co-produce with someone who is not part of the convention, then you need to rely on the bilateral agreements, if they exist. If they don't exist, then it's like the jungle. So it's much more complicated because then you need to see case-by-case compatibility to follow the rules of the two countries. So that's why it's easier to cooperate within this European Convention framework, and that's why we naturally go there to look for partners" (19).

Another consideration in co-production outside Europe is the disparity in funding availability. While European countries have access to multiple financing mechanisms, many non-European partners lack similar levels of public support: "There's more reciprocity inside Europe, because if I was a co-producer for one project, then maybe you would co-produce my main film. Outside of Europe, it's just more complicated because I think there are lots of co-productions between Latin America and Europe, Asia and Europe, and also Africa and Europe, but we cannot expect them to come in as big minority co-producers because there is just simply not that type of funding available in those territories. So I think it's important that we do also, as Europeans because there's simply also more money available that we do support these works from international markets" (17).

This perspective highlights the collaborative ethos of the EFI, which extends beyond economic interests to foster cultural exchange and support global storytelling. Rather than being a purely transactional process, co-production with non-European partners is often framed as an opportunity to reinforce Europe's commitment to artistic cooperation and diversity and to share its values: "When asking about outside partners, it is also very important because this is also a promotion of European values and European quality and exchange" (13). This underscores the broader role that co-productions can play in building bridges between industries, sharing expertise, and fostering long-



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term international collaboration. While these partnerships already exist, their potential could be further explored.

Despite these challenges, many professionals highlight the value of co-producing beyond Europe. These collaborations are seen not only as a way to expand market reach, but also as an opportunity for creative exchange and artistic innovation: “I think in general the idea of co-productions is fantastic, not just because they bring together the financing and the know-how of very different people, but also because that’s creative or at least knowledge input from different countries. I think the products, the films that come from international co-productions can work in a European or international context much better, or often much better, than a production that was made only in one country” (18). The presence of diverse perspectives in the production process enriches storytelling, making films more globally relevant and appealing to broader audiences: “It’s super great if they can collaborate with other producers because it opens our minds, our horizons, the storytelling” (20).

In addition to financial and logistical challenges, co-producing outside Europe is also recognised as an essential strategy for market expansion. In a globalised industry, forming international partnerships is seen as necessary for maintaining Europe’s audiovisual competitiveness: “It is vital for the European audiovisual industry to foster international cooperation and exchange and to encourage diversity, because European producers need to expand and cultivate new markets for exploiting their IP” (37). Engaging with new regions through co-production allows European filmmakers to adapt to different cultural expectations and storytelling traditions, ultimately making European productions more adaptable to diverse audiences: “New markets can only fully be explored through cooperation and international exchange, in order to meet and understand cultural sensitivities. International cooperation also opens up European producers to exploit/explore their IP in different formats and narrative treasure chambers and will expand their innovative and competitive edge. Facilitating cooperation with markets outside Europe through strong networks will aid and simplify co-productions” (37).

3.5. Video-on-Demand platforms

The rise of global streaming platforms marked a transformative period for the film and audiovisual industry. While the transition toward streaming had already begun before the COVID-19 crisis, the pandemic significantly accelerated this trend, solidifying digital platforms as the dominant mode of content consumption: “The streaming platform arose during COVID with the fact that people who were slowly but surely going towards this type of use all of a sudden sort of shifted towards it much



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more significantly" (35). With cinemas shut down, VOD platforms became an essential lifeline for the industry, providing financial support and work opportunities at a time of crisis: "The streaming platform helped a lot, saving a lot of companies during the pandemic because they were giving jobs, or at least they were financing a lot of stuff" (13). The role of these platforms in keeping the industry afloat was widely recognised: "The fact that they continued to do so during a very difficult period such as COVID, when the cinemas were shut, was also fantastic" (16).

This period is often referred to as a 'golden age' for streaming platforms, as they aggressively expanded their content libraries and significantly increased investment in production. However, these investments are now perceived as diminishing: "The Golden Age of global streamers because they wanted to get like some volume for the catalogue. Now they're more focusing on their own production or on very like, you know, a big film, but a big national film in that territory, and that's it" (3).

This shift has had a direct impact on the EFI, as many European independent production companies had structured their business models around the high demand from platforms during the pandemic: "During COVID, there was an enormous surge of commissions, especially for drama series. But they were investing, investing, and investing, and now all... also 'Viaplay' pulled the plug, and it has had such an effect on the industry because independent companies built a business plan around that as well, and now they don't have anything to sell to or to produce because they don't have these platforms to, let's say, work for" (17).

The animation sector has been particularly impacted by this shift. Initially, streaming platforms were seen as an important new market for animated content, allowing productions that struggled to find a place on traditional channels to reach audiences: "At the beginning, they [streaming platforms] were really active. And I mean at the beginning, five years ago or something like that. So when they started investing in animation, it was like a boom. And then a lot of people started working with a new IP; it was a new window of exploitation, and you could really place some content there that was impossible to place in a linear channel" (19). However, this enthusiasm has since waned: "Now the thing is that they have reduced a lot their investment in animation because they have perceived that, first of all, animation is really expensive. Compared to live action, processes are really long, and the productions that they can put on their catalogue are not the ones driving the audience" (19).



VOD platforms: competitors or partners?

The role of VOD platforms within the EFI is a subject of divided opinions among professionals. While some see these platforms as competitors that challenge traditional cinema and television, others view them as an integrated part of the audiovisual landscape, complementing existing distribution channels rather than replacing them. Some stakeholders also perceive VOD as competing for audience attention: “There's more competition for the time of audiences” (5).

With viewers increasingly dividing their screen time across multiple platforms, streaming services have undeniably reshaped viewing habits and industry dynamics: “There are competitors, there's a competition for the viewers' and listeners' attention” (8). This perception of VOD as competitors is echoed in the survey results, where 59.2% of respondents identified competition from US-based VOD services as a key obstacle preventing the EFI from reaching broader audiences within Europe.

On the other hand, many professionals stress that competition for audience time does not necessarily mean that streaming services are direct competitors to cinemas or traditional broadcasters. Instead, some argue that VOD platforms have become an integral part of how audiences engage with content, reinforcing rather than undermining traditional forms of consumption: “People who go a lot to the cinema also tend to watch a lot of things on streamers. It's complementary. People who like films like series. They like watching it on different media. So it's part of the ecosystem” (6). Rather than seeing streaming services as a disruptive force, some interviewees suggest that their presence has expanded the options available for both viewers and industry professionals: “I wouldn't see them as competitor or disruptor of the film industry. I see them as present, some player in the market now, so they are definitely contributing” (13).

In the eyes of many film industry professionals, streaming platforms have provided new opportunities rather than replacing existing models. Particularly for producers, VOD services have offered additional distribution windows that extend beyond the traditional reliance on television networks: “I have never seen the streamers as a bad actor. I have always thought that for us, they were an opportunity to have new windows because, being honest with you, we were very tight by the rules of television, and that was the only window we had. So when the streamers appeared, it looked like [a breath of] fresh air” (9). However, while streaming services have brought flexibility and new possibilities, some professionals acknowledge that their commercial relationships with these services can be challenging: “The commercial relationship can be very, very aggressive, and this is something that not all the organisations can handle” (9).



Nonetheless, professionals also point to the more structural challenges that VOD platforms present for the competitiveness of EFI. The scale of budgets available to global platforms creates disparities that are difficult for most European producers to match: “If you compare international TV series, let's say from Netflix or the Big 5, they put an enormous amount of money into producing those series, which is almost impossible to do with the European system” (1). These financial gaps can result in content from the EFI appearing less competitive, particularly when measured against high-budget international productions: “It [EU films] looked poor... and then he was referring to one of those Netflix series things. And he was like, it looks so different, it looks so professional and much more real (...) the chances for the film to be competitive on an international market decreases. So the filmmaker and the producer, they have to make the homework to compete with the quality of series production on several levels” (1).

In addition to budget inflation, which is viewed as a growing concern in the European context (21, 6, 8), streamers' ability to offer higher remuneration and better working conditions often draws talent away from the independent sectors (1, 7, 35, 37): “They can offer totally different budgets for the talent” (1). This results in what some professionals describe as a draining of creative and technical resources from the local industry: “The production boom is sort of sucking resources out of the independent sector and the local sector. So the stories that they would naturally be more empowered to tell are not necessarily being told because the finances and the manpower and the talent are not available” (35). Others echo this concern, noting that directors and crews do not necessarily benefit from international productions that shoot briefly in their countries: “The directors never benefit from international productions being brought to shoot for a few days in their countries because it's not for them. Usually, they're not in a position to have creative control over what they're doing” (35).

Finally, this practice is particularly criticised because the talent being absorbed by global streaming platforms has often been developed within the ecosystem of the EFI, an ecosystem largely supported by public funding. As one stakeholder put it, “They [the platforms] are not the ones developing and nurturing talent, which is done by independent producers. The risk is to take away the talent that has been developed by independent producers” (37). In this light, VOD investment is not simply generating new opportunities, but also capitalising on the long-term investment already made by publicly funded institutions and independent players. Therefore, there is a growing perception that VOD platforms should contribute more directly to the EFI, particularly because they benefit from infrastructure, skills, and talent nurtured through public support: “There's a strong foundation within Europe that is ready that gives advantage to how the international streaming



services work, and therefore I think it's fair to ask a return on that investment that has been made by the public over the past decades within Europe.” (22)

Circulation of EFI content

One of the most widely recognised benefits of VOD platforms is their impact on audience development and the international circulation of EFI content. Streaming services have given audiences access to a much broader selection of films and TV series, fostering a greater appreciation for diverse storytelling: "Audiences are educated by streaming platforms with a lot more content to see" (13). The growth of streaming has also contributed to changing audience habits, particularly in terms of international content consumption. With more exposure to non-English-language productions, viewers have become more accustomed to subtitles (28, 31, 36), increasing their willingness to watch foreign films and series. In line with this, the survey shows that 55% of respondents believe that VOD platforms help boost content that appeals to younger audiences, suggesting a recognition of their role in reaching demographic segments that are traditionally more difficult to engage through conventional distribution channels.

Besides boosting accessibility, streaming services are perceived as facilitating the circulation of European films and series on an international scale (2, 8, 10, 13, 16, 21, 36, 37). Some professionals highlight how they have enabled European works to reach global audiences in ways that were previously difficult or impossible: "Some films which were not really circulated widely before can now suddenly be circulated globally and get a lot of viewers" (10). As content is increasingly available across borders, European productions have gained visibility outside their domestic markets: "Through streaming platforms, European content can travel more" (13).

The commissioning of local productions has also contributed to a wider reach for European content: "If you enter into a co-production with a global platform like Netflix or Disney, obviously that content can travel globally through one deal rather than if you're producing the content yourself, [because] then you have to distribute it to lots of different individual broadcasters or content buyers yourself. So I think that kind of changed the dynamic, and that's an advantage that the global streaming platforms have" (8).

Although the increased circulation of European content through VOD platforms is widely recognised as a positive development, some professionals question the extent to which this truly benefits the EFI. One concern is that while platforms provide global reach, the industry know-how remains



concentrated within the streaming companies themselves: "The big American platforms can help distribute European works [that they do], but the know-how remains with them" (36).

Another major issue is the loss of intellectual property (IP), as streaming platforms increasingly retain the rights to the content they finance, limiting the long-term control and revenue streams for European producers: "Platforms are investing a lot in the European industry, but how about the IP of those films? Or the audiovisual content actually in general? And then how about improving the circulation, I mean the circulation of independent films on those platforms as well" (3). This limited control over IP also affects the remuneration of creators: "It's only in a few cases that they receive royalties for the exploitation on VOD platforms. So if we consider that this mode of exploitation is very important in the sector, this is really not the best framework for the remuneration of the authors" (34).

These concerns are echoed in the survey results, which reveal widespread scepticism about the contribution of VOD platforms to the broader development of the EFI. More than 70% of respondents believed that these platforms do not meaningfully contribute to the international competitiveness of the EFI and have little to no positive impact on its economic growth. This highlights the idea that, while these platforms may offer visibility, they do not necessarily strengthen the structural foundations of Europe's film industry.

This raises concerns not only about the sustainability of European production companies, but also about the future of creative ownership within EFI: "The downside is that they [VOD] are all keeping the IPs, the intellectual property. And so this is a real problem for the future, because Europe is losing a lot of talent and a lot of rights with this era" (24). Furthermore, some professionals highlight that while platforms facilitate circulation, they primarily promote content in which they hold ownership rights, leaving independent European films with limited visibility.

Conflict of practices

The entrance of US-based VOD platforms into the EFI has introduced tensions in industry practices, as professionals must navigate differences in working methods, production structures, and creative decision-making. While some highlight the positive impact of these platforms, particularly in terms of expertise transfer and the professionalisation of the sector, others point to shifts that challenge traditional European models of filmmaking.



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One of the most frequently mentioned positive effects is the transfer of experience and skills from major streaming productions to the broader European industry: "There is a big influence now from Netflix, who is investing heavily in the local production, has improved totally the atmosphere on the market because they demand certain qualities and certain storytelling processes (...) and also they have budgets" (33). As global platforms commission productions in Europe, local professionals gain exposure to new working methods, often returning to the independent sector with enhanced expertise: "Then my director is picked by Netflix, (...) and if she's coming back to me, she would bring me this experience she made on directing a Netflix series, and this could benefit me. And if I have technicians working with Netflix, they have a certain level because it's about quality, delivering like in a second... and this experience is coming back to the industry we are having here. Therefore, I think it can improve European works on some levels" (1).

These experiences are seen as a long-term asset for European productions, with streamers contributing to workforce development, technical expertise, and the professionalisation of local crews: "In most cases, the local crew might not be as experienced. This mix is crucial and absolutely important, and whoever pays attention to facilitating this mix of crews makes an incredible impact. Because once the streamer leaves, once the money goes away, something stays back: new location managers, new line producers, new young producers that will become the next big local producers. This is incredibly important in the growth of national cinemas" (20).

The influence of VOD platforms has also reshaped production timelines and financing models, creating new pressures on European producers. Many professionals note that working with streamers requires adapting to significantly faster production schedules: "You are forced to produce enormously quick. From decision to delivery, it's a very fast process" (21). This acceleration affects decision-making processes, particularly in financing and distribution, leading to a restructuring of industry roles: "The European way of doing things was, it's not anymore, more of a co-production where you had a producer, you had a broadcaster, you had a distributor, and somehow the deal was stable. With the entrance of the streamers, they produce and sell and become distributors, so producers distribute and distributors produce. These roles are mixed up" (9). These changes not only alter production workflows but also impact creative control. Some professionals express concerns that the standardisation imposed by streamers may compromise the traditional European approach to filmmaking: "The authors are not satisfied by the Netflix rules in Europe, because they do not have the rights on everything as they would have much more in the way we produce in Europe in general" (2).



This restructuring of industry roles has also led to a shift in creative autonomy. While streamers offer new funding sources, they often impose strict conditions on contracts, intellectual property rights, and even creative decisions: "Sometimes they impose several kinds of contracts. Sometimes they impose IP relationships. Sometimes they impose: I don't want this director, I want the other one, which was something we were not used to. We used to have certain boundaries fixed in the old European way of doing things, and now every contract is an open Pandora's box, where each deal is completely different. For good and for bad, because you can negotiate more. But I would say you can negotiate more if you have bargaining power" (9).

This evolving dynamic has led some professionals to reassess the value of working with streamers, compared to more traditional partners: "For some independent producers, or for some producers at the beginning when the platforms arrived, it was indeed perceived as really big deals and easy to get worldwide. The user-exclusive deals with the platforms. So they would go for it, but then they realised that the terms were not that favourable and that actually the more traditional partners like European commercial broadcasters or public broadcasters, the classical terms were more favourable. So that went also a bit back" (8).

Faced with this shift in power and values, some stakeholders have called on policy-makers to intervene and protect the European model: "European Commission to help us to preserve it. If we'll be left towards global, powers like Netflix, Amazon, Disney, they don't get Europe, they don't get the cooperation idea. They don't get culture and they don't want us to continue what we are doing. This is very risky" (15).

Content

The shift in creative autonomy is perceived by some professionals as VOD platforms exerting control over content, shaping narratives to fit their priorities and market strategies. However, others argue that this influence is not exclusive to streamers but rather a broader reality of industry financing: "I think everyone who commissions or pays for content shapes the content. I don't think that's exclusive to the streamers" (12). Nonetheless, this trend contrasts with the prevailing perception of the EFI as benefiting from artistic freedom due to its reliance on public support, rather than purely commercial considerations.

One of the key concerns raised by professionals is the perceived homogenisation of content on streaming platforms. While VOD services provide greater access to local productions, some argue that these stories are increasingly being formatted to fit global streaming trends rather than



preserving distinctive artistic voices: "They definitely contribute because they do bring some rather local stories to a wide audience. Still, these local stories, and that's my critique, are very formatted" (18). This perception appears to have intensified over time: "Streamers have been bringing very interesting projects, breaking the rules or offering very interesting new big hits. But I think the whole thing's got a bit tired indeed. There's a lot of production, and the quality or the attractiveness is not anymore the same as it used to be" (33).

A related concern is that while streaming platforms have been praised for improving representation in terms of inclusion and visibility of marginalised groups, this does not necessarily translate into diversity in storytelling itself: "You can say in a way Netflix delivers diversity, but diversity perhaps in the more modern type, inclusion, representation, a lot of those things. But perhaps not diversity in storytelling. In the long term, that will not be good because it will take away innovation and creativity" (21). This view reinforces the importance of understanding audiovisual diversity as a multidimensional concept (Albornoz & Garcia Laiva, 2019). Such scepticism is echoed in the survey findings. More than 70% of respondents perceived that VOD platforms have little or no impact on promoting diversity across film markets. Moreover, over 75% believed that US-based VOD services primarily serve to promote American culture, reinforcing concerns about cultural homogenisation and the dominance of globalised content frameworks within the streaming ecosystem.

This concern is closely tied to the type of narratives that can be developed within the VOD-driven market. The pressure to appeal to broad audiences often leads to content that avoids complexity or depth: "If you are thinking of a wide audience like that, you make it more superficial. That's why if you look at Netflix or the large streaming platform content, they're quite flat, or they don't get into that because otherwise, you exclude part of your audience" (13). Additionally, some professionals highlight the tendency of platforms to avoid politically sensitive themes in order to maximise market reach: "They want, first of all, to avoid any controversies, especially political controversies, because they want to maximise the revenues in that country. They are ready to cooperate with the leading power in the country, no matter what this leading power is proposing, sometimes dangerous for democracy" (15).

Some professionals also note contradictions in how streamers approach localisation: while streamers emphasise the production of local stories, they simultaneously limit opportunities for European productions to reach wider international audiences: "If any of us proposes something which, for example, is targeting a wider audience than just one country, we always hear: 'No, no,



no, no, no. Local for locals' (...) This is funny but also scary. The same when the biggest European companies propose something in English to reach a wider audience. The answer is 'No, no, no, stay local, stay local. For English-language productions, we have American companies or British companies'" (15).

Moreover, the approach to localisation has been criticised for prioritising market appeal over artistic freedom, a key element of the EFI as previously mentioned in this report: "When Netflix says I do produce locally, it means that they are trying to say, OK, I will do a film in France and it will happen in Lyon or in Marseille. I don't care about that (...). What is important is that there is a possibility that an artist expresses their internal universe" (4). This perspective suggests that while platforms may champion local production, they do not necessarily uphold the artistic autonomy traditionally associated with European filmmaking. As a result, the integration of VOD platforms into the EFI raises questions about whether the creative independence that has long defined the industry can be sustained, within a market increasingly influenced by global streaming strategies.

