

REBOOT

EUROPEAN FILM COMPETITIVENESS

Governance and public value Report -

Producing Value through the Moving Images: An Analysis of Public Value and its Cultural Contribution to the strength and competitiveness of the European film sector.

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

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Author(s): Katharine Sarikakis (UNIVIE), Gentiana Ramadani (UNIVIE), Angeliki Chatziefraimidou (UNIVIE), Janina Juengst (UNIVIE)

Reviewer(s): Antonios Vlassis (ULIEGE), Eirini Sifaki (ELIAMEP)

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1 PROJECT SUMMARY

This project aims to connect the existing strengths, identify and overcome weaknesses and plan for future competitiveness in the fields of policy, practice and experience. More concretely, the project's objectives are, on the one hand, to explore the long-standing strengths and pervasive gaps in European competitiveness and policies for competitiveness. This includes ways of 'measuring', 'analysing', and 'evaluating' the impact of policies and strategic pathways. On the other hand, the project aspires to place attention to the active preparation for the future in the area of audiences by exploring audience preferences and their generation, as well as modes of film content production. The latter are elements which today's youth will carry and engage with in the coming decades as makers and consumers, as well as industry and policy leaders. Therefore, the consortium interrogates not only the 'what is' but also the 'what has been' and 'what will be' with fresh lenses. REBOOT's ambition is to provide a full set of knowledge of the European film industry, which maximises its existing strengths, combined with strategic and tactical dimensions of action for the optimisation of the potential held in European youth publics, understood both as emerging audiences and as citizens. Specifically, the ambition of the project combines several dimensions, which reinforce each other but are listed separately for analytical purposes (and in no particular order): a) increasing support for young people's engagement with European film; b) strengthening the place of the EU in the global audiovisual economy, particularly in light of the rise of video on demand (VOD); c) supporting cultural diversity in the EU film industry; d) addressing the need for a different understanding of competitiveness and relevant indicators in this context; and e) recognising and supporting the importance for the EU of film and, more broadly, of the cultural and creative sector as a geopolitical asset.

Executive Summary

Beyond its clear economic value, the film industry holds significant social value. This is evident in the choices individuals make to engage with films, driven by the desire for entertainment, cultural enrichment, cross-cultural connection or personal reflection. It is reflected in the efforts of governments and cultural institutions that invest in the development of filmmaking talent and the production of films. These investments are often made not only with the aim of stimulating



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economic growth, but also with the intention of preserving and promoting cultural heritage, identity and diversity.

European public institutions, public values and cultural diversity are foundational pillars of European democracies and more broadly of the organisation of European societies. Despite their differences by nation or region, public institutions are considered core actors within ever-evolving societies, rather than static elements in an unchanging landscape. The value of film extends far beyond entertainment; it is a crucial cultural asset that shapes societal narratives. Public institutions play a significant role in supporting and maintaining these values through targeted policies and strategic investments. This report focuses on the organisations that provide public funding for films and audiovisual works, exploring their cultural impact and the contribution they make to enhancing public value within the film sector. It examines the broader implications of efforts led by public institutions on the competitiveness of the European film industry (EFI), considering the ways in which public support and cultural significance work together to elevate the industry's standing on the European and global stage.

By considering the investments made by public institutions, both directly and indirectly, to boost the EFI, the report explores the concept of ‘competitiveness’ in relation to public values in this field. In that respect, the report explores the under-researched dimension of public value of films and seeks to understand the spaces where it extends beyond box office revenue, such as collective identity, creativity and cultural heritage. In this vein, the following discussion views public value comprehensively, encompassing cultural enrichment, inclusivity and democratic discourse. A multiperspectival view of public value refers to the positive impact that publicly funded institutions, policies and initiatives create for society. Particularly, we explore the mechanisms through which public institutions through public value contribute to the strength and competitiveness of the European film sector.

As every country possesses its own unique characteristics in its own “ecosystem” of the film industry, including distinct financing and operational mechanisms, this diversity stems from different regulatory frameworks, public support systems, and market conditions. The report offers a thorough overview of public value in the European film industry, organised around four main pillars identified through desk research and discussions with stakeholders: cultural participation,



promotion of national and regional identity, support for creative talent and innovation, and contribution to social cohesion. While previous studies have explored different dimensions of public value in film, they predominantly concentrated on the values embedded within the films themselves. This narrow focus has created a significant gap in the literature, as it fails to address how public resources bolster the film industry and enhance its public value. Additionally, organisations face challenges in operationalizing and measuring results related to public value. To fill this gap, the report advocates for a well-defined concept of public value that is tailored specifically to the European film industry (EFI). **Public value** in film production is tied to the cultural and societal impact a film has beyond its economic success. This includes the role of film as a **cultural ambassador**, expressing local or national identity and values. Films can represent a country's culture internationally, and public funding enables films that may not be commercially viable to still achieve **audience attention** and contribute to cultural exchange. Some of the findings reveal that, despite the efforts of various stakeholders, government support for public value in the film sector remains fragmented and lacks cohesive coordination. This disjointed approach hinders the potential for a unified strategy that could effectively leverage public funding to maximise cultural impact and foster a vibrant film landscape. The report emphasises the need for a more integrated framework to ensure that public resources are utilised effectively, ultimately enhancing the film industry's contributions to society.

Objectives of the Report

This report builds on the work carried out under REBOOT's Work Package 3, specifically addressing the deliverable 3.2, titled "Governance of Public Value". The primary objective of this report is to identify the public value generated by institutions and stakeholders involved in fostering expertise and supporting film productions within a national context. By focusing on six EU countries—Austria, Belgium, Greece, Spain, France and Poland—this analysis seeks to understand the ways in which these nations contribute to the development of public value in the European film industry. Through this examination, the report aims to shed light on the governance practices that shape the cultural, economic and social impact of public investments in the film sector across these diverse European contexts. It aims to map and analyse the practices supporting the EFI while highlighting the roles of key actors and institutions.



Methodology

The research deploys desk research, reviewing a wide array of national and EU policies to uncover the frameworks and strategies that shape the public value of film production and development across various European contexts, with focus on policies and initiatives. This involves a detailed examination of numerous policy documents to grasp the underlying principles and regulations guiding the sector. Further, the report integrates insights from a series of qualitative interviews. Semi-structured interviews were conducted with a range of key stakeholders: public service media representatives, educational institutions that focus on training and development in the film industry; film festival participants and representatives and the dissemination of new film productions.

This mixed-methods approach allows for a nuanced understanding of how public value is created, sustained and enhanced within the EFI.

2 INTRODUCTION

Historically, public institutions in Europe have played an important role in strengthening the film industry through sustained investment, training and strategic use of taxpayer funds. This long term investment has been led by the establishment of essential educational and cultural bodies, such as film departments within public service broadcasters, national film academies, national and international film festivals and film funding institutions, which together foster a supporting ecosystem for film development. These institutions not only cultivate industry know-how and technical expertise, but also contribute to a broader and more democratic understanding of competitiveness in the film sector.

Decades of public policies, organisational strategies within public broadcasters, sub-sector policies for film support and state funding have collectively shaped the European film landscape. By highlighting the impact and value of these mechanisms, it becomes evident that competitiveness extends beyond economic success; it encompasses cultural enrichment, inclusivity and public engagement, reinforcing the essential role of public institutions in elevating the European film industry's global standing.



In a Europe characterised by diverse nations, cultures and languages, film production and transnational networks are seen as crucial for fostering unity. Historical treaties and initiatives of the EU have increasingly emphasised these networks, though cultural policies were not initially prioritised (Bondebjerg, 2016). The European Commission (EC), responsible for promoting fair competition between EU member states, determined that tax breaks were a form of indirect state aid that unfairly favoured certain countries. These tax breaks were given based on national or regional criteria, which made them seem protectionist (European Commission, 2006). To address this, a new rule was introduced, requiring that state aid, including tax benefits, not only focus on production costs and personnel but also take into account the 'cultural content' of audiovisual works (European Commission, 2001). In practice, this meant that under the new Film Tax Credit (FTC), introduced in the Finance Act of 2006, recipients had to produce 'cultural products' in order to qualify for national state support (Manor and Schlesinger, 2009). Over time, Europe-wide initiatives, such as Eurimages, MEDIA programmes and programmes, such as Creative Europe and the New Narrative for Europe have further embedded the idea of promoting Europe as a cultural and political entity that unites diverse narratives and identities, encouraging cultural encounters that redefine societal perceptions across the continent.

The European Union is now one of the world's leading film producers. The audiovisual sector within the European Economic Area (EEA) provides employment for a significant number of people (EC, 2014). The European audiovisual market is approximately valued at 130 billion EUR. In 2019, before the disruption caused by the COVID-19 pandemic, 2,421 feature films were produced in Europe, reflecting a 6% increase compared to 2018 (Orankiewicz, 2022).

To preserve the public value of culture, comprehensive public support across multiple dimensions is essential. Artistic and cultural dimensions are typically associated with various forms of elite culture that are financed by public funds (Dickinson & Harvey, 2005; Pratt, 1997, 2005). Public funding ensures that diverse voices and forms of expression can thrive, allowing culture to reflect the full spectrum of society. This support can take many forms, including direct financial assistance to artists, subsidies for cultural institutions and policies that promote the preservation and dissemination of cultural heritage. Additionally, public support is vital for making culture accessible to all, not only for those who can afford it. This effort for the democratisation of culture fosters social cohesion and promotes shared understanding across different segments of society.



The 2013 Cinema Communication (EC, 2013/C 332/01) emphasises that a key cultural objective for member states is to ensure that their national and regional cultures, along with their creative potential, are effectively represented in audiovisual media, including film and television. The document highlights the importance of fostering and showcasing the diverse cultural identities and creative talents within the audiovisual sector across different regions and nations, where the member states have “the primary cultural aim of ensuring that the national and regional cultures and creative potential are expressed in the audiovisual media of film and television” (European Audiovisual Observatory, 2019).

Film, when recognised as an endeavour that delivers a diversity of values, qualifies as a phenomenon of public value (Hjort, 2016). Distinguishing public value in the film industry and understanding the public value in this field requires a nuanced approach that differentiates it from the role of film in shaping public values. The public value of the film industry refers to its broader cultural, economic and social contributions, which extend beyond individual films to encompass the entire ecosystem that supports film production, distribution, and exhibition. This includes the promotion of local talent, the preservation of cultural heritage, and the enhancement of community cohesion through shared film experiences.

On the other hand, the role of film in public values addresses how films reflect and influence societal norms, beliefs, and identities. This secondary subcategory examines the impact of specific films or genres on public discourse, representation, and cultural understanding. While important, it does not encompass the full spectrum of benefits that the film industry provides as a whole. By recognising film as an endeavour that delivers diverse values, we can appreciate its significance as a public good. The film industry not only entertains but also educates, informs, and engages into dialogue within society, its ability to represent various cultural narratives contributes to a richer, more inclusive understanding of identity and community. As Hjort (2016) suggests, the various values conveyed through film, whether cultural, social, or educational, contribute significantly to the public sphere. This perspective understands film not simply as a form of entertainment or artistic expression, but also as a crucial medium that enriches society by providing access to diverse values that resonate with and benefit the public at large. In this way, film plays a vital role in fostering a more informed, culturally aware and cohesive society. According to Bondebjerg (2016) social and political debates are key to modern media and public spheres, but so are cultural and



historical narratives that help us make sense of our world. While news and documentaries build our understanding of national and global citizenship, fictional forms like TV dramas play an equally important role in connecting us emotionally to society's past and present. Fiction enhances our collective identity and enriches public discourse. In many European countries, Public Service Broadcasting (PSB) has been vital in supporting cultural diversity and debate, striking a balance between market influences and public funding to foster democratic and inclusive public spheres.

Public value in relation to film, particularly the specific values transmitted through various films, is understood as a belief in that, ultimately, the quality of the screen cultures plays a crucial role in shaping what Karol Soltan and Stephen Elkin (1996, in Hjort 2019) refer to as the “constitution of good societies”. In this view, the values embedded in films contribute not just to entertainment or artistic expression, but to the broader social fabric, influencing the overall quality and moral character of society. Thus, film is seen as a vital medium that helps to define and uphold the principles that constitute a healthy, well-functioning society.

Hjort (2019) argues that the values instantiated through film, such as artistic, aesthetic, cultural and experiential values, extend beyond mere personal or private significance. While these values may initially appear to matter only to those directly involved in the creation or appreciation of a film, such as the filmmakers and their audience, the author contends that these values possess a broader public significance. The realisation of these values in a film impacts not just the individuals directly involved, but society as a whole and therefore, the public nature of these values must be clearly articulated and vigorously defended. The author emphasises that these values are not confined to personal experiences but have implications that resonate on a larger public scale. The production and consumption of films are not merely economic activities, but are also seen as crucial in shaping cultural identity and expressing societal consciousness (Gao, 2009).

In acknowledging the cultural significance of filmmaking, European governments successfully negotiated a “cultural exception” clause for their film industries during the Uruguay Round of the General Agreement on Tariffs and Trade (GATT) negotiations in 1993 (Harold 2003) and which concluded in 1994 with the ambivalence of GATTs on culture as a trade issue reflected in Article IV, Part II of the GATT agreement (Thomas, 2003). This provision allowed European countries to protect film industries from the pressures of global trade liberalisation, emphasising the importance



of preserving cultural identity. Additionally, article 1947 of the GATT permits import restrictions when necessary to protect public morals, a principle that has historically been invoked by governments to justify content censorship as a form of cultural intervention. These measures underscore the interplay between trade policy and cultural preservation, reflecting a broader effort to safeguard cultural heritage in the face of global economic forces (Gao, 2009).

The concept of public value offers a useful framework for evaluating the goals and performance of public policy. It serves as a benchmark for assessing the activities produced or supported by public institutions, as well as the regulations governing them. By capturing the various dimensions of public institutions' performance, public value not only provides insight into their effectiveness but also aligns these institutions with contemporary societal needs and expectations. This report aims to explore this concept by considering public reflections and how they are presented in the publicly supported projects within the film sector. It highlights the critical role of public value in enhancing societal dialogue, particularly through film, which serves both as a reflection of society and a shaper of public discourse. Films can stimulate a more engaged and reflective citizenry by presenting complex narratives, ethical dilemmas, and diverse viewpoints, encouraging viewers to think critically about society and their place in it. In this context, the report, which covers six countries, presents a deliverable, D3.2, titled 'Governance and Public Value Report' (due in month 20) and addresses the issue of public institutional support for film by using two key approaches: (a) the governance perspective of public policy in relation to public value, and (b) an analytical framework for understanding social and cultural order through this lens.

The concept of 'governance' here includes more than traditional hierarchical or market-based approaches to policy. Instead, it embraces a pluralistic mode of governing, one that considers various stakeholders, levels of government, policy processes, and mechanisms for coordination and negotiation between public and private entities. This pluralistic governance model suggests that decisions about film funding are influenced by a web of relationships between stakeholders, institutions, and policy processes, as well as mechanisms of enforcement and collaboration. Such governance is essential for understanding how public resources are allocated to the film industry (Ginosar, 2018).



On the other hand, the concept of ‘public value’ draws on Mark Moore’s seminal work (1995), which defines public value as something legitimate, sustainable, and efficiently created, contributing to the satisfaction of societal needs. Although the idea of public value has been embraced in many industries related specifically with public sector (Bracci et al., 2019; Bryson et al., 2014; Steccolini, 2019; Van der Wal et al., 2015) and adapted as a framework for public organisations, its application to the film sector remains underdeveloped. There is a lack of focused analysis on how public value in the film industry is measured and evaluated, particularly in relation to its outcomes and societal impact.

These above-mentioned components are anchored in four main pillars for interpreting the concept: cultural participation, promotion of national and regional identity, support for creative talent and innovation and contribution to social cohesion. Thus, this report approaches public value from a cultural industry policy perspective. It serves as a starting point for discussions around the governance of public value, arguing that policy is just one dimension of a broader, multi-faceted approach to understanding and enhancing the societal contributions of the film industry. By investigating the intersection of governance and public value, this report seeks to provide a clearer framework for how public resources support and sustain the film sector while addressing broader societal goals.

Thus, the structure of this report first addresses the general concept of public value and introduces its application within the film industry. Following this, we present the results of our empirical research on public institutional support, showing how these institutions struggle with operationalizing and measuring public value. For example, film festivals in Europe, such as those in Belgium or Austria, lack concrete data on their social and cultural impact. In fact, the most recent study in Austria dates back to 2016. We also explore the efforts that have been made to address these gaps. This section answers the question: What are the specific policies that promote public value in the film industry?

The following section dives into the financial mechanisms of the EFI, including key aspects like Video on Demand (VOD). This section explores the ways in which public funds and market revenues are structured to sustain the industry, linking back to the broader question of balancing economic growth with public service. Six case studies from six European countries provide



real-world examples of how public value is implemented at the national level. The section highlights how EU and national policies intersect to promote and finance the national film industry, answering the question of how theory translates into practice.

Finally, the findings from stakeholder discussions are analysed, by incorporating the voices of EFI representatives through interviews. Here, the report answers: How do industry stakeholders themselves understand and experience public value in their respective work, position and their countries? This qualitative perspective connects policy and practice to the lived experience of industry professionals.

3 PUBLIC VALUE IN THE EUROPEAN FILM SECTOR

To examine the public value of the film industry, we reviewed the existing literature and examined how the concept of public value has evolved within the academic discourse. We explored how the scholarly community engages and interprets this concept.

