REBOOT

EUROPEAN FILM COMPETITIVENESS

The Framings and Strategies of Cinema Professionals. Report on International Understandings of the European Film Industry

Project:	Reviving, Boosting, Optimising and Transforming European Film Competitiveness - REBOOT
Grant Agreement:	101094796 - HORIZON-CL2-2022-HERITAGE-01

Author(s):	Mafalda Dâmaso, Anna Niutta,, Luis Albornoz, Isabela Vargas Miranda, Mª Trinidad García Leiva, Marina Rossato Fernandes, Antonios Vlassis, Ruken Doğu Erdede, Melis Behlil, Elif Akçalı
Reviewer(s):	Tuuli Lähdesmäki, Fernando Ramos Arenas

Object	D4.4
WP	WP4 (University of Liège)
Deliverable Lead	Erasmus University Rotterdam
Type	R = report
Dissemination Level	PU = public
Version	1.0

Funded by the European Union

Metadata

Project	Reviving, Boosting, Optimising and Transforming European Film Competitiveness - REBOOT
Acronym	REBOOT
Programme	Horizon Europe
Call	HORIZON-CL2-2022-HERITAGE-01
Grant Agreement No.	101094796
Licensing terms	CC BY 4.0
Author(s)	Mafalda Dâmaso, Anna Niutta (EUR), Luis Albornoz, Isabela Vargas Miranda, Mª Trinidad García Leiva (IUCE-UC3M), Marina Rossato Fernandes, Antonios Vlassis (ULiege), Ruken Doğu Erdede, Melis Behlil, Elif Akçalı (KHAS)
Reviewer(s)	Fernando Ramos Arenas (UCM) and Tuuli Lähdesmäki (JYU)
Title	Report on International Understandings of the European Film Industry
Deliverable No.	D4.4
WP No.	4
Deliverable Lead	Erasmus University Rotterdam (EUR)
Type	Report
Dissemination Level	Public
Version	1.0
Description	This report summarises the qualitative and quantitative data gathered for task 4.3 of the REBOOT project. It analyses the understanding by non-European film professionals from six key markets (Argentina, Brazil, Mexico, South Africa, South Korea and Türkiye) of the 'Europeanness' of the EFI, its strengths and

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

	weaknesses (namely vis-à-vis its main international competitors) and its presence in said six markets.
Keywords	European film industry, film circulation, film distribution, audiovisual policies, competitiveness, Europeanness
Language	English
DOI	https://doi.org/10.5281/zenodo.16744614

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

INDEX

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

The REBOOT project

This report is developed in the context of the REBOOT (Reviving, Boosting, Optimising and Transforming European Film Competitiveness) project. REBOOT 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.

The REBOOT project explores the competitiveness of the European Film Industry (henceforth known as EFI) – that is, how it is understood and how it could be reimagined – as it is perceived by multiple stakeholders, both in Europe and beyond. Among the key ambitions of the project is the aim to strengthen the place of the EFI within the global audiovisual economy, recognising the importance of film as a geopolitical asset.

Doing so in a sustainable manner requires, first of all, understanding how non-European film professionals perceive the 'Europeanness' of the EFI. It also requires understanding the main needs of the EFI across the supply chain and its strengths and weaknesses vis-à-vis its main competitors. These are some of the goals of task 4.3 of the REBOOT project (titled International understandings of 'European' in the EFI), on which this report is based. The report examines the views of international film professionals towards the EFI in six countries: Argentina, Brazil, Mexico, South Korea, Türkiye, and South Africa.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Summary

The report examines the views of non-European film professionals, focusing in particular on six non-European union (EU) countries (Argentina, Brazil, Mexico, South Africa, South Korea, and Türkiye) regarding the European film industry (EFI) both generally and in terms of its presence in these six markets. Specifically, it highlights existing linkages between European actors (at the EU level and at the level of Member States) and the six selected case studies in terms of film festivals, and co-production markets. In a context of the gradual intensification of the externalisation of cultural and audiovisual EU policy (Pauwels and Loisen, 2016), understanding the views of non-European film professionals regarding the European Film Industry and its global presence will support an evidence and needs-based approach to the continued development of international and global EU film policy, strengthening its effectiveness and impact and, consequently, supporting policies that in the long-term reinforce cultural relations between the EU and the six countries surveyed.

Methodologically, the report is based on extensive desk research of academic, policy and industrial literature, 99 semi-structured interviews with a wide range of non-European film professionals conducted from December 2023 to July 2025, and an international survey of 425 valid responses conducted between November 2024 and March 2025. It is organised as follows: first, after a brief summary of its aims, methodology and literature review (Section 1), the report discusses the six international markets (Section 2). Subsequently, the report summarises how the EFI is perceived and its presence in international markets both on a case-by-case basis and looking at the results of a common international survey (Section 3). In Section 4 the report discusses the views of film professionals regarding film festivals and in terms of co-production markets (as before, on a case-by-case basis, followed by an analysis of a common international survey), highlighting the social, cultural and industrial role that both types of initiative play. Finally, Section 5 identifies the common challenges that are revealed by the data analysis and identifies a wide range of policy implications.

The report gathers data and provides responses to questions that have hitherto not been addressed in a systematic manner, including: **What do non-European film professionals understand by the EFI? What do they identify as its main strengths? In which outlets does European film tend to circulate? What are the main obstacles to the international distribution of European films in theatres and other channels? What are the main needs of the film ecosystem in the selected six markets? Are the programmes and incentives offered by the EU to support such film ecosystems relevant? How do non-European film professionals compare collaborations with European and with non-European international partners such as the USA, China or Russia?** Altogether, these questions also allow us to understand how non-European film professionals perceive the Europeanness of the EFI, which remains a highly contested concept (see Section 1.4 Literature Review).