Besides individual contracts, the growing dominance of streaming platforms has broader implications for the EFI's structure. Some professionals anticipate an increasing divide between two levels of production: high-budget, globally oriented content co-produced by major platforms and lower-budget productions struggling for visibility: "I believe that in fact there will be, in five years or less, two markets, and it's already beginning to appear. Those main platforms, Amazon, Apple, Disney, NBC, Universal, Netflix, they contribute with a really selective approach. So there are winners and losers. I believe that there will be two levels in the content field: content that would have been co-produced with those key platforms with huge budgets and international potential, really universal content, with high revenue potential and all other productions, which should still represent more than 80% of the content but will have difficulty reaching audiences because they wouldn't be co-produced by those platforms and will have much lower budgets in general" (2). This perceived gap aligns with previous findings (Biltereyst et al., 2025) and raises concerns about how European independent productions will sustain themselves in an ecosystem where financing, distribution, and visibility are increasingly controlled by a handful of dominant players.

Some professionals argue that the coexistence of different industry situations, streamer-led productions and publicly funded independent films, creates a fragmented landscape where different production models rarely interact: "What is very difficult to understand about the European film industry right now is that different realities coexist at the same time. And even if these realities exist,



they don't necessarily have an impact on one another. Because you make art-house films with public money, it has no impact... the rules are different. So we're almost talking about different things" (23).

Power and effects at the EFI

As discussed throughout this section, professionals recognise both the positive and negative impacts of VOD platforms on the EFI. However, there is a widespread perception that, despite their relevance in the present, global streaming platforms may pose a threat to the long-term sustainability of the EFI, particularly because their interests do not align with the broader goals of fostering independent production, cultural diversity, and local creative ecosystems. Notably, these findings suggest a more critical stance towards VOD than has been identified in previous research (Mitric, 2024).

For many stakeholders, the core issue lies in the fact that VOD platforms, particularly large transnational services, are private actors primarily driven by the interests of private US-based companies. Their investments in local markets are seen as strategic, rather than as a commitment to the development of the EFI: "The streamers have a double language, because they said that they want to empower the different talents and stories from the different countries. But it's only valid if it makes sense for them economically and in Europe there are maybe just five or six countries that make sense economically for them" (23). As noted by several professionals, this creates imbalances between countries and it undermines national and EU-level regulatory efforts to promote investment: "Some politicians don't understand that, at the end of the day, these companies are private companies. They want to make money, and they don't hide it. So they are not going to fix any issues that Europe should be addressing with public policy" (23).

A major structural concern is the loss of intellectual property (IP) and the erosion of independent production capacity. While streamers may inject substantial resources into a project, their financing models often exclude producers from retaining rights, thus limiting long-term economic and creative benefits for the local industry: "Whenever you work with these global streamers, usually this is a work-for-hire. So it's an original content, and that means the platform controls the production and holds the copyright. That's totally different from working with linear broadcasters, they don't pay 100% of it so the editorial control and the copyright is in the hands of the producer. It's a big shift because at the end of the day, you're just doing a service for them... It does not create an industry" (19). These arrangements, while profitable in the short term, are seen as undermining the ability of European producers to invest in future projects or build sustainable business models: "Buying out



producers so that they are left without rights to their productions, i.e. not supporting the film industry and independent production. Also, they are not nurturing and growing or discovering new talent, but rather focusing on established talent, which is not a very forward-looking strategy” (37).

This situation generates a dependency that many see as dangerous: “It brings a big threat because European cinema for many years was based on SMEs, small and medium enterprises. And global platforms who came to our countries and they are raising big revenues. They try to control this message we talked about, and this is the threat. Because the economic conditions they propose are weakening SMEs... They give a small percentage to cover overheads but not to develop further European projects, and to sustain economically independent entities. So the way they try to cooperate with European companies is making us totally dependent in terms of future economical sustainability. Dependent on the American platforms and this is very dangerous” (15).

The risk is that, over time, the European sector will become reliant on external financing without securing ownership or autonomy, thus leading to increased vulnerability: “There’s a certain dependency on players that are not committed to particular markets. And we need to be aware that a lot of the production capacity that has built up in Europe over the past few years can disappear even quicker than it appeared” (21).

Moreover, the imbalance of power between local producers and transnational VOD platforms is compounded by their centralised and opaque decision-making structures, typically based outside Europe: “When the US platforms came, like Netflix, they set up their main office here in the Netherlands, and then they started to set up all these other satellite offices. But the real decisions are made across the pond in the US. And... if you don't have the contacts internally, you don't actually know [whom to contact] because they have so many different names for positions that it's actually quite fake” (17). This lack of transparency and accessibility limits the ability of European professionals to negotiate equitable terms or engage with platforms on a strategic level.

Regarding this power imbalance in the negotiation, a stakeholder raised concerns about the expectations and demands placed on local infrastructures by international streamers: “The negative side is streamers and big executives from big studios do demand the impossible sometimes. What is important, and they keep saying that to film commissioners, is that a film commission should always, always know how to say no. It could be negative if you find demanding and stubborn producers, you know that want the visa to be offered to X VIP actor who wants to fly [somewhere]. But if the local ambassador, the local embassy says, I'm sorry I cannot provide this visa. This is



illegal. They have to play ball. They have to accept it. It's a no, they have to find another way of flying the VIP after, you know what I mean? Sometimes there has to be a common ground in accepting a no and not demanding the impossible" (20). These demands demonstrated the power imbalance and difficulties in the relationship with some VOD services.

Considering the dependency on global platforms and the challenges of negotiating with US-based VOD services, some professionals lament the absence of a strong EU-based streaming alternative. They acknowledge that such a platform could help retain rights, reinforce cultural diversity, and strengthen the European audiovisual ecosystem. However, several interviewees also pointed out that creating a competitive European VOD service would be extremely difficult, particularly due to the financial and technological advantages of established global players: "All these platforms, they have a huge, huge, huge purchasing power and they have a huge, huge, huge technological advance on us. If you take an example like the BBC in England or like in France Arte or whatever, they have all tried to make some platforms trying to compete with Netflix and so on. It won't work. It won't work for many reasons, but the first one is that we don't have the same technological power. I'm not sure we will be able to do the same because they have a lot of data, a lot, lot, lot of data all over the world and know exactly what women of Western Europe that is 40 years old what she likes what she wants, what she's roughly coping with, what kind of problem she's facing. And they have so much information and they are able to in terms of marketing, in terms of discoverability, they didn't know exactly to suggest what you want. " (4). This scepticism is reflected in the survey results, where EU-based VOD platforms were generally perceived as having only a slight contribution to the EFI across key dimensions, including competitiveness, visibility among young audiences, and overall market impact.

Another factor that complicates competition with global platforms is the latter's business model, which does not necessarily depend on audiovisual content being directly profitable. Unlike traditional film distributors or producers, some tech companies use streaming content as a promotional tool to support their broader ecosystem of services. This shift alters the underlying economics of the industry, creating a structural imbalance: "I think the economics of the film industry has changed for some players. So if you look at the tech companies, and I'm thinking about Apple in particular, they can have a very high-budget film, which doesn't necessarily need to make money itself. It could be used as a promotion tool for their Apple Plus TV service, which can then feed into their other services like Apple Music, their devices, etc. So I think that fundamentally changes the economics of the film industry, and that's obviously a challenge for the traditional film distributors and producers" (8).



Policy

In light of the growing influence of VOD platforms within the EFI, most professionals interviewed support the implementation of public policies to ensure a balanced and fair environment. EU Regulations such as the Audiovisual Media Services Directive (AVMSD), which impose content quotas and investment obligations on VOD platforms (Vlassis, 2023; Fernandes, Vlassis & Coenen, 2025), are largely seen as necessary to protect the diversity and sustainability of the European film sector: “Now with the new audiovisual law, they [platforms] have to be more regulated. They have to also invest in a certain type of content, and so this is positive. I don't think that they should be like having the field of Europe open wide. They need to respect some rules and boost the local talent and be more respectful with the content they sign and not keep the IP always” (24).

Among the regulatory tools, quotas for European content are generally perceived as a positive and essential measure. This is brought out in the survey results, where quotas for VOD services are perceived as extremely or very relevant for 62% of respondents: “In other countries without the quotas, you wouldn't have anything. And that's not OK because we are living in a world where you need to have access to more than just a few series that are done to make money” (7). Some industry professionals even suggested that the existing quotas should be more ambitious: “The 30% quota for us is a bit too low. We would like something more ambitious because... there are plenty of European works, so there is no reason to say that they cannot have them in their catalogue. We wanted to start with 30%, but then progressively that we would reach the same level as for broadcasters” (34).

However, there is less consensus when it comes to investment obligations. Some stakeholders warn that these rules may inadvertently strengthen the market dominance of global platforms, rather than creating a more level playing field: “What you create then is that the streaming services become even stronger. Because then they will commission a lot of works because they can manage the quotas with buying content more or less. They don't need to actually commission and produce themselves. So you're actually strengthening their power and influence” (21). Despite these concerns, the survey results suggest broad support for such measures: 63,4% of respondents identified the imposition of investment obligations on various stakeholders, including VOD platforms and broadcasters as a central priority for promoting the EFI in international markets. This contrast highlights the tension between perceived policy effectiveness and unintended consequences within the industry.



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From the perspective of VOD representatives, these regulations can be seen as overly burdensome and counterproductive: “The problem is that these are very, very prescriptive when you come to the national level and when that happens and you create obligations to invest X percent of your revenues in the country with specific language sub quotas with specific production quotas, to use specific kinds of producers with specific sub-obligations for independent producers... All of that is quite burdensome... It becomes an exercise of compliance rather than creativity. (...) Our members are not incentivized to choose the best incredible project to take to that place. They're looking to deal with the requirements instead” (16).

Moreover, these obligations are perceived as barriers to the development of strong European players in the market: “What we mean by raising regulatory barriers and preventing the growth of European champions is that these national level obligations are not easy to comply with. And the more of them you have, the more difficult it is to comply. So if I was a European player wanting to expand in the markets, I'm gonna go first to the countries that don't [have] obligations because that's where I can maximise my freedom and have my business without anyone telling me that I need to invest my proportion of my revenue there” (16).

Others emphasise that in addition to quotas and investment, the discoverability and visibility of European works remain urgent issues to address, especially as digital catalogues grow larger and more difficult to navigate: “With the volume, there is a very big need for discoverability and prominence for the European films. Also inside the EU... this is how you also improve the competitiveness of the European film industry by making it more valuable, more prominent, and easier to discover to the European audience” (3).

Concerns also arise around how investments are allocated. Several film professionals point out that while streamers may meet their regulatory obligations by financing new productions, they often neglect acquisition, thus failing to support the broader ecosystem of existing European content: “They are helping production only again. And so the thing is that what happens is all these big platforms, they do help produce more, more, more, more, but they don't acquire (...) Can we be a little bit more holistic and also make sure that these are also acquiring works (...) not kidding with us, and that's actually acquiring also works is not only buying catalogues of old thing (...). They don't even pick up the phone sometimes. So I mean you can't negotiate with someone that's not answering” (7).



Proper attribution is also seen as a necessary element of regulation, especially in co-productions with global platforms so that European partners receive visible credit and recognition: “European producers need to look out for when doing co-productions, is to make sure that they get attribution. So for example, [if] the BBC were to do a co-production with Netflix. It's very important for the BBC to ensure that their branding is put out there wherever the content travels internationally. So I know that's a look out for producers and distributors, making sure that they are properly attributed to the content” (8).

Another central element highlighted is the lack of transparency with which VOD players operate, especially when compared with other areas of the audiovisual industry. Many stakeholders view the asymmetry in data access and reporting requirements as a major imbalance: “Sharing data, which is also another battle... it's a pity that in the new audiovisual law they are not obliged to, because other windows in the industry are obliged to [do it], like the box office and the TV. And they are audited. So that's not fair at all, and that's a bad-faith decision” (24). “The transparency of data for us is also really important, because cinemas have to report box office admission numbers across territories. It's a much more transparent industry... But we don't have data” (6).

This lack of transparency also extends to contracts and business practices. Some professionals stress the importance of public funding mechanisms like regional film funds, which impose accountability standards that platforms often avoid: “We have some regional film funds, where the streamers do not want to have their money... because regional film funds as co-production partners are equity investors, and that means they also have to see, watch, and read all the contracts” (10). This situation raises concern when public money is being used without the safeguards normally expected: “We give out a lot of public money without making sure that directors and production companies are actually treated in a fair manner” (10).

Similar criticisms apply to tax incentive schemes, which are widely used across Europe but are seen by some stakeholders as lacking cultural criteria or appropriate oversight: “I'm not saying the tax incentives are bad. I just think that they need to be structured in a different way and also... checking up the contracts and so on” (10).

One of the main concerns is that these schemes operate according to purely economic metrics, granting funding based on expenditure thresholds without assessing cultural value or market need. As one professional pointed out, “The way the tax incentives are designed, it's purely economic. You know, if you access the money, you can make a very, very bad film and then still get the money.



So I think that kind of mechanism could be improved. It could be improved in terms of what is actually selected and is there need for this product in the market (...) But now it's there's often no criteria in that regard. It's more like 'OK if you spend this amount, you get the money.' And that's not really anything to do with cultural policy" (10).

This disconnect between financial incentives and cultural objectives highlights a broader issue in the use of European public funds. This becomes particularly problematic when global players, such as US-based streamers, benefit from European public investment without aligning with the values and responsibilities that define the EFI. As one stakeholder sharply observed, "The American film industry is getting an enormous amount of subsidies from European public money... our film schools and our experimental film funding and our artistic film funding is pushing the art form further and training filmmakers with new voices that Hollywood can absorb (...) The American industry has been historically very good at commercialising the innovations that have been created in Europe" (30).

These concerns raise fundamental questions about the alignment between cultural policy and financial instruments. When public money supports activities that do not necessarily serve cultural diversity or long-term sector development, its purpose is called into question. As one stakeholder concluded, "From another point of view, it's like, why are you giving money to activities that support streamers? That is not actually exactly what we want to do in terms of cultural diversity" (23).

3.6. Competitiveness

Building on the characteristics of the EFI explored in previous sections, we now turn to how professionals explicitly perceive the industry's competitiveness. A key preliminary issue raised by interviewees was the importance of defining the metrics by which competitiveness should be assessed. The parameters mentioned include market share, international recognition through awards, profitability relative to cost, and visibility at film festivals.

Overall, the EFI is perceived as competitive primarily through the quality and originality of its content. Several interviewees noted that European storytelling stands out globally: "Content-wise it is because [of] the storytelling" (1), while others highlighted the region's creative assets: "[we] have a rich storytelling tradition, directing and camera tradition, highly skilled professionals and a lot of talent" (37). According to one professional, "content is attractive" (36), which reinforces the notion that the EFI's edge lies in its artistic and narrative value.



However, the notion of competitiveness varies depending on the type of content under consideration. For many professionals, art house cinema and commercial productions are guided by different concepts of success: “But then what makes a different approach is that either you work for Art House cinema or you work for more commercially-driven cinema and then the approaches will be different, because one is driven by the money first of all. And the success is judged based on the money that the film has brought, or the TV series. And the other one, the art house, money is [important], of course. But there is also another level of appreciation coming from the world, which is more in the way of a festival tour, festival awards. More based on their industry recognition actually, not audience recognition” (14).

In this context, art house cinema is often regarded as the EFI’s competitive stronghold: “It depends what kind of films we are talking about. If we talk about art house films, definitely because we are very strong in it. If it comes to the big budget films, big blockbusters, then there is a problem because there is no such money or very little money available compared to what, for example, big American studios have at their disposal” (14).

For these reasons, many interviewees stressed the EFI’s relative advantage in producing high-quality, low-budget films with strong artistic value. As one explained, “We are able to produce quite low-budget films in Europe that are competitive and that earn money. Because they recoup their investment quite easily. We are not competitive in producing blockbusters that cost €100 million and travel all around the world. So it depends on the economy of the audiovisual work we are talking about, but recouping investment is sometimes easier when you have a smaller production” (34). Therefore, the low-budget content produced by the EFI is perceived as highly competitive in light of “the content that travels compared to the costs to produce it. I think we’re probably one of the most competitive areas in the world in that regard” (35).

Despite these strengths, the EFI is not widely perceived as competitive in terms of market share: “We do a lot of things that can be attractive and competitive, but we are not, if we count ourselves in market shares and look at it from that perspective. We have still quite a long way to go” (21). This perception is echoed by others: “If we’re looking at the industry in terms of sheer numbers, KPIs, figures, the European film industry is struggling to be competitive due to the market size, due to language barriers” (22). These limitations are seen as structural, tied to the fragmented and nationally bound nature of production.



As one professional concluded, “so we managed to produce a big variety [and] diverse set of films. The problem is that if you look at the audience, or the market shares, I think they are not competitive and we don't have the same funding for big productions. But if you look at the independent cinema, of course they are competitive” (28). The perception of limited market share is further supported by market data presented in Figures 47, 48 and 49 of Annexe, which show that between 2012 and 2024, the share by admissions ranged from 25,4% in 2023 to a peak of 39,7% in 2020, with an average of 29% of European films.

Interestingly, films produced with US players were highlighted by some stakeholders as an element that indicates the competitiveness of the EFI: “The fact that you have big US blockbusters being filmed in Europe using European directors, using European casting, using European talents. That's indicative of a competitive industry which also includes production with VOD players (5, 8).

A further indicator of competitiveness frequently mentioned was the performance of European films in film festivals (27, 17, 18, 28, 3). This form of recognition was particularly valued in the context of art house cinema: “The weight that European cinema has put on awards and the degree to which, like premier status and so on, really matters for major European festivals, so in that sense they think it's competitive and probably not necessarily commercially competitive, maybe more like an emphasis on critically competitive” (27). Another interviewee highlighted the broader cultural reach of European films: “The European film industry is competitive in the sense that we are reaching a lot of viewers. We are making European values travel throughout the EU” (3).

Interestingly, the Oscars were repeatedly mentioned as a benchmark of the EFI's global recognition and competitiveness (2, 6, 8, 17, 18, 28). While these awards are often associated with the US industry, professionals pointed to recent successes of European films and creators as proof of the EFI's international standing: “Look at the last Oscars for example. They were European productions, European artists. European films honoured with the Oscars” (18).

Key elements of competitiveness

When reflecting on the conditions necessary to ensure the EFI's competitiveness, professionals highlighted several recurring themes, most notably the importance of promotion, public funding, content diversity, production quality, and audience engagement.

A key element was the role of promotion, which many interviewees felt was underestimated in the production process. As one noted, “The producers need to focus on making the films and then there



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is very little space for the marketing thinking behind it and what really makes a huge difference for a film to be competitive: one is that you have a clear strategy how to promote the film before you enter the shooting” (14). Poor visuals and lack of attention to contemporary formats were also mentioned: “We usually get very, very poor visuals (...) Then you are getting some random stuff that doesn't have much to do with... or someone is not thinking about the vertical formats for digital campaigns. You know all this kind of stuff that is pretty easy to embrace” (14). Others stressed that promotion efforts should be integrated early into the production chain: “That is something that, if it's done at the level of production, it's financially a lot more interesting than having that done by distributors down the line” (7).

This need for strategic promotion ties in closely with the broader issue of development and production resources: “I think there should probably be more money, but also more money for the production itself and the development, and I think sometimes producers feel rushed. They have to sort of start producing but... is there then enough money for development and enough money during the whole process also for promotion?” (17).

A second element connected to competitiveness is diversity, which was also indicated in the survey as a key feature for the EFI's competitiveness, by more than 80% of respondents. Several professionals pointed to diversity as a core strength and a necessary condition for competing in a globalised market: “Diversity is really important for our competitiveness” (21); “this diversity which makes the strength of European cinema” (37).

Here, diversity was understood not only in terms of representation but also in the variety of content produced. As one stakeholder noted, “It's important to have a diversification of content and I think a lot of the European companies that are having a lot of success are diversified in terms of content” (24). This includes the ability to “produce different types of movies” (28), and to explore genres that remain underrepresented in the European production landscape. “People are certainly used to a certain level of production quality and there are genres that people really like to see films in that we don't currently make films in, [in] part because it might be more expensive, and in part maybe because we don't have the skills” (30). In this context, diversity is closely linked to the imperative of understanding and responding to a plural and evolving audience: “The audience that you need to connect with in the marketplace is diverse. The market is globalised. If you want to compete, then you need to be more diverse” (12).