Public value was initially introduced by Moore (1995) as a flexible objective rather than a specific definition. Moore argued that public managers carry the responsibility to create and increase public value (Moore, 1995, p.20). From this perspective, public managers make decisions for the benefit of the public and strive to increase the effectiveness of public organisations. Since then, the objective and understanding of public value has evolved considerably and describes the systematic efforts to use public resources and services as effectively as possible to serve the public interest and promote shared values. The recent study of Cañedo et al. (2022) aimed to find and collect the components of the public value of public service. The combination of these components simultaneously serves as a working definition of public value. Cañedo et al. (2022) conducted a document analysis, which is described in overview as follows: 1. “Social engagement” responds to the audience's need for information, entertainment and education; 2. “Diversity” refers to various aspects including audiences, programming as well as production sources; 3. “Innovation” represents promoting creativity and services, applying technologies and introducing new forms of citizen engagement; 4. “Independence” refers to the operation of the PSM above political interest and power; 5. “Excellence” in the work field includes high-quality content, professionalism of



broadcasters at all levels of the hierarchy and in leadership; 6. “Universality” refers both to the technical requirement of the content to reach the entire geographical area and to meet the interests of many target groups; 7. “Citizen participation” emphasises the citizen's right to participate in the creation and distribution of content, which is connected to the aspects of innovation and programming; 8. “Media literacy” refers to the promotion of knowledge and culture of the audiovisual industry for dissemination purposes; 9. “Accountability” is attached to transparency and efficiency of public spending and the promotion of creative economies, combined with sustainability; 10. “Territorial cohesion” represents the inclusion of different communities and the development of a common identity beyond the borders; 11. “Social justice” refers to the universal protection of human rights including the prevention of violence and gender equality; and 12. “Cooperation” refers to synergies and cooperation between institutions and organisations of public services (Cañedo et al., 2022, pp. 591-594). The combination of these components shapes the meaning of public value.

The application of the concept of public value with focus on film industry is a rather recent turn and has been approached by Hjort who argued that “to claim that film (whether as a creative practice of making or as a viewing experience) benefits health and well-being directly is to assert that moving images can have immediate instrumental value” (Hjort, 2019, p.12) and a few years later, Hjort and Nannicelli (2022) approached the public value of film as a responsibility of both private and public actors. Filmmakers, referring to the example of film producers, carry the responsibility to promote “the realisation of values that are constitutive of our communities’ well-being” (Hjort & Nannicelli, 2022, p.17), or not. They additionally underline the role of film audiences to perceive and “participate in the realisation of the public value” (ibid.), while their reactions to films express acceptance or reluctance of the promoted values of the film (ibid.). More analytically, they divide and analyse the public value of the film in the following seven categories: Artistic and aesthetic value; Moral value/ethical value; Spiritual value; Environmental/ecological value; Cultural, social and political value; Cognitive, educational and developmental value; and Value of health.

The role of film as a form of entertainment, communication and public pedagogy was analysed by Giroux (2011) who underlined the impact of film industry upon “public consciousness” (Giroux, 2011, p.689) arguing that “film produces images, ideas and ideologies that shape both individual



and national identities” (ibid.). The study of Giroux (2011) highlights the importance of films as a media to address social issues and foster public discourse.

The public value of film in the sector of health, well-being and humanities was explored by Hjort (2019) setting as a priority to ensure and promote health through watching and engaging with films including also all kinds of moving images. The study of Hjort (2019) analyses approaches to value film’s beneficiary health effects such as film consumers and filmmaking for special purposes, health relief, film viewing practices and viewing spaces related to the disease (Hjort, 2019, p.14).

The study of Vanleene et al. (2020) describes a co-production project of filmmaking through the work of street-level professionals in Belgium, aiming to increase public value. They understand public value as “general sense as what is valued by the public and what enhances the public sphere, which implies that both individual interest and wider public interest are important” (Vanleene et al., 2020, p.5) and their purpose was to empower the community through the project. The results underline that the public value of films is perceived in a way that meets the needs and desires of the community. Active participation and the inclusion of marginalised voices of citizens impact the public value of the project as they benefit both citizens personally and the community.

Another aspect of the public value of films was explored in the study by Lawton et al. (2022). They examined the celluloid film heritage that is being lost, along with cultural history and proposed the creation of a free online film archive portal of historical films across the UK, with a subscription for users or donation for non-users. The findings highlight the social value that the general public gains from accessing the digital archive. “Wellbeing values” (Lawton et al., 2022, p.190) are associated with using the digital archive and in addition, “value is gained from knowing that the cultural heritage continues to be accessible by the public for current and future generations” (ibid.).

Moreover, Zemaityte et al.'s (2024) recent study quantitatively examined the public value of film festivals as part of the international film industry with important cultural and economic value. By mapping 616 festivals worldwide between 2009 and 2021, they examined aspects of diversity in terms of themes, gender, geography and language. International film festivals contribute to public value by supporting both local audiences and global industries. To underline the value to society that the festivals promote, they divided the festivals into two categories: first category festivals play



an important role in networking, marketing and cultural diversity, while second category festivals promote thematic diversity and underrepresented voices.

The same year, the British Film Institute published a report about the value of cinema theatres with social and cultural aspects by conducting four focus groups with a total of 23 participants. The study examined cinema theatres in the UK and their impact on social wellbeing and their cultural contribution. The results showed that cinema theatres play an important role in fostering a “sense of community” (Lawton et al., 2024, p.13) as they provide spaces that are accessible to different people and offer them the opportunity to achieve their social goals by getting connected with others, therefore the study characterised cinema theatres as a “social infrastructure” (Lawton et al., 2024, p.14).

Although previous studies have investigated various aspects of public value within the film industry, these works have primarily focused on the values conveyed through films themselves. This focus creates a gap in the literature, as it overlooks the examination of how public resources support the film industry and contribute to its public value. Addressing this gap necessitates a comprehensive definition of public value specific to the EFI. To advance this understanding, we analysed case studies from six European countries to explore how national governments and the public sector promote and support the EFI, thereby shaping its public value. This exploration demonstrates that public value is shaped not only by the content produced but also by the infrastructure and policies that sustain and develop the industry. In this context, the role of EU and national policies becomes crucial.

4 ROLE OF EU AND NATIONAL POLICIES

Support for the European film industry began in the 1980s with the launch of initial funding initiatives. Today, the Creative Europe Programme serves as the European Commission’s key mechanism for fostering the cultural and audiovisual sectors. With a budget of €2.44 billion for 2021-2027, Creative Europe is split into two sub-programmes: MEDIA and Culture. sectors. With a budget of €2.44 billion allocated for 2021-2027, Creative Europe is divided into two main sub-programmes: MEDIA and Culture.



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The *MEDIA* sub-programme focuses on the development, distribution and promotion of European audiovisual works, while the *Culture* sub-programme emphasises cross-border cooperation, mobility and innovation within the cultural and creative industries. The *MEDIA* program is excelling in promoting European cultural and linguistic diversity by supporting the development and distribution of hundreds of audiovisual works, enabling them to reach broader audiences. By backing the creation and distribution of approximately 25% of films produced annually, *MEDIA* significantly contributes to the formation of a European audiovisual ecosystem that allows films to expand beyond domestic markets. The program has exceeded its targets in terms of European film audiences in cinemas and remains on track in the VOD sector. This achievement is particularly notable given the ongoing disruption of the audiovisual landscape, especially with the rapid growth of global digital platforms (Creative Europe Program statement, 2021). *Eurimages*, a support fund established in 1988, is part of the early wave of European film support initiatives that supports the co-production, distribution and exhibition of European films. Its goal is to boost the European film industry by encouraging professional cooperation and aiding in the production and distribution of European film works.

In 2004, the *World Cinema Fund Europe* was created to foster co-productions of innovative feature films and documentaries, particularly targeting regions outside North America and Northern Europe that lack robust production infrastructure. Since 2014, this project has been supported by the Creative Europe Programme, aiming to enhance cultural diversity and reinforce Europe's role in global film production.

Additionally, “*A Stronger Europe*” represents one of the European Commission's key priorities for 2019-2024, focusing on strengthening the cultural and audiovisual sector as part of broader efforts to enhance Europe's cultural presence and industry competitiveness.

Governments demonstrate the importance of the film industry within their cultural policies through substantial investments aimed at maintaining and expanding their role in the sector. The financial commitment underscores the recognition of films as powerful vehicles for expressing symbolic and cultural values (Crane, 2014). However, the process of crafting film policies is often influenced by local political dynamics. The ideological and institutional environments in which state actors operate significantly affect their interpretation and pursuit of the public interest (Vogel, 1996). This



means that the approach to film policy can vary widely depending on the specific political and cultural context, making the task of policy-making both complex and deeply intertwined with national identity and social values. These programmes and cultural financing mechanisms are influenced by a range of complex factors, both within and outside the cultural sector. External influences include the broader political and legal environment, while societal factors like public support for cultural initiatives and the intergenerational transmission of values also play a critical role. Additionally, the cultural sector's internal capacity, particularly its ability to secure external funding, is a significant determinant of its success (Orankiewicz, 2022). Along with the European financial programmes, important are also the diverse funding frameworks and mechanisms, which enhance the economic and cultural growth of the EFI.

4.1 Framework of Film Sector in Europe

The film industry's unpredictability makes it difficult to secure funding. National support systems for film production, development, and distribution have a direct or indirect influence on the industry's structures and practices, as well as on the kinds of films that are produced and distributed (European Commission, 2014). However, the European film industry relies on diverse funding mechanisms, each with specific goals and approaches to support film production while fostering cultural and economic growth. State authorities persist in subsidising their film industry as a valuable cultural resource that merits political safeguarding (Morawetz et al., 2019). However, they often find themselves facing a core dilemma: on one hand, their support programs are designed to nurture artistic talent and creativity, preserve cultural diversity, promote cultural cohesion, and enhance the economic prosperity of the film industry and its stakeholders (European Commission, 2014). These mechanisms fall into four main categories: culture-oriented, market-oriented, cross-border collaboration and mixed schemes (Orankiewicz, 2022).

Cultural Promotion Framework

This framework centres on advancing culture and the arts while enhancing a country's cultural image. It generally uses direct subsidies and public loans, allocated selectively to projects that align



with cultural development objectives. By funding films that preserve cultural heritage and foster artistic expression, this approach aims to enrich the cultural landscape.

Economic Growth Strategy- Market-Oriented Scheme

Unlike the culture-oriented approach, the market-oriented scheme emphasises economic growth by attracting foreign film production to the local market. It utilises financial incentives like tax shelters, cash rebates, tax credits and tax relief, which are allocated through an automatic selection method. The primary goal is to boost the local economy by encouraging international productions to choose European locations, thereby generating economic benefits and creating jobs.

Cross-Border Collaboration Scheme

This scheme aims to boost the competitiveness of the European film market and encourage cross-border partnerships. Thus, co-productions is seen as the main strategy for addressing financial challenges and boosting budgets by integrating funding from both public and private sources. It provides direct subsidies, loans and guarantees through a selective process for projects that foster collaboration among European countries. By funding films with cross-national appeal, the scheme enhances supranational cooperation and contributes to a more unified European market.

Mixed Scheme

The mixed scheme combines elements from both culture- and market-oriented approaches, offering a blend of direct subsidies, public loans, tax incentives (such as tax shelters, cash rebates and tax credits) and guarantees. It operates with both selective and automatic selection methods, depending on the type of support provided. This dual approach allows for targeted support of cultural projects while also creating economic incentives for investors, balancing cultural development with market-driven goals.

The European frameworks of the film sector encompass also the VOD, a sector that has spread rapidly throughout Europe and has significantly reshaped the EFL.



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4.2 Economy and Public Value on Demand

The European film industry is important for both cultural and economic development across the continent. It is characterised by a range of national markets, each with its own production styles, funding mechanisms, and distribution channels, shaped by the unique cultural, historical, and social contexts of individual countries. From major productions in countries like France and Spain to smaller, independent films from Austria and Greece, the European film industry remains an interesting player in global film production and distribution.

According to the European Audiovisual Observatory, around 42% of the total budget of an average European film comes from public funding (EAO, 2024). This support includes direct public funding, tax incentives and obligations for broadcasters to invest in film and audiovisual content (Bams, 2024). Between 2016 and 2020, the share of public funding increased from 39% to 41.8% (EAO, 2024). One of the key features of the European film landscape is its reliance on public funding and financial incentives to support local filmmakers. Government grants, subsidies, and tax rebates are widely used across the continent, with initiatives such as the European Union's Creative Europe programme providing vital support for film development, production, and distribution. In 2020, Creative Europe MEDIA, the film-specific strand of the programme, supported 432 projects with a budget of around 120 million Euro (European Commission, 2020). National bodies like France's Centre national du cinéma et de l'image animée (CNC) and Spain's Spain Audiovisual Hub play a central role in distributing these funds, ensuring the growth and sustainability of their local film industries (CNC, 2021; Spain Audiovisual Hub, 2021). In addition to direct public funding, many European countries have introduced tax rebate schemes to attract both local and international productions. France offers a 30 percent tax rebate on eligible production expenses through its Tax Rebate for International Productions (TRIP), with an annual cap of 30 million Euro per project (CNC, n.d.). Similarly, Spain provides a 30 percent tax rebate on the first ones million Euro of qualifying expenses, with 25 percent on the remaining budget, while in the Canary Islands, this rebate can reach 50 percent, making it a popular destination for high-budget international productions such as *Game of Thrones* and *The Witcher* (Spain Film Commission, n.d.). Belgium also offers a high 42 percent tax deduction through its Tax Shelter system, which has proven to be one of the most successful in Europe. In 2019, it attracted over 800 million Euro in production



investment, with 465 million Euro specifically allocated to film and television projects (Wallimage, n.d.). Regional programmes, such as Screen Flanders, further enhance the country's appeal by providing additional funding of up to three million Euro per project. Smaller countries like Austria and Poland have also implemented effective financial incentives to promote local production and attract international filmmakers. Austria offers rebate through its Film Industry Support Programme, which allocated 5 million Euro in 2020 to support local and international projects (Austrian Film Institute, n.d.). Poland, which introduced a 30 percent cash rebate in 2019, has attracted over 45 million Euro in foreign investment for film and television productions between 2019 and 2021, helping position the country as a growing player in the European film industry (Polish Film Institute, n.d.). Greece has also a 40 percent cash rebate on eligible production expenses. Between 2018 and 2021, Greece allocated over 100 million Euro in rebates to more than 120 film and television projects, helping boost the local economy through job creation and tourism (Greek National Centre of Audiovisual Media and Communication, n.d.).

A major shift in the European film industry has been the rise of Video on Demand (VOD), as of 2020, the European VOD market was valued at over 11 billion Euro, with subscription-based services dominating the sector (European Audiovisual Observatory, 2021). When discussing the film industry in Europe, it's essential to include the growing role of video platforms in the conversation. These platforms have transformed how audiences consume content, reshaping the distribution models and providing new opportunities for European filmmakers to reach global audiences (Grece, 2021). According to a report by the European Audiovisual Observatory, revenues from VOD platforms in Europe skyrocketed from 388 million in 2010 to 11.6 billion in 2020, primarily driven by subscription-based services (SVOD) like Netflix (Grece, 2021). This shift has not only transformed audience habits but has also provided new opportunities for European filmmakers to showcase their work internationally, thus making VOD an indispensable part of the modern European film ecosystem.

Harmonising frameworks is vital for aligning VOD services with national and supranational public value policies, ensuring that digital media content distribution supports cultural objectives and regulatory standards consistently across Europe. The rise of streaming services such as Netflix, Amazon Prime Video and Disney+ has significantly reshaped the media landscape in Europe



(Lobato, 2019), impacting both local broadcasters and the concept of Public Value. As these global streaming giants have gained market dominance, European broadcasters have been forced to adapt in order to maintain their relevance. Netflix, for example, has complied with the *European Union's Audiovisual Media Services Directive* (AVMSD, 2020), which mandates that streaming platforms ensure at least 30% of their content is European. This has led Netflix to make substantial investments in local content, with its programming meeting these required quotas in major European markets. These investments are not just about meeting regulatory requirements, they also enhance the global visibility of European productions. Public service broadcasters face significant challenges in competing with the massive content budgets of global streaming services. In response, many broadcasters have expanded their own VOD platforms across Europe, though they often struggle to match the scale and appeal of platforms like Netflix (TVBEurope, 2023). To counter the dominance of these streaming giants, several European governments have implemented regulatory measures aimed at protecting their local content industries. and introduced levies and direct investment obligations that require streamers to contribute financially to local productions. These regulations vary in their enforcement and impact, but they generally aim to ensure that streaming services support the European audiovisual ecosystem.

After examining the European framework and support policies, the following section examines the specific national contexts of six European countries and highlights their mechanisms for promoting public value in the local film industries.

5 OVERVIEW OF THE POLICY ECOSYSTEM OF SIX EU COUNTRIES

In the 1980s, national support for film varied significantly across EU Member States. Larger countries like France invested heavily in comprehensive policy measures, including exhibition quotas, direct subsidies, tax credits and levies on cinema and cable distribution (Kerrigan & Ozbilgin, 2004). In contrast, smaller countries like Belgium (particularly Flanders) and Greece, had limited support mechanisms, focusing primarily on maintaining domestic production levels rather than comprehensive support for distribution (Pauwels, 1995 as cited in Raats, Schooneknaep and Pauwels 2018). According to the European Audiovisual Observatory (2021), public support and



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broadcasters continue to be the primary sources of financing for European fiction films. Between 2007 and 2016, documentary production experienced a dramatic rise, almost doubling to 698 films by 2016. Majority documentary co-productions saw a 57.8% growth over the decade, a rate comparable to the 52.5% increase in feature fiction production. However, the most significant growth occurred in fully national documentary productions, which surged from 287 films in 2007 to 597 in 2016 (European Audiovisual Observatory, 2017). Direct public funding and broadcaster investments are the two most crucial contributors, comprising 26% and 21% of the total financing for European theatrical fiction films, respectively. Producer investments account for 17% of the total financing, while pre-sales and production incentives each contribute 15% (European Audiovisual Observatory 2021).

In this section, six European countries are analysed in regard to public support and funding in promotion of the film industry. The aspects of policy, education, institutions, film festivals and funding are explored. They were selected to represent the varied landscape of the EFI due to their differing levels of film industry strength: France as a strong industry, Spain and Poland as medium-sized industries, and Greece, Austria, and Belgium as smaller industries. This selection helps capture the diversity within the EFI.

5.1 AUSTRIA

5.1.1 Public Service Media in Austria

Austria's Public Service Broadcaster, ORF, plays an important yet secondary role in co-funding films. ORF can only provide financial support for films that have already secured a grant from the Austrian Film Institute. However, the collaboration between the film and television sectors in Austria is significantly strengthened through the Film and Television Agreement between the Austrian Film Institute and ORF. This agreement is crucial in promoting Austrian films by ensuring that projects, including those featuring new talent and innovative approaches, receive initial funding from the Austrian Film Institute or other film promotion entities. About 10% of the annual budget is dedicated to such projects. Under this agreement, ORF supports the production of



domestic feature films, but its co-financing depends on prior funding approval from the Austrian Film Institute or, in some cases involving innovation and emerging talent, from other Austrian film funding bodies such as the BKA (Federal Chancellery of Austria) or regional funds. The Joint Commission of the Film/Television Agreement, which consists of three representatives each from ORF and the Austrian Film Institute, is responsible for making these funding decisions.