The data provided in the report provide the following insights:

- Altogether, **the EFI** is:

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

    - mostly associated with international co-productions (70.1%), *cinéma d'auteur* (69.8%), state support (60.8%), art cinema (60.5%), and cultural diversity (46%);
    - respected for its cultural particularities but limited in its recognition among the wider public;
    - recognised as the result – to a significant extent – of complex forms of state and European intervention and support that are, however, burdensome in bureaucratic terms, hindering international collaboration with independent and/or small-scale non-European film professionals;
    - dependent on traditional distribution formats and limited in outreach and commercial success – with VoD platforms, especially American-based, emerging as both potential outlets of circulation and a source of increased competition for attention and partnerships;
    - failing to respond to strategic approaches with, arguably, the aim of replacing the centrality of Europe in the global film ecosystem – both by international VoDs and as is evident in the emerging but already combined strategy of the BRIC in South Africa;
    - mainly perceived in reference to large Western countries, such as France and Italy in the South Korean case, and France, Italy, Spain, and Germany in all three Latin American countries – with France being by far the most frequently mentioned (see Section 3. EFI in International Markets).

- Non-European film professionals identify as the **main strengths** of the EFI its industrial model (in particular, international co-productions and film festivals, the latter being very important for the circulation of European film beyond its borders), its policy model (based on public support), and its professionals and cultural diversity. In the case of South Africa, Argentina and Türkiye's surveys, artistic freedom also emerges as a particular strength – reflecting the particularities of the countries' political regimes. Regarding the interviews, in Brazil, Argentina and Mexico, interviewees emphasised auteur-driven storytelling and cultural heritage alongside the European model for funding and distribution through co-productions and state-supported initiatives. In South Africa, interviewees highlighted the EFI's storytelling and film style, diverse cultural heritage, and the EFI's complex structure. In South Korea, the EFI strengths are associated with access to public support, creative freedom and cultural diversity. In Türkiye, interviewees foregrounded EFI's well-functioning public funding mechanisms, prestigious film festivals and its film markets and qualified audience (see Section 3. EFI in International Markets).

- Regarding the **main outlets supporting the circulation of European films**, all case studies confirm the importance of film festivals and thematic weeks as well as arthouse cinemas. Streaming platforms are also important in this regard, particularly MUBI and Netflix (see Section 3. EFI in International Markets). The views of international film professionals are, therefore, aligned with the scholarship. Respondents agree that releasing films in cinemas continues to be an important strategy to support the dissemination of European film (Smits, 2025).However, they also indicate that streaming services have opened up opportunities for selected European productions to reach audiences (Alvaray, 2023).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- As for the **main obstacles to the international distribution of European film** in theatres and other channels, all case studies identified competition from Hollywood productions, highlighting the dominant position of the US film industry in global distribution circuits. This was followed by limited marketing budgets (foregrounded in five out of six markets) and complex distribution agreements (a top choice in four case studies), suggesting the need to address such structural barriers (see Section 3. EFI in International Markets). These findings add nuance to the previous point. Despite the opportunities created by streaming services to challenge traditional Hollywood studios (Smits, 2024) and transform power relations in the film sector, other Hollywood players have tended to take their place – a fact that non-European film professionals see as an obstacle to the distribution of European films.

- Regarding **the main needs of the film ecosystems** in the six case studies, the analysis highlights several common issues: weak domestic market shares (with the exception of South Korea and Türkiye); limited exhibition space for independent and arthouse cinema; heavily concentrated distribution channels; insufficient public support tailored to independent productions, players and circuits; inadequate mechanisms to safeguard artistic innovation, cultural diversity and artistic freedom; outdated and bureaucratic co-production frameworks; inadequate forms of support to international film festivals and markets; insufficient professional training and opportunities for professional exchange; inequitable policy and institutional frameworks (see Section 2. International Markets: Case Studies). This data contribute to the literature: although scholarship has confirmed that cooperation agreements such as co-productions allow EU actors to encourage the adoption of regulatory models aligned with its standards (Loisen and De Ville, 2011; Vlassis, 2016; Fernandes, 2025), the existence of a desire for such frameworks from non-EU film professionals hadn't yet been confirmed.

- **Awareness of the programmes and incentives offered by the EU differs** across case studies (ranging from Argentina, where 73.7% respondents reported being somewhat aware or very aware, to Türkiye, where 43% of respondents reported being not very aware or not aware at all). Likewise, the answers provided by each sample regarding **the effectiveness of these programmes** differed significantly. In Argentina and South Asia, most participants rated these programmes as somewhat effective or very effective (75.1% and 71.5%, respectively), whereas in Brazil approximately half of the respondents rated these programmes as not very effective or not effective at all (50%). As for Turkish respondents, 63% evaluated them as not very effective or not effective at all. In the cases of Mexico and South Africa respondents were mostly split (see Section 3. EFI in International Markets). It should be noted, however, that respondents' self-evaluation of their awareness should not be directly equated with how well they know such programmes and incentives – rather, this data should be taken as broadly pointing at how confident survey respondents feel regarding such programmes.