This leads directly to a third key element: the ability to connect with audiences. As one interviewee stated succinctly, “The audience is always the most important aspect and not having that in mind is just producing something because you want to” (13). For some, this disconnect can result in lost engagement: “I think it's content at the end of day. (...) if you are bringing to the market all the time something, you're like disappointing the viewer when he's going to the cinema to see some European or Czech or whatever movie, and most of them are not good. So they will not go anymore” (33). Connecting with audiences also involves ensuring access, particularly through a strong theatrical network. As one stakeholder pointed out, “It is about in Europe the capacity of an audience to see a film in a theater. That's for me the biggest issue. So it means that there's enough movie theaters in the European cities, in the small European cities, in the European villages, that the audience can access the theater and those theaters have support from the state to survive. Because they cannot survive without support from the state and this support is related to a contract of diversity. Basically, they have support from the state and they need to show a certain diversity” (32).

Finally, a central element identified as fundamental to the EFI's competitiveness is the role of public support: this was also recognised by the survey's respondents as a key feature. For many professionals, public funding is not only a means of sustaining production but a strategic advantage that enables Europe to stand out in the global landscape: “I actually see this with public funding as a competitive advantage, because we can support content which would perhaps not be made if it was only private money” (10). Therefore, public support offers a competitive advantage for the EFI: “The public subsidy system in Europe as it stands is a big competitive advantage to any other territories. And as long as we speak about the film industry and the media industry, we need to remember that it is market and figures, but it's also [a] cultural good and to be able to balance both poles of the spectrum of the media” (22).

As explored in previous sections, the EFI's perceived identity is rooted in its capacity to produce diverse, ambitious, and artistically driven content. This vision depends on an ecosystem supported by public funds, one that allows for experimentation, nurtures talent, and fosters the kind of long-term development needed to create work that is not only culturally significant but also, at times, commercially successful.

A clear example cited by interviewees is the international success of *Anatomy of a Fall* by Justine Triet: “It's a typical film that was produced within a system, a typical European environment system. She was raised as a filmmaker in this system, in a state-funded film school. The audience and



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festival can be an International Festival, but also pushing on a certain kind of field, the film reaches the festival, explodes in the festival in a good sense, and then reaches the level of an international audience and, I guess, thanks to that reaches an audience that would maybe not always see this kind of film and that's extremely positive. (...) But the fact that she can make her film huge [at the] international level, it's not about the money invested. It's not about competitiveness or anything, it's about the fact that she comes from a protected environment, state funding environment, and an environment that pushes the artistic and the content, not the financial (dimension)" (32).

Others linked this model to a broader strategic logic: "That's the triumph of the idea that there is a system that accepts to take risks on film that won't be profitable, because at the end one of them will be at a very famous... at the international level and then it will be kind of the flagship of European cultural diversity, in terms of our cinematographic offer means. I could take the same idea with [TV] series" (4).

What ultimately allows the EFI to remain competitive, they argued, is not just funding itself, but the infrastructure that allows talent to develop and thrive: "At the end it's the content that makes films travel. It's not the money you invest in the films, it's the talents you have nurtured, the schools, the way that talent, screenwriters, directors etc. go to school, and after school are inside an industry that allows them to continue working, not only surviving by doing advertising or cheap TV stuff because they cannot survive just with the film industry because it's too difficult for independent filmmakers... and I think that's the key aspect of how you develop those filmmakers" (32).

Competitors

A central question that arises in discussions of competitiveness is: with whom is the EFI actually competing? For most film professionals, the United States and Hollywood were clearly identified as the EFI's primary competitors (1, 2, 3, 7, 8, 10, 11, 12, 13, 17, 19, 28, 36, 37). US players are seen as dominant due to their vertical integration, unparalleled marketing capacities, worldwide distribution power and established international infrastructure: "They're really powerful in promoting, we're talking about majors with a vertical organisation" (19). Others pointed to structural advantages: "The US industry has much more experience on creating audience-driven films, mainstream films, has much more private funding going in and there, I think, the European model is a bit lacking for the really big ones" (28).

The depth of American reach was also cited: "If you aim at an international outreach, it's almost impossible for European films to compete with American films because... they travel much better



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because there is a full network of American companies everywhere in the world. So that's not necessarily the case of the European production market made of small and medium enterprises" (34). This widespread perception is reinforced by the survey findings, where 65.9% of respondents identified competition with Hollywood studios as the main obstacle preventing the EFI from reaching broader audiences within Europe.

However, the specific characteristics of the US film industry and its production model led some stakeholders to argue that it should not be considered a direct competitor to the EFI, as the two operate according to fundamentally different notions. As one interviewee explained, "So in terms of international competition, we are not selling the same thing. (...) It's not the same purpose. The first one [EFI] has some cultural purpose and some cultural targets, some cultural goals, and is aimed to exist in terms of a project for democracy and for the world, and then, you know, we have international competition strength in that way" (4).

Others pointed to structural differences, especially budgetary disparities: "Competitive is not the right word because we don't have the same budgets and this is, I would say, almost the only reason. When you compete in international markets, you compete against budgets" (9). Similarly, some emphasised that not all American films perform well and that only the biggest projects reach global prominence: "There are plenty of American films who do not have a big audience. We only see the ones here that are big projects. (...) I do not put that in the same basket as *Anatomy of a Fall*, it's not a competing project" (34).

Rather than framing the relationship in oppositional terms, some professionals highlighted Europe's interdependence with Hollywood: "You wouldn't have the infrastructure of cinemas we do have without Hollywood" (1), one noted. Another pointed out: "Today in the state of the market, cinemas can't do without American blockbusters. It's just not possible. Because they attract certain demographics, certain audiences that we wouldn't reach otherwise" (6).

From the perspective of US-based professionals, the rhetoric around competition is even viewed as potentially unhelpful and misaligned with current market realities: "How can you say competitiveness of the European film industry with non-European film industry? And then look at policy goals, which aim to attract investment of non-Europeans in Europe, right? It seems there's something not connecting here (...). We're all part of the same ecosystem and that we all thrive together is something that we're really believing in" (16).



US stakeholders also challenged the very notion of a distinctively European industry in a globalised context: “When you define European film industry, you include all of the players which are part of that industry and sector. You don't include just companies whose ultimate beneficial ownership is European. And by the way, again speaking very personally here, what does that even mean anymore? (...) I invest in American companies on my stock market portfolio. So again, what does that mean in the big picture of things (...)? A lot of this is framed very politically when you come to the policy debate and it can be a bit challenging. But overall we see this as a cooperative landscape where we should try and work together not against each other” (16).

Given the differences between the EFI and the US film industry, some professionals pointed instead to other international players as more direct competitors, particularly those producing content more closely aligned with European approaches. For example, one interviewee noted that the “Middle East could be a very strong competitor” (21), while another stressed that competitiveness is less about geography and more about resources and creative vision: “There is not one main competitor. I think that depending on the sectors, depending on the kind of story, depending on the genders, depending on the genre (...)... I would say that it's a matter of money, of investment. I think that in some cases a very specific Indian film or very specific Asian film would succeed internationally and in Europe for different reasons, but not because it's Chinese or Asian, it's because they had a good budget. They had a good idea” (9).

In addition to global players, some professionals also identified forms of competition within Europe itself, highlighting tensions among national industries and the structural challenges of a fragmented market (2, 5, 7, 22, 34). Interestingly, in the survey, film competition inside the EU was the last voted (13,8%) obstacle that prevents EFI from reaching EU audiences. Others went further, pointing to an even broader competitive landscape in which film now contends with other entertainment platforms, such as social media, that are increasingly capturing audience attention (12, 18, 34).

Underlying these reflections was a strong and widely shared perception that the audiovisual market is becoming more competitive overall: “It's getting much harder for European content to [succeed] on an international level” (2). The narrowing of distribution opportunities and growing market concentration were seen as key constraints: “At the end of the day, the windows are few. And we are tied up to those windows. So if the windows are the streamers, the choice is quite small and there is a lot of concentration, more and more and more than ever so” (9).



The challenges of boosting the EFI's competitiveness in the current global landscape are closely tied to issues of budget constraints and market fragmentation. As one professional put it, "It's a really segmented market, and this makes it really difficult to challenge the international key players" (2). While fragmentation limits the scale and reach of European productions, it is also deeply embedded in the structural identity of the EFI, reflecting its linguistic, cultural, and national diversity. This dual nature of fragmentation, as a barrier and a defining feature, is widely acknowledged and highlighted as a paradox of the EFI (Biltreyst et al., 2025). As the same interviewee observed, "It's true that if we would be on the complete other approach, which would mean huge budgets, no real co-productions on an European scale with a real strategy of audiences, we would do genre films mostly... probably it would have an impact on the diversity of films and not represent the real mosaic of cultures and points of view" (2). This view illustrates the delicate balance between increasing global competitiveness and preserving the cultural diversity that distinguishes the EFI.

Challenging competitiveness

While competitiveness is often framed as a desirable goal in policy discourse, many professionals expressed deep reservations about its applicability to the EFI. For some, the concept itself is at odds with the nature and values of the sector: "I think the big problem is actually this term of competitiveness, because Europeans are trying to chase for a model that they cannot, it's not part of the DNA" (23). These concerns suggest that framing the EFI in terms of competitiveness risks overlooking the industry's distinct foundations in cultural policy, artistic diversity, and public interest.

Several interviewees argued that prioritising competitiveness may even be detrimental to the health of the EFI: "If you start looking at cinema in terms of competitiveness and money, you're actually killing it. Building a cinema system in regular financial terms is actually killing the system (...) when you design the policy in that direction, you are actually damaging the system because what the industry profits from is a different logic" (32). The purpose and logic of the EFI is further illustrated by the perception that it is not a profitable industry: "There are very few people who are really making money in this. Most of the people that I know, 95%, maybe 99% of the film industry, don't make so much money. It's not such a profitable industry" (32).

The EFI's strength, according to many, lies not in outcompeting global players on commercial terms but in the industry's alternative model, one that prioritises diversity, cultural value, freedom of expression: "I think it's amazingly rich because it gives us diversity. It feeds us all. It gives the opportunity to have small and big and different and others. But it's more artisanal, and it would never



be this kind of very heavy machinery with a lot of money like *Mandalorian*, you know. So competitive is not the right word” (9). In this sense, attempts to measure the EFI against blockbuster-driven industries like Hollywood are seen as misguided: “We were not competitive, and that's why we're allowed to give state aid to film productions... I never understood quite why this competitiveness word is that important. I think it's more about ensuring that you have the infrastructure, you have the competences to actually build up the type of films you want for your own territory and then often they can actually travel” (10).

Others interviewees went further, questioning the ultimate purpose of competitiveness and how it aligns with broader societal goals: “You can be as competitive as you want. It's ultimately what kind of society you want to have. If the idea is to have the market share bigger than Asia or the US, then, ultimately, what's the use of this image? To make people apathetic? To make them active? To make them happy? I mean, what is the ultimate [goal]? People give their brain to images, and what do you do with that?” (23).

This tension between market imperatives and cultural missions was perceived as increasingly acute in the current policy landscape: “You are coming to me and asking me, you're worried about competition, and I answer you: What about culture? When you speak to someone from the Commission, not even on the side of the meeting, but bilaterally or in off situations, they are saying very frankly that we are out of scope of culture now. We are running into a new era, which is the era of competition and of industry. But that's very dangerous to do so because culture is still something that every citizen needs to have” (4).

Finally, some interviewees questioned whether competitiveness was even an appropriate framework for thinking about film at all, particularly when it comes to art cinema: “I would start by reminding that film is an art form and so we are talking about unique... like those are unique prototypes every time, it's works of art. And so therefore, is it a good idea to talk about competitiveness for an art film?” (3). As this professional concluded, pushing the EFI to become more competitive may come at the cost of what makes it unique: “Do we want to have... a less diverse film industry in order to compete? But will we actually be able to compete even if we have less [diversity]?” (3).

These ideas are further reinforced by a strong and widely shared perception that each film is a unique endeavour, “a pilot”, and therefore inherently unreproducible (4, 10, 11, 14, 19, 23, 25, 30, 32, 33, 34, 35). Across the interviews, professionals consistently challenged the notion that film



production could or should be standardised or managed with industrial predictability. As one respondent put it, “We have this saying in our industry that every film is a pilot, and it is really whether you think about the production stage, whether you think about the marketing stage there is no such thing like a golden rule that will work for all. There's really no [rule] because it's a very risky business” (14).

The uniqueness characteristics of a film inevitably make it hard to predict its market performance: “The audience lacks formulas, but when it's too much a formula, they just don't see the films, and the history of filmmaking is full of those films with a huge budget, huge star, huge director who just tanked and did extremely badly because... we don't know exactly why” (33). Others highlighted the complex and circumstantial nature of success: “When you have a project, it's very hard to foresee everything (...). There is no recipe for that. Sometimes it's a question of circumstances” (25). These observations point to a high level of risk and uncertainty that defines filmmaking as a sector: “The history of this sector has shown that when you think you're producing a hit, it never works” (35). As one interviewee put it bluntly: “I have never seen a situation where a producer obtains financing on sell forecasts. I think the film will perform this in Korea and this in Japan. Never, never. It does not happen” (4). In this sense, the EFI's defining characteristics might contradict a conventional industrial agenda, in terms of competitiveness.

3.7. Challenges and policies

When asked about the main challenges facing the EFI, stakeholders pointed to a combination of structural, financial, and political issues. Among these, the fragmentation of the sector was frequently mentioned (2, 8, 19, 22, 24, 34). While diversity across languages, cultures, and production ecosystems is one of the EFI's core strengths, this very diversity also presents structural limitations. Fragmentation is seen as a barrier to the cross-border circulation of content, making it harder for companies to scale up and compete with international players.

As one professional put it, the EFI is composed of “small companies that are very fragmented and it's very complicated for companies to grow” (24). Others emphasised the need for a more balanced industrial structure, with stronger mid-size players: “We need more and bigger independent production companies” (9),” especially ones that are capable of working across both art house and commercial projects, a combination that remains relatively rare” (21).



The current environment makes it difficult for companies to develop sustainably over time. One interviewee described the challenge of scaling up in a fragmented market: “One of the things that is very much talked about now is the need for integration of companies and for more vertical integration in the industry. And I do believe in that and I am experiencing that myself, in our own company where we have kind of touched the ceiling of growth. We feel a bit boxed and unless we have some integration in the future, it is very complicated to expand” (24).

At the same time, the companies that do achieve a degree of success are increasingly being bought by larger, often non-European entities. As one stakeholder noted: “We still don’t have incentives for big production companies to remain in Europe (...). The small remain small because they cannot scale and the medium to big [like us] finally tend to be bought out by the big groups” (9). Another added that “buying out companies that are successful and that are producing independent content... has been a trend all over the last two years. Well, can we still define them as independent?” (13). The financial pressure and structural imbalance often push independent producers toward acquisition: “There’s a lot of stress for producers when it comes to the financial burden and cash flow. Because that’s a big, big difference and that’s why certain producers... let themselves be bought by bigger entities” (17).

Some stakeholders drew parallels between the EFI and other vulnerable sectors in Europe, such as agriculture. As one professional warned, “We have the same issues that agriculture has, and almost any industry. I can make a lot of comparisons between the problems Europe has with agriculture and the cultural sector in general. Everybody knows that we must be preserved. Everybody thinks we must be preserved. But there is no money. Nobody puts the money. We need to be preserved. The money will never come from us as it does not come from the farmers (...). Public money does not help us to grow as we should to compete internationally. So yes, there is a little bit of a threat of being bought out by companies. More and more independent producers are bought out by European networks. And those networks have more and more foreign investment” (9).

In this context, alternatives focused on collaboration are being explored as a way to preserve independence and strengthen the sector: “I see [this] happening a lot with production companies which want to stay independent, that they create these informal alliances with each other to share information to work on a different level together. And I think that is a very good new development (...). They support each other, they inform each other, they co-produce with each other, but they keep their independence” (17).



However, the fragmentation is also perceived as a strength, since it generates diversity, as this report noted in the previous section: “So a lot of people point this out: that we have different languages, different cultures, and it's a cottage industry, so it's small production companies, independent production companies. But on the other hand, that is also what can actually make sure that we don't have mainstream, that we actually have the diversity we need” (10).

A key mechanism that enables this diversity is the principle of territoriality. Widely regarded as a cornerstone of the European film ecosystem, territorial exclusivity is seen as vital to the financing, circulation, and sustainability of diverse audiovisual works: this view reinforces previous findings (Cabrera Blázquez et al., 2015; Biltereyst et al., 2025). Across the industry, there is broad consensus and strong advocacy for the preservation of territoriality. As one stakeholder explained, “The threat to territorial exclusivity is of deep concern to us. I mean, this is an essential tool for all the European film value chain. It's very important to keep [territoriality] because this is how we can finance films. This is how we are reaching cultural diversity and that we can express European values. So this is really something that everyone needs to understand” (3).

This view was echoed by another interviewee, who noted that “territoriality, which is the cornerstone of European cinema, European co-productions, international co-productions... that is something we want to see preserved at all costs. And we see constantly threats coming up through geo-blocking to erode territorial exclusivity. It's the basis and the way that we have value” (16). The preservation of the EFI's characteristics is also defended in relation to external models: “Keep in mind that the European way of doing [things] in our sector is a combination of very different actors working in a kind of ecosystem that is very, very specific to Europe. You know, receipts coming from the outside would only disrupt the market, so we must find new rules for our way of doing [things] if we want to preserve the film and series sector as it is now” (9).

Another frequently cited challenge is the insufficiency of funding across several key stages of the value chain. At the production level, the lack of financial resources is perceived as limiting both the ability to support large-scale, high-budget productions capable of competing with US content (1, 14, 19) and the development of more artistic or experimental works. In this context, the question of overproduction also emerged as a hot topic among professionals. Some argued that the limited funding should be more concentrated: “I think it's absolutely necessary for Europe to fund fewer films, with a lot more money, to make them, to make it possible for them to be made in a much better way. By that also creating a possibility for them to reach out to a larger audience” (21). However,



others challenged the very framing of the debate. As one professional noted, “I think it's a very difficult discussion about overproduction, because what territory should we ask not to produce this number of films?” (10).

This tension around overproduction reflects broader concerns about how to balance efficiency with the core values of the EFI. For some, overproduction is viewed as an inefficient use of public resources: “In my opinion, there is too much content and that's not normal and this content has been mostly produced with the support of public funds. It makes no sense. I mean, if there was a third of those films produced, we could have much more, bigger production and much more interesting quality” (2). However, others firmly rejected this argument, warning that reducing the number of films could undermine the industry's strength in diversity and innovation: “I think it's a complete nonsense. The more we do films, the better the industry is (...) and at the end you end up with like 5 producers, OK, producing all the crap, all the films only for their local market because that's where they make money and that's it. And you kill the industry, like you kill the creativity and the diversity, and the possibility of films to travel, because once again the only European films that travel are good films, not commercial films. They travel because of the content” (32). Another interviewee echoed this concern more philosophically: “Well, overproduction for whom is the question? And this is a really important question. So one way of thinking about this is, are we writing too many novels?” (30).

The funding gap is not limited to production alone. Several professionals pointed out the need for greater investment in development, as many projects are seen as moving into production too quickly without sufficient preparation. Strengthening development funding could enhance the quality and coherence of films, while reducing risks later in the process (7, 10). Likewise, marketing remains underfunded, which undermines a film's visibility and success potential, particularly at the international level (6, 7, 14). To address this, stakeholders highlighted the role of initiatives like European Film Promotion (EFP), acknowledging this network's relevance in helping to position European films globally. Some suggested that the EFP's scope could be further expanded to amplify its impact (17, 18).