5.1.2 Public Institutions and Initiatives Supporting Filmmaking

Austria, a federal state, is among the top five countries in Europe, after France and Germany, with the highest number of film funding bodies. With a total of 22 funding institutions, six at the national level and 16 at the sub-national level, Austria has the largest number of such bodies in Europe. This extensive network provides a comprehensive funding system that integrates both national and regional support for film production (Kanzler, M., & Talavera, J. 2018).

Production companies in Austria (film and TV) clearly generate the largest share of the industry's revenue, with €1.141 billion, accounting for 83.2% of the sector's total revenue (up from 81.8%). In comparison, public funding decreased from €54.7 million in 2017 to €52.3 million in 2019 and reached €49.3 million in 2020. In 2021, a total of €90.55 million was provided by public funds to production companies, representing 7.9% (up from 4.8%) of the revenues and income of film and TV production companies (Österreichisches Filminstitut, 2019).

The Austrian Film Institute (Österreichisches Filminstitut) is a national funding agency that supports both the cultural and economic dimensions of film. Its legal foundation is the Film Funding Act (FFG) of 1980 and established in 1981, first amended in 1987 and most recently updated in 2021 (AFI, 2024). The concept of funding films based on both artistic and economic criteria has increasingly become a central principle within the creative industries. Based in Vienna and operating under public law, it strengthens the Austrian film industry by promoting artistic excellence and ensuring economic success. Its support enhances the cultural impact of Austrian films while also contributing to their commercial viability, both, domestically and internationally. The institute's financial year follows the calendar year. It supports in particular the production of films on the basis of projects (selective funding) or on the basis of performance (AFI). For the year 2024, covering the period from January to April, the Austrian Film Institute's Project Commission



supported numerous film projects and activities through its four sessions. The first session saw funding for 10 project developments and 10 productions, along with 13 distribution activities (2 festival participations, 5 cinema releases, 6 other measures) and 13 professional training programmes. An additional 17 projects (6 productions, 11 cinema releases) received ÖFI+ funding. The second session approved funding for 25 script developments. During the third session, 8 project developments and 9 productions were funded, alongside 31 distribution activities (9 festival participations, 8 theatrical releases, 14 other measures) and 20 training programmes, with 24 projects (14 productions, 10 releases) benefiting from ÖFI+ support. The Fourth session granted funding to 26 script developments. Overall, the year highlighted significant support for script development, project production, distribution and professional development in the Austrian film sector (ÖFI, 2024). In this context, the winning films enrich public discourse by tackling complex themes crucial for cultivating a well-informed, reflective and empathetic society. They create a space for discussing issues such as historical awareness, technological ethics, cultural diversity, human resilience and migration. The selected scripts reflect the dedicated efforts of film teams to contribute to a more inclusive, aware and culturally enriched public sphere—an essential foundation for nurturing democratic values, social cohesion and a strong sense of community. Examining and analysing some of the short scripts of each winning project in the last year (2024) reveals a rich mosaic of themes that are both varied and interrelated, offering a comprehensive exploration of public values synthesised through the image.

To mention some of the movies representing society and everyday life that promotes cultural heritage and diversity through migration stories here is for instance “Henry Krips and his sisters- a career in Australia” which adds to public value by documenting the experiences of refugees and their contributions to cultural diversity. The biopic provides insight into the cross-cultural influences that shaped Australian music, highlighting the positive impact of migration and cultural exchange. “Königin von Island” (Queen of Iceland) explores migration and personal reinvention, while “Lady Bluetooth” celebrates pioneering women in science. “Maria” addresses disability and activism and “Miss Sophie” critiques historical gender norms.

This narrative promotes appreciation for cultural diversity, reinforcing the values of openness, acceptance and the enrichment that comes from different cultural heritages. When talking about fostering cultural understanding and inclusivity “Der Einheimische” (The Native), is a documentary



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contributing to the exploration of themes of identity, belonging and cultural diversity. Through personal narratives set against a multicultural backdrop, the film enhances understanding of how identities are constructed and the significance of cultural exchange. It invites audiences to engage with the complexities of what constitutes “home”, thereby fostering cultural empathy and inclusivity. A contribution to the concept of public value by promoting dialogue on integration, diversity and coexistence in a multicultural society. Exploring ethical and existential questions in the age of technology, “Do Androids dream of the Crungus?” expands by engaging with contemporary debates on artificial intelligence, ethics and human identity. It examines the limitations and potential dangers of AI, prompting viewers to think critically about the ethical implications of technological advancements. The film encourages reflection on what it means to be human in a world increasingly shaped by artificial intelligence, contributing to an informed public discourse on technology’s role in society.

The Art Section of the Austrian Federal Chancellery’s film department, Kunst und Kultur-Film II/3, on a national level, plays a crucial role in supporting Austria’s film industry by funding innovative projects in the areas of fiction features, documentaries, animations and experimental films. The department particularly focuses on fostering young filmmakers and emerging talent, considering both age and experience, while also ensuring the preservation of Austria’s film cultural heritage and supporting institutions and associations related to film. Funding is available for various stages of film production, including scriptwriting, project development, production, distribution and more specialised activities such as scholarships, repertory cinema and festival participation. To be eligible for funding, applicants must have Austrian citizenship or have been permanent residents in Austria for at least three years. Applications are generally accepted three times a year, sometimes on different dates depending on the specific field of promotion and funding decisions are made based on the recommendations of an advisory board.

The Austrian Television Fund (Fernsehfonds Austria), managed by RTR-GmbH (Austrian Regulatory Authority for Broadcasting and Telecommunications), is a key public supporter of the film sector. It operates with an annual budget of EUR 13.5 million, derived from fees collected under Article 3 (1) of the Austrian Broadcasting Fees Act (RGG). It is based on KommAustria-Gesetz (KOG), BGBl. I Nr. 32/2001 idF BGBl. I Nr. 86/2015. The television fund is part of state media governor Rundfunk und Telekom Regulierungs GmbH.



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This fund is dedicated to promoting and administering television productions, including films, series and documentaries. It subsidises Austrian films and co-productions involving Austrian and foreign partners. To qualify for funding, projects must meet at least three criteria related to “cultural content”, ensuring that the supported productions contribute meaningfully to Austria's cultural landscape. Each year, (Fernsehfonds Austria) has EUR 13.5 million at its disposal for the purpose of supporting the creation and exploitation of cultural assets with Austrian character, in the form of television films (including television series, miniseries and documentaries), subject to the provisions of Articles 26 to 28 KOG as well as the Guidelines detailed in this document. (2) The criteria are specified in Regulation (EU) No 651/2014 of 17 June 2014, amended by Regulation (EU) No 2021/1237 amending Regulation (EU) No 2020/972 amending Regulation (EU) No 1407/2013 and amending Regulation (EU) No 651/2014 OJ L 215 of 7 July 2020, last amended by Commission Regulation (EU) No 2023/1315 of 23 June 2023, OJ L 167/1 of 30 June 2023 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty on the Functioning of the European Union (GBER) and in particular in Article 54 of the Regulation, are mandatorily applicable.

Film Commision Austria, while not a state institution, provides essential services to filmmakers. It assists with location scouting, permits and production logistics. The Vienna Film Commission serves as the primary point of contact for both national and international film productions in Vienna. It facilitates communication between the Vienna City Administration, Municipal Departments and the film industry, primarily focusing on securing shooting permits. The commission assists filmmakers in finding suitable locations and industry service partners. Additionally, it advocates for the film sector and promotes Vienna as a premier film and production destination, aiming to create lasting benefits for the local film industry. These institutions contribute significantly to Austria's vibrant film scene, fostering creativity, talent development and cultural exchange.

5.1.3 Film Festivals in Austria

Austria hosts several notable film festivals that celebrate creativity and culture. Austria is also home to several prominent film festivals that highlight the country's commitment to cinematic arts



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and public support for film. Vienna, as Austria's capital, serves as the hub of the national film industry, bringing together academic institutions, funding agencies, archives, production companies, and film festivals. Vienna is a city deeply rooted in cinema culture, boasting 26 cinemas, 18 of which are dedicated art house venues, along with a film archive and a film museum (Ungerböck & Javritcher, 2018). While these festivals are prominent in highlighting Austria's dedication to the film industry, understanding the evolving landscape of Vienna's film festival scene requires more recent impact studies (Teissl, Verena; Mayerhofer, Elisabeth; Reid, Wendy, 2021). The latest comprehensive study on this subject is the „Film festival report Österreich” (Film Festival Report), (Zachar & Paul, 2016) which was the first to assess the impact and dynamics of film festivals in Austria.

The report reveals a marked difference in audience attendance, with 68% attending during festivals compared to 43% during regular cinema operations (p. 4). It also identifies an upward trend in participation, with the audience being predominantly young, educated, and female. Furthermore, the economic multiplier effect is significant, with every €1 in funding generating €4 for the local economy. Additionally, 7% of festival attendees come from abroad or other regions in Austria.

The report emphasises the symbiotic relationship between film festivals and art house cinemas, stating: “The existence and diversity of art house cinemas is an important prerequisite for film festivals. Together, cinemas and festivals work to preserve film as an art form and its best possible presentation” (p. 33).

A shared characteristic across Austrian film festivals is the significant public support each festival receives, underscoring Austria’s commitment to promoting its national film industry and cultural exchange. This funding ensures that festivals showcase a diverse range of films, fostering both local talent and international collaboration. All festivals, regardless of their focus, reflect Austria’s broader cultural policy, which values cinematic diversity and talent development.

However, each festival has a unique emphasis. The “Viennale” established in 1960, is a prestigious international event that brings global cinema to Vienna, while the “Diagonal” since its inception in 1998, is more focused on celebrating Austrian films and nurturing local filmmakers. The “Crossing Europe Film Festival” launched in 2004, highlights the importance of cross-cultural dialogue



within Europe, and the “Let’s CEE Film Festival” founded in 2012, centres on films from Central and Eastern Europe, enhancing visibility for lesser-known filmmakers from these regions. Meanwhile, the “Salzburg International Film Festival” blends local and international films, contributing to Salzburg’s cultural vibrancy despite being a newer player in the festival scene.

5.1.4 Public Educational Institutions

In Austria, several prominent education institutions have nurtured talent and advanced the film industry through specialised programmes and interdisciplinary approaches.

Film Academy Vienna (Filmakademie Wien), located in Vienna, is a leading institution in film education. It offers comprehensive programmes in film and television production, where students acquire essential technical skills, artistic vision and industry knowledge. The academy places a strong emphasis on practical training, enabling students to work on real film projects. Its graduates often make significant contributions to both the national and international film scenes.

University of Music and Performing Arts Vienna provides a specialised Film Music and Media Composition programme. It focuses on the creative process, synchronisation techniques and effective collaboration with filmmakers, equipping students with the skills needed to enhance film experiences through music.

University of Applied Arts Vienna (Die Angewandte), through its Institute of Design and Institute of Fine Arts, supports a diverse range of creative disciplines. While not exclusively focused on film, these institutes foster interdisciplinary approaches that include visual storytelling, experimental filmmaking and multimedia art. This environment encourages students to explore innovative ways of integrating film with other art forms.

Salzburg University of Applied Sciences (FH Salzburg) offers the MultiMediaArt programme, which covers various aspects of digital media, including film. The programme emphasises animation, visual effects and interactive media, promoting innovation and collaboration across disciplines. Students are encouraged to push the boundaries of traditional film and media practices.



Academy of Fine Arts Vienna (Akademie der bildenden Künste Wien) provides programmes in fine arts that intersect with film. Students engage in visual expression, conceptual art and experimental approaches, with some graduates transitioning into filmmaking or applying their artistic skills to film-related projects.

Danube University Krems (Donau-Universität Krems) is home to the Center for Digital Media and Film Production. This centre focuses on digital media, including film production, animation and interactive storytelling. Students at this centre work with cutting-edge technologies and explore new forms of cinematic expression, contributing to the evolution of the film industry.

5.1.5 Impact on the Film Sector

In 2023, Austria introduced a new Investment Incentive Model to invigorate its film industry and attract both national and international productions. This model offers a substantial 30% grant on eligible Austrian production expenses, provided minimum spending thresholds are met based on the project type. To further promote sustainable and inclusive filmmaking, the model includes a “Green Bonus”, granting an additional 5% in funding for productions that meet specific environmental standards. To address gender disparities in the film industry, a “Gender Gap Bonus” of 25,000 euros is available, supporting projects that actively promote gender equality. Additionally, there is an “Added Value Bonus”, offering a 25% increase in funding for projects that demonstrate significant local economic impact. The maximum funding a single project can receive under this model is capped at 5 million euros, ensuring that the support is both substantial and targeted. While this incentive primarily focuses on theatrical film production, similar provisions are available for TV and streaming productions, aligning with Austria’s goal to foster a competitive and diverse media landscape. This new incentive model represents a strategic shift in Austria's approach to film funding, balancing cultural objectives with economic growth opportunities. This substantial investment has several positive effects:

Job creation by contributing to job creation within the film sector, providing employment opportunities for filmmakers, actors, crew members and other professionals.



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International success where productions supported by the ORF have achieved international acclaim. Over the years, these films and series have won prestigious awards such as the Oscar and the Emmy. The ORF's commitment to investing in local film and TV production helps maintain a vibrant creative ecosystem in Austria.

Identity and cultural representation, regarding the requirements, films and series from Austria should answer the question: *Who are we?* This criterion guides the selection of material and influences collaboration with filmmakers. By telling authentic stories that reflect Austrian culture and identity, the ORF contributes to the preservation and celebration of national heritage.

5.2 BELGIUM

5.2.1 Public Service Media

Public broadcasters, particularly RTBF (Radio-Télévision Belge de la Communauté Française) and VRT (Vlaamse Radio- en Televisieomroeporganisatie), play a crucial role in the Belgian film sector. RTBF is mandated to invest a significant portion of its budget in local productions through co-productions, pre-purchases of broadcasting rights and various other contracts with local producers, with a minimum of €30 million annually. Similarly, VRT invests extensively in local content, supporting emerging and established filmmakers through production orders, co-productions, development funds and partnerships. These investments by public broadcasters have several impacts: they create jobs across the film production value chain, lead to international recognition for Belgian films and promote cultural representation by focusing on themes central to Belgian identity.

5.2.2 Public Institutions and Initiatives Supporting Filmmaking

Belgium's film and television industry benefits from a wide array of PSM policies, initiatives and funding bodies that aim to promote local film productions and foster collaboration among key stakeholders, including public broadcasters, regional film funds and federal institutions. In



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Belgium, film and audiovisual policies are primarily managed at the regional and community levels, reflecting the country's federal structure. The responsibility for these policies is divided among various ministries and regions/communities, each overseeing different aspects of the film industry through a range of funds and institutions.

At the core of these efforts is the Belgian Tax Shelter for Audiovisual Works, a crucial initiative introduced to stimulate investment in local film and television productions. Adopted in 2002, the tax shelter is a complementary measure to the funding policies coming from Belgium's Regions and Communities. It is a tax exemption from which companies can benefit if they invest in the financing of audiovisual and cinematographic works. The tax shelter offers a 40% tax deduction for eligible investments, provided that minimum spending requirements are met within Belgium. The tax shelter applies only to eligible works, i.e. European works that meet the definition of a European work as set out by the Audiovisual Media Services Directive and approved by the relevant language Community. To qualify, projects must pass a cultural test to ensure they contribute to Belgian and European cultural heritage. The audiovisual works involved are: fictional, documentary or animated films intended for theatrical release; fictional or animated TV series; TV documentaries; feature-length television documentaries; feature-length TV films; children's and youth series.

Belgium's multifaceted approach to film funding, the involvement of public broadcasters and robust education initiatives highlight the country's strong commitment to supporting its film and television industry, both culturally and economically.

The cultural aspect of film funding falls under the jurisdiction of the different communities within Belgium, each led by its respective Minister of Culture. These film funds are critical for fostering and supporting the diverse cinematic landscape across the country. For the Flemish Community, the Flanders Audiovisual Fund (VAF), specifically its Film Fund division, plays a central role. This fund offers selective support across various film genres and lengths and it also backs innovative projects through its FilmLab and impulse grants.

In the French-speaking Community, the Film and Audiovisual Centre (CCA) provides similar selective financial support across multiple stages of film production, catering to various genres and formats. Additionally, the Fonds FWB-RTBF, also for the French-speaking Community, focuses on



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the development and production of TV series. This fund is unique as it combines resources from both the Wallonia-Brussels Federation and the public broadcaster RTBF.

For television projects within the Flemish Community, the VAF/Media Fund offers selective support, particularly for TV fiction series, documentaries, animations and cross-media projects. This fund, established in 2010, has become a vital source of support for innovative and diverse television content.

On the economic front, film funding is managed at the regional level under the auspices of the Ministers of Economy for each region. In the Flemish Region, Screen Flanders was launched in 2012 and provides selective support for film and television projects, operating with an annual budget of EUR 4.5 million. Meanwhile, in the Walloon Region, Wallimage serves as a significant economic fund with an annual budget of EUR 5.5 million, offering production support by acting as a co-producer.

These institutions and funds collectively ensure that Belgium's film and audiovisual industries are well-supported, fostering cultural expression and economic growth across its diverse communities.

Belgium's film funding landscape is regionally divided, with three major regional film funds; Flanders Audiovisual Fund (VAF), Wallimage and Screen Brussels.

The VAF, located in Flanders, focuses on supporting film production, distribution and promotion, emphasising cultural and artistic value, innovation and audience engagement. It operates several sub-funds, such as the VAF/Filmfonds, VAF/Media Fund and VAF/Game Fund, each with specific mandates and objectives. The VAF not only implements film and game policy but also prepares these policies for relevant government ministers, conducting data collection and analysis to inform strategic decisions.