- Although each sample provides a different view regarding **the policy areas that the EU should prioritise** in each case study or region, there's generalised agreement regarding the need to develop co-production initiatives with other countries and to provide tax incentives and subsidies for film production (see Section 5. Discussion).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- When asked to establish a **comparison between collaborations with European and with non-European international partners**, the majority of Argentinian, Brazilian and Mexican, South African respondents and 45% of East Asian respondents found them similar. Turkish respondents were the outlier – they were broadly split between finding experiences with non-European partners similar (38%) or worse (30%). Conversely, 30% of Brazilian respondents found them better (30%) – see Section 3. EFI in International Markets. In other terms, the EFI is perceived as an important ally – supporting cultural diversity with substantive financial backing and strong policy structures. That is, while European co-productions continue to be significantly influential beyond the borders of the EU (Mitric, 2025), other stakeholders are beginning to emerge and to challenge the EFI's position as the preferred international partner of these film professionals in their co-production and distribution strategies.

- When the quantitative and the qualitative data are combined, the **EFI's Europeanness** emerges as a complex imaginary built around values and principles such as cultural diversity and *cinéma d'auteur*, and policies such as international co-productions and state support focused on small or independent players (see Section 3. EFI in International Markets). The EFI is understood by film professionals as crucial to help them diversity funding sources, co-production opportunities and distribution circuits, and to strengthen, therefore, the presence of art house and/or independent films in their domestic markets as well as the international circulation of such productions. Reflecting their tendency to associate the EFI with abstract values and policy frameworks above particular institutional remits, non-European film professionals occasionally refer interchangeably to EU and non-EU initiatives (such as the Council of Europe's Eurimages, which supports co-productions – something that emerges in particular in the Turkish case study). This echoes the literature that suggests that Europeanness is a flexible signifier (Mary Harrod et al., 2015) whose boundaries are increasingly dissolved by transnational forms of collaboration (Lobato and Lotz, 2023).

- In conclusion, in light of market concentration in distribution and exhibition, unstable public funding, soaring film budgets, the growing power of American streamers, and the increasing weight of economic considerations (that is, above creative experimentation) in film funding, **the six case studies confirm that the cultural, social and industrial relevance of European film festivals and co-production markets** (Section 4. Film Festivals and Co-Production Markets) **and, more broadly, of the European model of film policy continues to be perceived by professionals outside the EU as unabated** – although they call for the renewal of its constitutive elements (international co-productions, film festivals, exhibition and distribution, European programmes, and modes of working; see Section 5.2 Policy Implications). The views of non-European film professionals confirm the importance of film festivals and their markets as alternative circuits (Peranson, 2008) that facilitate links across multiple forms of value (e.g. cultural and economic) and the emergence of transnational networks (Iordanova, 2016; Marijke de Valck, 2007). These findings are also aligned with scholarship discussing co-productions as frameworks with multiple forms of value and impact (Mitric, 2025). More broadly, the report's findings contribute to addressing the need for the EU's international film policy to be more grounded on robust data regarding local policy contexts and priorities (Vlassis, 2016; Fernandes et al., 2021).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

It is also important to highlight the main findings regarding the six national case studies. Although **Argentina** boasts a long-standing cinematic tradition and remains the only Latin American country to rank among the top ten globally in terms of feature film production, it has faced increasing difficulties in retaining domestic market share. In 2024, Argentine produced 241 films that accounted for merely 3% of national box office revenues, a marked decline from 7.6% the previous year. Similarly to what happens in other countries in Latin America, Argentina's box office is dominated by Hollywood productions mostly due to a highly concentrated distribution and exhibition sector that is controlled by foreign entities. The situation has worsened under the administration of President Javier Milei, whose government has introduced sweeping changes to the sector. These include the dismantling of the national film agency INCAA, the removal of domestic screen quotas, deep cuts to production support, and new financing criteria tied to box office performance. These changes have deepened existing inequalities and weakened institutional support for film production. Film professionals have emphasised the need for policy revisions, enhanced support for distribution and promotion, and improved infrastructure for independent cinema. European films have also struggled to gain commercial visibility in Argentina. Despite a strong historical appreciation for European cinema, anchored in its association with auteur filmmakers and influential cinematic movements, contemporary European productions are largely confined to a non-commercial circuit such as film festivals, themed weeks, and film cycles. These events, while symbolically valuable, do not seem to translate into a broader commercial circulation of European films within the country.

In this challenging landscape, co-production has emerged as a vital mechanism for accessing alternative sources of funding and expanding distribution possibilities. Argentina maintains strong co-production ties with European countries and regional partners in Latin America. Co-productions with European partners are viewed as an effective means of accessing international funding opportunities, expanding market reach, and enhancing the likelihood of participation in prominent European film festivals and markets. While EU film programmes and initiatives are broadly recognised by professionals, common criticisms include excessive bureaucracy, complex eligibility criteria, and financial thresholds that do not reflect the economic conditions or production capacities of the Argentine film sector. In contrast, collaborations with the U.S. are often driven by streaming platforms seeking local content, while engagements with countries like China, India, and South Korea remain limited, sporadic, or primarily financial rather than creative in nature. To conclude, the Argentine audiovisual sector is undergoing a moment of considerable vulnerability. While deeper engagement with European stakeholders could offer meaningful support, the domestic industry continues to erode under reduced public funding. As noted by one of the interviewees, as public funding declines, the projects that are produced are more frequently shaped by market driven pressures (increasingly those of global streaming services) rather than by artistic innovation or experimentation.