Distribution was also highlighted as an area needing more policy attention and funding: “I think the priority of the institutions in Europe should shift away from production. I think that there is an oversupply of political attention and of financial support to the production of films and there needs to be a greater acknowledgement and recognition of the importance of connecting films with audiences” (5). This perspective is strongly supported by the survey findings, where the top two



priorities identified for promoting the EFI in the international market were increasing support for distribution, both within the EU (81.7%) and beyond (74.9%).

Despite its recognised importance, public funding might not be able to support film distribution, depending on their institutions' policy goals and the capacity of the national film institutions. In this context, EU-level support is considered essential: "Creative Europe's MEDIA programme can make this big difference within the distribution side. Because it's difficult for a local or national fund to justify extra money for distribution" (10).

Support for international distribution in particular was seen as vital. This includes helping European films reach audiences beyond their national borders: "Film sales support and different national [forms of] support that are also given to non-EU distributors or like non-national distributors, those are also very key for the sales agents to be able to bring the films outside of the EU's borders" (3). A concrete example cited was Unifrance's support to foreign distributors: "Unifrance is giving support to, for example, an Argentinian distributor that is buying a French film. So that means they are helping the promotion in Argentina of this film. And I think the German film [institute] is also doing it. And so here we can only encourage the rest of the film promotion institutes [in the EU] to do the same, because this is extremely important and it works really well" (3).

Ultimately, many stakeholders stressed that distribution efforts should be designed with audience connection in mind. One interviewee proposed an outcome-based model: "It should take the form of reimbursement of the cost paid after every viewer. What I mean is that support is not for distributing film, the support is for getting audiences to [see] this film. And then it would create the appetite for more audience-friendly films from different countries. If we put huge money for distribution support, paying for every audience on non-domestic films" (15). Such a model, however, risks privileging films with broader commercial appeal, which could potentially sideline more experimental or culturally specific works that may struggle to attract large audiences, despite their artistic or social value. This could, in turn, influence the kinds of stories being told, encouraging content that caters to prevailing tastes rather than supporting diversity and innovation within the EFI.

In this context of financial challenges, some professionals argue that increasing private investment could provide a pathway to strengthening the industry's resilience and competitiveness. As one interviewee noted, "The independent film scene is struggling because the public finance thing is going down somehow on a national level (...). If European producers get to have a good network of financiers that are not depending on public funding, then the competitiveness will be, I think, wider"



(13). However, this shift towards private financing is not without risks: “Now that financialisation is coming. They [funders] are asking for return on investment, which is absolutely an oxymoron, I mean you cannot say I want return on investment on a prototype sector. I have no guarantee when I finance the film, even with Brad Pitt or even with Omar Sy in France, that the film will be a success. I have no idea. That's a prototype system. So how can it cope with it? How can I stay in the logic of a return on investment? That's not possible. So that means that we are changing the sector and if we are changing the sector... in which way? Then of course we are more and more speaking about entertainment, to make sure that people will watch and also we are more and more working with the data to make sure that people are offered what they want to get offered (...). This is a very, very dangerous game that they are playing because, above all that means that we are getting out of the notion of culture” (4).

There are also warnings about the kind of content that tends to attract private investment. The pressure to minimise risk often leads to formulas, franchises, and branding which may undermine the creative and cultural richness that defines the EFI. As one professional explained: “And all of a sudden we're talking about equity funding and IP because obviously, of course, if you're putting risky investment you like to put it in something that you feel is safer. One is, you have to put lots of money in it to make it consistent and a brand for the audience so they can return to, and you have to give full creative control to some folks who actually know how to handle talent, to handle the actors you're going to bring back to direct, to really give a sort of an arc, a storyline that makes sense. All of this costs money. (...) But this is the kind of endeavour that you cannot engage in with a cheap mind, and this is for me the risk that people are looking at as a sort of a safe bet. So therefore, we don't invest too much in it. That is a terrible mistake, I think” (35).

In addition to financing constraints, professionals also point to growing competition with US content (8, 12) and other forms of media, particularly social media platforms (12, 18). This competitive environment is compounded by persistent difficulties in connecting with audiences, especially younger viewers (24). As one stakeholder noted, “I find it very easy to find films for under 30s and very hard to find films for younger... kind of 16 to 20 (years-old) audience” (27). Others raised concerns about how young people perceive European cinema today: “I think the younger people don't have an idea of what European film is, and if they have an idea, it's not necessarily positive” (30).



Building on these concerns, many stakeholders stressed the urgency of engaging younger audiences and forming their relationship with European cinema from an early age (13, 18, 19, 28, 29, 30). Several professionals argue that without early exposure, young viewers are unlikely to seek out or appreciate different forms of storytelling later in life: “If you are not introduced to a different type of storytelling quite early, I don't think you will be looking for that later, 'cause you're not used to it. But at the same time, I think there is a huge job to do on the European level, talking about the education towards kids” (14).

This need goes beyond simple marketing strategies. Stakeholders underscored the importance of incorporating film literacy into schools and universities, as a way of building lasting connections between younger generations and European content: “Not only marketing towards the young audiences, but get them on board soon. So [this means] education and going to schools, going to universities. A lot of people mention that sometimes they discovered European cinema even [through] two or three films” (24). Film festivals were also mentioned as an important space to connect and educate audiences (6, 8, 13, 37).

The issue is particularly pressing for children's content, where European productions face several challenges, such as the high cost of dubbing in multiple languages, which limits the reach and accessibility of European children's films (19). At the same time, some professionals worry about the cultural impact of exposing children almost exclusively to non-European content: “We are watching European kids who consume American content or Japanese content, and the question is, is this the point of view that we want our kids to have?” (19).

This issue ties in closely with broader concerns about values and narrative diversity. Several professionals believe that the current landscape, particularly on platforms and mainstream broadcasters, prioritises entertainment over depth – often delivering fast-paced, easily consumable stories at the expense of more meaningful content: “Variety of storytelling and taking kids seriously by the film makers. It's something that is very much lacking right now. (...) There is even a problem on the values level. I mean because we keep saying that this young generation is much more sensitive than ever, we are very scared, there's a lot of fear on what to give to the kids. And that's why these stories are less challenging probably (...) when it comes to the platforms and TV stations. They usually go for the easy content that's like easy meaning entertaining, you know, that the family will have a nice time, or the kids will just go get so involved in the stories that I [the parent] can do



something else at the same time. And so that's why also that very fast pace of the editing... and the kids are just brainwashed watching that" (14).

Beyond structural and financial concerns, several professionals also pointed to broader societal and environmental challenges that impact the future of the EFI. The political context in various parts of Europe was described as increasingly hostile to democratic values and cultural investment, with stakeholders warning of the repercussions this could have on publicly funded cultural sectors such as film (4, 18, 30, 35, 37). In parallel, the urgency of addressing climate change and adopting more sustainable practices within the EFI was highlighted as a pressing issue (13, 30, 37).

Gender inequality also remains a significant challenge. Progress has been acknowledged: "once they started measuring the relevance to a female audience, for instance, by the Bechdel test to films that are submitted for production funding and by looking at the percent, the number of women-funded work versus the number of men-funded and then taking that information and increasing the number of women that they funded, (...) ...now funding more or less on a 50-50 basis. That's been absolutely transformative" (12). However, professionals stress that this progress is far from sufficient, especially when it comes to larger-budget productions: "In the film industry in Europe, the gender gap is still very real. And the bigger the budgets, the fewer, the less likely a woman is to be making the film. So for instance, women get to make short films when they leave film school, new talent programmes mean that it's quite easy to make your first film. And some of those women go on to make their second films. By the time you get to third, fourth feature films, the number of women making films really reduces" (12).

This perception is further supported by the analysis of the Top 60 European films by admissions (see Figure 53 of Annexe), which reveals significant gender imbalances. Among the 60 films, only two were directed by women. When it comes to screenwriting, 13 scripts were co-written by a woman and a man, but none were solely authored by a woman. These figures highlight persistent gender disparities in key creative roles within the EFI, even among its most commercially successful productions.

Another challenge highlighted by stakeholders was the COVID-19 pandemic, which had a profound, though largely temporary, impact on the EFI. The crisis disrupted production schedules (see Figures 50 and 51 of Annexe), halted theatrical releases, and accelerated changes in consumption behaviour, notably increasing the power and reach of VOD platforms. However, most professionals do not see the pandemic as having caused long-term structural transformations within the industry.



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Its effects were felt more acutely in specific segments, such as cinemas and distributors, and among particular groups.

For instance, the pandemic is said to have exacerbated existing gender inequalities: “I think it was very difficult for [women] to stay in the industry, particularly if they had caring responsibilities, and that falls mostly on women” (12). Still, while the disruption was significant, many perceive the sector as having largely recovered: “The myth that we want to make sure goes away is that (...) COVID killed cinemas. People won't be coming back here and it's something that we still hear a lot in the European institutions and that's just not true. We've had a number of European countries that are back to pre-COVID levels (...). Not only are cinemas back, but they've also come up with new ideas and new ways of working that are getting people in and not just older audiences, but young people as well” (6). In this sense, the pandemic revealed vulnerabilities, but it is mostly seen as a disruptive episode rather than a source of lasting systemic change.

Artificial Intelligence

The integration of Artificial Intelligence (AI) into the EFI is widely acknowledged by professionals as an emerging and complex challenge. While many express concerns about this technology, AI is also seen as a source of significant opportunities, particularly in improving efficiency across various stages of production (11, 14): this was also reflected in the survey results indicating openness to AI and in the Locarno Pro debates. Stakeholders highlight AI's potential to streamline tasks such as post-production and special effects (30), rotoscoping (16), marketing (24), managing and organising productions (35, 37), and even preparing applications for public funding (25). In these areas, AI is valued for its ability to save time, reduce costs, and increase productivity, offering new tools to support filmmakers and producers across the industry.

Despite these potential advantages, many professionals express deep concerns about the transformative effects of AI on labour, creative control, and cultural values. The loss of jobs is a frequent theme: “I think the dangers would be that it would take jobs from certain people, when it comes to the technical positions, maybe even when it comes to writing” (11). These concerns extend to specific sectors such as animation, where automation could erode entry-level opportunities: “We can see how animation can take a big hit and how this would be very detrimental to the training of young creators and young technicians on these segments of the industry (...). You're going to make the creators community more elitist, more trained, and less diverse” (35).



In the Locarno Pro debates, the discussion on impactors in labour focused on the importance of human autonomy, where professionals agreed on the importance of having a person in charge of deciding how and when to use AI and then verifying the final outcome. The importance of human connection in the film sector was also stressed as an element that cannot be replaced.

Another major risk identified is the concentration of AI infrastructure and skills in a few locations or countries, potentially marginalising others: “What will happen if there's only 10 places in Europe where you actually have virtual production studios, because then you will not need the locations anymore... This is about the skills because they all want to be the hub” (10). This technological imbalance could mean that European locations, and even entire productions, are replaced by synthetic environments created in other regions: “Could it be a situation where they don't need to produce content anymore in Europe, because it could all be done in a studio in the US without having to kind of go to locations; etc. ...?” (8).

Concerns also extend to the potential homogenisation of audiovisual storytelling. During the StepIn debate at Locarno Pro, professionals discussed how data-driven decision-making may prioritise ‘safe’ content – stories deemed more broadly audience-friendly, at the expense of creative risk-taking and narrative diversity. These discussions were also linked to broader shifts in the relationship between films and audiences: the potential manipulation of language might impact the relationship with audiences and make international content more appealing to local viewers: “Brad Pitt in a film will speak in Spanish, not only the voice, it will be the voice of Brad Pitt, speaking Spanish, it will be the face, the mouth of Brad Pitt speaking the Spanish language and they're going to fake it completely for sure. And that might bring a bit of a different experience for the others because, once you see those mega stars and they are really speaking in your own language, like truly in your own language, and you cannot [spot] a difference, I think that's going to change something at some point” (32).

For some, the implications go even further, affecting the relationship with audiences: “Just the idea that you can create images with AI in a documentary film, like you can prolong something via AI, but it is not the real image any longer” (18). According to another interviewee, “The key risk with AI I think is the loss of trust. Trust between the product and its audience. So far we had a very clear arrangement between the makers and the audiences that what they are seeing, what an audience sees is what a particular maker conceived with his or position in the world or on the topic, and so on. And that's a very crucial arrangement and to let go this arrangement, this relationship between



audience and the film. And that's [trust erosion] a risk, so we need to understand how to maintain that level of trust. We need to understand how to generate trust" (22).

This erosion of trust is also closely linked to the nature of the companies developing AI technologies. Some professionals question the diversity, accountability, and underlying motivations of those building the systems that are now being integrated into cultural production: "My biggest question is: who are the people that are building these systems? And who are the people whose datasets we're using and how diverse are those?" (27). The lack of diversity in the images generated by AI was also criticised at the Locarno Pro StepIn conference. Concerns are also raised about the influence of powerful tech companies, in shaping not only film tools but also content, in ways that may be misaligned with the values of the EFI: "The rules are given by the big companies of AI, and then the content will change according to what their business is and not [reflect] the true independent or local authentic" (13).

These AI-linked concerns extend beyond cultural values to economic structures and long-term sustainability. Stakeholders warn that the business models behind AI companies may lead to monopolisation, artificial price manipulation, and the crowding out of traditional creative economies: "There isn't a business model right now, for the cost of training these models is so huge that I don't see how... you can't make that money back with like \$20 subscriptions or even professional services... So what often happens when new technologies are introduced is that the new technology is sold underpriced so that it forces out the current (players)... So it's also something where we should be very open-eyed: that the fact that it becomes cheaper... doesn't mean that using the services... will be cheaper necessarily. And... if the market is dominated by one or two or three companies, they can [later] set the prices however they want" (30).

The broader implications of AI for the EFI are profound, especially when considering the fusion of digital and cultural domains. As one interviewee put it: "So we have GAFA+ that generate work, so that means these two lines that were totally separate, cultural matters and digital matters, then they are meeting together (...). I think this is a catastrophe. Why? First, because copyright must be allotted to human beings. Everybody agrees on that. But if there is no difference made between content generated by a human being or not, how would we be able to know what is compatible or not? (...) Second point, it's a catastrophe because all the rules are focused on the idea of cultural exception, focused on the idea that culture is not a simple industrial thing, it's not shoes. So, it's something different because it has some democracy aims and it is there to emancipate people. If



you look at the other treaty and then at all the bilateral agreements, commercial bilateral agreements, for instance... culture, there is a carve-out. But now, if I have no possibility to make a difference between industrial goods and human works, how can I make sure [that] it won't be put aside in the future? I have no way [of doing that]" (4).

In this context, stakeholders highlighted recommendations and the need for a clear and balanced regulatory framework for the film industry at EU level. A recurring concern is the use of copyright-protected material in training AI models without proper authorisation or remuneration: "Those systems and models are developed on the basis of big amounts of data, including copyright protected works and without any remuneration, any authorisation. (...) This is a big problem" (34). To address this, several interviewees called for strong safeguards around intellectual property and the development of licensing models that guarantee fair compensation for creators. As one put it: "We really need to be able to protect IP and copyrighted content. (...) It shouldn't be a threat for (...) a more human centered industry" (3).

The protection of IP requires transparency to assure the identification of the content used to train AI (16) and to clearly distinguish synthetic from human-generated content: "We are very much in favour of labelling synthetic products as synthetic, so that everybody knows what they are playing with and that these products are not protected by intellectual property rights because they are not made by human creators" (34).

Several professionals raised concerns about the limits of existing EU legislation. The interpretation of Article 4 of the 2019 Copyright Directive, which allows text and data mining, is contested: "We do not accept that interpretation. (...) We believe that, actually, these types of use were not foreseen when the exception was created" (35). The collaborative nature of audiovisual works further complicates the enforcement of rights: "It's very unclear which right holders are going to take care of that. Audiovisual works are collaborative" (35). In addition, current EU legislation on image and voice rights was seen as insufficient: "When it comes to the protection of people's likeness and voice, (...) we're not up to date with that" (30).

To avoid dependency on non-European technologies and to safeguard privacy, stakeholders also underlined the need to invest in the development of AI tools within the EU: "It's creating some difficulties because we cannot use the existing tools for privacy purposes. (...) We have to build our own tools, or at least have something which is self-hosted" (25). Developing European capacities in this area is not only about sovereignty, but also about economic and creative competitiveness: "We



will not have any competitive advantages if we do not know how to use this new technology. (...) We need new training and competences” (10). As another professional pointed out, having European tools would enable the industry to better align AI development with its own values and data protection standards: “It would be much more interesting to be a producer of such products and to steer it much better” (28). In this matter, at Locarno Pro StepIn, film professionals acknowledged the differences of using US-based and European AI, and advocated for the development of EU-based AI companies that could reflect European values and reduce reliance on US-dominated systems.

However, while some AI opportunities and threats have been identified, it is clear that the debate around this technology in the EFI is still in its early stages. Many stakeholders expressed uncertainty about the full scope of AI’s implications, both technically and culturally, and they pointed to a general lack of concrete knowledge or structured engagement within the sector. As one professional noted, “Nobody really is clear on many things concerning AI and new technologies” (18). Another added, “I would say that we have not even started to test it” (19), which underlines the nascent stage of practical application and policy reflection.

Moreover, there is a sense that meaningful debate about this topic of AI is not yet widespread across the sector: “The discussions take place in some places, but not in the most places” (30). In fact, many interviewees were unable to offer concrete opinions or policy recommendations, suggesting that the focus on AI may be premature in some respects: “Right now I see that Europe is putting so much money on artificial intelligence (...) even if it has absolutely directly or indirectly, no connection with that” (23). This sentiment is echoed in the concern that premature enthusiasm for AI might lead to the neglect of existing priorities: “Even European organisations like Creative Media are trying to move to the next step, which is AI (...), and leave a little bit on the side of traditional film production. I don't think it's time to get [into] something like that” (26).

Nevertheless, there is broad agreement on the need for proactive engagement on AI, albeit one that is inclusive, thoughtful, and aligned with the needs of the sector. As one interviewee aptly noted, “I think everyone needs to work on every level, like all the unions and guilds need to work locally and nationally and on the European level and just figure out what would we actually want?” (30). The current moment on AI in the EFI calls for coordination, open dialogue, and concrete policy recommendations.



4. DISCUSSION

4.1. EFI on the international market: professionals' understandings and strategies

The concept of the 'international market' is understood by most professionals primarily to be everything beyond the national context. Yet in practice, this concept often translates into a focus on the EU itself. From a business perspective, the European market is perceived as the primary international market for European film productions. Many professionals also emphasised that their strategic efforts naturally orient them toward national markets in the EU, due to their shared legal frameworks, existing co-production schemes and wide professional networks.

The findings also revealed the absence of common strategies to approach internationalisation. A widely shared perception among professionals is that each film is a singular, context-specific endeavour, a "pilot," shaped by unique creative and production conditions. This understanding often leads to the rejection of international uniform strategies. Although this understanding echoes traditional creative economics scholarship (Caves, 2002), it contradicts policy discourses calling for more industrially standardised approaches. As a result, film distribution, promotion, and marketing efforts tend to remain fragmented, reactive, and tied to national frameworks, rather than being integrated into a broader European strategy: this conclusion highlights the need to develop more coherent cross-border circulation strategies, adding fresh empirical insights to existing scholarship (Raats et al., 2018).

Nonetheless, there is growing recognition in Europe of the untapped potential in embedding both marketing and international promotion of films earlier in the production process. Recent policy developments, such as the introduction of promotional funding for producers by Eurimages, as announced during Locarno Film Festival in 2024, reflect this shift and confirm the need for more structured support mechanisms. Interviews also highlighted the potential for fostering stronger collaboration between distributors and sales agents across the EU. Although often viewed as competitors, professionals from these sectors could benefit from mutual learning and knowledge exchange. This could contribute to building a more coordinated 'European thinking' approach to distribution, one that recognises not only the diversity of national markets but also their shared challenges and opportunities.