The Wallimage, based in Wallonia, has an annual budget of EUR 5.5 million, it provides production support by acting as a co-producer and serves as the region's economic fund for the audiovisual and gaming industries. It provides co-financing for films and games, aiming to stimulate local economic activity and attract international productions.



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The Screen Brussels focuses on making the Brussels-Capital Region an attractive hub for audiovisual production by offering financial incentives and logistical support. It has an annual budget of EUR 3 million, it provides support for domestic productions and international coproductions. Producers can receive substantial investments to cover expenses incurred in Brussels, enhancing the local audiovisual industry's infrastructure.

5.2.3 Film Festivals in Belgium

Belgium is home to numerous film festivals that celebrate both local and international film productions. In 2022, according to VAF, 1,827,175 cinema goers went to see Flemish films, with an increase of 180,080 visitors from films released in the previous year.

Flanders and Brussels host approximately 35 film festivals of varying sizes and objectives. Among them, three major festivals adopt a more 'generalist' focus: the International Film Festival Ghent, the Ostend Film Festival, and the Brussels International Film Festival. Other key festivals target specific genres, such as the Brussels Fantastic Film Festival, Anima (Brussels International Animation Festival), the Leuven International Short Film Festival, and Docville, which focuses on documentaries.

While none of the Belgian festivals rival the global influence of major events like Cannes, Berlin, or Venice, where awards can significantly impact a film's international success, the Ghent Film Festival stands out for its renowned World Soundtrack Awards, celebrating top composers in the industry annually (CresCine project website). The Landscape Sketch of Flanders document (2014) provides a clear overview of the Flemish professional film sector, highlighting the patterns of film screenings in the region. Both traditional screenings and those held in subsidised venues occur with a recognizable schedule, whether daily, weekly, bi-weekly, or monthly. Film festivals in Flanders rarely play an international role in the film industry (Flanders also does not have any A-list festivals), but they do play a significant local screening role: they bring specialised film offerings to places where they normally would not be seen, due to a lack of space in the existing screening infrastructure. Notable festivals such as Film Fest Gent, Mooov Film Festival in Bruges and Turnhout, and various others in Brussels and Leuven are instrumental in this regard. Each festival



focuses on specific themes, genres, or perspectives and has received support from the Arts Decree in recent years.

Many festivals extend their reach beyond the main event through additional screenings in various locations, a practice known as “decentralisation.” For instance, the Mooov Festival has successfully organised spin-off screenings in cities like Genk, Sint-Niklaas, and others. Moreover, most festivals engage in a range of activities related to their themes. Some serve as knowledge centres, while others focus on distribution. Educational initiatives are often aimed at younger audiences, with many festivals offering training for professionals. In certain cases, these educational aspects become so prominent that the festival functions partly as an educational institution.

Belgian filmmakers, particularly in Flemish fiction and documentaries, have garnered international recognition through nominations and awards. Notably, Lukas Dhont’s film *Close* (BE, FR, NL 2022) won the Grand Prix at the Cannes Film Festival and was also nominated for an Oscar for Best International Feature Film. some of the key players in the film festival are;

Brussels International Film Festival (BRIFF), which showcases a wide array of films;

Ghent Film Festival, known for its focus on film music;

Brussels Short Film Festival, which provides a platform for emerging talent;

Docville, Leuven's documentary film festival;

Anima, Brussels' animation film festival

International festival of Francophone film (Festival international du film francophone-FIFF):

Since 1986 and its 1st edition, the Wallonia Film Festival has changed its name to become the Festival International du Film Francophone de Namur. The festival is dedicated to the French-speaking films and each year, its various Juries award the different Bayard.

Love International Film Festival Mons: Created in 1984, the “Festival International du Film d'Amour” (International Love Film Festival) was created with an idea to place love in cinema at the heart of its programming.

Liège International Comedy Film Festival: The festival was created in 2016. The festival is held every year and features an official competition of national and international feature-length and short films dedicated to the cinema genre of comedy.



5.2.4 Public Educational Institutions

In terms of education, Belgium has several prestigious institutions that offer comprehensive film education programmes.

INSAS in Brussels, a world-renowned French-speaking film school, offers courses in filmmaking, acting, and more.

RITCS School of Arts, also in Brussels, provides extensive training in film and television production with an emphasis on practical skills and artistic development.

LUCA School of Arts, with campuses in Brussels and Ghent, offers programmes in audiovisual arts that encourage innovative and interdisciplinary approaches.

The Institut des Arts de Diffusion (IAD) in Louvain-la-Neuve specialises in film, television, and radio, providing both technical and creative training.

KASK & Conservatorium in Ghent offers programmes in audiovisual arts, focusing on experimental and artistic filmmaking.

5.2.5 Impact on the Film Sector

The Belgian case highlights the delicate balance between supporting the national film sector through public funding and adapting to global market forces. While fiscal incentives have proven effective in boosting production and economic returns, the film sector must continuously evolve to remain competitive. The challenge lies in maintaining cultural diversity and public value in an increasingly commercialised and globalised industry.

The concept of public value emerges as a safeguard for maintaining Belgium's cultural diversity in an industry increasingly driven by commercial interests and dominated by global streaming services.

The public value not only enhances cultural representation but also fosters a sustainable film sector. As for the Article 29 of the CCA Cinema Decree, it outlines one of the criteria for granting financial support to audiovisual projects, emphasising the importance of cultural contribution. One of the key requirements for promotion support is that the original version of a film must be in French with the possible exemption by the government on the basis of “(a) the cultural interest of the project for the French Community; (b) the specificities of the script”, although exceptions can



be made based on the cultural significance of the project or the specifics of the script. Additionally, films originating from French-speaking Belgian initiatives are eligible for higher levels of funding. This approach not only provides clear guidelines for filmmakers seeking financial assistance but also promotes local talent and the production of culturally relevant content, thereby ensuring that public funding supports projects that enhance the cultural fabric of Belgium's French-speaking community that reflect and contribute to national cultural identity (European Audiovisual Observatory, 2019).

5.3 GREECE

5.3.1 Public Service Media in Greece

PSM's role is pivotal to support the local film industry fostering collaboration among stakeholders, providing film funding, enriching the cultural landscape and ensuring broad access to film content. In Greece PSMs policies promote investments on local film productions.

The Greek Public Service Broadcaster, ERT, according to the Art 8(a) of Law 3905/2010 (FEK A 219 – 23.12.2010), is required to allocate 1,5% of its annual turnover to the film production that meet the criteria set out in Article 3 of the same law. Article 3 outlines the criteria according to which a film can be classified as a Greek film production, which is necessary for eligibility under various funding programmes. This legal framework ensures that part of the ERT budget is consistently invested in supporting the Greek film industry, as well as nurturing the country's film culture. Under the same Greek Law (3905/2010), Art 8(b) defines that up to half of this mandated investment can be used by the Hellenic Film Commission for advertising time to promote these films (FEK A 219 – 23.12.2010). In line with this legislation, the latest investment of ERT, approved by the Boards in July 2023, allocates 925,000 EUR for film production.

ERT has established the Microfilm programme in accordance with the provisions of Law 3905/2010 on the strengthening and development of filmmaking arts and other provisions. Since 1999 Microfilm has been promoting by providing workshops and funding for short fiction and



animation films created to young directors (National Center for Public Administration and Local Self-Management, 2004) as well as public online promotion through their digital platform ERTflix.

5.3.2 Public Institutions Supporting Filmmaking

The Hellenic Film Commission (HFC) directs the Greek Film Center (GFC) under the provisions of the Ministry of Culture and Sports and is funded by the state (HFC, 2024). The HFC aims to develop the Greek film industry by supporting Greek film and TV productions. According to the Art 9 of Law 3905/2010, the GFC provides financial support to Greek filmmaking in all stages of film production, from script writing to completion, including the production of short films and foreign audiovisual productions from Greece. In addition, GFC works to distribute and promote films in Greece and abroad and organises seminars and scholarships for emerging professionals (FEK A 219 – 23.12.2010). The GFC announced in July 2023 five new financial programmes (GFC, 10.04.2023) from the European Commission – Next Generation EU – within the framework of the National Recovery and Resilience Plan “Greece 2.0” with a total value of 7,247,000 Euros (GFC, 11.07.2023) to strengthen Greek film production: Micro Budget-Short; Micro Budget-Plus; Co-Production Window; Development; The Future is Here.

National Centre of Audiovisual Media and Communication (EKOME) aspires as its mission the promotion of initiatives related to the audiovisual industry in Greece. EKOME supports public and private, domestic and foreign productions through education and entrepreneurship with the aim of the financial development of the country. Additionally, it fosters cooperation among regional and municipal authorities to enhance the domestic market and attract audiovisual productions (EKOME, 2024). An important measure was the creation of a national network of film offices that identify and highlight regional advantages that municipalities can use to attract audiovisual productions and investments (EKOME, 2024). According to the article 71E of Law 4172 / 2013, Greek Tax Relief corresponds to 30% of the eligible costs. EKOME received 298 applications within four years, from 2018 (April) to 2022 (October), investing €545 million in the film industry (Zenelis & Vasileiou, 2024, p.9). The two bodies GFC and EKOME have been merged into a new institution the Hellenic Film and Audiovisual Center S.A.- Creative Greece, under the purview of the Ministry of Culture established by Law 5105/2024 (FEK A 61 - 29.04.2024).



5.3.3 Film Festivals in Greece

Over the years, there have been more and more Greek film festivals, ranging from old ones like the Thessaloniki International Film Festival, founded in 1960, to newer ones. We can identify several key commonalities across them starting with festivals with international scope such as AegeanDocs International Documentary Film Festival, Drama International Short Film Festival, Thessaloniki International Film Festival, and Athens International Film Festival, designed to promote international dialogue. Many film festivals are dedicated to support alternative and experimental productions such as Athens Avant Garde Film Festival, Syros International Film Festival, and Athens International Digital Film Festival with focus on innovative and alternative films. Moreover, there are film festivals with emphasis on emerging filmmakers Aegean Film Festival, Athens Animafest, Athens Avant Garde Film Festival, and Thessaloniki International Short Film Festival (TiSFF) as they provide platforms for young filmmakers to present their work. Additionally, analysing the genres across the Greek film festivals documentary films are a dominant genre either in festivals dedicated to them, such as AegeanDocs International Documentary Film Festival, Peloponnisos International Documentary Festival, and Thessaloniki International Documentary Festival, or including them as key categories such as Chania Film Festival, Bridges International Film Festival, and Olympia International Film Festival. Short films are another key genre found in Drama International Short Film Festival, Aegean Film Festival, Chania Film Festival, International Short Film Festival Psarokokalo, and Thessaloniki International Short Film Festival (TiSFF) and others.

Aegean Film Festival, held in September, takes place in Patmos and Paros, under the support of UNESCO, Greek National Tourism Organization (GNTO) and the Greek Film Center (GFC) and sponsorship from COSMOTE TV, SundanceTV and the co-production of the Municipality of both islands. The film festival launched in 2010 on the Patmos island aiming to foster creativity in the Aegean, reaching 7000 tickets up to 2018. Their international programme includes more than 70 films and the following awards: Best Aegean Short Film: Jury Award € 2000,00; Best Greek Short Film: Jury Award € 1500,00; ReScript the Future - Environmental Short Script Awards: 1st - €25.000 (ages 13-17) and 2nd - €25.000 (ages 18-24); Runner Ups: 8 paid Internship Programmes with WaterBear and AegeanFF; Feature Fiction Audience Award; Feature Documentary Audience Award (Aegean Film Festival, 2024).



AegeanDocs International Documentary Film Festival takes place in October mainly in Lesvos and 11 other Greek islands since 2013. It is supported by the North Aegean Region, the Municipality of Mytilene, the Municipality of Dytikis (West) Lesvos and in cooperation with the University of the Aegean. The film festival aims to promote documentary film productions and encourage an international dialogue on new media and information technologies. In addition, the film festival offers workshops, master classes and the following awards: Best Foreign Documentary – 1,000.00 €; 2nd Best Foreign Documentary, Best Greek Documentary – 1,000.00 €; 2nd Best Greek Documentary, New Director Award – 500.00 €; 2nd New Director Award – Honourable Mention (AegeanDocs, 2024).

Animasyros International Animation Festival is one of the 20 most important animation festivals in the world. It has been held in September since 2008 on the island of Syros in the Cyclades. The festival offers, among other things, media literacy activities for children, workshops, studios and activities for children, young people, adults, people with disabilities and seniors. In addition, the animation market “Agora” is organised, which includes sessions, presentations and master classes by prominent representatives of the global animation industry. Their awards are: Best Feature (Audience Award); Best Short Film (Professional); Best Student Short Film; three TV & Commissioned Film awards; Best Greek Film; Best K.ID.S Film; Best Animapride Film (LGBTQI+ Film); Best Pitch for an Agora Project (Animasyros, 2022).

Athens Animfest is the International Animation Festival in Athens since 2006 in March, organised by the Center of Animation, Audiovisual and Performing Arts (Ars Anima). The festival focuses on European animation films and nurtures young emerging professionals. Their awards are for Short Animated Movie; Student Animated Movie; Experimental Movie; Experimental Movie; and Music (Athens Animafest, 2024).

Athens Avant Garde Film Festival is the largest event of the Greek Film Archive since 2010, in November. The festival highlights bold global voices in filmmaking and is the only festival in Greece that focuses exclusively on alternative forms of films and on artists from all over the world who are experimenting with new forms of storytelling. The festival collaborates with a non-profit organisation: Artworks, which supports emerging artists and filmmakers. It is implemented within the framework of the Regional Operational Programme of Attica and is jointly financed by the



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European Regional Development Fund and Greece. The Artworks Best Film Award is worth 5,000 EUR (Athens Avant Garde Film Festival, 2024).

Athens International Digital Film Festival held in December since 2012 in Athens, aiming to create space for technological innovations in the film industry and support modern filmmakers. Their awards are the Best Fiction; Best Experimental; Best Video art; Best Animation; Best Video Dance and Best Documentary (Athens International Digital Film Festival, 2024).

Athens International Film Festival launched in September 1995 aiming to promote independent and groundbreaking productions. The awards are the Golden Athena Award; City of Athens Best Director Award; Best Screenplay Award; The Golden Athena Best Music & Film Award, Audience Award; Best Short Film Award; Best Newcomer Award - Director and Best Newcomer Award - Actor and Actress (Athens International Film Festival, 2024).

“Bridges” International Film Festival of Peloponnese / Nafplio International Film Festival was established in 2008 and its aim is to foster cultural expansion and expand collaboration and communication with other film festivals. The topics of their screenings emphasise on peace, environment and diversity. Additionally, there are screenings from emerging film professionals. The film festival also collaborates with the Cyprus International Film Festival. Their awards include A. Short films awards in different categories (Best Mobile film; Best short animation; Best Music short film; Best Dance short film; Nostimon Imar Award; Best Experimental/Art short film) B. Documentaries (Best short documentary award; Best Cinematography Award in a Feature Documentary; Best Feature Documentary; Best Documentary by a Female Director – by WIFT GREECE) C. Best “We Can Do” for persons with special needs/tasks D. Short Films Awards and the Golden Pegasus Awards (Bridges International Film Festival, 2024).

Chania Film Festival (CFF) organised by AMKE “Cultural Society of Crete” is an international film festival launched in 2013, in Chania. The film festival provides space for fiction, documentary and animation films. Additional actions include exhibitions, summer school and implementation of educational programmes in schools. Their awards are: Best Short Fiction Film; Best Medium Length Fiction Film; Best Full-Feature Fiction Film; Best Short Documentary Film; Best Medium Length Documentary Film; Best Full-Feature Documentary Film; Best Animated Fiction Film; Best Animated Documentary Film; and Best Student Film (Chania Film Festival, 2022).



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Drama International Short Film Festival held in September since 1995 in Drama. The festival specialises in short film productions, providing space to national and international filmmakers from different age groups including children. They offer a rich programme including pitching lab and cinematherapy. Their awards are The grand prix; Best direction; Best “South & Eastern Europe” film award; Best animation film award; Best production award “TV5 Monde”; Fipresci prize awarded by Fipresci Jury; “Human values award” by special jury of the Greek Parliament (Drama International Short Film Festival, 2024).

International Short Film Festival Psarokokalo held since 2007 in July run by Kyklos a nonprofit organisation based in Athens and conducted in different places every year. The festival, along with short films, offers additional workshops and seminars. The awards they offer are about Fiction; Documentary; Animation; Focus in Japan; Architecture and Environment; National; and Special Prize GR2ME (International Short Film Festival Psarokokalo, 2024)

Olympia International Film Festival for Children and Young People has been held in December since 1997 in Pyrgos, funded by the Ministry of Culture and the General Secretariat of Youth. Their main objective is the promotion of production and distribution of films addressed to children and youth. The awards they offer are: From an international jury the Best Feature Film; Best Feature Film Director; Best Screenplay; Best Young Actor in a Feature Film; Best Young Actress in a Feature Film; Best Short Fiction Film; Best Short Animation Film and from an international Kids and Docs jury the Best Feature Documentary; Best Feature Documentary Director and Best Short/Medium Length Documentary (Olympia International Film Festival for Children and Young People, 2024)

Peloponnisos International Documentary Festival held in December since 2014 in Kalamata and another 11 cities in Peloponnese with focus on European Documentaries including masterclasses, exhibitions and seminars (Peloponnisos International Documentary Festival, 2024).

The Kalamata International Short Documentary Festival launched in October 2021 in Peloponnese creates space for emerging professionals encouraging them to engage with filmmaking and produce their own films fostering networking opportunities. It is organised by the Kalamata Creative Documentary Center.



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The Syros International Film Festival has been held in July in Syros since 2013 and will be interrupted in 2024. It is a non-profit film and arts organisation that promotes non-commercial film productions and also offers workshops and educational activities (Syros International Film Festival, 2024).

Thessaloniki International Film Festival (TIFF) has been held in November since 1960. The festival promotes innovative narrative forms and emerging professionals. It offers exhibitions, masterclasses, screenings for children and a variety of events. The festival's awards are Golden Alexander; Silver Alexander; Best Director; Best Script; Best Female/Male performance; Best Artistic Achievements (Thessaloniki International Film Festival, 2024). Additionally, TIFF holds the **Thessaloniki International Documentary Festival** in March founded in 1999 (Thessaloniki International Documentary Festival, 2024).