Brazil, as the largest country in Latin America and the 10th largest cinema market globally, possesses a robust domestic audience capable of sustaining its film industry. In 2024, the sector demonstrated renewed dynamism, with nearly 200 films produced and domestic productions achieving a market share of 10.1%, up from 7.6% the previous year. Despite this growth, the market continues to be dominated by Hollywood productions, largely due to a distribution landscape heavily influenced by US-based companies. While exhibition is slightly less concentrated than in other regional contexts like Argentina, foreign control over 33.5% of cinema screens remains a significant barrier to national and independent content.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

European cinema maintains a strong cultural standing in Brazil, with films from France, Italy, Germany, and Spain historically respected by Brazilian cinephiles. However, contemporary European films struggle to reach commercial audiences, primarily circulating in non-commercial spaces such as film festivals and cultural events organised by European institutions. This limited visibility reflects broader structural challenges, including a lack of support for independent film distribution and the continued need to expand local audiences through public education and promotion. Brazilian professionals view the European film industry as a model of institutional strength and financial support, thanks to its public funding systems and extensive festival networks. Co-productions with European countries are seen as vital not only for accessing international financing and markets but also for fostering cultural and professional exchange. That said, many of these collaborations rely heavily on public funding, which remains a vulnerability within Brazil's audiovisual ecosystem. Although some cooperation has occurred with non-European countries, such as South Africa through a joint initiative with Spcine, interviewees generally highlighted Latin American and European partnerships as the most common and meaningful. Awareness of engagements with China and India remains limited among film professionals.

Festivals and markets in Europe are widely regarded by Brazilian film professionals as essential platforms for advancing international co-productions, securing distribution deals, and enhancing the global visibility of their work. These events, particularly film festivals, are seen as crucial spaces for the recognition and circulation of Latin American cinema, with awards and selections often serving as a springboard for future opportunities. For many Brazilian producers, success in Europe is not only an artistic achievement but also a strategic asset in navigating the international film landscape. Nonetheless, professionals have increasingly pointed to the financial barriers that hinder access to these spaces, with rising travel and participation costs posing significant challenges. Beyond their industrial function, these festivals and markets are also valued for their cultural dimension, fostering exchanges in storytelling practices, production knowledge, and collaborative relationships. As such, they are understood to play a multifaceted role, culturally enriching, industrially strategic, and symbolically affirming, in the development of Brazil's film ecosystem.

Mexico is the largest cinema market in Latin America and ranks fourth globally in admissions, making it a key player in the global audiovisual landscape. The country's audiovisual sector is highly dynamic, particularly due to its longstanding television tradition, a skilled workforce, and solid production infrastructure. In 2024, Mexico released 112 domestic films, achieving a market share of 4.5%. However, the domestic industry continues to face structural challenges, particularly in distribution and exhibition. The market is highly concentrated, with two Mexican companies controlling 92% of cinema screens, while US companies dominate the distribution sector. Additionally, Mexico's proximity to Hollywood and its integration through the United States-Mexico-Canada Agreement (USMCA) has made it both an attractive location for international productions and a highly competitive environment for local films, which struggle to secure screen space.

European cinema holds a strong cultural presence in Mexico, particularly among cinephiles, and is typically associated with quality, auteur-driven storytelling and a tradition of public support and policy-driven production models. Films from France, Spain, Germany, and the UK are especially well-regarded. European cinema is often viewed in contrast to Hollywood, representing more

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

artistic and culturally rooted narratives. European co-production programs are seen as important avenues for Mexican filmmakers to access funding, foster creative collaboration, and reach international audiences. The UK stands out as a more active co-production partner for Mexico compared to Argentina and Brazil, while collaboration with Canada is described as structurally similar to Europe due to its public funding system. Despite growing opportunities, filmmakers highlighted that European co-productions are often complex and bureaucratic. In comparison, partnerships with US industry players are described as more efficient and commercially straightforward. There was little to no awareness among participants of formal funding initiatives or co-production agreements involving India or China. Film professionals expressed a strong interest in deepening international ties but acknowledged that current collaborations remain mostly confined to Latin America, the US, and selected European countries.

European film festivals and co-production markets play a crucial role in defining the visibility and circulation of European films in Mexico. Selection or awards at major European festivals significantly influence local distributor decisions. Furthermore, cultural initiatives supported by embassies and institutions provide European cinema with important non-commercial screening avenues. However, many of the structural challenges faced by the Mexican industry — such as lack of support for independent exhibition, weak distribution networks, and limited public funding — continue to limit the broader impact and reach of both domestic and international independent films.

Despite a growing and increasingly active film industry that is the largest film market in Africa, **South Africa**'s industry is characterised by the strong presence of Hollywood productions, industrial fragility, and a position of dependency within global film value chains. This is evidenced, for example, in the market share for domestic films, which was 0% in 2024 (European Audiovisual Observatory, 2025) and in the tendency of hiring South African professionals as service providers in international productions or co-productions. In 2024 South Africa had 6.4 million admissions and a Gross Box Office of 31.8 million euros, which makes it the highest market in Africa (European Audiovisual Observatory, 2025). However, this coexists with a market characterised by gradually decreasing theatre admissions. This can be explained by the growing importance of streamers as distribution channels. Although traditional TV remains important, US VOD platforms have become increasingly popular. Netflix launched in the country in 2016 and quickly became the dominant platform, holding a 67.9% audience share in 2019 (Statista, 2022). European film circulates namely through this platform and in the Cinema Nouveau chain – a collection of 26 screens across South Africa dedicated to arthouse cinema – facing significant difficulties in other circuits.

Echoing these challenges, the data suggest a shared desire among South African film professionals and stakeholders for a repositioning of their industry – both to increase the share of South African films in the domestic market and to strengthen the role of professionals in international film value chains and circuits. To respond to this strategic goal, increased funding, supported distribution, and easier access to international film circuits were highlighted as fundamental needs.