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In addition, although the importance of investing further in institutional promotion has been recognised (Nistoreanu et al., 2022), there remains a gap in the EFI. Currently, the Member States remain the main players in the international promotion of their respective film industries (Vlassis et al., 2025). Notably, initiatives like the EFP network are valued, although their scope is considered too limited in relation to the scale of the challenge of promoting European films.

Film festivals play a crucial role in increasing the visibility of European films and supporting their distribution in international markets. This conclusion is also made in the academic literature (Montal, 2016). Professionals consistently emphasised that once a film wins an award at a major festival, its chances of securing international distribution increase significantly. This observation was also confirmed by the REBOOT findings on the views of non-European film professionals on the EFI (Dâmaso et al, 2025).

Festivals are recognised as essential platforms for the validation, networking, and strategic positioning of European films within the global audiovisual landscape. This factor is also reflected in the survey results, where participation in international festivals and the receipt of awards were among the most frequently cited indicators of the EFI's competitiveness. However, this prominence of festivals also raises concerns about the concentration of visibility and the gatekeeping power held by a small number of influential festivals. While festivals contribute significantly to the symbolic value and transnational circulation of European films, their curatorial decisions shape which narratives are elevated, potentially reinforcing hierarchies within the EFI and narrowing the diversity of works that achieve international exposure (Wiedemann & Krainhöfer, 2020).

One of the underlying issues is the absence of a clearly recognised identity for the EFI. When asked to define the EFI, professionals were often reluctant to offer a precise description: they frequently emphasised the industry's diversity and the difficulty of reducing it to a single narrative. They also believe that audiences in EU and non-EU markets cannot connect with the notion of an EFI.

Yet, despite this hesitation about the identity of the EFI, both survey and interview data point to a set of shared values that consistently emerge across professional perspectives. These include a strong emphasis in the EFI on diversity, creative freedom, the cultural value of film works, as well as the central role of film co-productions and public support (a finding that again echoes research developed at a smaller scale, which discovered that “cultural diversity turns out to be higher in countries where the movie industry receives strong public support” – see Moreau & Peltier, 2009).



Taken together, these shared values suggest the presence of a coherent, albeit implicit, core identity for the EFI.

These findings indicate an untapped potential to explore the development of a flexible European promotional framework, one that does not impose uniformity, but instead highlights the core principles that define the EFI. While professionals remain divided on the idea of promoting European films under a unified label or establishing a European Centre of Cinema (similar to the *Centre national du cinema* in France), largely due to concerns about administrative burden and preserving diversity, there is room to build on the common ground identified through this research.

Finally, the idea of tailoring promotional strategies for European films to specific world regions defined by geographic, cultural, or economic criteria did not receive support from professionals. Neither the survey nor the interviews indicated enthusiasm for regionally targeted approaches to such promotion. This finding is consistent with the broader perception of each European film as a singular, stand-alone work, requiring bespoke promotional strategies rather than a one-size-fits-all model.

4.2. Evolving models of content creation and circulation: co-production, co-venture, and commissioning

Co-productions are perceived as a pathway to international circulation, but not necessarily as a gateway to global reach. While co-productions grant access to the markets of partner countries, they are rarely seen as sufficient for expanding into regions beyond those involved in the co-production agreements. From a political perspective, the priority for co-production and distribution placed in the EU is further reinforced by the belief that the core purpose of the EFI is to ensure the production and accessibility of European content for European audiences. Many interviewees noted that, even within Europe, distribution remains unbalanced, and significant efforts are still needed to build a truly integrated EU market. The survey confirmed this emphasis: professionals identified distribution within the EU (81,7%) and outside the EU (74,9%) as the top priorities for strengthening the EFI's international position.

Co-production is perceived by professionals as a structural need for the EFI. It is commonly assessed positively for its business value, since it enables films to access additional markets and funding sources, and for its importance to project development and creative enrichment. Many professionals view co-productions as a catalyst for innovation, helping to shape content through



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collaboration between diverse cultural and professional backgrounds. However, the perceived benefits of co-production go well beyond the production process itself.

Interviewees stressed the political and societal dimensions of co-productions. These are seen as fostering enduring ties among European professionals, strengthening a sense of collective identity, and contributing to the development of a shared audiovisual space rooted in cooperation, diversity, and mutual support. Co-production also plays a key role in enabling smaller countries to maintain active production sectors and in fostering knowledge transfer across regions and professional communities. In this sense, co-production plays a key role not only in sustaining the industry but also in shaping the values and practices that underpin the EFI. While co-production challenges related to bureaucracy and administrative complexity are acknowledged, film professionals consistently emphasise that these are outweighed by the long-term creative, strategic, and cultural benefits.

The typology proposed by Morawetz et al. (2007) which classifies co-productions as creatively motivated, financially driven, or capital-oriented, proves to be less clear-cut when examined through the lens of EFI professionals. Within the EFI, the use of the co-production model is predominantly perceived as an economic necessity, echoing earlier claims that most partnerships are financially motivated (Jones, 2016). However, this report's findings suggest that these motivations are rarely isolated. In practice, film professionals describe co-productions as fulfilling multiple roles simultaneously: enabling access to broader funding pools, expanding distribution networks, and enhancing the creative development of content.

The economic and artistic motivations are often interlinked, with cross-border collaboration enriching narrative depth and cultural specificity, while also making projects financially viable. This complexity mirrors the multiple policy jurisdictions and imperatives that coalesce around co-productions (Hammett-Jamart, 2018, p.56). Importantly, the benefits of co-production are understood as extending beyond individual projects. Film professionals emphasise co-production's role in fostering knowledge transfer, creating professional ties across borders, and reinforcing a collaborative ethos within the European industry. In this sense, co-productions are not merely a production strategy but a structuring force within the EFI, contributing to a shared professional culture and helping to sustain a sense of collective identity across diverse national contexts. It can be said, then, that co-productions support the transnationalisation of the EFI (Bergfelder, 2005).



While film co-productions within the EU are well established and largely supported through existing policy frameworks, professionals pointed to significant limitations when it comes to co-producing with non-EU partners. These collaborations are often constrained by the absence of common funding schemes, legal agreements, and established networks of trust and cooperation. Despite these structural barriers, co-productions with non-European partners are generally viewed as important opportunities, both to expand market reach and to reaffirm Europe's commitment to artistic collaboration, cultural diversity, and international solidarity. Professionals highlighted the potential of such co-productions not only in terms of market access and creative enrichment, but also as a means of projecting shared European values onto the global stage. However, they also cautioned that without clearer instruments and institutional support, these opportunities remain difficult to realise in practice.

Transnational VOD platforms are recognised by professionals as important players in facilitating the international circulation of European films, particularly in reaching broader and younger audiences. Their global infrastructure and digital accessibility offer a channel for greater visibility of European works beyond national borders. However, the engagement with these platforms is marked by a conflicting dual perception: while they help to increase exposure for European films, they are not seen as effectively addressing the structural distribution challenges faced by the EFI.

During the COVID-19 pandemic, transnational VOD platforms were perceived as highly active players, commissioning content and offering new production opportunities. However, professionals have now noted a decline in investment, and they have growing concerns about the impact of VOD platforms in the EFI. A central concern is the business model adopted by powerful US-based VOD platforms, which often retain intellectual property rights, consumer data, and marketing know-how, as has also been highlighted by film industry scholars (Senftleben & Izumenko, 2024) and policy-makers (European Parliament, 2023) alike.

Film professionals also highlighted the growing asymmetry in power between local producers and global platforms. The decision-making processes of these platforms are typically centralised and opaque, with key operations based outside Europe. Additionally, platforms often fail to adequately acknowledge the role of European production companies, which weakens the visibility and recognition of the EFI in the international audiovisual market. While VOD platforms have contributed to the global circulation of certain European titles, their investments are widely perceived as market-driven and short-term, rather than reflecting a genuine commitment to the long-term development of



the EFI. This is further evidenced by the uneven distribution of film industry investments across EU Member States and a strong focus on specific film genres or formats that align with commercial priorities.

Furthermore, the perceived impact of VOD platforms is not uniform. It significantly varies depending on the role of the professional (e.g. producers, directors, distributors), the country of origin, and even the subsector, such as animation or independent cinema. While film professionals acknowledge that VOD services may contribute positively by transferring technical expertise and increasing the volume of European content produced, their contribution to the EFI's competitiveness is seen as conditional. Without control over IP, adequate attribution, and safeguards for editorial freedom, these benefits will remain partial and insufficient to reinforce the structural and symbolic strength of the EFI in global markets.

This misalignment between the interests of transnational VOD platforms and the core principles of the EFI – such as independent production, cultural diversity, and support for local creative ecosystems – raises significant concerns about the sector's long-term sustainability. Film professionals fear that the EFI may become structurally dependent on external financing models without securing ownership, visibility, or creative control. This dependency risks undermining both the economic autonomy and the creative freedom that professionals consistently identify as essential pillars of the EFI's competitiveness. In this context, some professionals lament the absence of a strong EU-based VOD platform that could help strengthen the EFI. However, they are not optimistic about developing such an alternative, as many perceive it to be extremely difficult to compete in financial and technological terms.

In this debate, it is important to note that the survey and interviews were conducted prior to the start of the second Trump administration in 2025 and the implementation of its agenda. Several concerns raised by professionals, particularly regarding dependence on US-based VOD platforms, cultural homogenisation, and the imbalance of power between EFI professionals and US streaming services may be even more pronounced in the current political climate. As such, future research could examine how this political shift influences perceptions and discourses within the sector, and to what extent it translates into more explicit calls for increased policy intervention, as observed in the public debates during the 2025 Cannes Film Festival (Vlassis, 2025b).

The debate on AI within EFI is still at an early stage, with many film professionals beginning to experiment with its potential. While there is an openness and optimism about AI's capacity to support



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different phases of the audiovisual value chain, concerns are also emerging. Professionals share apprehension about the technology's possible impact on cultural diversity, artistic identity, and employment. Many fear that a growing reliance on data-driven decision-making may favour commercially safe content, thereby weakening the creative diversity that defines the EFI. Some professionals advocate for stronger transparency and regulatory frameworks, alongside advocacy for the development of EU-based AI technologies that would embody European values and reduce dependence on dominant US-based systems.

4.3. Rethinking competitiveness beyond economic metrics

The REBOOT findings challenge the dominant understanding of the EFI's competitiveness, particularly as framed in policy discourse (Draghi, 2024) and business literature (e.g. Howse et al, 2006; Boediman, 2024), where it tends to be narrowly defined in terms of economic performance. In contrast, the perspectives gathered in this project's research reveal that film professionals take a broader and more nuanced view – one that places cultural value, creative freedom, and public interest at the core of the idea, rather than emphasising market expansion or profit margins.

The main strengths of the EFI, as identified by both the survey and interviews, lie in its cultural diversity and its capacity to produce high-quality, culturally, artistically and/or socially relevant films. Crucially, the very elements often portrayed as limitations to EFI's global competitiveness – such as the complex nature of the European film market, linguistic diversity, and the dominance of small and medium-sized enterprises – are also seen by professionals as defining features of its richness and originality. These are not flaws to be fixed but assets to be acknowledged and preserved, and the pillars of a paradigm that is not only cultural and industrial but also geopolitical (Dâmaso, 2025).

Professionals consistently value symbolic and cultural markers of success, such as international film festival presence, awards, and critical acclaim, over economic indicators like corporate growth or production scale. This signals a different understanding of competitiveness: one rooted in visibility, influence, and cultural relevance rather than in market expansion alone. Public funding, for instance, is not only recognised as essential for sustaining production but also framed as a competitive advantage. It enables risk-taking, supports freedom of expression, and aligns production practices with broader EU values such as diversity, collaboration, and democratic access to culture.

This alternative vision of competitiveness becomes particularly clear when contrasted with the dominant model represented by the Hollywood film industry. The EFI professionals perceive



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European and Hollywood cinema as operating within fundamentally different frameworks. The Hollywood movie model, including US-based VOD platforms such as Netflix, Prime Video and Disney+, is largely perceived as being guided by purely commercial imperatives, vertical integration, expansive ambitions and the pursuit of global market dominance. By contrast, the EFI is characterised by cultural aspirations, collaborative processes, and public-interest values. Interestingly, this contrast, evident during the debates from late 1980s to mid-2000s on cultural exception (*exception culturelle*) and the diversity of cultural expressions within the context of European and international economic integration (Vlassis, 2015) remains clearly dominant within the EFI. In addition, these distinctions extend beyond geography, as they reflect differing notions of production and distribution. Many film professionals report challenges in collaborating with US-based players, especially when it comes to maintaining creative control and navigating differing approaches to transparency, ownership, and narrative development (once again echoing previous research on the relationship between European and Hollywood professionals – see Pardo, 2007).

The reluctance or inability to define the EFI in a single, unified way is also telling. While professionals were hesitant to articulate a clear identity for the industry, fearing that such a definition would exclude or flatten the sector's diversity, there was nonetheless consensus around certain core values: cultural diversity, creative freedom, public support, and a strong commitment to cooperation among EU Member States. These elements, and the governance framework that they establish (Sarikakis et al., 2025), form the implicit backbone of the EFI's identity, even if they are not always formally codified.

These perspectives position the EFI not merely as an economic sector, but as a cultural and political project, rooted in the principles of collaboration at various levels, and artistic expression – something that UNESCO's 2005 Convention calls "the dual nature" of cultural expressions (UNESCO, 2005). The EFI's value is located as much in the diversity of its narratives and the inclusiveness of its production practices as in its perceived capacity to resist homogenising market pressures. Attempts to measure the EFI's competitiveness solely through the lens of economic performance risks overlooking these defining elements. In doing so, this could ultimately undermine what makes the EFI both distinctive and resilient.

However, this does not imply that there is no need to enhance the EFI's market performance. On the contrary, the project findings highlight a pressing need to strengthen distribution and promotion strategies, particularly within the EU, which film professionals overwhelmingly see as their primary



operational space. Despite the fragmented nature of the market, there is untapped potential in fostering cross-border circulation, connecting films with diverse audiences, and exploring shared promotional strategies. The idea of an EFI brand, while met with ambivalence, could help address this gap, especially if built around core values such as diversity, cooperation, public support, and creative freedom.

In conclusion, the findings from this research call for a redefinition of competitiveness, one that integrates cultural, symbolic, and public-interest dimensions alongside economic considerations. A top-down industrial agenda that exclusively prioritises scale, profitability, and market share risks sidelining the very elements that constitute the EFI's comparative advantage. Instead, a bottom-up approach that recognises and builds upon the values and practices identified by film professionals offers a more coherent and sustainable vision for the EFI's future in the international landscape.



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5. CONCLUSION

This research set out to investigate how film professionals across Europe understand and engage with the concepts of the European Film Industry (EFI), the international market, and competitiveness. Drawing on survey data and in-depth interviews, the findings reveal not only how diverse and layered these understandings are, but also how they challenge dominant policy discourses and conventional notions of competitiveness.

A key conclusion emerging from the project analysis is the persistent disconnect between how competitiveness is understood by film professionals and how it is typically framed in EU policy debates and business literature. Whereas in the literature competitiveness is often approached through a narrow economic lens, focusing on growth, scale, market expansion, and financial returns, industry professionals tend to conceptualise competitiveness in cultural, symbolic, and political terms. For them, the core strengths of the EFI lie in its capacity to produce high-quality, artistically ambitious, and culturally diverse films that are rooted in freedom of expression and (co)supported by public funding. These elements are viewed as defining features of the EFI and are crucial to its sustainability.

Competitiveness, according to most respondents, is associated with cultural value, artistic recognition, and symbolic visibility, particularly through festivals, awards, and international screenings. Conversely, traditional economic indicators such as profitability, corporate growth, or scale were ranked as less important. Public funding was consistently identified as the EFI's primary competitive advantage, not only for its role in enabling risk-taking and experimentation in films, but also for guaranteeing creative autonomy and safeguarding democratic values and cultural diversity across EU Member States. In this sense, public support is not merely an instrument of subsidy, but also a structural pillar that underpins the very identity of the EFI.

The study also shows that the EFI is widely seen as fundamentally distinct from the Hollywood model. The contrast is not only one of scale or global reach, but of underlying values and modes of operation. The Hollywood/US industry is perceived as highly hierarchical, commercially driven, and vertically integrated, often prioritising profitability. In contrast, the EFI is seen as more decentralised, collaborative, and transparent, with a greater emphasis on storytelling, authorial voice, and freedom of expression. These differences often translate into practical challenges when attempting to collaborate with US-based players, especially in the VOD context where creative control, co-



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authorship, or ownership rights are at stake. For many professionals in the industry, these are not just technicalities, they are political and ethical boundaries that define what the EFI stands for.

While VOD platforms have undeniably increased the international visibility of some European works, especially among younger and more globally distributed audiences, they are not perceived as a solution to the EFI's distribution and sustainability challenges. Film professionals raised concerns over the retention of intellectual property, the lack of transparent data sharing, and the platforms' influence over content development and discoverability. Notably, VOD's contribution is perceived unevenly, varying by country, professional role, and genre. Although global platforms are now part of the ecosystem, their rationale does not always align with the core values of the EFI, nor do they guarantee long-term benefits for the European sector.

Yet, despite the EFI's strong commitment to core values, there is notable ambivalence when it comes to defining the industry as a unified entity. Professionals frequently emphasised the diversity and fragmentation of the sector as both a challenge and a feature. When directly asked to define the EFI, many hesitated, suggesting that any single definition risked excluding parts of the industry. Nonetheless, the project research revealed implicit convergence around a set of foundational values: cultural diversity, creative freedom, collaborative production practices, and public interest. These elements form the informal but robust backbone of what the EFI represents, even if they are not always explicitly articulated.

This ambiguity also extends to how the 'international market' for films is understood. For most industry professionals, the international market is pragmatically defined as everything beyond the national context. But, in practice, this often means prioritising the EU market. Co-production is viewed as a key strategy for accessing new markets and building cross-border networks. While largely assessed positively on creative, political, and business grounds, co-productions are also seen as unevenly accessible, particularly in non-EU contexts where legal and financial frameworks are less established. Nevertheless, co-productions are credited with fostering a shared European film culture, thereby facilitating knowledge exchange, and enabling small countries to produce and distribute content they would otherwise struggle to finance independently. This reinforces the perception of the EFI's commitment to freedom of expression.

The report's findings also reaffirm that distribution and promotion remain the challenging links in the EFI's international strategy. Survey and interview data highlight the structural fragmentation of the EFI's distribution landscape and the lack of consistent promotional frameworks, both of which



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impede access to broader audiences. Film professionals stressed the need to embed international promotion from the earliest stages of production and to strengthen collaboration among distributors and sales agents. In addition, many film professionals recognise the strategic value of coordinated branding to enhance visibility, audience engagement, and international positioning. This is a point that warrants further research, particularly to understand how a shared brand could support the EFI without compromising its inherent diversity.

Taken together, the report's results suggest that the very definition of the EFI and the values it represents must be central to any conversation about competitiveness. Competitiveness, as understood by industry professionals, is not a function of financial returns alone. Rather, it is linked to the ability to maintain a distinctive cultural identity, to produce diverse and meaningful content, and to operate within a framework that supports democratic principles and artistic freedom. This implies a broader redefinition of what it means for the EFI to be competitive, one that reconciles industrial goals with cultural imperatives, and economic logic with public interest (Dâmaso et al, 2025).

Crucially, this redefinition of competitiveness for the EFI demands a closer alignment between top-down policy visions and bottom-up professional practices. As long as competitiveness in Europe's film industry is measured only by economic indicators, there will remain a fundamental mismatch between institutional agendas and the lived realities of those working within the sector. Policies that ignore the cultural and political nature of the EFI could undermine its legitimacy, effectiveness, and resilience.

In conclusion, REBOOT's research underscores the need to rethink how competitiveness is conceptualised in the context of the EFI. Rather than rejecting competitiveness, the project's findings call for its redefinition, one that incorporates bottom-up perspectives and remains aligned with the sector's cultural and political foundations. Competitiveness, as understood by the industry's professionals, is not at odds with the values of the EFI, but must be approached in a way that embraces its core dimensions. Expanding the notion of competitiveness to include these dimensions is essential, as this will ensure that strategies aimed at strengthening the EFI's position in international markets do not undermine what makes this sector distinctive.