Thessaloniki International Short Film Festival (TiSFF) has promoted short film productions since 2007 in collaboration with the Directorate of Culture of the Municipality of Thessaloniki and the support of the Thessaloniki Film Festival. TiSFF is an international festival, aiming at the support of young filmmakers and innovative ideas (Thessaloniki International Short Film Festival, 2024).

5.3.4 Public Educational Institutions

Public value support through tertiary education programmes includes:

Aristotle University of Thessaloniki – Faculty of Fine Arts, School of Film, established in 2004, is dedicated to promote the art of filmmaking. It aims to provide comprehensive audiovisual education combining academic research and teaching (School of Film, 2024).

Ionian University – Department of Audio and Visual Arts, founded in 2004 and located in Corfu, offers a combination of visual and multimedia courses, with the aim of developing skills such as video editing and scriptwriting, combining cultural and academic approaches (Department of Audio and Visual Arts, 2024).



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National and Kapodistrian University of Athens (NKUA), School of Economics and Political Sciences, Department of Digital Arts and Cinema in Evia was founded in 2019 and is dedicated to the promotion of artists with a focus on animation, film and art. In the field of Art and Technology, the dual focus of the bachelor's programme focuses on Digital art and Cinema (Department of Digital Arts and Cinema, 2024)

Panteion University, Department of Communication, Media & Culture is located in Athens, was founded in 1990 and offers theoretical and practical courses on filmmaking, visual and audio communication in the field of culture and creative industries (Department of Communication, Media & Culture, 2024)

University of Ioannina, School of Fine Arts, Department of Fine Arts and Art Sciences, is located in Ioannina and was founded in 2000. Its objective is to promote the fine arts through teaching and aims to improve the aesthetic education and skills of students. Graduates are specialised in the field of fine arts and art history (Department of Digital Arts and Cinema, 2024).

University of the Aegean, Department of Cultural Technology and Communication, located in Mytilene (Lesvos) and founded in 2000, offers an interdisciplinary university education on digital technologies and techniques that promote creative production and nurture visual cultural content through multimedia (Department of Cultural Technology and Communication, 2024).

University of Thessaly, Department of Culture, Creative Media and Industries, located in Volos and founded in 2019, while the university does not focus explicitly on film, it offers a range of foundation courses in the fields of visual and video arts, including digital culture and virtual reality, visual and performing arts, visual culture and audiovisual media, among others. Its interdisciplinary cultural and creative production programme aims to promote creative industries (Department of Culture, Creative Media and Industries, 2024).

In addition to tertiary education programmes, there are many education film programmes for children and youth organised by public organisations:

The Greek Film Archive is dedicated to preserving film history and promoting cinema education. They offer programmes and workshops to help young audiences explore the film art (Greek Film Archive, 2024).



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Cinedu, a project of the Greek Film Center under the Ministry of Culture, aims to promote Greek films. Cinedu is a digital platform which offers educational films to schools, supporting educators and fostering media literacy (Cinedu, 2022).

Thessaloniki Film Festival operating under the Ministry of Culture through public programmes fosters film education by providing school screening, workshops, masterclasses and digital archives for teachers and students (Thessaloniki Film Festival, 2024).

5.3.5 Impact on the Film Sector

The statistics regarding the revenues of the Greek industry “Motion picture, video and tv programme production” from 2012 to 2018, including forecasts until 2025. Revenues from audiovisual publishing activities in Greece are expected to reach 576.67 million US dollars by 2025 (Statista, 2024). In addition, the statistics on Greek “Distribution activities for cinematographic films, videos and television programmes” from 2012 to 2018, including forecasts to 2025, forecast that revenues from film distribution will amount to 121.64 million US dollars by 2025 (Statista, 2024). Zenelis and Vasileiou (2024) discovered that each million euros invested in film production generates 30 new jobs, making the audiovisual production sector “having the largest direct impact on employment” (Zenelis & Vasileiou, 2024, p.16). Moreover, audiovisual productions contribute to the development of Greek tourism, as the country’s landscapes become appealing to both tourists and film production companies as filming destinations (Zenelis & Vasileiou, 2024).

5.4 SPAIN

5.4.1 Public Service Media

Public Service Media in Spain

Public broadcasters in Spain like RTVE, TV3, and Canal Sur are particularly focused on reflecting the cultural and linguistic diversity and reaches the entire country of Spain. RTVE marks the broad channel that covers all Spain but there are in total twelve broadcasters that are dedicated to the



regional territories of Spain. These channels are legally mandated to promote regional languages and cultures, ensuring that the unique identities of Spain's various autonomous communities are represented on screen and together are part of the *La Federación de Organismos o Entidades de Radio y Televisión Autonómicas* (FORTA, n.d.). Spanish film production also contributes to this cultural representation, with films often exploring themes of identity, social issues, and historical memory.

RTVE (Radiotelevisión Española): RTVE is Spain's national public broadcaster, renowned for its range of channels that cater to various audience needs. It includes La 1, the main generalist channel, La 2, which focuses on cultural and educational programming, 24h, a dedicated news channel, Clan, aimed at children, and Teledeporte, which specialises in sports content. RTVE operates without commercial advertisements, relying instead on government subsidies and a tax levied on telecommunications companies and private broadcasters (RTVE, 2024). This funding model allows RTVE to prioritise high-quality content, with a substantial investment in Spanish audiovisual productions, particularly in drama, documentary, and cultural programming. In 2023, RTVE had a budget of approximately 1.2 billion euro, underscoring its vital role in the Spanish media landscape (RTVE, 2024).

Canal Sur: Canal Sur serves as the public broadcaster for the autonomous community of Andalusia, delivering a variety of channels that focus on regional news, culture, and entertainment. Canal Sur plays a crucial role in promoting Andalusian culture and language, with programming that includes local news, flamenco music, and regional sports (Canal Sur, 2024).

TV3 (Televisió de Catalunya): TV3 is the public television network of Catalonia, renowned for its high-quality productions and significant influence within the region. Broadcasting mainly in Catalan, TV3 offers a wide array of programming, including news, drama series, and cultural shows that emphasise Catalan identity (TV3, 2024). In 2023, TV3 managed a budget of approximately 300 million euro, largely supported by the Catalan government and advertising revenue, ensuring its continued prominence in the Catalan media landscape (TV3, 2024).



5.4.2 Public Institutions Supporting Filmmaking

The Spanish government plays a crucial role in nurturing the country's media and film industries, offering significant support through a range of institutions and policies. One of the key players in this effort is the Instituto de la Cinematografía y de las Artes Audiovisuales (ICAA), which operates under the Ministry of Culture. The ICAA is central to the promotion, funding, and regulation of Spain's film and audiovisual sectors. By providing grants and subsidies for various stages of film production, distribution, and promotion, the ICAA helps ensure that Spanish film production remains sustainable and diverse. This financial backing is vital for both established filmmakers and emerging talent, allowing them to bring a wide array of stories and perspectives to the screen (ICAA 2023). ICEX Spain Trade and Investment, a public entity under the Ministry of Industry, Trade, and Tourism, plays a pivotal role in promoting the internationalisation of Spanish companies, including those in the audiovisual sector. With an annual budget of approximately €130 million, ICEX focuses on enhancing Spain's global competitiveness by providing support for the promotion and expansion of companies abroad (ICEX, 2024). Through initiatives such as Audiovisual from Spain and Shooting in Spain, ICEX helps boost the visibility of Spanish film and media productions in prestigious international contexts, ensuring that they reach global audiences. Similarly, the Programa de Incentivos a la Creación y al Estudio de Cine y Audiovisuales en España (PICE AC/E) offers crucial financial backing across various stages of production and distribution, fostering collaboration and cultural diversity both domestically and internationally. The Spain Audiovisual Hub, launched by the Spanish government with a dedicated budget of €1.6 billion, aims to make Spain an attractive destination for international film production by encouraging foreign investment, creating innovative distribution channels, and improving the economic sustainability of the audiovisual sector. These combined efforts position Spain as a major player in the global audiovisual industry (ICEX, 2024; Acción Cultural Española, 2024; Spain Audiovisual Hub, 2023).

Beyond the national level, support for the creative industries is further reinforced by organisations like the Fundación SGAE (Sociedad General de Autores y Editores). The Fundación SGAE is dedicated to supporting the creation and dissemination of cultural works, which includes films, television programmes, and music. Through its initiatives, SGAE provides essential resources and



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opportunities for artists and producers, fostering the growth of Spain's cultural output and ensuring that these works reach broader audiences (Fundación SGAE, 2023).

Regional governments also play a significant role in supporting the media and film industries. For instance, the Catalan Institute of Cultural Companies (ICEC) is instrumental in promoting and funding cultural projects within Catalonia. Similarly, the Basque Government's Department of Culture offers tailored support to filmmakers and cultural producers in the Basque Country. These regional institutions not only provide financial assistance but also help with the logistical aspects of production, such as location scouting and facilitating permits, making it easier for filmmakers to bring their projects to life (ICEC, 2023; Basque Government, 2023).

Another significant institution is Acción Cultural Española (AC/E), which plays a key role in promoting Spanish culture, including film, on a global scale. AC/E provides support for Spanish filmmakers to showcase their work at international film festivals and markets. This support is important for securing distribution deals and gaining exposure to global audiences, helping Spanish films reach broader markets and achieve international success (AC/E 2023).

At the regional level, Spain's autonomous communities have their own film commissions, which offer local support to filmmakers. These regional film commissions provide a range of services, including financial incentives, logistical support, and assistance with location scouting. By offering these resources, the commissions make it easier for filmmakers to shoot their projects in various parts of Spain, thereby promoting regional diversity in Spanish film production and attracting international productions to the country (Spain Film Commission, 2023). The Spain Film Commission, established in 2001, promotes Spain as a premier filming location for both domestic and international productions. Working in conjunction with 46 regional commissions, it offers essential services such as location scouting, logistical support, and permit assistance. Regional commissions, including the Catalonia, Andalucía, and Canary Islands Film Commissions, provide additional services tailored to their regions, such as regional funding and tax incentives. The Canary Islands, for instance, offers up to 50% tax rebates, making it a particularly attractive location for filmmakers. Supported by public funding, these combined efforts aim to strengthen Spain's position as a global hub for audiovisual production by offering competitive incentives, diverse landscapes, and extensive production support (Spain Film Commission, 2024; Catalonia



Film Commission, 2023; Andalucía Film Commission, 2024; Canary Islands Film Commission, 2024).

The Galician Agency for Cultural Industries (AGADIC) is the key institution promoting and funding cultural projects within Galicia. AGADIC offers extensive support to the Galician film industry, providing financial assistance through grants and subsidies for film production, distribution, and promotion. In addition to financial support, AGADIC assists filmmakers with logistical aspects such as location scouting and obtaining permits, which facilitates the production process in the region. This institutional backing is crucial for fostering the growth of Galicia's audiovisual sector, supporting both emerging and established filmmakers (AGADIC, 2023).

The Instituto Cervantes is another pivotal institution, primarily focused on promoting Spanish language and culture around the world. While it is widely known for its role in language education, the Instituto Cervantes also plays an important part in promoting Spanish films globally. It organises film festivals, screenings, and retrospectives in various countries, ensuring that Spanish films are accessible to international audiences. This not only boosts the global visibility of the Spanish film industry but also fosters a deeper understanding of Spanish culture and heritage (Instituto Cervantes, 2024).

Spanish law and policy related to audiovisual and cinematography

Ley General de Comunicación Audiovisual: The Ley General de Comunicación Audiovisual is a fundamental piece of legislation that outlines the general framework for audiovisual communication in Spain. This law is crucial for maintaining high standards in broadcasting, as it ensures that both public and private broadcasters adhere to specific regulations concerning content, diversity, and cultural promotion. One of the key aspects of this law is the establishment of quotas for European works and independent productions. By requiring broadcasters to include a certain percentage of European and independent content in their programming, the law supports the domestic audiovisual industry and encourages the production of diverse, high-quality content that reflects European cultural values (Gobierno de España, 2024). This law not only protects the integrity of Spanish media but also fosters a rich cultural landscape that is inclusive of various voices and perspectives. In 2007, Spain enacted the Cinema Act (Law 55/2007), a significant piece



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of legislation aimed at promoting cultural diversity and strengthening the national film industry. The law supports European and Ibero-American cinema, mandates that broadcasters allocate revenue to European audiovisual works, and encourages the production of films in Spain's official and regional languages. It also promotes gender equality, emerging talent, and the preservation of Spanish film heritage (BOE, 2007). Cinemas are required to dedicate at least 25% of their screenings to EU films, and various subsidies are provided to support all stages of film production through the *Instituto de la Cinematografía y de las Artes Audiovisuales* (ICAA) (Ministerio de Cultura y Deporte, 2024).

In 2022, Spain introduced the General Audiovisual Communication Act (Law 13/2022), which regulates audiovisual communication while promoting cultural and linguistic diversity, equality, and non-discrimination. The General Audiovisual Communication Act (Law 13/2022) includes specific provisions that grant Spain's Autonomous Communities (CCAA) the flexibility to manage their own public audiovisual services while adhering to national guidelines. These regulations acknowledge the autonomy of the CCAA, allowing them to tailor additional or specific rules that meet regional needs, as long as they align with the broader legal framework (Article 58.2). CCAA are permitted to establish their own funding mechanisms for regional public services, provided they meet national minimum standards, such as promoting European content and supporting productions in regional languages (Articles 118, 119). Each Autonomous Community is also responsible for regulating and ensuring compliance with these obligations, including maintaining content quotas for regional languages (Article 120.3). Despite their autonomy, the CCAA must coordinate with national regulations set out in the General Audiovisual Communication Act to ensure consistent cultural and linguistic diversity across Spain (Preamble, Part III) (BOE, 2022). The law also requires audiovisual service providers, including those from other EU countries targeting Spain, to financially support Spanish audiovisual works (BOE, 2022). Both laws ensure robust support for the Spanish film and audiovisual sectors, fostering a rich cultural and linguistic representation in the media.

Punto de Cultura: This initiative is particularly focused on supporting independent and regional productions, which are often underrepresented in mainstream media. Punto de Cultura provides funding and resources to small and medium-sized media companies, enabling them to produce



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culturally significant content that might otherwise struggle to find a platform. By doing so, this initiative helps to ensure that diverse cultural expressions are preserved and promoted within Spain's media landscape, enriching the overall cultural fabric of the nation (Ministerio de Cultura y Deporte, 2024).

Digital Spain 2025: Digital Spain 2025 is designed to encourage the development of new media platforms and innovative content distribution models, which are essential for staying competitive in the global market. The initiative also aims to position Spain as a leader in digital content creation and distribution within Europe. By fostering an environment that supports digital innovation, Digital Spain 2025 helps ensure that the Spanish audiovisual sector can thrive in the digital age, opening up new opportunities for content creators and media companies alike (Gobierno de España, 2024).

5.4.3 Film Festivals in Spain

San Sebastián International Film Festival (SSIFF): Established in 1953, is one of the most renowned film festivals in the world. Held every September in the coastal city of San Sebastián, this festival is a highlight on the international film calendar. It showcases a diverse range of films from around the globe, with a special emphasis on Spanish and Latin American film. The festival's top prize, the Golden Shell, is highly coveted and awarded to the best film in the competition. Over the years, the SSIFF has become a vital platform for filmmakers to debut their work to an international audience, making it a cornerstone of Spain's cultural export (San Sebastián International Film Festival, 2024).

Sitges Film Festival: Sitges Film Festival, held annually in October. Known officially as the Sitges International Fantastic Film Festival of Catalonia, it is the world's leading festival dedicated to the fantasy and horror genres. Sitges is a must-attend event for fans of horror, science fiction, and fantasy, attracting both established filmmakers and genre enthusiasts from around the world. The festival is renowned for its cutting-edge programming and its role in launching new and innovative



genre films, making it a hub for creativity and filmmaking experimentation (Sitges Film Festival, 2024).

Malaga Film Festival: The Malaga Film Festival, which takes place every March, is dedicated to celebrating Spanish film productions. It is one of the most important platforms for showcasing the work of Spanish filmmakers, both established and emerging. The festival features a wide range of films, including feature films, documentaries, and short films, all reflecting the richness and diversity of Spanish films. By focusing on national film productions, the Malaga Film Festival plays a crucial role in promoting Spain's cultural identity through film and providing Spanish filmmakers with valuable exposure (Malaga Film Festival, 2024).

Gijón International Film Festival: The Gijón International Film Festival is held every November and is known for its focus on independent and avant-garde cinema. This festival is a key event for filmmakers who push the boundaries of conventional filmmaking, offering a platform for innovative and daring works. Gijón is particularly supportive of young filmmakers and experimental films, making it an essential venue for discovering new talent and exploring unconventional narratives. The festival's international scope and commitment to independent cinema have earned it a respected place on the global festival circuit (Gijón International Film Festival, 2024).

The Semana Internacional de Cine de Valladolid (Seminci): One of Spain's most prestigious film festivals, established in 1956. Held annually in October in the city of Valladolid, the festival focuses on showcasing high-quality independent and auteur cinema, with a particular emphasis on films that offer innovative storytelling or explore pressing social issues (Seminci, n.d.). Seminci is known for highlighting films from around the world, including features, documentaries, and short films. The festival includes various competitive sections, such as the Official Section, Punto de Encuentro (dedicated to emerging directors), and Tiempo de Historia (focused on documentary films).

Mostra de València - Cinema del Mediterrani: Established in 1980, the festival focuses on celebrating the rich film traditions of the Mediterranean region, featuring films that reflect the



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cultural, social, and political realities of these countries. The festival's primary aim is to promote understanding and dialogue between Mediterranean cultures through the medium of cinema (Mostra de Valencia, n.d). It features a wide range of films, including fiction, documentaries, and short films, with a particular emphasis on supporting independent and auteur cinema. The Golden Palm is the festival's highest award, given to the best feature film in the official competition.

5.4.4 Public Educational Institutions

ESCAC (Escola Superior de Cinema i Audiovisuals de Catalunya): ESCAC, founded in 1993 located in Barcelona, is one of Spain's most prestigious film schools, offering comprehensive programmes in filmmaking, screenwriting, and production. The school has produced many successful filmmakers who have gone on to make significant contributions to Spanish and international films (ESCAC, 2024).