A potential response to this scenario lies in intensifying collaboration opportunities with the EFI. South African professionals have positive views of European film, which is associated with a storytelling type or film style, diverse cultural heritage and references, and a complex policy

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

structure characterised both by fragmentation and co-productions. This is evident in the cultural importance that is given to the European Film Festival (which takes place annually in South Africa) and in the positive views of interviewees vis-à-vis European film festivals more broadly, which are often taken as industrial models in the development of similar initiatives in South Africa and Africa. However, European films face significant challenges circulating in the territory. As for EU film programmes and initiatives, while most professionals are aware of their existence, they are split regarding their effectiveness. They also question the bureaucracy, complexity and funding requirements of European co-productions, which are often unrealistic considering the local currency and the scale of South African productions. Moreover, despite the desire for further opportunities for participation and collaboration in and with European initiatives and partners, existing opportunities are seen as too limited and, again, inadequate to the local context. Additionally, the interviews uncovered persistent tensions that reflect former colonial relations – such as difficult (if not de facto impossible) access to African content in European archives. Reflecting the changing geopolitical positioning of South Africa, reflected in its decision to become a member of the BRICS in 2010, interviews reflect a pattern of increased participation of non-European actors in the South African film landscape, particularly China and Russia. In conclusion, the South African film industry is at a turning point and increased cooperation with European stakeholders is both needed and wanted – but this might not last for long.

In **South Korea** the film industry is commercially successful and largely dominated by vertically integrated conglomerates, resulting in a strong domestic market share but limited space for independent and arthouse productions. Key needs identified include increased support for independent filmmakers, more diverse exhibition opportunities, and stronger international networking mechanisms. The market is now facing additional challenges after the COVID-19 pandemic, including a decline in cinema attendance, a reduction in public funding due to political changes, and a shifts in audience habits due to the growing influence of global VOD platforms. Together, these factors have led to greater financial uncertainty, reduced investment in risk-taking projects, and a stronger focus on commercially proven genres. For independent cinema, this has meant fewer production opportunities and more difficulty securing distribution. These conditions also limit the presence of European films in the market, as they compete for scarce screens in a system heavily oriented towards domestic blockbusters and US productions.

The EFI is widely perceived as synonymous with arthouse cinema, creative, diverse, and publicly supported, but its presence in the South Korean market remains limited. European films face barriers to distribution and exhibition due to concentrated cinema ownership and commercially driven audience tastes. While co-production mechanisms exist, including a treaty with France and the EU–South Korea Cultural Cooperation Protocol, their impact has been minimal due to structural, cultural, and financial barriers. France stands out as the most active European country, though broader engagement is lacking, with most of South Korean attention still directed toward the US market. Film festivals are recognised as crucial platforms for the circulation of European content and for building networks between professionals. Overall, while there is growing interest in international collaboration, fully activating EU–South Korea film relations will require targeted policy support, improved access to funding, and more sustained efforts to build trust and networks across both industries.

In **Türkiye**, the film industry saw a significant revival in the 2000s but has struggled to recover after the COVID-19 pandemic and recent economic crises. Despite a tradition of domestic box

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

office success, the sector is sharply divided between commercially successful mainstream films and internationally recognised but underfunded arthouse cinema. In 2024, 295 domestic productions were released (TÜİK, 2025), accounting for a 66% market share, with over 14 million tickets sold for national films (Box Office Türkiye 2024). While mainstream national productions generate the majority of these ticket sales, independent films are typically screened at film festivals, a limited number of independent cinemas, and on art-house-oriented services such as MUBI. Similarly, European productions are screened in Türkiye primarily at film festivals, including the two EUFFs (European Union Film Festivals) held in Türkiye, the EU Human Rights Film Festival, and the European Film Week. They are also shown in a small number of independent cinemas, on digital platforms such as MUBI, and within the programs of museums and cultural institutions. Despite being admired and closely followed by Turkish cinephiles and filmmakers, European films generally fail to attain commercial success in theTurkish market. The primary needs include politically independent public funding, a national cinema policy, and structural support for independent filmmakers. Turkish professionals acknowledge the EFI, particularly its public funding models, strong institutional support, and audience culture. Some interviewees, however, also raised concerns about orientalist attitudes and power imbalances in international collaborations. The EFI is present in Türkiye mainly through co-productions, Eurimages funding, and partnerships with institutions like TRT. Eurimages has supported more than 100 Turkish films, and recent reforms have made access more transparent. Co-production platforms like Meetings on the Bridge and Antalya Film Forum have been essential, though the latter has faced disruptions due to censorship. Film festivals such as Berlin, Sarajevo, and Rotterdam are praised for offering both funding and visibility. Turkish filmmakers stress that these festivals are often the only places arthouse films can reach audiences. Industry professionals see festivals as cultural rituals that foster discovery, networking, and long-term collaborations. Many professionals note a decline in EFI's physical presence in Türkiye over the last decade. However, European festivals remain critical to initiating and completing Turkish co-productions. In conclusion, Türkiye's arthouse cinema depends on the EFI for survival and international recognition amid domestic structural challenges.