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7. ANNEXES

7.1 Survey

DEMOGRAPHICS

Q1. Gender - To which gender do you identify to ?

[1: Man 2: Woman 3: Non-binary 4: Prefer not to say]

Q2. How long have you been working in the film industry?

[Open question that shall be turned into a range]

Q3. Location – Where are you currently based?

[Open question]

Q4. Relation with film industry – What is your role within the film industry?

[Broadcaster, VOD platforms, film production, film distribution, policy regulation, film promotion, marketing, support roles, other].

COMPETITIVENESS & EFI.

PART 1. GENERAL DEFINITION & EFI

Q5. Please type in three words that you associate with the European film industry.

Q6. In the following list, which words do you associate most with competitiveness in the European film industry (please choose three)

[Marketability, Distribution, Reviews/Acclaims/Recognition, Casting, Budget, Genre, Soundtrack, Co-production, International markets, Streaming rights, niche content, talent, ... not so sure... diversity of language, diversity of cultures, government support, state subsidies, private funding, artistic innovation, distribution, digital platforms, cinema, marketing, exports, copyright/intellectual property, technological tools, range of offer, other]

Q7. In your opinion, does the EFI substantially differ from other type of cinema (e.g. Hollywood,...)?

7.1. In terms of content

7.2. In terms of rentability [Yes/No]

Q8. In the following list, which words do you associate most with European cinema?

(please choose three) [Art house, there is no such thing as European cinema, rich history, artistic diversity, cultural diversity, creative cinema, public support, auteur cinema, film festivals, co-productions, film literacy, mainstream productions, blockbusters, other]



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- Q9.** In the European market, what do you consider an important policy tool to promote a film? (multiple answers possible) [support to participate in festivals, support to participate in market events, coproduction, press event, investment in subtitle and dubbing, investment in marketing, other]
- Q10.** What elements do you think contribute to promote a European movie on the international market? (multiple answers possible) [Award nominations, film festival selection, casting, recognized director/producer, country of origin, box office performance, soundtrack, other]

Part 2. EU INTERNAL DIFFICULTIES / EU ID

- Q11.** How competitive is the European film market according to you?
- 11.1. On the global market [Not at all/Extremely]
- 11.2. Within European countries (as opposed to national films?) [Not at all/Extremely]
- Q12.** In your opinion, from where comes the strongest competition? [outside the EU, inside the EU]
- Q13.** What obstacles prevent the European film market to expand further on the global market? [quality of European works, originality of European works, Hollywood dominance, competition from the Asian market, lack of EU-wide media, limited marketing, limited distribution, cultural differences, lack of funding, fragmented market, limited exposure abroad, limited exposure in international festivals, others...]
- Q14.** What obstacles prevent European works from circulating better on the European film market? [The size difference in regional markets, the size difference in EU countries, language barriers, cultural specificity, the lack of interest from the EU population for foreign films, fragmentation of the EU market, lack of cross-border collaboration, lack of funding and support for distribution, audience preferences, limited promotion, limited visibility, fragmented distribution, subtitling and dubbing, other]
- Q15.** What solutions could you envisage to overcome such barriers? [EU policies, standardizing subtitles practices, facilitating easier cross-border distribution, increasing promotional efforts, fostering pan-European film festivals, fostering pan-European collaboration, creating fund schemes encouraging cross-border productions, other]

Part 3. INTERNATIONAL COMPETITIVENESS (AMERICAN HEGEMONY, OTHER MARKETS, DIFFERENT ACTORS)

- Q16.** Please type in three words that you associate with the “international market” (regarding the film industry).



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- Q17.** Who is the main competitor to the European Film industry?
[Hollywood/American Film Industry, Asian Film Industries, Latin American Film Industry, streaming platforms, other regional film industries, none]
- Q18.** To what extent do you perceive the emergence of VOD platforms (such as Netflix, Prime, Disney+)
- 18.1. As having an impact on the European Film Industry [yes/no, positive/negative]
 - 18.2. As boosting competitiveness of the European Film Industry [yes/no, positive/negative]
 - 18.3. As threatening European culture [yes/no, positive/negative]
 - 18.4. As threatening European Film Industry [yes/no, positive/negative]
 - 18.5. As boosting American culture / Americanisation [yes/no, positive/negative]
- Q19.** How do you believe that VOD platforms are shaping the dynamics of the international market? [increased international co-productions, facilitated international distribution, increased international competition, ...+ options?]
- Q20.** To what extent do you believe that European VOD platforms (such as Canal+, Viaplay, BBC iPlayer, Salto, Joyn, NordicStreamers) help...
- 20.1. Promoting European films and European culture?
 - 20.2. Making European production more discoverable?
 - 20.3. And help making the EFI more competitive? [Not at all/Extremely]
- Q21.** Do you believe that the existence of several national public broadcasters is an advantage or disadvantage for the EFI and its international promotion?
[advantage/ disadvantage for promotion inside EU, advantage/ disadvantage for promotion outside EU]
- Q22.** How important are film festivals to promote the EFI abroad?
[Not at all/Extremely]
- Q23.** To what extent do you perceive that major American VOD platforms (such as Netflix, Disney+, Prime) are shaping the content produced in Europe? [Not at all/Extremely]
- 23.1. How do you perceive American VOD platforms have influenced European creative choices, thematic elements, storytelling and representation in the entertainment industry?
[Strongly influential (with significantly shifted themes, narratives and representation in European content), moderately influential (some impact on creative choices and storytelling, but not drastic), no discernible impact, not influential (minimal influence on European content), I don't know/Not applicable]



- Q24.** To what extent do you see international co-productions as advantageous for the competitiveness of the European film industry? [negative/positive + kind of impact]
- Q25.** When it comes to prioritizing investment in co-productions, should the focus be on projects within Europe or those involving international partners outside of Europe?
[Inside EU, Outside EU overall, Asia, US, Latin America,...]
- Q26.** How do you perceive the impact of streaming platforms' recommendation system on the competitiveness of the EFI? / Do you believe that streaming platforms' recommendation systems help to promote the EFI? [Not at all/Extremely - positive/negative]
- Q27.** Do you think that big streaming platforms' recommender systems help to promote a diverse range of AV content? [yes, they promote diversity by suggesting varied content, enhancing exposure for a wide range of genres / no they lack diversity and tend to prioritize popular and mainstream content]
- Q28.** How do you perceive the collaboration with Hollywood majors and its impact on the promotion of the EFI in the international market? [Positively/Negatively + Not at all/Extremely]

Part 4. (EU) POLICIES (SOLUTIONS: EXPORT, STATE AIDS, LICENSES, CO-PRODUCTION)

- Q29.** To what extent do you believe that priorities and strategies to promote the EFI abroad are shared amongst European film professionals? [Not at all/Extremely]
- Q30.** How often do you collaborate with other European film professionals to increase competitiveness? [Likert scale: frequency]
- Q31.** To what extent do you perceive the implication of the EU in boosting the European film industry? [Not at all/Extremely]
- Q32.** Do you believe that the international promotion of the European film industry should be based on specific geographical areas? [Yes/No – also based on cultural, linguistic, economic, political?]
- Q33.** Initially, quotas were introduced to reduce imports and protect European works. How do you perceive the impact in increasing the competitiveness of EFI, if there is any? [Not at all/Extremely + positive/negative]

33.1. If yes, do you believe it remains relevant in the VOD context?



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- Q34.** Who should be held responsible for creating a competitive European Film industry? [broadcasters, governments, EU, producers, distributors, platforms, audience, all of them, other]
- Q35.** What is the influence of copyright laws on the European Film Industry's growth and competitiveness? (Multiple answers possible)
[Positive/Negative – safeguard European film creativity, promote innovation, hinder innovation, foster growth and competitiveness, create some hurdles, contribute to protecting European film content, ensure fair compensation, ensure sustainability, impose significant barriers, hinders the EFI's ability to compete globally]
- 35.1. How do challenges associated with retaining intellectual property on VOD affect the competitiveness of the European Film Industry?
[Crucial challenge, moderate challenge, is not a challenge, does not have a significant impact]
- Q36.** Does the EU policy help small EU countries against competition from larger countries? [Not at all/Extremely]
- Q37.** What are the main mechanisms or strategies that can be employed to promote the competitiveness of the European Film Industry abroad?
[Support to co-productions, support to dubbing/subtitles, support to marketing, support to participate in international events, Other]
- Q38.** In your opinion, is the EU doing enough to increase the ability of the European industry to compete against international (outside EU?) competitors? [Not at all/Extremely]
- Q39.** What do you consider priorities in promoting the EFI in the international market?
[increase coproduction, support to distribute content across EU, support to distribute content outside of the EU, increase investment in marketing, develop an EU film brand, invest in training, other]

PART 5. COVID.

- Q40.** Has the COVID-19 pandemic affected the balance of power between streaming platforms and the EFI? If so, how? [Not at all/Extremely + positively/negatively]
- Q41.** What specific challenges are faced today by the industry due to the pandemic?
[Production hurdles (restriction of film schedules, locations, health protocols), distribution challenges (cinema closures, consumer behaviour shift), financial constraints, (increased production costs, uncertain returns, budget constraints), audience engagement (changes in preferences, attention spans change), others]



Q42. What strategies do you believe would help the AV industry adapt to these challenges in the long term? [EU dedicated budget, more partnerships, audience-centric content, technology, investment in platforms, ...?]

7.2 Questionnaire

PROFILE

- What is your role in the film industry?
- How long have you been active as a film industry organization and what other roles did you have previously in it, if any?

GENERAL

- In your view, when it comes to the European film industry, which concepts or values, do you associate with it?
- In your opinion, what are the key challenges facing the EFI?
- What core concepts or values should drive the EFI forward?

COMPETITIVENESS AND INTERNATIONAL MARKET IN THE EFI

- Do you consider that the European film industry is competitive within the international film market? If yes/no, why? What are its main strengths and weaknesses?
- How do you define the international markets for national films (for example, France or Belgium) and for European films? Are there any key differences?
- Do you believe that there is a common definition of what is the international film market and what it should include/entail at the European level? (In other terms,) do you believe that European film professionals have common priorities and strategies regarding the promotion of the EFI in the international market?
- What aspects are central to successfully promoting the competitiveness of the European film industry within the international market?
- Tensions exist within the EU between smaller and larger Member States, for instance, or between the Eastern and the Western regions. In your opinion, do they impact the competitiveness of the EFI and, if so, how?
- What are the primary obstacles that prevent the EFI from reaching broader audiences?
- How crucial is effective marketing and promotion in increasing the competitiveness of the EFI in the international market, and what key strategies or initiatives should be prioritized to enhance the visibility and appeal of European cinema on an international scale?
- Do you feel that specific groups or countries are leading the negotiations and decisions being made when it comes to the international promotion of the EFI? If so, which ones?
- Do you believe that defining different geographical areas as priorities would help with the promotion of the EFI? If not, why? If yes, on which criteria would you select those



geographical areas? Cultural, linguistic, economic, political (liberal regimes vs authoritarian regimes), etc.?

STREAMING PLATFORMS

- Do global VOD players shape professionals' understanding of the international market and, if so, how?
- Do you perceive any advantages offered by VOD platforms when it comes to distributing and showcasing European cinema on an international scale?
- Do you perceive big streaming platforms (Netflix, Prime Video, etc.) as contributors to a more competitive European film industry in the international market? Could you elaborate on the positive or negative impacts that streaming platforms have on the European film industry?
- What role do you think that European streaming platforms, such as Viaplay, play in attempts to increasing the competitiveness of European film industry in the international market?
- To what extent does the negotiation of intellectual property agreements with VOD players influence the overall competitiveness of the EFI?
- Do you believe that the recommender systems used by big streaming platforms are promoting a diverse range of audiovisual content? Is their impact rather positive or negative in terms of the goal to make the EFI more competitive in the international market?
- To what extent do you believe that the discoverability and prominence of European content is assured by VOD platforms? How does this affect the competitiveness of European films in the international market?
- As you know, the AVMSD includes quotas of 30% of European content or contribution from platforms to the production of national content. Today, countries such as Canada, South Africa, Australia, and Mexico seek to adopt similar provisions. Do you think that the promotion of cultural diversity through quotas of national content is compatible with an industrial agenda favouring a more competitive EFI in the international market?
- Do you believe that major streaming platforms are shaping the content produced in the EFI, regarding creative choices, thematic, storytelling, etc.? Can you provide examples of how this influence manifests? What consequences, both advantageous and detrimental, does this influence have? How does it impact the notion of European film or European content?

PUBLIC BROADCASTERS AND EFI IN THE INTERNATIONAL MARKET

- Considering the role of public broadcasters as a historical feature in the European audiovisual landscape, what is their role in the promotion of the competitiveness of the EFI? Do you believe that the existence of several national public broadcasters is an advantage or disadvantage for the EFI and its international promotion?
- How could PSB enhance their competitiveness? Do you consider that investing in VOD is a good strategy to promote the competitiveness of the EFI? Why? Finally, should these public VOD services compete with private ones?
- In your opinion, who should bear the largest responsibility for creating a more competitive EFI in the international market? Producers, distributors, streaming platforms, public



broadcasters? And what specific actions or changes should they undertake to achieve this goal?

INSTITUTIONAL CONTEXT AND COMPETITIVENESS

- From your perspective, which are the main European mechanisms available for promoting and disseminating/exhibiting film content internationally?
- What are the strengths and weaknesses of existing structures for disseminating/exhibiting film content internationally?
- How do you perceive the role of film festivals in increasing the international competitiveness of the EFI, and what specific strategies can maximize the impact of these festivals in promoting European cinema globally?
- How crucial are specialized training programs and professional networks in enhancing the competitiveness of the EFI, and what specific strategies or initiatives can be implemented to foster these elements effectively?

INTERNATIONAL CO-PRODUCTIONS

- From your perspective, are international co-productions an advantage or disadvantage for the competitiveness of EFI in the international market? Could you elaborate on the positive or negative impacts that international co-productions have on the European film industry?
- What are the key differences in engaging in international film co-productions with European companies compared to collaborations with partners from outside Europe? Do these differences influence EFI's global standing and success in the film industry and, if so, how?
- When it comes to prioritizing investment in co-productions, should the focus be on projects within Europe or those involving international partners outside of Europe? Why?
- What potential benefits or challenges do you foresee in implementing greater international co-productions involving partners outside of Europe?
- Are international co-productions between European countries and the UK central to increasing the competitiveness of the European film industry? If yes, what are the key challenges that need to be addressed to facilitate and enhance such collaborations?
- How did Brexit impact the work of your organization?
- Do you agree that international co-productions can be a valuable mechanism for professionals to learn, share expertise, and build networks for future endeavours? Do you think this contributes to the EFI competitiveness? How it could be improved?
- To what extent does international coproduction influence and potentially shape the creative choices of a film? Do you believe there's an impact on the final product compared to films produced solely within a single cultural or national context?
- Some research suggests that international film co-productions can lead to potential exploitation of cheaper labour in certain countries or unbalanced power dynamics. How can these issues be addressed to ensure equitable collaboration in cross-border filmmaking?

EUROPEAN CINEMA AND IDENTITY

- If I say, "European cinema", what words or images come to mind?



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- What do you consider European cinema? How do you define the European in the European film industry? Do you believe the European audience connects the notion of "European" to some specific features?
- In your opinion, is there a relationship between European cinema and arthouse cinema? If yes, do you think that this link between European cinema and art-house-auteur cinema has a positive or negative effect on today's international promotion of European cinema? Do you think that this relationship has negative effects for the good performance of other kinds of European movies, such as comedies, animation movies or European blockbusters, e.g. Luc Besson's movies?
- If not, in your opinion, is European cinema more closely associated with a certain type of cinema (comedies, animation, artistic films, etc.)?
- Do you think that the European film industry has a special feature compared to other cinematography (Hollywood, Chinese, Indian)?
- Is there any type of film that you see as not compatible with the current international market for European films?

INTERNATIONAL COMPETITORS AND EUROPEAN FILM INDUSTRY

- In your opinion, which is the main competitor of the EFI?
- Do you think that the association with Hollywood majors is negative or positive to the promotion of the EFI in the international market? Are Hollywood majors an obstacle or a partner for improving the competitiveness of EFI?
- What are the key differences between European film industry and Hollywood majors regarding the promotion of audiovisual content in the international market?
- To what extent do the Chinese and Indian cinema industries compete with the EFI? What are their main differences in terms of competitiveness?
- What policies would you recommend to address these international competitors?

COVID-19 AND EFI

- Has the COVID-19 pandemic influenced the power dynamics between streaming platforms and the EFI and, if so, how?
- In light of the COVID-19 pandemic, do you believe that it will have any long-term effects in the audiovisual industry? What recommendations or strategies can be proposed to help the industry to adapt and overcome these challenges?

POTENTIAL RISKS

- Is the sustainability of the European film industry under threat? If yes, what do you identify as its main threats?
- What do you see as the most significant impact of AI technologies on the EFI? Do you have any recommendations to address this issue?