Academia de las Artes y las Ciencias Cinematográficas de España: Founded in 1986, the Academy is instrumental in promoting Spanish cinema and nurturing talent. It offers various training programs focusing on directing, screenwriting, cinematography, production, and more. These programs aim to enhance professional skills and contribute to the Spanish film industry's growth (Academia de Cine, n.d.).

Instituto RTVE: The Instituto RTVE was established in 1967 as the Official Radio and Television School and renamed in 1975. It serves as the training division of RTVE, providing educational programs in image, sound, journalism, and media literacy. These programs are targeted at current professionals and future audiovisual specialists, offering workshops and master's degrees in collaboration with public universities (RTVE Institute, 2024).

CECC (Centre d'Estudis Cinematogràfics de Catalunya): Offers practical training in film directing, screenwriting, production, and post-production. It focuses on developing industry-relevant skills to prepare students for careers in the audiovisual sector (CECC, n.d.).



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ESCIVI (School of Cinema in the Basque Country): ESCIVI provides professional training in image, sound, and film production. It offers master's degrees and workshops designed to equip students with the necessary skills to succeed in the film industry (ESCIVI, n.d.).

TAI (Escuela Universitaria de Artes y Espectáculos): Founded in 1971 and located in Madrid, TAI is a multidisciplinary arts school offering courses in film, television, and digital media production. The school is recognised for its innovative curriculum that integrates new media and emerging technologies with traditional film education. TAI emphasises creative expression and technical skills (Escuela Universitaria de Artes y Espectáculos, 2024).

ECAM (Escuela de Cinematografía y del Audiovisual de la Comunidad de Madrid): Established in 1994 and located in Madrid, ECAM offers a diverse range of courses in film production, direction, and technical disciplines. The school is known for its strong industry connections, providing students with valuable professional experience. ECAM focuses on practical education to prepare students for careers in the film industry (ECAM, 2024).

5.4.5 Impact on the Film Sector

The global success of Spanish media has been a remarkable achievement, both culturally and economically, for the country. Over the last decade, Spain has established itself as a significant player in the international entertainment industry, with its television series and films gaining widespread popularity across the world.

“La Casa de Papel” (Money Heist), for example. This series has become a worldwide phenomenon since it first aired. Originally produced by Atresmedia and later picked up by Netflix, “La Casa de Papel” managed to break through language barriers and quickly became one of the most-watched non-English language series on Netflix. Its complex plot, memorable characters, and the now-iconic red jumpsuits of the heist crew have come to represent the captivating power of Spanish television. Building on this success, another Atresmedia and Netflix collaboration, “Élite”, also became a huge hit, further reinforcing Spain’s reputation as a leader in producing addictive, globally appealing content. This wave of success is also influencing the domestic market, where there’s been a noticeable increase in investment in the audiovisual sector. Spanish production



companies are now focusing more on creating content with international appeal, which is making the local media landscape more dynamic and competitive. Moreover, Spanish actors, directors, and writers who have gained international recognition are finding new opportunities in Hollywood and other major film industries, leading to a rich exchange of talent and ideas.

Creation of new employment opportunities

RTVE (Radiotelevisión Española) is a major employer in the media sector in Spain, with over 6500 employees. The extensive job creation at RTVE is primarily linked to its diverse programming, which includes a strong focus on Spanish drama and documentary productions (RTVE, 2023).

Atresmedia employs approximately 3.000 people, making it a significant player in job creation within the Spanish media landscape (Atresmedia, 2023). Employment at Atresmedia includes roles in production, broadcasting, and digital content management, reflecting the company's broad influence and its commitment to high-quality media production (Atresmedia, 2024).

Movistar+, a premium television platform operated by Telefónica, leads the pay-TV market in Spain, operated by Telefónica, directly employing about 1.500 individuals, further contributing to job creation within the industry. Movistar+ is well-known for its investment in original Spanish content, a strategy that not only enhances its market position but also creates numerous job opportunities (Telefónica, 2024).

5.5 FRANCE

5.5.1 Public Service Media in France

Public Service Media

France Télévisions is the national public broadcaster in France, including several channels such as France 2 (leading general interest channels, broadcasts a wide range of content: *news, drama, entertainment, sport*), France 3 (regional news and local programmes), France 4 (youth and cultural



channel), France 5 (documentaries, debates and educational content), news channel Franceinfo (24-hour news channel, also available online), France TVsport and Okoo (kids channel), Lumni (online educational and cultural service that provides resources for teachers and students), France.tv (streaming, live and replay). The organisation's objective is to disseminate information, provide education and engage the public through entertainment, while ensuring the availability of a diverse range of high-quality content to all. France Télévisions is dedicated to ensuring that its content is accessible to all, including the provision of subtitles for those with hearing impairments and audio descriptions for those with visual impairments. The Group is engaged in initiatives aimed at enhancing public consciousness regarding sustainable development concerns, in alignment with its ecological objectives. One of its key objectives is to represent the diversity of French society and to promote cultural, social and regional diversity in its programming. In addition to its broadcasting functions, France Télévisions is the largest contributor to the production of drama content in France. In 2023, the group generated total revenues of around €3.5 billion and invested €285 million specifically in drama production, making it the largest investor in French drama content (France Télévisions, n.d.).

Arte, a Franco-German television network collaboration established in 1991, is dedicated to cultural programming with a particular focus on arts, culture, and documentaries. In 2023, Arte reported revenues of approximately 287 million euros (Arte, 2023). The channel is jointly funded by the French and German governments, enabling it to offer a diverse range of programming that promotes European culture and values. Arte is particularly noteworthy for its commitment to European productions, with over 85% of its content dedicated to highlighting European arts and culture (Arte, 2022). A significant aspect of Arte's mission is its support for independent filmmakers. The channel engages in active co-production of films and documentaries that address intricate social issues and advance the cause of cultural diversity. This co-production approach not only supports artistic innovation but also ensures that a wide array of voices and perspectives are represented in its programming. (Arte, 2023).

France 24, an international news channel launched in 2006, broadcasts in multiple languages, including French, English, Arabic, and Spanish, reaching over 355 million households worldwide (France Médias Monde, 2023). Funded by the French government, France 24 is part of France



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Médias Monde and operates with an annual budget of approximately 114 million euro (France Médias Monde, 2023). The channel is dedicated to providing a French perspective on global news, enhancing France's cultural facets by offering news and analysis that contrasts with other global news channels. Through its in-depth coverage of international events, France 24 plays a significant role in the global public sphere, promoting the French language and culture across the world (France Médias Monde, n.d.).

RMC Découverte, a free-to-air channel launched in 2012 as part of the NextRadioTV group, is dedicated to documentary programming that covers a wide array of topics, including history, science, and technology (Altice Europe, 2023). The channel plays a sufficient role in contributing to public knowledge and education by offering high-quality documentaries that are both informative and engaging. RMC Découverte's focus on accessible, educational content makes it a vital resource for viewers interested in learning about the world around them, reinforcing its importance in the French media landscape (NextRadioTV, n.d.).

La Chaîne Parlementaire (LCP) is a public television channel launched in 2000 that broadcasts coverage of the French Parliament (Assemblée Nationale, 2022) and related political content valued typically around 30 million Euro. It is often paired with Public Sénat, which covers the Senate. LCP plays a crucial role in maintaining transparency and informing the public about legislative processes in France. It provides live coverage of parliamentary sessions, political debates, and documentaries on political and social issues, fostering civic engagement and an informed electorate.

Public Sénat, launched in 2000, is a public television channel dedicated to the coverage of the French Senate with a budget of approximately 30 million Euros Annually, funded by it (Public Sénat, 2023). It broadcasts sessions of the Senate, political debates, and documentaries. Public Sénat contributes to the public's understanding of the legislative process by providing direct access to Senate proceedings and political discussions. It plays a key role in democratic transparency and educating the public on political issues (Public Sénat, 2023).

Cnews, launched in 1999 as iTélé, is a 24-hour news channel owned by the Canal+ Group and worth 5.5 billion Euro in 2022 (Canal+ Group, 2023). It was rebranded as CNews in 2017 and has



since positioned itself as a major news broadcaster in France. CNews provides continuous news coverage, including live reporting, analysis, and debate (Canal+ Group, n.d.). It contributes to the public discourse covering a wide range of topics, including politics, economics, and social issues.

TV5 Monde is a French-language international television channel which facilitates the promotion of French-language cinema, disseminating French and foreign films and providing support for the production and dissemination of audiovisual content.

The French National Centre of Cinema (CNC) is a crucial public service institution that addresses the legislative aspects of the cinema and animated image code. It is accountable to the Ministry of Culture and is tasked with formulating and executing the government's policies pertaining to cinema and other artistic and industrial domains associated with animated imagery, including audiovisual, video, digital creation, and video games. The CNC plays a pivotal role in the promotion, regulation, and financial support of the film and audiovisual sector. This enables the preservation and enhancement of the national cultural identity, while also facilitating the creation of French and European films.

5.5.2 Public Institutions Supporting Filmmaking

French law and policy related to audiovisual and cinematography

Loi n° 86-1067 du 30 septembre 1986 relative à la liberté de communication

The Law of 30 September 1986, which stresses the scope of the public service role that France Télévisions must fulfil, outlines the overarching missions and general orientations for both the group and each of its channels, ensuring that their programming serves the public interest. The law referred to in the context of France Télévisions' public service missions is the Law of 30 September 1986 on freedom of communication. This law is a key legislative framework that governs the public service obligations of broadcasters in France, including France Télévisions.

Contract of Objectives and Means (COM)

The Contract of Objectives and Means (COM) governs the relationship between France Télévisions and the French State. This contract links the broadcaster's content and development commitments



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with the funding provided by the State. It is a strategic document that sets out the broadcaster's objectives over a five-year period, with specific performance indicators tied to each goal. The COM ensures that France Télévisions remains aligned with its public service mission while also being accountable for the resources it receives from the government. The Contract of Objectives and Means (COM) for France Télévisions, lays out the strategic priorities, objectives, and the corresponding funding mechanisms for France Télévisions, as agreed upon between the broadcaster and the French State. It includes detailed plans for content creation, regional programming, digital innovation, and transparency, all of which are key to the organisation's mission of serving the public interest.

Ongoing support for public value in France is sustained through a combination of government policies, public funding, and the active involvement of media companies. The French government ensures that public broadcasters adhere to their public service missions through legislation like the Loi du 30 septembre 1986 relative à la liberté de communication, which stresses that broadcasters such as France Télévisions focus on content that serves the public interest. This includes promoting French language and culture, providing educational programming, and representing a diverse range of voices. Regulatory bodies like the Conseil supérieur de l'audiovisuel (CSA), which is now part of l'Autorité de régulation de la communication audiovisuelle et numérique (ARCOM), oversee compliance with these regulations, ensuring that public broadcasters fulfil their obligations to the public (Sénat, 2023). The Centre National du Cinéma et de l'image animée (CNC) plays a significant role by providing funding and subsidies for film and television productions that align with public service goals. The CNC's support helps ensure a diverse range of content that contributes to the cultural richness of France media and film industries (CNC, 2022). Founded in 1946, the CNC is a public administrative organisation under the authority of the Ministry of Culture and Communication. It is responsible for regulating, supporting, and promoting the film and television industries in France. The CNC provides substantial financial assistance to filmmakers through various funding schemes, including pre-production grants, production subsidies, and post-production support. This funding is essential for both established filmmakers and emerging talent, enabling them to bring their creative visions to life (CNC, 2022). The CNC also plays a significant role in supporting film festivals across France. By funding and promoting these events, the CNC helps ensure that the French film industry remains vibrant and accessible to both national



and international audiences. Major film festivals such as the Cannes Film Festival, which is one of the most prestigious film festivals globally, benefit from the CNC's support, ensuring that they continue to be a platform for showcasing the best in French and international film productions (CNC, 2022). Financial incentives, such as the Tax Rebate for International Production (TRIP), are a significant draw for filmmakers choosing to shoot in France. This rebate offers up to 30% back on eligible French expenditures, making it an attractive option for international productions. Film commissions provide detailed guidance on these incentives and assist filmmakers in applying for them, ensuring that they can maximise the financial benefits available (Film France, 2023).

The French Ministry of Culture is another key institution supporting the film industry via the CNC but also by itself. The Ministry oversees the cultural policies that govern the film industry and audiovisual production, ensuring that they align with the broader objectives of promoting French culture and heritage. It also supports film festivals that are crucial for the cultural dissemination of films, such as the Clermont-Ferrand International Short Film Festival, which is renowned for showcasing short films from around the world (Ministry of Culture, 2022). The Institut français is promoting French culture, especially French films, both domestically and internationally. This institution operates under the authority of the Ministry of Europe and Foreign Affairs and the Ministry of Culture, making it a key player in the cultural diplomacy efforts of France. The Institut français is involved in organising film festivals, retrospectives, and screenings around the world, ensuring that both classic and contemporary French films reach global audiences. Moreover, the institute supports the international distribution of French films by providing essential resources such as subtitles and promotional materials, which are critical in reaching wider audiences (Institut français, 2023). Unifrance is another French organisation dedicated to promoting French film productions internationally. It supports filmmakers in bringing their work to global audiences through international film festivals, markets, and distribution channels. Unifrance organises screenings, promotional events, and networking opportunities for French filmmakers abroad, helping them to secure distribution deals and gain recognition in foreign markets (Unifrance, 2022). In addition to national institutions, regional film commissions across France provide local support for filmmakers by Commissions which offer funding, logistical assistance, and location scouting services, making it easier for filmmakers to shoot their projects in various parts of the country. One of the key roles of these film commissions is to assist with location scouting, helping filmmakers



find settings that match their creative visions. France offers a diverse range of options, from urban environments and rural landscapes to historical sites and natural wonders, and the film commissions are instrumental in making these locations accessible to filmmakers (Film France, 2023). For example, the Île-de-France Film Commission offers grants and rebates for films shot in the Paris region, while the Provence-Alpes-Côte d'Azur Film Commission provides similar support for productions in the South of France. These regional efforts complement the national support provided by the CNC and the Ministry of Culture, ensuring that filmmakers have the resources they need at every stage of production (Île-de-France Film Commission, 2022). Media companies themselves, especially public broadcasters like France Télévisions and channels like Arte, contribute to the ongoing support of public value by investing in a wide array of culturally and socially significant programming. France Télévisions, for example, dedicates a large portion of its schedule to French and European productions, including documentaries and educational programmes, which reinforce national identity and cultural heritage. Arte, known for its commitment to cultural programming, plays a key role in promoting European values and artistic expression, further contributing to the public value in France and beyond (France Télévisions, 2022; Arte, 2022).

5.5.3 Film Festivals in France

Cannes Film Festival, founded in 1946, is the world's most prestigious film festival. Held annually in May, it is renowned for its glamorous red carpet events and the Palme d'Or award, which honours the best film of the festival. The festival showcases a selection of the best films from around the globe internationally, including feature films, shorts, and documentaries (Festival de Cannes, n.d.).

The Lyon Lumière Film Festival, established in 2009, celebrates the history of film in the city where the Lumière brothers pioneered filmmaking. The festival is known for its retrospectives, screenings of restored classic films, and tributes to significant figures in the film industry. It is held every October in Lyon.



FIPADOC is an international documentary film festival held annually in Biarritz, France. It celebrates the creativity and diversity of documentary filmmaking, featuring films from around the world in various categories such as international competition, music documentaries, and youth-oriented projects. The event attracts industry professionals, filmmakers, and audiences passionate about non-fiction films, providing a platform for networking, screenings, and discussions about documentary films.

Clermont-Ferrand International Short Film Festival, founded in 1979, is the world's largest festival dedicated to short films. It provides an essential platform for emerging filmmakers to showcase their work and is recognised for its vibrant short film market. The festival takes place annually in late January to early February in Clermont-Ferrand (Clermont-Ferrand Festival, n.d.).

The Annecy International Animated Film Festival, established in 1960, is the world's leading event dedicated to animated films. The festival features a wide variety of animation styles, from traditional hand-drawn to the latest CGI techniques, and serves as a global meeting point for animation professionals. It is held annually in June in Annecy, France (Annecy Festival, n.d.).

The Three Continents Festival, founded in 1979, is held in Nantes and is dedicated to promoting films from Asia, Africa, and Latin America. It is known for showcasing the work of filmmakers from these regions, offering a valuable platform for voices that are often underrepresented in the global film industry. The festival takes place annually in November (Three Continents Festival, n.d.).

FIDMarseille (Festival International de Documentaire de Marseille), has been an important platform for documentary films since 1989. Known for its avant-garde and experimental focus, the festival showcases works that push the boundaries of documentary filmmaking. It is held annually in July in Marseille (FIDMarseille, n.d.).

The Angoulême Francophone Film Festival annually in August, established in 2008, celebrates French-speaking films from around the world. The festival promotes Francophone culture and films, offering a platform for a diverse range of films in the French language (Festival du Film Francophone d'Angoulême, n.d.).



Les Arcs Film Festival, held in the picturesque French Alps, is dedicated to European film productions, particularly independent films. Since its founding in 2009, the festival has become a hub for discovering new European talent and features a strong focus on sustainability and environmental issues in film. It is held annually in December (Les Arcs Film Festival, n.d.).

Paris International Fantastic Film Festival (PIFFF), launched in 2011, the Paris International Fantastic Film Festival (PIFFF) focuses on genre films, especially horror, fantasy, and science fiction and is held annually in December (Paris International Fantastic Film Festival, n.d.).

5.5.4 Public Educational Institutions

France is home to some of the most prestigious film schools in the world, offering aspiring filmmakers education and training in various aspects of filmmaking. According to RealImmiGuide (2024), the five best film schools in France are renowned for their filmmaking programmes. These schools include La Fémis, widely recognised for its rigorous curriculum and producing award-winning directors, and École Nationale Supérieure Louis-Lumière, which focuses on technical training in filmmaking, sound, and photography. EduRank (2024) expands on this by ranking the top ten film schools in France, highlighting institutions such as CinéFabrique in Lyon, known for its practical approach and inclusivity, and Les Gobelins in Paris, famous for its excellence in animation. These schools are not only ranked for their educational offerings but also for their industry connections and the success of their alumni. Beverly Boy Productions (n.d.) also emphasises the significance of these institutions in shaping the next generation of filmmakers. Their list includes schools such as 3iS (Institut International de l'Image et du Son), which offers a diverse range of programmes including sound design, special effects, and animation, and the International Film School of Paris, noted for its focus on independent filmmaking. These sources collectively highlight the breadth and quality of film education available in France, making it a prime destination for aspiring filmmakers from around the world.