In common, the report reveals, in a context still dominated by traditional imaginaries of European cinema as arthouse, the recognition of the EFI as a culturally relevant industrial model. Moreover, the report reveals a pattern of gradually intensifying film relations between European actors and the six chosen countries. This is evident in a growing number of co-production treaties and other agreements, collaborations through film festivals and other initiatives, echoing a broadly positive view of the European Film Industry as a culturally and industrially diverse entity. However, existing organisational and institutional frameworks are often seen as bureaucratic, complex, and ill-suited to the needs of non-European film professionals in terms of timelines, available budgets, and scope of existing support. As a result of this, unofficial co-productions are in some cases (as in South Africa) preferred, often leading film professionals towards streamers. In the case of South Korea, the cooperation agreements have not resulted in meaningful co-productions, hindered by a lack of networking opportunities, limited mutual knowledge of each other's industries, and cultural and language barriers. In South America, official co-production agreements with European partners assume a crucial role for funding beyond state support while also providing potential access to international markets as well as prominent film festivals and industry circuits, despite the limitations that certain mechanisms and regulatory conditions often entail.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

This state of affairs, combined with a sense of imbalanced relations between European and non-European film professionals and stakeholders that occasionally reflect former colonial relationships, can motivate non-European professionals to develop or intensify official and unofficial international film relations with non-European actors. This is evident in South Africa, where both intra-African and BRICS funding and initiatives – particularly, from China but also Russia – have intensified in the last decade, namely through the organisation of film festivals. In South Korea, this often translates into a natural preference for partnerships within East Asia and the US, which is widely perceived as the most strategic route to global market access. In Mexico, a partnership with American partners is also considered the main pathway to global market access, although with the recognition that non-mainstream or niche films encounter considerable barriers within this context. In Argentina and Brazil, European partners continue to be regarded as the most conventional collaborators; nevertheless, a substantial number of co-productions are undertaken with other Latin American countries, and initiatives have been pursued with other international partners, including recent engagements with China and South Africa in the Brazilian context. At the same time, the growing involvement of US-based global streamers as a source of film financing in all three Latin American countries should be noted. Despite this, European film festivals continue to be seen as highly relevant from a cultural, social and industrial perspective, and film professionals show an eagerness for more opportunities to participate and showcase their work in those contexts. European film festivals have a role in validating productions from other countries by granting them visibility through awards and screenings, thereby facilitating their entry into foreign markets. They also showcase European films to international distributors and influence which films gain access to global exhibition circuits. Furthermore, as Rud (2018) highlights, European festivals often function as intermediaries fostering relationships between non-European film industries, as evidenced in the case of film productions in Argentina and South Korea.

To reinforce the relationship between the EFI and the six non-European film markets surveyed, the report concludes with the following **policy recommendations**, which it details in Section 5.2 Policy Implications:

- **Co-productions**
  - Update international co-production agreements.
  - Consolidate and make information accessible in a dedicated website.
  - Lower thresholds of co-production financing requirements.
  - Reinforce existing funding available to support international co-productions.
  - Lower bureaucratic burdens.

- **Film festivals**
  - Reinforce and widen existing funding towards the participation of non-European film professionals.
  - Strengthen dedicated workshops and events in co-production forums and markets.
  - Revise the positioning of non-European pavilions in European film festivals.
  - Establish funding mechanisms to cover or subsidise screening fees for selected European films, enabling their participation in international film festivals beyond Europe.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

REBOOT
EUROPEAN FILM COMPETITIVENESS

- Support the participation of EU film professionals in non-EU festivals and market events.

- **Exhibition and distribution**
  - Develop new partnerships among publicly managed windows of exhibition.
  - Develop new partnerships among publicly managed streaming services.
  - Provide greater support to European distributors and local exhibitors of arthouse independent European film.
  - Invest in long-term audience building.

- **European programmes**
  - Review and simplify current support schemes for the distribution and the promotion of European films.
  - Revive programmes dedicated to distribution.

- **Modes of working**
  - Include non-Europeans in film funding evaluation committees.
  - Facilitate access to film archives by non-European stakeholders.
  - Improve two-way exchanges.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

I. Abbreviations

ACFM Asian Contents & Film Market

ACP African, Caribbean and Pacific countries

AgenciaGov Government Communication Agency (Brazil)

ANATEL Agência Nacional de Telecomunicações (Brazil's National Telecommunications Agency)

ANCINE Agência Nacional do Cinema (Brazil 's National Film Agency)

AR Argentina

ARSAT Empresa Argentina de Soluciones Satelitales Sociedad Anónima (Argentine Company for Satellite Solutions)

BIFF Busan International Film Festival

BR Brazil

BRIC Brazil, Russia, India, and China

BRICS Brazil, Russia, India, China, and South Africa

BRICS+ Brazil, Russia, India, China, South Africa, Egypt, Ethiopia, Iran, Saudi Arabia, and the United Arab Emirates.

CANACINE Cámara Nacional de la Industria Cinematográfica (Mexico's National Chamber of the Film Industry)

CEPAL Comisión Económica para América Latina y el Caribe (Economic Commission for Latin America and the Caribbean - ECLAC)

DAC Department of Sport, Arts and Culture

DIFF Durban Film Festival

DFMI Durban FilmMart Institute

DFO Durban Film Office

DSAC Department of Sport, Arts and Culture

DTI Department of Trade, Industry and Competition

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

EAO European Audiovisual Observatory

EAVE European Audiovisual Entrepreneurs

EFI European Film Industry

EFICINE 189 Estímulo Fiscal a Proyectos de Inversión en la Producción y Distribución Cinematográfica Nacional (Mexico's Fiscal Incentive for Investment in National Film Production, Distribution and Exhibition)

EFP European Film Promotion

EGEDA Entidad de Gestión de Derechos de los Productores Audiovisuales (Audiovisual Producers' Rights Management Association)