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7.3 Market Overview - EFI

Market Share Breakdown of European admissions by origin of films				
Year	European Films	EUR incl/US	US	Others (%)
2012	35,2	2	61,1	1,6
2013	26,2	1,1	69,1	3,6
2014	33,6	0,3	63,1	3
2015	26,1	7,3	64	2,6
2016	26,7	3,6	67,4	2,3
2017	27,5	3,7	66,2	2,6
2018	29,4	5,4	63,2	2,1
2019	25,7	3,2	68,7	2,5
2020	39,7	6	49,4	4,9
2021	26,5	9,3	58,6	5,7
2022	28,4	4,3	64,5	2,8
2023	25,4	0,9	71,1	2,7
2024	32,8	1,1	62,8	3,3
Average	29,47692308	3,707692308	63,78461538	3,053846154
Median	27,5	3,7	64	2,6
Standard Deviation	4,607247255	2,675443888	5,568205195	1,228228584

Figure 47 – Market share breakdown of European admissions by origin of films (I)



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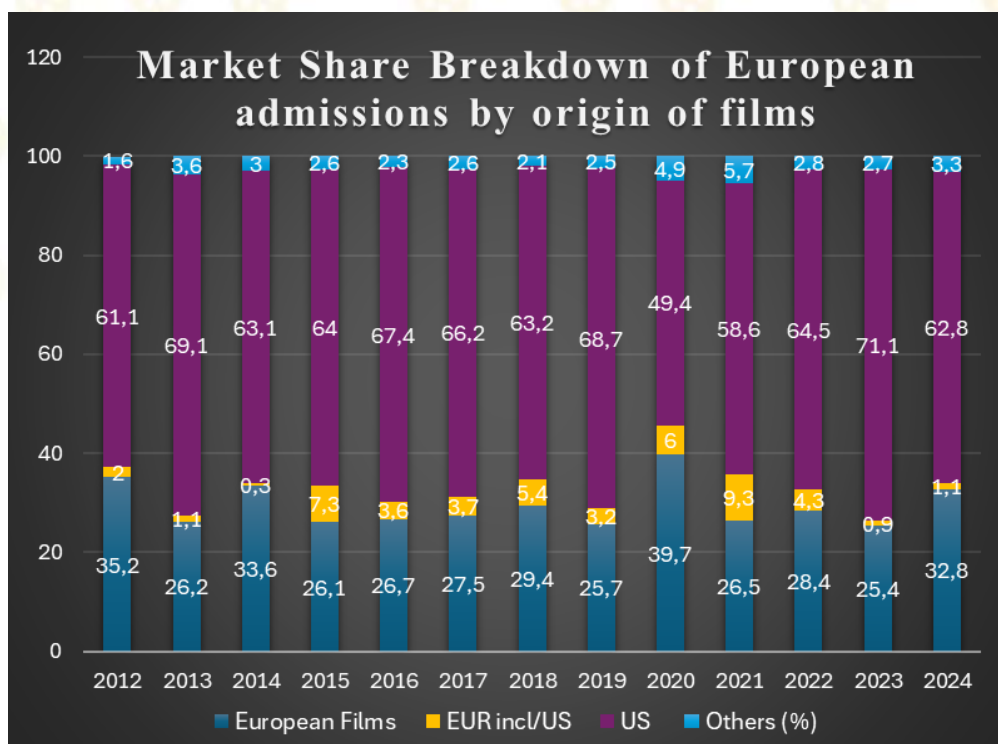


Figure 48 – Market share breakdown of European admissions by origin of films (II)

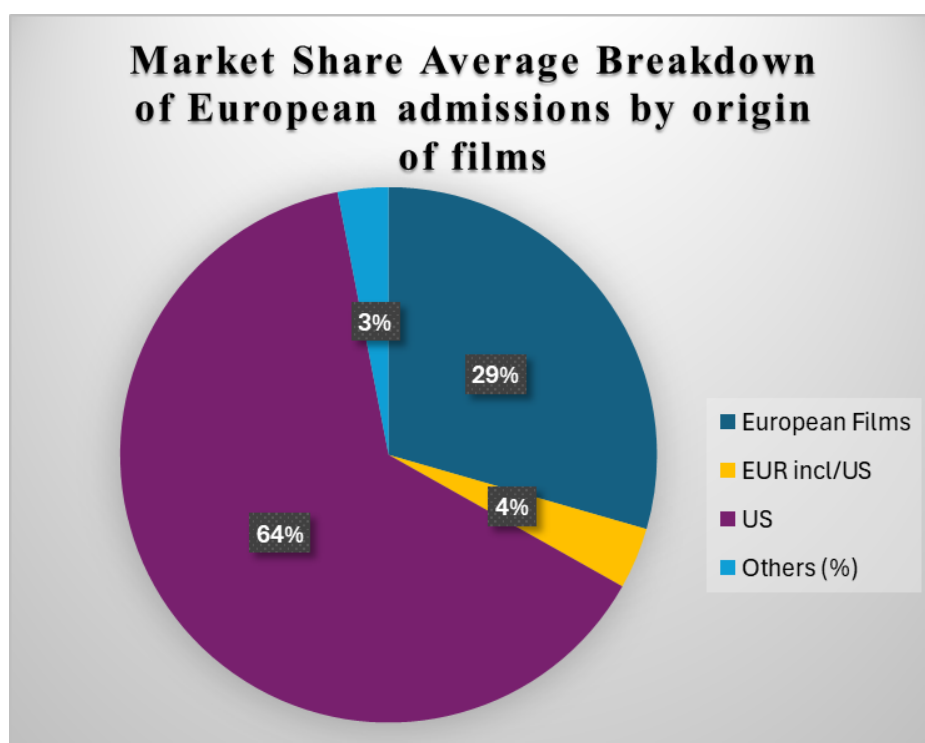


Figure 49 – Market share breakdown of European admissions by origin of films (III)



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Number of feature films produced in the European Union			
Year	Total fiction films EU 28	Total Features documentaries EU 28	Total Feature films EU 28
2012	1072	456	1528
2013	1075	471	1546
2014	1118	485	1603
2015	1127	516	1643
2016	1133	607	1740
2017	1072	604	1676
2018	1142	705	1847
2019	1135	746	1881
2020	879	525	1403
2021	1153	683	1836
2022	1189	771	1960
2023	1223	773	1996
2024	1167	858	2024
Average	1114,230769	630,7692308	1744,846154
Average in %	63,87	36,13	100
Median	1127	604	1676
Standard Deviation	81,78797422	114,7744032	172,2453324

Figure 50 – Number of feature films produced in the European Union (I)

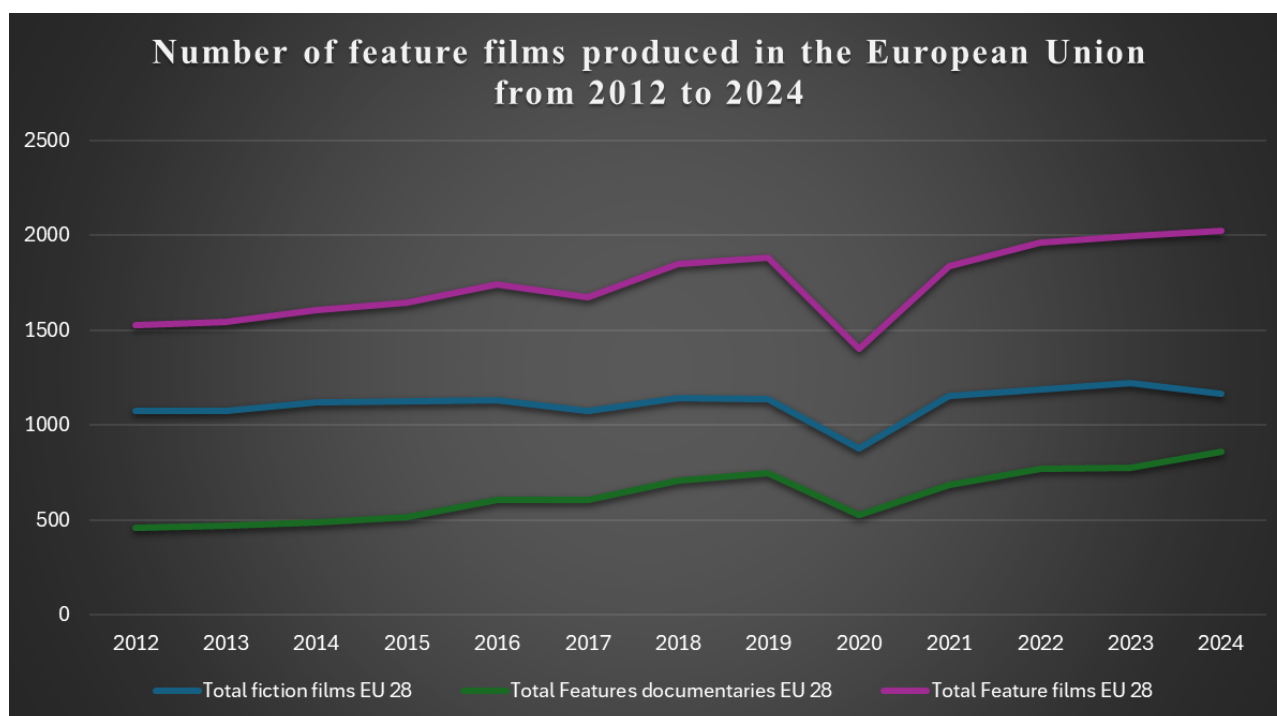


Figure 51 – Number of feature films produced in the European Union (II)



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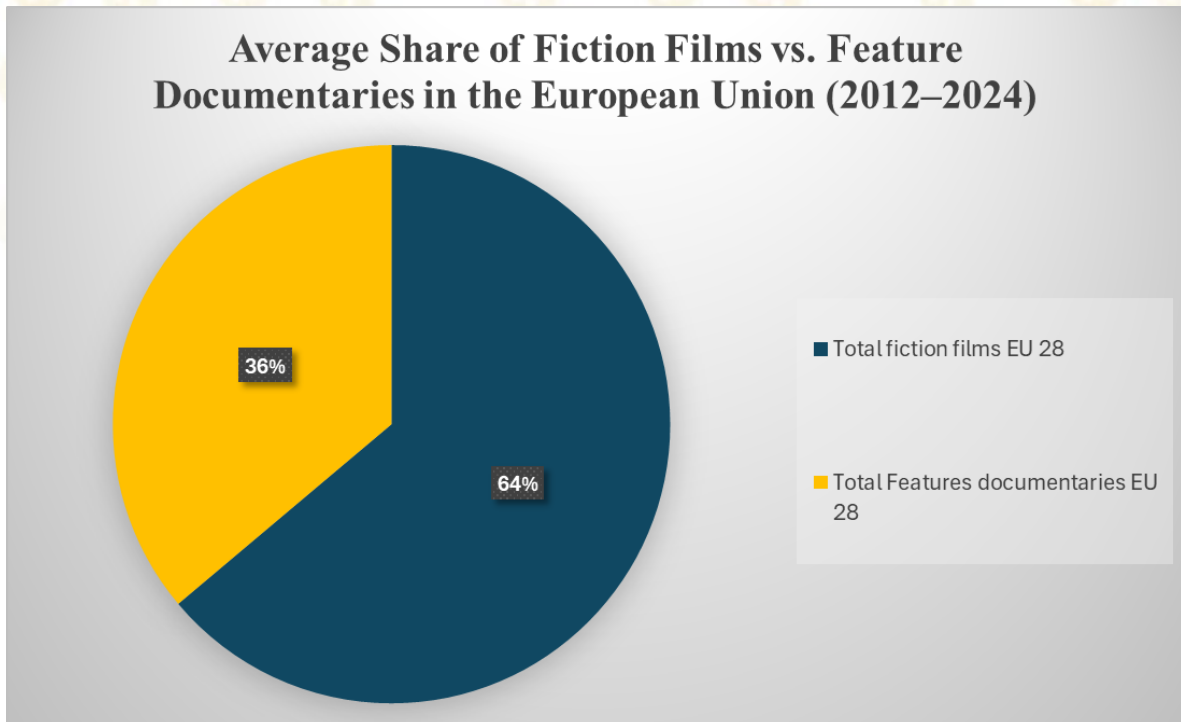


Figure 52 – Average share of Fiction films vs. Feature documentaries in the European Union



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Top 60 European Films by admissions in the European Union and GB.											
Original Title	Country of Origin	Director(s)	Release market	Admissions	Year	Awards	Nominations	IMDB grade	IMDB number of votes	Gender (director)	Gender (Writer)
Dunkirk	GB/US/FR/NL	Christopher Nolan	N/A	17 150 314	2017	49	81	7,9/10	591k	M	M
Qu'est ce que l'on a fait au bon dieu ?	FR	Philippe de Chauveron	N/A	17 098 008	2014	2	2	7,0/10	45k	M	M
Bridget Jones Baby	GB/US/FR	Sharon Maguire	N/A	16 267 602	2016	2	6	6,5/10	82k	F	FMF
Lucy	FR	Luc Besson	N/A	15 202 930	2014	1	12	6,4/10	533k	M	M
Paddington	GB/FR	Paul King	N/A	12 505 954	2014	3	7	7,3/10	133k	M	M
Un p'tit truc en plus	FR	Artus	15	11 679 391	2024	0	1	7,0/10	5,2k	M	M
Le cornet de Monte Cristo	FR	A. de la Panthère, M. Delaporte	21	10 578 098	2024	6	22	7,6/10	38k	M	M
Que vado ?	IT	Gennaro Nunziante	N/A	9 517 654	2016	2	4	6,6/10	12k	M	M
Ocho apellidos vascos	ES	Emilio Martínez Lázaro	N/A	9 322 010	2014	11	14	6,5/10	18k	M	M
Qu'est ce qu'on a encore fait au bon Dieu?	FR	Philippe de Chauveron	N/A	9 289 517	2019	1	1	6,1/10	9,6k	M	M
Paddington II	GB/FR	Paul King	N/A	9 093 158	2017	15	52	7,8/10	94k	M	M
Taken 3	FR	Olivier Megaton	N/A	8 937 358	2015	3	3	6,0/10	204k	M	M
Pack Ju Götze 2	DE	Bora Dagtekin	N/A	8 640 137	2015	4	1	5,9/10	14k	M	M
Valerian and the city of a thousand planets	FR/CN/US/DE/AE	Luc Besson	N/A	8 155 288	2017	0	11	6,4/10	196k	M	M
Sole à cannelle	IT	Gennaro Nunziante	N/A	8 005 353	2013	0	2	6,4/10	6,9k	M	M
Johnny english strikes again	GB/US/FR	David Kerr	N/A	7 128 046	2018	1	0	6,2/10	83k	M	M
Toto Tolo	IT	Checco Zalone	2	6 674 872	2020	3	4	5,7/10	4,2k	M	M
Honig im kopf	DE	Til Schweiger & Lars Grefling	N/A	6 549 967	2015	9	0	6,6/10	7,1k	M	M
Pack Ju Götze 3	DE	Bora Dagtekin	N/A	6 511 430	2017	6	4	6,9/10	32k	M	M
Poor things	GB/US/IE	Yorgos Lanthimos	31	6 469 704	2024	123	452	7,8/10	346k	M	M
La Chèvre Famille	FR/BE	Dany Boon	N/A	6 428 659	2018	N/A	N/A	5,7/10	4,5k	M	MF
Asterix & Obélix: L'Empire du Milieu	FR	Gilles Lellouche	N/A	6 139 526	2023	0	4	5,1/10	12k	M	M
Pack Ju Götze	DE	Bora Dagtekin	N/A	5 976 948	2013	6	4	6,9/10	32k	M	M
Les Tuches 3	FR	Olivier Baroux	N/A	5 965 078	2018	1	0	4,6/10	1,4k	M	M
Supercondriaque	FR/BE	Dany Boon	N/A	5 892 379	2014	N/A	N/A	6,0/10	9,2k	M	M
Kier	PL/CZ	Wojciech Smarzowski	N/A	5 362 662	2018	13	5	7,4/10	6,5k	M	M
The favourite	GB/US/IE	Yorgos Lanthimos	N/A	5 186 255	2019	186	355	7,5/10	232k	M	FM
Paddington in Peru	GB/FR/US	Douglas Wilson	7	5 179 385	2024	2	7	6,7/10	26k	M	M
Ocho Apellidos Catalanes	ES	Emilio Martínez Lázaro	N/A	5 134 311	2015	2	3	5,3/10	7,9k	M	M
Das perfekte Geheimnis	DE	Bora Dagtekin	N/A	5 100 778	2019	4	3	6,6/10	7,2k	M	M
L'amour ouf	FR	Gilles Lellouche	4	5 075 064	2024	2	16	7,0/10	6k	M	MF
Back to Black	GB/FR/US	Sam Taylor-Johnson	31	4 885 605	2024	0	10	6,3/10	27k	M	M
Ce ancora domani	IT	Paola Cortellesi	N/A	4 840 575	2023	23	21	7,7/10	7,7k	F	FM
Raid Dingo	FR/BE	Dany Boon	N/A	4 805 349	2017	1	0	5,6/10	4,5k	M	MF
Rush	GB/US/DE	Ron Howard	N/A	4 705 321	2013	6	65	8,1/10	512k	M	M
Les Tuches 2: Le rêve américain	FR	Olivier Baroux	N/A	4 619 884	2016	1	0	4,9/10	1,9k	M	M
A monster Calls	ES/US	Ja Bayona	N/A	4 606 272	2016	39	57	7,4/10	94k	M	M
Alibi.com 2	FR	Philippe Lachaux	N/A	4 449 544	2023	0	0	6,5/10	3,5k	M	M
Le grand bain	FR/BE	Gilles Lellouche	N/A	4 387 141	2018	5	16	6,9/10	12k	M	M
Les nouvelles aventures d'Aladin	FR/BE	Arthur Benzaquen	N/A	4 377 328	2015	N/A	N/A	4,8/10	2,7k	M	M
Le imposteur	ES	Juan Antonio Bayona	N/A	4 312 437	2013	28	70	7,5/10	243k	M	FM
Mummies	ES/mc/US	Juan Jesús García Galocha	N/A	4 274 238	2023	0	3	5,9/10	10k	M	M
The zone of interest	GB/US/PL	Jonathan Glazer	30	4 236 978	2024	71	188	7,3/10	136k	M	M
The Danish Girl	GB/US/BE/DE/DE	Tom Hooper	N/A	4 179 967	2016	31	80	7,1/10	199k	M	FM
Taxi 5	FR	Frank Gastambide	N/A	4 138 811	2018	1	2	4,6/10	11k	M	M
Alibi.com	FR	Philippe Lachaux	N/A	4 022 564	2017	N/A	N/A	6,5/10	10k	M	M
Les trois mousquetaires: D'Artagnan	FR	Martin Bourboulon	N/A	3 993 046	2023	4	6	6,7/10	25k	M	M
Les profs	FR	Pierre-François Martin Laval	N/A	3 955 113	2013	N/A	N/A	5,2/10	4k	M	M
Mia et le Lion blanc	FR/DE/ZA	Gilles de Maistre	N/A	3 917 941	2019	N/A	N/A	6,5/10	6,3k	M	FM
Qu'est ce qu'on a tous fait au bon Dieu?	FR/BE	Philippe de Chauveron	12	3 840 980	2022	N/A	N/A	6,1/10	3,6k	M	M
Les vacances du Petit Nicolas	FR	Laurent Tirard	N/A	3 685 470	2014	N/A	N/A	6,2/10	3,5k	M	M
Miraculous: Le Film	FR	Jeremy Zag	N/A	3 660 449	2023	0	2	6,1/10	7,5k	M	FM
Handzaaringen som klev ut genom fönstret	SE	Felix Herngren	N/A	3 654 734	2014	6	11	07-oct	43k	M	M
The Physician	DE	Philp Stölz	N/A	3 636 062	2014	0	5	7,2/10	42k	M	M
The Commuter	GB/US/FR	Jaume Collet-Serra	N/A	3 609 532	2018	0	2	6,3/10	125k	M	M
Demain tout commence	FR/GB	Hugo Gélin	N/A	3 599 469	2017	0	2	7,3/10	29k	M	M
Ballarina	FR/CA	Eric Summer & Eric Warin	N/A	3 572 312	2017	1	1	6,7/10	24k	M	FM
Le sens de la fête	FR/CA/BE	Olivier Nakache & Eric Toledano	N/A	3 570 180	2017	0	21	6,9/10	12k	M	M
A shaun the sheep movie : Farmageddon	GB/US/FR	Will Becher & Richard Philbin	N/A	3 531 230	2019	2	22	6,8/10	16k	M	M
Samba	FR	O Nakache, E. Toledano	N/A	3 497 531	2014	0	4	6,7/10	17k	M	FM
Les Profs 2	FR	Pierre-François Martin Laval	N/A	3 494 230	2015	0	0	4,4/10	1,8k	M	M
The little prince	FR/IT	Mark Osborne	N/A	3 492 725	2015	7	15	7,6/10	67k	M	FM
The queen's corgi	BE/US	V. Keetloor & Ben Stassen	N/A	3 455 329	2019	0	0	4,9/10	7,9k	M	M

Figure 53 – Top 60 European films by admissions in the European Union and Great Britain (2013-2024)



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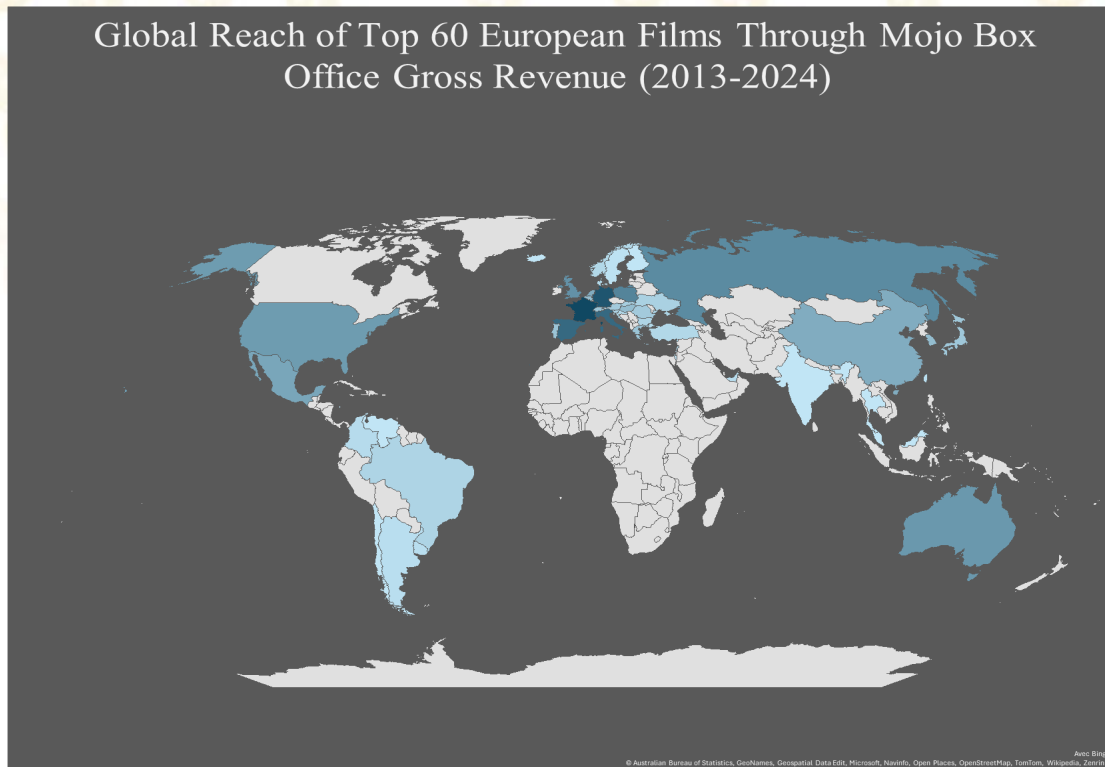