La Fémis (École Nationale Supérieure des Métiers de l'Image et du Son) in Paris is one of France's most prestigious film schools. Established in 1986 under the Ministry of Culture, La Fémis is renowned for its rigorous training programmes in directing, screenwriting, filmmaking, cinematography, and other relevant disciplines (La Fémis, n.d.). The school's emphasis on



hands-on learning and its close ties with the French film industry have produced many critically acclaimed filmmakers, making it a significant contributor to both French and international film industry.

École Nationale Supérieure Louis-Lumière, also based in Paris, was founded in 1926 and named after the Lumière brothers, pioneers of early filmmaking. This institution is highly regarded for its focus on the technical aspects of filmmaking, offering specialised programmes in filmmaking, sound engineering, and photography. The school's dedication to technical excellence has made it a vital training ground for professionals who contribute to the technical foundation of the film industry (École Nationale Supérieure Louis-Lumière, n.d.).

Ciné Fabrique in Lyon is a newer national film school that provides training in directing, production, and technical fields. Known for its inclusive and practical approach, CinéFabrique integrates real-world experience with academic learning, positioning itself as a key player in nurturing innovative talent in the French film industry (Ciné Fabrique, n.d.).

ESRA (École Supérieure de Réalisation Audiovisuelle) with campuses in Paris, Nice, and Rennes, was established in 1972. It is a private film school that offers comprehensive programmes covering various aspects of film, television, and digital media production. ESRA's strong connections with the industry provide students with crucial internships and networking opportunities, helping bridge the gap between education and professional work (ESRA, n.d.).

3iS (Institut International de l'Image et du Son) with campuses in Paris, Bordeaux, and Lyon, is known for its high-tech facilities and extensive programmes in filmmaking, sound design, special effects, and animation. Established in the late 1980s, 3iS has built a reputation for producing graduates who are well-prepared for the technical demands of the film and media industries (3iS, n.d.).

Les Gobelins, l'école de l'image in Paris is globally recognised for its excellence in animation, visual effects, and multimedia. Since its establishment in 1975, Les Gobelins has become one of the leading institutions worldwide for animation, with its graduates often securing positions in top animation studios globally (Les Gobelins, n.d.).



École Supérieure d'Audiovisuel (ESAV) in Toulouse, founded in 1979, offers degrees in film studies and production. This public university is known for blending academic film theory with practical production training, preparing students for various roles in the film industry (École Supérieure d'Audiovisuel (ESAV), n.d.).

Ateliers de Paris (Conservatoire Libre du Cinéma Français - CLCF) is one of the oldest film schools in Paris, France, focusing on practical training in directing, editing, and screenwriting. Established in 1963, CLCF has a long history of providing students with hands-on experience that is essential for building successful careers in filmmaking (Conservatoire Libre du Cinéma Français (CLCF), n.d.).

ENS Louis Lumière in Paris, another institution named after the Lumière brothers, specialises in film, sound, and photography. This school has a strong technical focus and is known for its rigorous academic and practical training programmes, producing graduates who excel in the technical aspects of film production (ENS Louis-Lumière, n.d.).

5.5.5 Impact on the Film Sector

Creation of new employment opportunities

Job creation within the French media and film industries is a crucial aspect of their economic and cultural contributions, driven by huge investments and expansive operations across key players in the public service and private sectors like France Télévisions, TF1, Canal+, M6, Arte, and France 24. These organisations not only play a pivotal role in cultural representation but also serve as major employers, creating thousands of jobs across various sectors, from content creation to digital media management. It is a multifaceted process, driven by substantial investments in content production, digital expansion, global distribution, and legislative support. Creating various roles, from creative professionals like screenwriters and directors to technical staff such as editors and sound engineers, these companies not only create direct employment within their organisations but also stimulate job growth in related sectors, including digital media, global broadcasting, and independent film production. The process is further supported by policies on national and international levels, which require significant investment in local content, thereby sustaining and



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expanding employment opportunities. The global reach of these media companies, extends job creation beyond France, contributing to the international media landscape. This not only enhances the cultural output of these companies but also supports the broader economy by generating employment across a wide array of industries internationally. France Télévisions, as the largest public broadcaster, employs over 10.000 people (France Télévisions, 2022), with a significant portion of these jobs linked to its investment in French drama and documentaries (France Télévisions, 2022).

Arte, employing around 500 people directly in France, supports job creation across Europe through its commitment to cultural programming. Arte's impact extends further through co-productions with independent filmmakers, creating opportunities for a broader network of creative professionals. Arte's bilingual broadcasting model also generates jobs in translation, subtitling, and dubbing, ensuring content accessibility across different linguistic groups (Arte, 2022).

France24, employing about 1.800 people, plays a significant role in journalism, reporting, and broadcasting. The channel's global reach, broadcasting in multiple languages, requires a network of correspondents and support staff worldwide, creating employment opportunities in various regions and language services (France Médias Monde, 2022).

These media channels extend their job creation efforts beyond direct employment within their organisations. By supporting the production of films, series, and cultural content, they indirectly generate employment in the broader creative industries, including roles such as actors, set designers, and post-production professionals. Their investment in digital transformation further drives job growth in technology and media, contributing significantly to the overall economy.

International Success

French media channels have significant international success with their positions as key players in the global media landscape. France Télévisions exporting French culture through its extensive drama and documentary productions (France Télévisions, 2022), while TF1 dominates with widely adapted entertainment formats and its content production, (Groupe TF1, 2022). Canal+ stands out for its international reach, particularly in Europe, with the original series gaining global acknowledgement (Canal+ Group, 2022). Arte, a beacon of European culture, extends its influence



across the continent with high-quality cultural programming (Arte, 2022), while France 24 plays a crucial role in international news, broadcasting in multiple languages to over 355 million households worldwide (France Médias Monde, 2022). These channels not only showcase French culture but also contribute to global discourse, reinforcing France's cultural diplomacy and media influence across the world.

5.6 POLAND

5.6.1 Public Service Media in Poland

Polish law and policy related to audiovisual and cinematography

Broadcasting Act (29 December 1992): The Act sets out the fundamental principles of broadcasting in Poland including among others respect, independence of information and opinion, respect Polish culture, access to a diverse audience and content. The Article 15a mandates that broadcasters ensure that at least 5% of their transmission time is dedicated to European works (USTAWA z dnia 29 grudnia 1992 r. o radiofonii i telewizji).

Cinematography Act (30 June 2005): The Cinematography Act governs Polish cinematographic works. The Article 7 of the Act established the Polish Film Institute (PISF) as the responsible organisation to support the development of the Polish film industry and the sections of production, promotion, distribution, and the preservation of film heritage. The institute provided funding, grants and training to foster the industry both domestically and internationally. The PISF has an important role in co-financing the production of Polish films (USTAWA z dnia 30 czerwca 2005 r. o kinematografii).

Act on the National Broadcasting Council (KRRiT): This law establishes the National Broadcasting Council (KRRiT), which regulates media content and oversees the implementation of broadcasting and audiovisual policies in Poland. The KRRiT ensures that Polish broadcasters comply with the country's laws regarding content, including the promotion of Polish and European works (KRRiT, 2024).



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Polish Tax Incentive Scheme for Film Production (introduced in 2019): This government programme is designed to attract both local and international film productions through tax reductions. Administered by the Polish Film Institute, the programme offers a tax reduction of eligible production costs for feature films, documentaries and TV series produced in Poland. The aim is to stimulate the domestic film industry and increase international cooperation (Polish Film Institute, 2024).

Public Service Media

Telewizja Polska (TVP) is the main public television broadcaster in Poland, offering multiple channels such as TVP1, TVP2, TVP Info, TVP Sport, TVP Kultura, and more. TVP is a state-owned entity and plays a significant role in Polish media. TVP has a significant role in film distribution on national and international level. They promote Polish films and television productions at international film festivals, TV markets and various industry events (TVP, 2024).

Polskie Radio (2024) is the national public radio broadcaster in Poland, which offers several stations, including PR1, PR2, PR3 and PR24. Polskie Radio offers a varied programme including news, talk shows and cultural content. Radio and television are by law (The Broadcasting Act. 1992, Article 1.1) responsible for the promotion of domestic productions of audiovisual works.

Polskie Radio's regional channels include regional stations such as Radio Kraków, Radio Wrocław and others, which provide local audiences with regional news and programmes.

5.6.2 Public Institutions Supporting Filmmaking

Polish Film Institute (PISF) is a state institution established in 2005 in Warsaw providing funding for the Polish film productions and international co-production, promotion and distribution. PISF aims at the development of the Polish film industry, including access to the cultural and artistic Polish filmmaking as well as the nurturing of emerging filmmakers (Polish Film Institute, 2020).



Ministry of Culture and National Heritage / Ministerstwo Kultury i Dziedzictwa Narodowego

oversees various cultural initiatives and provides funding for films, often through subordinate bodies such as the PISF. In the Act of 9 November 2018 on Financial Support for Audiovisual Production implemented by the Ministry is defined a 30% cash rebate scheme to attract both domestic and international film productions to Poland. The rebate covers up to 30% of production eligible costs, including the costs of filming, post-production incurred in Poland (Polish Film Institute, 2022) based on the Act of 9 November 2018, Article 14 on Financial Support for Audiovisual Production (Act of 9 November 2018). In addition, the ministry plans to merge several film studios into a single entity to handle large-budget projects (IFACCA, 2019). The Ministry also supports the international promotion of Polish films by screening Polish films at international festivals and events, such as the Focus on Poland programme in China in 2017, which highlights the work of prominent Polish filmmakers and introduces them to a global audience (Polish docs, 2017).

Adam Mickiewicz Institute is a national institution responsible for promotion of Polish cultural achievements by fostering international collaborations. Supported by the Minister of Culture and National Heritage, within 20 years, they have organised about 6000 events and they publish daily the Culture.pl web portal for the communication of Polish culture.

There are eleven **Regional Film Funds (RFF)** in Poland from the oldest founded in 2007: Łódź Film Fund, to the newest two founded in 2017: Podkarpackie FF, and Warmia-Masuria FF. REgional governments distribute financial support to film projects that are thematically linked to their region, supported also by Polish Film Institute and Polish Filmmakers Association (KIPA, 2018).

5.6.3 Film Festivals in Poland

Among Polish film festivals there are key commonalities such as Watch Docs International Human Rights Film Festival and Gdańsk DocFilm Festival both centre around human rights and social issues. There are film festivals with an international perspective such as Warsaw International Film Festival and ŻubrOFFka. Short films play a central role in many of these festivals ŻubrOFFka



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International Short Film Festival, Etiuda & Anima and Warsaw International Film Festival. Moreover, documentaries are a significant genre across several festivals such as Watch Docs, Gdańsk DocFilm Festival and Warsaw International Film Festival.

Watch Docs is the International Human Rights Film Festival and the oldest documentary film festival in Warsaw since 2001 in November/December (Watch docs, 2024). The festival runs under the cooperation of the Helsinki Foundation for Human Rights, the Centre for Contemporary Art Ujazdowski Castle, and the Social Institute of Film (Human rights film Network, 2024). Their awards are the Marek Nowicki Prize; the documentary film competition for the Watch Docs Award and the Audience Award.

ŻubrOFFka International Short Film Festival (2024) in Białystok since 2006 in December promotes not only short films but also workshops, international film breakfasts, exhibitions, and even film therapy sessions. Their international awards are Eastward Window; Whole Wide World – directed to artists from all over the world; Kids competition; and the best Music Video. Their national competitions are for Polish students, amateur artists and independent artists (ŻubrOFFka International Short Film Festival, 2024).

International Young Audience Film Festival Ale Kino since 1983 in Poznań (<https://alekino.com/>) in November/December presents productions for kids and youth. Their main awards are Golden Goats to the best full-length film for children - 4000 euro; Golden Goats to the best short live-action for children - 1.500 euro; Golden Goats to best full-length film for young people - 4000 euro; and Golden Goats to best short film for young people - 1.500 euro and they offer many more additional awards (Ale Kino, 2024).

Warsaw International Film Festival (WFF) in October since 1985 organised by the Warsaw Film Foundation in Warsaw. The festival's aim is to present the best films from the global film industry creating an international audience. They offer many awards among them for the International Competition; Competition 1-2; Free Spirit Competition; Documentary Competition; Short Films Competition and many others (Warsaw International Film Festival, 2024).

Gdańsk DocFilm Festival established in 2003 in Gdańsk and held in November, is produced by the Association of Film Education. The main focus of the festival is the human being along with the



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work environment, social conflicts, moral issues, democratic values, human rights and dignity. The awards are the Main Award of the Festival and the Audience Award (Gdańsk DocFilm Festival, 2024).

The International Film Festival Etiuda & Anima held in Kraków since 1994 offers opportunities to emerging professionals from all over the world, who are studying in film and art schools as well as animation filmmakers. The awards at the “Etiuda” competition are the Grand Prix – Golden Dinosaur, Silver Dinosaur and Bronze Dinosaur. The awards at “Anima” competition are the Grand Prix – Golden Jabberwocky, Silver Jabberwocky, Bronze Jabberwocky and the Special Golden Jabberwocky for the best student animated etude (International Film Festival Etiuda & Anima, 2024).

5.6.4 Public Educational Institutions

Public value support through tertiary education programmes:

Lodz Film School founded in 1948 in Lodz, is one of the oldest film schools in the world and offers courses in film directing, filmmaking, photography, screenwriting and acting. The school is known for its intensive support of aspiring professionals and its creative media training, reaching around 300 film productions annually (Lodz Film School, 2024).

University of Warsaw (UW) programmes in Journalism and Media Studies are provided by the Faculty of Journalism, Information and Book Studies, which was founded in 2016 (UW, 2024). Although the Department's primary focus is on media marketing, journalism, photography and new media, they additionally offer courses about film and digital media (UW ECTS course catalogue, 2024). The same university offers the Institute of Polish Culture, specialised in cultural studies and consisting five main sections: Section of Film and Visual Culture; Section for Theater and Performance; Section for Cultural History; Section for Contemporary Culture; and Section for Anthropology of the Word (Institute of Polish Culture, 2024). It also supports the Cultural Animation Team.



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Academy of Fine Arts in Warsaw (ASP) provides courses in Fine Arts, including the Faculty of Media Art that was established at the Academy of Fine Arts in 2009. The Faculty offers courses related to digital art and specifically digital and analogue photography, video, animation, virtual reality and others (Academy of Fine Arts in Warsaw, 2024).

Krzysztof Kieślowski Film School founded in 1978 and based in Katowice is part of the University of Silesia. The school offers courses in directing and film production, aiming at promoting art and film culture. The school's students have won awards at national and international film festivals and the school cooperates with important organisations in the industry, such as the Theatre School in Krakow, Polish Television, Canal + and Kino Polska, as well as the film institution Silesia Film – Film Art Center (University of Silesia, 2024).

5.6.5 Impact on the Film Sector

In Poland three indicators measure the economic impact of screen production: the economic output, gross value added (GVA) and employment. In 2022, the 2,528 million PLN (US \$ 569 million) investment in production had an economic output of 8,671 million PLN (US \$ 1,952 million) (Materska-Samek, 2023, p. 28). The additional economic value created by screen production is described by the GVA. The total expenses in 2022 by producers in Poland of 2,528 million PLN (US \$ 569 million) resulted into 3,416 million PLN (US \$ 769 million) in GVA (Materska-Samek, 2023, pp. 28-29). Moreover, regarding employment has been used a contract-based counting the Full Time Equivalent (FTE) jobs which adjust also part-time contracts. Within 2022, production expenses in Poland from producers created 21,021 FTE jobs (Materska-Samek, 2023, p. 29).

In the six case studies, we examined public investments in funding and resources aimed at creating, establishing and expanding local film industries within the broader framework of the EFI. Although the concept of public value emerged as a central theme, it remains fragmented. To better define and focus this concept, we seek insights from industry representatives from the above-mentioned countries.



6 DISCUSSION WITH THE INDUSTRY'S STAKEHOLDERS

In this section, stakeholders from various sectors of the film industry have provided reflections into the concept of public value and its implications for the EFI. The interviews reveal several key pillars shaping the conversation around public value and positioning it into six categories starting with its definition, methods for measuring and evaluating it, and its application in the broader notion of competitiveness in the film industry. The term “competitiveness” in the European film industry emerges as a critical theme, highlighting the balance between industry regulation and creative freedom. Governance and the distribution of public funds are explored as essential factors in supporting both cultural and economic sustainability. Furthermore, experts address the challenge of balancing cultural, economic, and entertainment values, with a particular focus on the support needed for newcomers to the industry. The interviews also shed light on the current state of the film industry in the countries examined in this report, offering a comprehensive view of the evolving landscape and the role of public value in its development.

Pascal Cesaro, a lecturer in cinematographic studies and film director for documentaries, provided insights into the concept of public value within the film industry, particularly in the context of the European film industry and what is happening in France. As a researcher at PRISM laboratory (Perception, Représentations, Images and Music), Cesaro's work focuses on how film can be used in humanities research, exploring the intersections between cinema, society, and health. Understanding public value in the film industry in relation to the concept is relatively new and is not commonly addressed in the traditional paradigms of the industry. “Public value is described as an alternative framework that does not merely reproduce existing models but instead introduces new perspectives that can enrich audience experiences and societal understanding. This approach challenges the conventional commercial focus of the film industry and reorients it towards creating a meaningful cultural and societal impact”. Cesaro highlights that public value should not be confined to the generative (economic) autonomy of the film sector but should consider broader societal contributions. In France, for instance, according to Cesaro, there is an emphasis on educational programmes that encourage audiences to critically engage with films. These programmes are designed to help viewers understand the socio-political contexts depicted in films and develop a more profound knowledge of society through cinematic experiences. Meanwhile, film festivals, both big and small, are increasingly focusing on films that have a tangible impact on



society. For example, the Fipadoc Film Festival has introduced a new section dedicated to showcasing films that drive societal impact.