EU European Union

EUNIC European Union National Institutes for Culture

EUFF European Union Film Festival

FIAPF International Federation of Film Producers Associations

FICUNAM Festival Internacional de Cine UNAM

FOCINE Fondo de Fomento al Cine Mexicano (Mexican Film Promotion Fund)

GDP Gross Domestic Product

HOD Head of Department

IBGE Instituto Brasileiro de Geografia e Estatística (Brazilian Institute of Geography and Statistics)

IFT Instituto Federal de Telecomunicaciones (Mexico's Federal Telecommunications Institute)

IMCINE Instituto Mexicano de Cinematografía (Mexico's Film Institute)

INCAA Instituto Nacional de Cine y Artes Audiovisuales (Argentina's National Institute of Cinema and Audiovisual Arts)

INDEC Instituto Nacional de Estadística y Censos (Argentina's National Institute of Statistics and Censuses)

INEGI Instituto Nacional de Estadística y Geografía (Mexico's National Institute of Statistics and Geography)

İKSV İstanbul Kültür Sanat Vakfı (Istanbul Foundation for Culture and Arts)

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

IP Intellectual Property

KFoF Korea Fund of Funds

KOFIC Korean Film Council

NEF National Empowerment Fund

NFVF South Africa's National Film and Video Foundation

KZN KwaZulu-Natal

MX Mexico

MERCOSUR Mercado Común del Sur (The Southern Common Market)

MinC Ministério da Cultura (Brazil's Ministry of Culture)

MIP Africa Marché International des Programmes Africa

MIPCON Marché International des Programmes de Communication (International Market for Communication Programmes)

MOSTRA Mostra Internacional de Cinema em São Paulo (São Paulo International Film Festival)

MoU Memorandum of Understanding

NFVF South Africa's National Film and Video Foundation

OBITEL Observatório Ibero-Americano da Ficção Televisiva (Ibero-American Observatory of Television Fiction)

PROCINE CDMX Fideicomiso para la Promoción y Desarrollo del Cine Mexicano en la Ciudad de México (Trust for the Promotion and Development of Mexican Cinema in Mexico City)

RECAM Reunión Especializada de Autoridades Cinematográficas y Audiovisuales del MERCOSUR (Specialised Meeting of Cinematographic and Audiovisual Authorities of MERCOSUR)

SA South Africa

SEYAP Sinema Eseri Yapımcıları Meslek Birliği (Film Producers' Association of Türkiye)

SIAESP Sindicato da Indústria Audiovisual do Estado de São Paulo, Brasil (Audiovisual Industry Union of the State of São Paulo, Brazil)

Spcine an initiative of the Sao Paulo Municipal Government (Brazil), focused on the development of the film, TV, games, and new media industries

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

SK South Korea

SVOD Subscription Video on Demand

TÜİK Türkiye İstatistik Kurumu (Turkish Statistical Institute)

UK United Kingdom

US United States of America

USMCA United States-Mexico-Canada Agreement

VC Venture Capital

VOD Video On Demand

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

II. List of Figures

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

III. List of Tables

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

1. Aims, Method, Literature Review

1.1. Aims and Structure

The aim of the report is to analyse how international film professionals (filmmakers, producers, distributors and other stakeholders), in particular but not only from six selected international markets (Argentina, Brazil, Mexico, South Africa, South Korea, Türkiye), understand the EFI's 'Europeanness', namely in terms of funding, co-production, and distribution and what they identify as the sector's strengths. To understand why these case studies were selected, see Section 1.3 Case Studies. The report summarises the views of such professionals both regarding the EFI on its own and vis-à-vis its counterparts from US, Chinese and Indian film industry according to their role in the supply chain. Before advancing, it is important to highlight that the report considers Türkiye (a non-EU country) as non-European merely for analytical purposes, that is, to enable a comparison with other non-EU countries – even though the authors recognise that culturally Türkiye is both European and Asian.

The report is organised as follows: first, after a brief summary of its aims, methodology and literature review (part 1), it discusses the six international markets (part 2). Subsequently, the report summarises how the EFI is perceived and its presence in international markets both on a case-by-case basis and looking at the results of a common international survey (part 3). Then, in part 4, the report discusses the views of film professionals regarding EFI film festivals and in terms of co-production markets (as before, on a case-by-case basis, followed by an analysis of a common international survey). On this topic, a point of clarification is needed. The goal of the literature review and the qualitative research was to understand the links between the six case studies and the European Film Industry, focusing namely on film festivals and co-production markets. Due to the particularities of the six countries, the data gathered differs substantially. That is, although authors aimed to examine the presence of European cinema in local film festivals, the importance of European festivals for each film industry, and the types of festivals and similar initiatives supported by the EU and the EFI across all case studies, the balance between these dimensions is not the same across the case studies. This reflects the highly disparate actors that organise festivals or similar initiatives in the six markets (e.g. EU film festivals, regular retrospectives organised by cultural institutes, film markets, industrial initiatives…). Moreover, some case studies (such as South Africa) also include brief references to local or regional festivals due to their importance to the domestic film industries under analysis.

The subsequent section (part 5) identifies the common challenges that are revealed by the data analysis and identifies policy implications. Finally, the report lists its references (part 6), provides further methodological details (part 7) and graphs and tables deemed secondary (part 8).

1.2 Methods

The report employs a mixed-methods approach, combining quantitative and qualitative methods. On the one hand, a common international survey was implemented across the six international markets. The survey focused on issues such as stakeholders' perceptions of the EFI, its

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

strengths and weaknesses, their views regarding the circulation of European film in their local industries, and their opinions on the EFI vis-à-vis its international counterparts. On the other hand, the team carried out 99 semi-structured interviews with key informants across the film supply chains in the selected international film markets in order to provide an in-depth understanding of their views and differences. Together, this data provides empirical breadth – a sector-wide overview provided by the survey – and depth – the insights enabled by the interviews – advancing efforts to decenter European film policy (Dâmaso et al., forthcoming) as discussed in Section 1.4 Literature Review.