Figure 54 – Global reach of Top 60 European Films through Mojo Box Office Gross Revenue

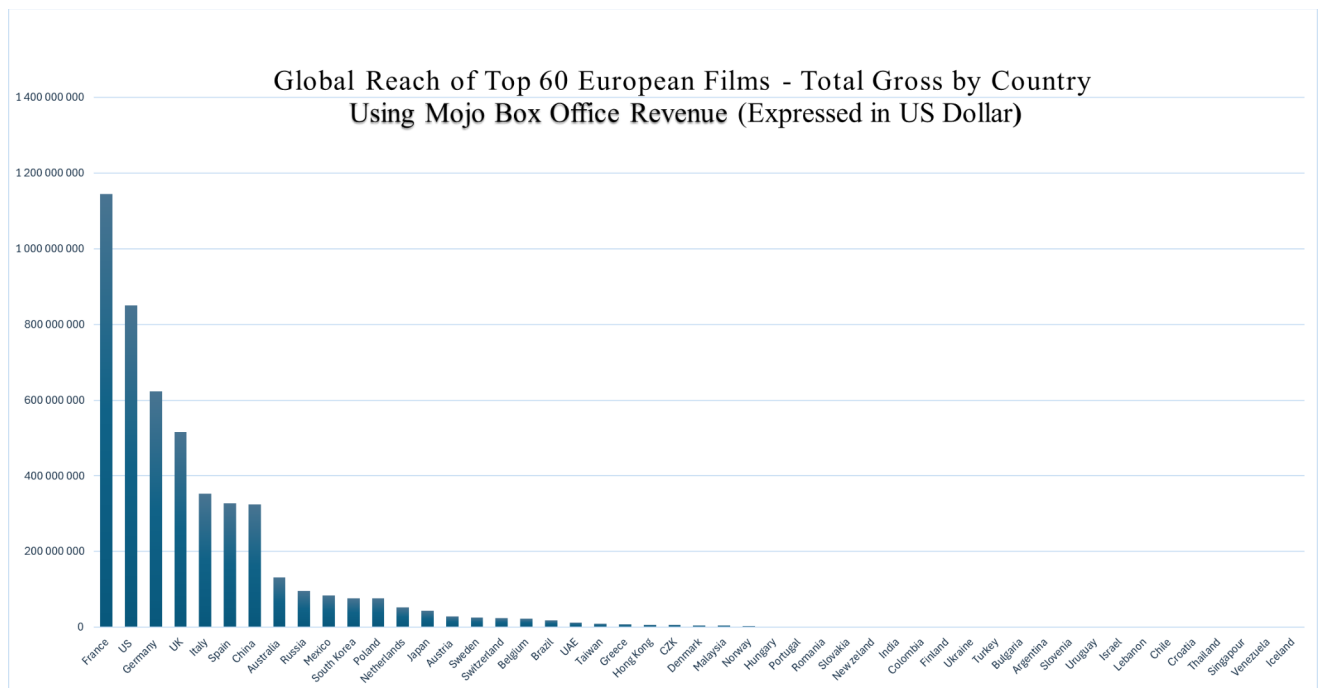


Figure 55 – Global reach of Top 60 European Films - Total Gross by Country (I)



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Global Reach of Top 60 European Films - Total Gross by Country
Using Mojo Box Office Revenue (Expressed in %)

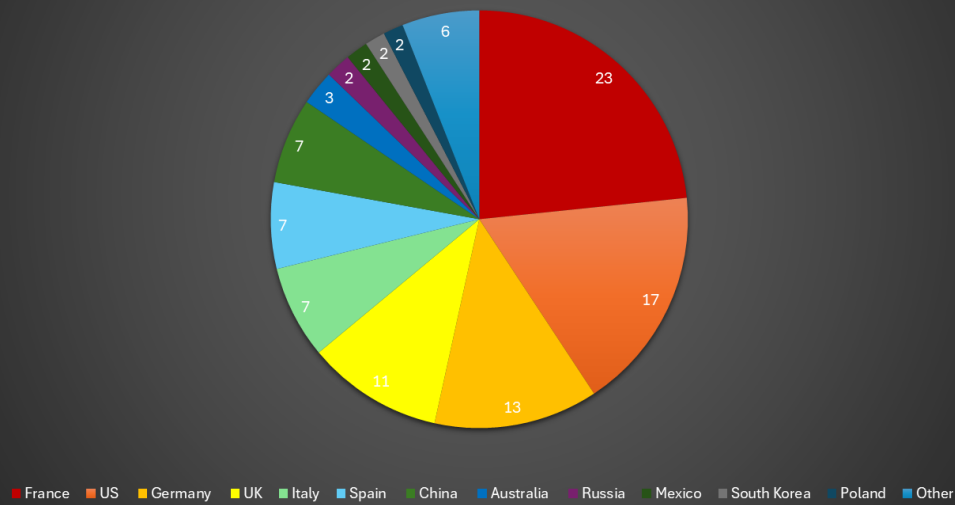


Figure 56 56 – Global reach of Top 60 European Films - Total Gross by Country (II)

Global Reach of Top 60 European Films - Total Gross by Region
Using Mojo Box Office Revenue (Expressed in %)

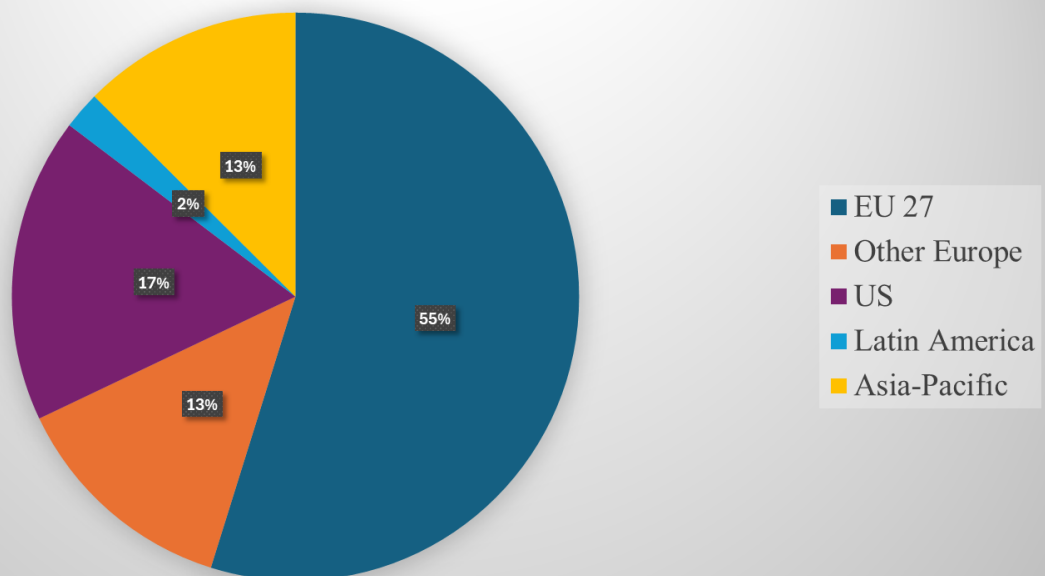


Figure 57 – Global reach of Top 60 European Films - Total Gross by Region



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Top 60 European Films through IMDB Top voters countries					
Original Title	Top 1 Country	Top 2 Country	Top 3 Country	Top 4 Country	Top 5 Country
Dunkirk	USA	UK	Turkey	Germany	India
Qu'est ce que l'on a fait au bon dieu ?	Germany	France	Greece	Spain	USA
Bridget Jones Baby	UK	USA	Netherlands	Sweden	Turkey
Lucy	USA	UK	Turkey	Germany	Netherlands
Paddington	USA	UK	Germany	Netherlands	Canada
Un p'tit truc en plus	France	Belgium	Germany	Switzerland	Netherlands
Le comte de Monte Cristo	France	USA	Spain	UK	Germany
Quo vado ?	Italy	Greece	Spain	Germany	USA
Ocho apellidos vascos	Spain	USA	Argentina	UK	Portugal
Qu'est ce qu'on a encore fait au bon Dieu?	Germany	France	Greece	Spain	Poland
Paddington II	UK	USA	Germany	Netherlands	Australia
Taken 3	USA	UK	Germany	Netherlands	Sweden
Fack Ju Gøhte 2	Germany	Hungary	Austria	Switzerland	USA
Valerian and the city of a thousand planets	USA	UK	Germany	Turkey	Netherlands
Sole a catinelle	Italy	Greece	USA	UK	Switzerland
Johnny english strikes again	UK	USA	Netherlands	Germany	India
Tolo Tolo	Italy	USA	UK	Germany	Switzerland
Honing im kopf	Germany	Switzerland	Austria	USA	Russia
Fack Ju Gøhte 3	Germany	Hungary	Austria	Switzerland	USA
Poor things	USA	UK	Germany	Brazil	Turkey
La Chtite Famille	France	Germany	Russia	USA	Portugal
Astérix & Obélix: L'Empire du Milieu	France	USA	Germany	Greece	Poland
Fack ju Gøhte	Germany	Hungary	Austria	USA	Switzerland
Les Tuches 3	France	Belgium	USA	Switzerland	UK
Supercondriaque	France	Germany	Italy	Greece	Poland
Kler	Poland	UK	USA	Germany	Lithuania
The favourite	USA	UK	Turkey	Greece	Brazil
Paddington in Peru	UK	USA	Netherlands	Germany	Canada
Ocho Apellidos Catalanes	Spain	USA	Argentina	UK	Mexico
Das perfekte Geheimnis	Germany	Austria	Switzerland	USA	Hungary
L'amour ouf	France	Belgium	Germany	USA	Switzerland
Back to Black	UK	USA	Netherlands	Germany	Brazil
C'è ancora domani	Italy	France	USA	Germany	UK
Raid Dingué	France	Germany	Poland	USA	Russia
Rush	USA	UK	Turkey	India	Germany
Les Tuches 2: Le rêve américain	France	Belgium	USA	Switzerland	UK
A monster Calls	USA	UK	Spain	Germany	Turkey
Alibi.com 2	France	Hungary	Poland	USA	Romania
Le grand bain	France	Netherlands	USA	Brazil	Italy
Les nouvelles aventures d'Aladin	France	USA	Russia	Poland	Turkey
Lo imposible	USA	UK	Turkey	Spain	Netherlands
Mummies	Egypte	USA	UK	Spain	Canada
The zone of interest	USA	UK	Germany	Brazil	Turkey
The Danish Girl	USA	UK	Turkey	Brazil	Sweden
Taxi 5	France	Hungary	USA	Turkey	Romania
Alibi.com	France	Hungary	Germany	Poland	USA
Les trois mousquetaires: D'Artagnan	France	USA	India	UK	Germany
Les profs	France	Hungary	USA	Russia	Belgium
Mia et le Lion blanc	USA	Italy	Germany	France	Spain
Qu'est ce qu'on a tous fait au bon Dieu?	Germany	France	Greece	Spain	Poland
Les vacances du Petit Nicolas	France	Poland	Greece	Brazil	Germany
Miraculous: Le Film	USA	UK	Germany	Brazil	Turkey
Hundraaringen som blev ut genom fönstret och	Sweden	Germany	USA	Netherlands	UK
The Physician	Germany	USA	Turkey	Spain	Brazil
The Commuter	USA	UK	Germany	Netherlands	Turkey
Demain tout commence	Netherlands	Germany	France	Italy	USA
Ballerina	USA	UK	Brazil	Greece	Canada
Le sens de la fête	France	Spain	Italy	Germany	USA
A Shaun the sheep movie : Farmageddon	USA	UK	Germany	Brazil	Netherlands
Samba	Netherlands	France	Germany	Brazil	USA
Les Profs 2	France	Hungary	Belgium	USA	Switzerland
The little prince	USA	UK	Turkey	Brazil	Italy
The queen's corgi	UK	USA	Netherlands	Germany	Russia

Figure 58 – Top 60 European Films by admissions/IMDb Top Voters Countries (I)



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D.4.1 International market in the EFI

Country	1st	2nd	3rd	4th	5th	Total
USA	18	15	9	8	8	58
France	19	5	1	1	0	26
Germany	9	5	15	12	4	45
UK	6	18	2	5	4	35
Italy	4	1	2	1	2	10
Spain	2	1	3	6	1	13
Netherlands	2	1	5	5	5	18
Poland	1	1	2	2	4	10
Sweden	1	0	0	1	2	4
Egypte	1	0	0	0	0	1
Hungary	0	8	0	0	1	9
Belgium	0	4	1	0	1	6
Greece	0	2	4	4	0	10
Switzerland	0	1	1	5	5	12
Austria	0	1	4	0	0	5
Turkey	0	0	8	2	7	17
Russia	0	0	2	1	3	6
Argentina	0	0	2	0	0	2
Brazil	0	0	1	9	3	13
India	0	0	1	1	2	4
Canada	0	0	0	0	4	4
Portugal	0	0	0	0	2	2
Australia	0	0	0	0	1	1
Lithuania	0	0	0	0	1	1
Mexico	0	0	0	0	1	1
Romania	0	0	0	0	2	2

Figure 59 – Top 60 European Films by admissions/IMDb Top Voters Countries (II)



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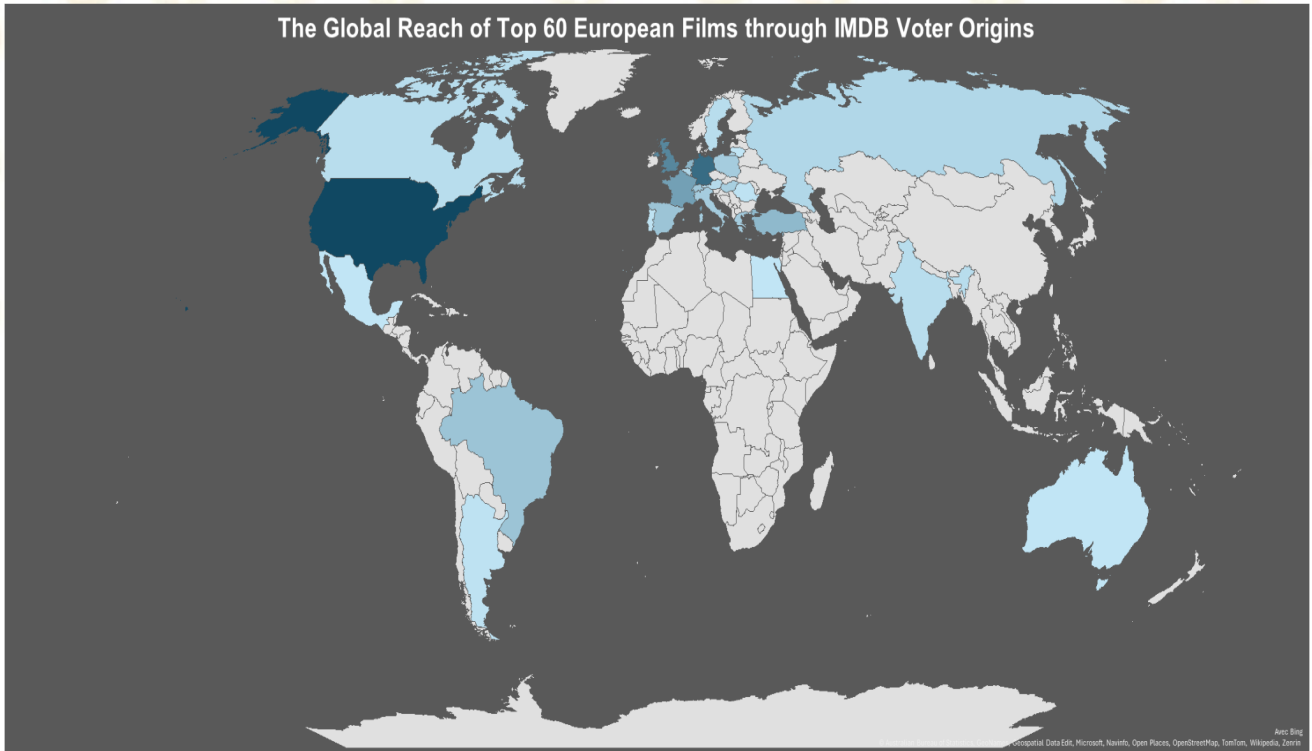


Figure 60 – Global Reach of Top 60 European Films through IMDb Voter Origins (I)

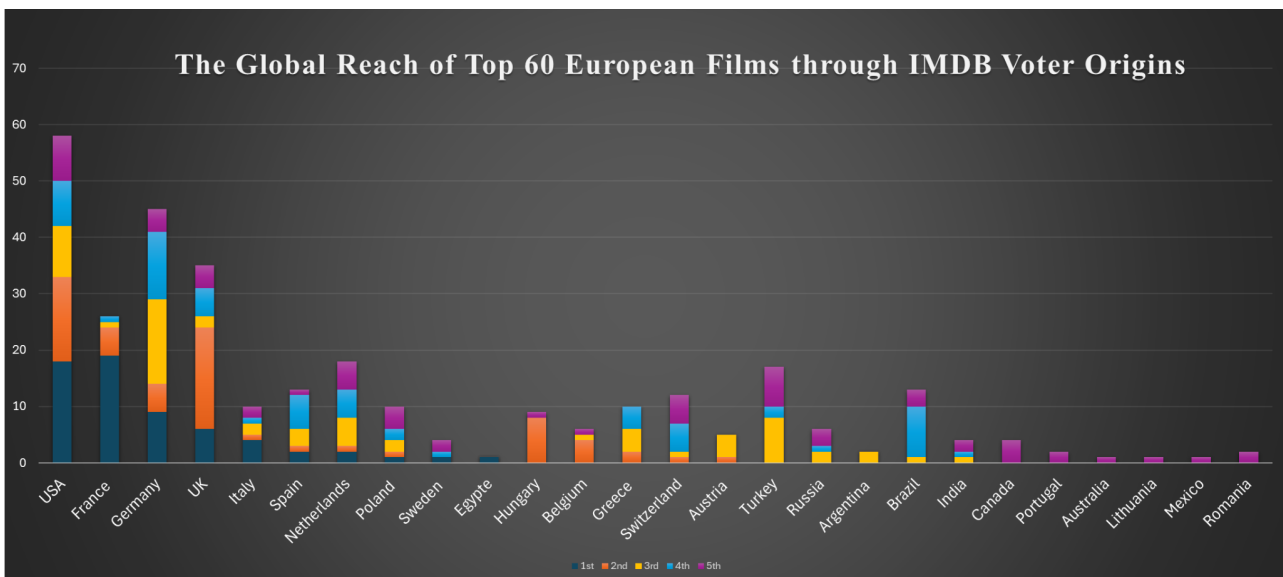


Figure 61 – Global Reach of Top 60 European Films through IMDb Voter Origins (II)



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Disclaimer

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