“Despite efforts by various bodies, government support for public value in the film industry appears fragmented and lacks cohesive coordination. Institutions like the CNC (Centre National du Cinéma et de l'image animée) in France have a degree of flexibility in funding projects that promote public value, yet there is a disconnect in how these efforts are unified across different sectors”. Cesaro notes that while there are new policies aimed at improving the film industry, such as funding special commissions and supporting independent producers, there is still room for a more integrated approach to enhance the public value through state-supported initiatives. When it comes to competitiveness in the film sector, Cesaro provides a nuanced view of competitiveness in the film sector, emphasising that while financial profitability is a key indicator, it does not necessarily align with public value. “Competitiveness should also consider how well a film connects with its community and reflects public questioning. There is a clear distinction between commercially successful films and those that genuinely impact society. This raises questions about how different stakeholders, including producers, distributors, and policy-makers, perceive and cooperate in advancing public value” (interview, 2024).

Elise Jalladeau, the General Director of the Thessaloniki Film Festival, provides a thorough analysis and view of public value in the context of a film festival. She highlights that public value extends beyond mere organisational competitiveness and encompasses broader responsibilities as a public entity. Jalladeau defines public value as a balance between sustainability and responsibility: “It involves not just considering the competitiveness of an organisation but also addressing responsibilities related to education, democracy, accessibility and sustainability”. She emphasises that public value encompasses economic, historical, community, and political responsibilities.

When discussing the measurement and evaluation of public value, Jalladeau acknowledges the challenge in quantifying the impact of public value specifically. She provides examples of metrics, such as hosting 25,000 children annually for educational programmes and tracking industry support activities, including financial support and training for industry members. However, she notes that “while these actions are measurable, assessing their impact on public values remains complex”.



The festival tracks how many people are trained or sent abroad and the effectiveness of these programmes in supporting the industry, but the broader impact on public values is harder to gauge: “We are sending to film festivals a lot of members of the industry community or artists or directors in different festivals and markets. We also train them. I can count how many people per year have been trained, have been sent abroad, have been mentored, have been supported financially, or have been participating in co-production markets”. Jalladeau distinguishes European competitiveness from the American market, stating that the “European film industry is partially driven by public regulation and investment. Competitiveness is crucial, it should not overshadow cultural diversity and originality”. She criticises an overemphasis on competitiveness, which can lead to uniformity and diminish diversity. She reflects on the American market’s focus on profitability, which resulted in a repetitive output of similar films, like Marvel and superhero movies, and contrasts this with the European approach, which must balance industry strength with artistic and cultural values.

Regarding governance and public funds distribution, Jalladeau outlines various mechanisms, such as film commissions and subsidies at both European and national levels: “Networks like Europa Cinemas promote the distribution and circulation of European films. There are ongoing challenges in reaching audiences and maintaining quality”.

In balancing values in the industry, Jalladeau notes that “film production must juggle cultural, economic and entertainment values. Public funding should support both market success and high-quality projects. However, she voices concern that the selective funding process might not sufficiently support innovative or diverse content”. She advocates for increased support for newcomers, emphasising that the “Thessaloniki Film Festival dedicates competitions and mentorship programmes to first-time and second-time directors, as well as producers and industry professionals”.

In summarising the current state of the Greek film industry, general director Jalladeau acknowledges its stabilisation, supported by organisations such as the EKOME and the Greek Film Center. “However, challenges include a lack of cinemas for distribution and insufficient investment in script development and exhibition” (interview, 2024).



Monique Goeschl and Markus Deutsch- representatives of the trade association Film and Music Austria (FAMA) in the Austrian Federal Economic Chamber (WKÖ) (interview, 2024), agree that the European film industry faces a complex intersection of cultural, economic, and policy challenges.

Independent production companies, vital to the creative and cultural diversity of European cinema and television, struggle to maintain sustainability amidst policy pressures that prioritise consumer convenience and digital market access. “In Austria, recent reforms to the film funding model have begun to yield positive results, with increased employment, international collaborations, and a boost to the national economy. However, these benefits are just the tip of the iceberg”, says Markus Deutsch. Production incentives that bring increased filmmaking activity to Austria also create added value for other sectors and attract tourism to the country through the portrayal of interesting locations.

The film sector, while expanding, faces a significant shortage of skilled labour, partly due to a lack of public awareness of the industry’s inner workings and employment opportunities. According to Monique Göschl, structured multi-stakeholder initiatives are underway to attract more diverse talent, both behind and in front of the camera, ensuring that European audiovisual production reflects the richness of its many cultures and modern society. She considers it would be beneficial to include the subject of film in media competence initiatives at all levels of public education. The public value of film extends beyond economics, it plays a vital role in fostering social cohesion and communal experiences. An example is travelling cinemas in rural areas that act as cultural ambassadors, uniting generations through shared experiences. She adds that, “despite these achievements, the film industry finds itself in constant dialogue with policymakers, particularly in Brussels, where the intricacies of territorial licensing, film financing & distribution, and the unique cultural value of independent filmmaking are often misunderstood or not considered a priority. The industry's challenge lies in clearly communicating these complexities and explaining the consequences of detrimental policy initiatives ensuring that the public value of film, both as an economic driver and as a cultural force, is recognized and supported at all levels of governance”.

Monique Goeschl defines public value in film production as encompassing the cultural and societal impacts that films/series have, extending beyond mere economic success. She emphasises that film



serves as nuanced story-telling, articulating local and national identities and values. Through this lens, film/TV can represent a country's diversity on the international stage, fostering understanding and appreciation. Equally, coproduction allows for joint narratives. It is also a vehicle for reinforcing cross-border financing and distribution of audiovisual productions. Goeschl notes that public funding plays a crucial role in this process, allowing films that might not be commercially viable to reach audiences and promote cultural exchange. Furthermore, Goeschl underscores the challenge of conveying the significance of independent film production to policymakers, particularly at the European level. She notes that “while there is a recognition of the sector, the complexities of its ecosystem often get overshadowed by broader market consolidation concerns. The public value of independent films lies not just in their economic contributions but also in their ability to reach individual audiences, enrich cultural landscapes, support local creatives, and encourage regional identities, ultimately benefiting the entire European creative sector.”

Markus Deutsch points out that at the heart of the Austrian film landscape is public broadcasting, “which funds a significant portion of documentaries and fiction films, reinforcing national identity and cultural values. Public value, as enshrined in Austrian law, goes beyond economic metrics to include ethical standards, inclusivity, and regional diversity. In this context, film serves not only as a form of entertainment but also as a cultural representative, reflecting Austria's varied identities and reaching global audiences. Austria’s public film funding system emphasises economic criteria, such as the requirement that production has a positive impact on the Austrian economy. There are various incentives like gender and environmental bonuses that aim to promote inclusivity and sustainability in film production”.

To conclude with competitiveness in the industry, Monique Goeschl provides a comprehensive definition of it, emphasising its reliance on public funding and the ability of various players to engage in production and to enforce their rights. She states, „Competitiveness is about the ability to access public funding, allowing the different actors (...) to get involved in film production and allowing productions to “travel” (eg. with support for subtitling, dubbing and marketing),,. Goeschl further explains that to remain competitive, independent production companies must have a sustainable operational foundation. She notes that policies emphasising “rights retention or rights reversion for independent production“ are essential for fostering competitiveness. These rights allow smaller companies to operate independently, rather than merely servicing larger entities.



They also enable value generation in Europe. Co-production also plays a significant role in enhancing competitiveness, as it enables collaboration among smaller companies across different countries. Goeschl emphasises that such collaborations are facilitated by international and European co-production agreements, which help create a more level playing field. In addition, existing national and European VOD platforms, beyond the global players, deserve more attention and support. Overall, her insights underscore the multifaceted nature of competitiveness in the film industry, driven by public support, rights management, and collaborative efforts among independent producers.

Peter Schernhuber, the Head of the Film Department at the Federal Ministry for Arts, Culture, the Civil Service and Sport, underscored the crucial role of public funding in sustaining the Austrian film industry, particularly for experimental and artistically driven films that struggle to thrive in a free market, stating that such films “couldn't exist without the funding”. This funding aligns with the Ministry’s mission to bolster Austria’s cultural identity, especially for projects that are unattractive to private investors. The complexity of Austria's film funding landscape is marked by multiple funding bodies, including the Federal Ministry for Arts, Culture, Civil Service and Sport (Innovative Film Fund), its Austrian Film Institute (ÖFI, ÖFI+), the Federal Ministry of Labour and Economy (FISA+), regional funds and commissions (such as Vienna Film Fund) and the The Austrian Television Fund – RTR, each governed by distinct laws and regulations. As he noted, “Austria’s funding landscape might seem a bit complicated and confusing because institution-wise, we are very separated, but for those working in the Austrian film industry it's rather clear where to apply for money. This separation allows for targeted funding across various sectors, from experimental films to international co-productions. Additionally, while each institution is responsible for producing annual reports to measure public value, such as the Kunst-und Kulturbbericht, there remains a notable gap in comprehensive data regarding audience perceptions of publicly funded films”.

In reflections of public value in the film industry, particularly from the perspective of Austrian film sector, Schernhuber remarked, “Probably we’ve been talking about public value in Austria’s film industry, since many years, even if we did not use the term or we didn’t know that we talked about



public value before the term was brought into the literature. Considering, for example, the history of the development of Austria's Film Promotion Act (Film Funding Act)".

Further expanding on this, he notes that because talking about art funding, always means that we talk about films with unique characteristics, a very strong artistic impact and a unique selling point (USP). "Austrian film always tries to have its own language". Schernhuber emphasises that public value is reflected in the unique, distinct character of Austrian films. This uniqueness not only enhances the cultural identity of the nation but also helps Austrian films carve out a place in the global film market. In essence, public value is linked to the preservation and promotion of Austria's cultural distinctiveness, ensuring that films funded by the state reflect the unique voice of the country's artists other than simply copying international styles or trends. Schernhuber's reflections draw attention to the broader implications of public value when says that "it is not solely an abstract cultural concept, but also a strategic tool that enhances both the local and global standing of the Austrian film sector".

He continues to highlight this cultural specificity, saying, "for us as funding institutions it is also very important to gain a certain position on the global film market. We wouldn't be successful if we copied international films". He explains how Austrian film funding prioritises the development of a distinct identity, which in turn helps position Austria in the global market. "This approach aligns with the broader governance perspective on public value, where public funding is directed towards fostering originality and cultural relevance, ensuring the industry's long-term sustainability".

In conclusion, as Schernhuber mentions, "Austrian film as well as Austria's film industry are key players in preserving and promoting cultural heritage, contributing to a broader understanding of public value through both its artistic output and its strategic positioning on the global stage" (interview 2024).

Dr. Michael Paul, partner and Managing Director of Paul & Collegen, explains that in Austria, the concept of public value within the film industry is closely linked to the regulatory framework governing the public broadcaster, which mandates the production of public value reports. According to Dr. Paul, these reports "define public value in some dimensions, such as information, education, and entertainment", highlighting a comprehensive understanding of public value that encompasses various impacts films can have on society. He further clarifies that these reports take



into account “economic criteria like the yield, the revenue of film-producing companies, and visitor numbers, as well as societal trends mirrored in the films”.

He points out the absence of a singular definition of public value, stating that “it’s a very broad range of different dimensions and criteria included in public value”. Dr. Paul highlighted two crucial aspects regarding the competitiveness of Austrian films, both domestically and internationally. He pointed out the significant challenge posed by the dominance of the Anglo-American film industry, which boasts a strong distribution network and market presence. By raising the question, “is there a chance for Austrian films to be recognized and shown in other countries, given the tough competition posed by the dominance of the Anglo-American film industry?” He emphasised the struggle for Austrian films to gain visibility in a saturated market. Furthermore, he addressed the inherent limitations within the European film landscape, primarily due to diverse languages and cultural differences. Dr. Paul stated that “the most important problem of the European film industry is that we see very limited market potential in the home markets”. This limited potential complicates financing for films in smaller countries like Austria, making public funding essential. He emphasised that “film funding is one of the most important tools for public policy to support public value and the competitiveness of the industry”.

In examining the balance between cultural, economic, and entertainment values in public funding, he observed a growing divide. He explained that “more and more, I see a split. On one hand, there is film funding which is art house, film-oriented”, where projects are selected through a jury system based on specific cultural criteria. Conversely, he noted the rise of more economically focused funding systems, such as tax rebates, which operate without jury selection, prioritising financial returns over cultural impact. He summarised, “we have more art house-oriented projects with a selection process then we have more economic-oriented, commercial-oriented projects” (interview 2024).

According to the stakeholders, the core characteristics of the public value in the film sector can be summarised as follows: Pascal Cesaro highlights the *enrichment of societal culture* through the introduction of new ideas that augment and supplement traditional perspectives and models. Additionally, Pascal Cesaro underlines the *societal and cultural impact* that goes beyond the



financial parameters, including contributions to the society such as in the field of education. Another aspect of public value mentioned by Elise Jalladeau involves *responsibility* related to education, democracy, accessibility and sustainability. Moreover, Elise Jalladeau highlights the importance of public value of the film industry to *balance economic competitiveness with cultural diversity* and originality. In the public value discourse, Monique Goeschl and Markus Deutsch emphasised the role of film to support *regional identities* and local communities as film promotes cultural diversity, while Peter Schernhuber underlined that the public funding ensures long-term *sustainability* of the film industry, referring to both cultural and financial dimensions. Dr. Michael Paul highlighted the *multidimensional nature* of public value in the film sector. The characteristics expressed by the stakeholders shaped the public value definition as following:

Public value in the film industry refers to a multidimensional concept which goes beyond the traditional economic profit-centre metrics and instead emphasises social and cultural dimensions, embracing the social responsibility, protecting social regional identity and ensuring industry's sustainability, aiming to balance and advance both cultural and financial aspects of the film industry.

7 OUTLOOK

The exploration of public value within the EFI across six countries indicates the essential role of public sector support, in cultivating a dynamic and competitive industry. It highlights five main dimensions critical to the future sustainability and impact of the EFI; competitiveness and distribution, public value and cultural identity, funding and policy frameworks, regional and global perspectives, future audiences and media consumption.

Public value begins with active citizen participation and culminates in community empowerment, principles that are at the heart of the film industry's public contributions. Public value is to be understood as an evolving framework within which the contribution, impact and potential for the wellbeing of societies can be understood. This means that Public Value is highly contextual, as it depends on the needs of societies in specific times and under specific conditions, whether these are economic but not limited to such, cultural or even political. Further, it is important to note that public value cannot be easily identified at the moment of its production, but often it is subject to



historical social changes and evaluations of this process. Hence, this report did not seek to quantify public value of the EFI, but to showcase the significant amount of investment and often intangible know-how afforded to the European industries through their public institutions, cultures of understanding of the role of the film industry and the storytelling traditions and technologies, as well as normative expectations as to the broader role of the EFI, even within a highly marketised and commercialised context. Although it is impossible to capture the dimensions and lengths that EFI demonstrates functions and impact of public value for European societies, it is the aim of this report to highlight not only the levels of investment in the EFI but also to highlight the connections between institutions, policies, the sector, and society at large as dynamic flows of input into the market of EFI, its sustainability and its outreach. Hence, it is noteworthy that despite dominant arguments in favour of so-called free markets, in reality, the ability and capacity to operate in a market requires state intervention which can take various forms. Public policies supporting smaller, independent productions, co-productions, and rights retention, as well as the infrastructure that supports film production (like new studios), also contribute to public value. Historically, European public institutions have been instrumental in developing the film industry by channelling taxpayer resources into training, technical expertise, and infrastructure. This long-term investment does more than cultivate talent, it creates future skilled creators, workers and audiences for the EFI, it connects the development of quality traits, whether technological, aesthetic or otherwise, to the global place of the EFI and to the continuous interest in its output, as well as its relevance to societal dilemmas and changes.

Over the past five years, the EFI has received significant public support, both directly and indirectly which illustrate the important role that public investment plays in supporting the European film industry by supporting both cultural and economic values. Despite the rich cultural ecosystem supported by public funding, previous studies have predominantly focused on the values embedded within the films themselves, leaving a gap in understanding the ways in which public resources contribute to the overall public value of the industry.

One of the key challenges identified is the balance between cultural, economic, and entertainment values in film production. While financial profitability is often prioritised, it does not always align with public value, particularly when it comes to supporting films that contribute to cultural diversity and social cohesion. Indirect impacts of public funding, such as incentives for hiring more



women in key film production roles or encouraging environmentally friendly film practices, also embody public value by promoting social equity and sustainability. The need to cater to the audience of the future is important, which requires the inclusion of diverse languages and cultural backgrounds, reflecting multiculturalism within European countries.

Competitiveness in economic terms in the film industry should not overshadow these broader cultural and societal responsibilities, and public funding should be structured to support both commercial success and artistic innovation. The true competitiveness of the film industry is not measured solely in economic terms but also in how it promotes cultural diversity, inclusion, and broad public engagement. By making culture accessible to all, public funding ensures that underrepresented voices and artistic expressions can thrive, reinforcing the EFI's global standing. While various public bodies have implemented policies to support the EFI, efforts still present themselves as rather fragmented and lack cohesive coordination. A more integrated approach is needed to enhance public value through state-supported initiatives, particularly in ensuring that funding mechanisms are inclusive and support diverse, high-quality content that resonates with and enriches society.

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Contact

Website: www.thereboot-project.eu

E-Mail: reboot.2023@univie.ac.at



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REBOOT Contributors



universität
wien



ΕΛΙΑΜΕΠ
ELIAMEP



UNIVERSIDAD
COMPLUTENSE
MADRID



KADİR HAS
ÜNİVERSİTESİ

Erasmus
University
Rotterdam



UNIVERSITEIT
GENT

uc3m

Universidad Carlos III de Madrid
Instituto Universitario del Cine Español



Sant'Anna
School of Advanced Studies - Pisa



UNIVERSITÉ
CÔTE D'AZUR



JYVÄSKYLÄN YLIOPISTO
UNIVERSITY OF JYVÄSKYLÄ



UNIVERSITY
OF WARSAW



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