The resulting data were analysed using thematic analysis. In Section 2. International Markets: Case Studies, the teams triangulated the qualitative and quantitative data with policy documents and grey literature focusing in particular on the following themes: exhibition, distribution, trends, and challenges. Key findings are highlighted in bold. Section 3. EFI in International Markets focuses on the words and ideas associated with the EFI. These terms and related insights are also highlighted in bold. Finally, Section 4. Film Festivals and Co-Production Markets is structured according to the roles that are played by both festivals and markets. Such themes are highlighted as new headings and with bold text throughout the text, as are key organisations or initiatives in each local market. Across the report, long quotes illustrating the main ideas are highlighted and indented; smaller quotes are embedded in the text.

1.2.1 Survey

The survey was available to respondents between November 2024 and March 2025. It was distributed via email using a combination of professional networks of the REBOOT partners, key industry associations, and email addresses collected through the Cinando database. Each questionnaire included an information sheet and consent form, inviting recipients to participate in the study. In total, 515 responses were recorded. However, as is explained in detail in Table 1, only 425 responses met the eligibility criteria and were included in the dataset.

The main eligibility criteria to select respondents for each sample were based on participants' nationality and country of main professional activities. Participants were included in the case study if their first or second nationality was non-European, as was their country of professional activity. That is, for the sake of clarity and replicability, although the authors recognise that political, citizenship and cultural lines do not always align, "European" is defined for the purpose of ineligibility in the quantitative analysis as a citizen of the European Union. In the case of the regional sub-samples, nationality and country of activity had to coincide. This robust selection logic guarantees that the views gathered are based on in-depth knowledge of each local market. This selection process yielded the samples listed in Table 1.

While all efforts were made to gather a representative sample of survey respondents, it was significantly harder to gather respondents in South Africa and in South Korea than it was in other countries. In the case of South Korea, the limited number of respondents reflects the broader findings of this study regarding the lack of EU–South Korea networking, as well as cultural and language barriers. To address this limitation and broaden the analytical scope, the survey sample for this case study includes both South Korean respondents and respondents from other

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

East Asian countries. Moreover, the Turkish team was able to ensure responses from a higher number of local respondents than what was achieved in all other case studies. To guarantee that this doesn't skew the findings and recommendations, the analysis of the survey's answers includes, in all cases, an analysis of the full database and, accompanying this, an analysis of the full database minus the respondents from Türkiye. For the sake of readability, figures pertaining to the selected sample that confirm the findings of the main sample are included in Annex 2 (see 8.1 Extra Data). When that is not the case, details regarding the selected sample are included in the body of the report.

Subsequently, the data analysis was divided into several samples. The data were recorded in Qualtrics (all partners) and analysed with SPSS and Excel (all partners).

Sample	Respondents	Selection criteria	Other comments
Main sample	Total: 425	Three criteria were used, resulting in the main sample. First, respondents included in the main sample answered at least one question besides the initial sociodemographic questions. Out of 515 responses to the survey, 62 respondents only responded to the initial sociodemographic questions, providing insufficient data for the analysis. They were therefore excluded. This resulted in a sample of 453 respondents. Second, regarding nationality, European citizens (only one nationality, which is European, or two nationalities, both European) were removed. Conversely, when a respondent indicated a non-European nationality (first or second), they were included. Third, regarding their country of professional activity, respondents who declared that their countries of regular professional activity were	Regarding the second criterion, 25 respondents were removed from the sample as as they did not match the criterion of non-European nationality (either first or second) or did not indicate any nationality. For details regarding the second nationality, see Table 17 - Respondents by second nationality (Section 8.1 Extra Data). Regarding the third criterion, 3 individuals that had been included according to the first criterion (non-European nationality) but did not fulfil the second criterion (main countries of regular professional activity outside of Europe) were removed. Note: British citizens were defined as Europeans in the REBOOT survey associated with a deliverable examining how European professionals understand the international film market (Fernandes et al., 2025). Following the

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

		exclusively European (assessed via two variables: main country of activity, and other countries of professional activity) were also removed.	same logic and to avoid an overlap, this group was removed from this survey, which focuses exclusively on the views of non-European film professionals.
Selected sample (main sample minus Turkish respondents)	Total: 311	The selected respondents included in this sample consisted of the main sample (425 respondents), minus the 114 Turkish respondents working in Türkiye.	
Argentine sample	Total: 70	All selected respondents included in this sample had Argentine citizenship (first or second citizenship) and selected Argentina as their main country of activity.	10 respondents were not included in the sample because they did not match the selection criteria. Specifically, 9 had Argentine citizenship but did not select Argentina as their main country of activity whereas 1 did not have Argentine citizenship even though they selected Argentina as their main country of activity.
Brazilian sample	Total: 72	All selected respondents included in this sample had Brazilian citizenship (first or second citizenship) and selected Brazil as their main country of activity.	3 respondents were not included in the sample because they did not match the selection criteria. Specifically, these 3 respondents did not have Brazilian citizenship even though they selected Brazil as their main country of activity.
Mexican sample	Total: 55	All selected respondents included in this sample had Mexican citizenship (first or second citizenship) and selected Mexico as their main country of activity.	13 respondents were not included in the sample because they did not match the selection criteria. Specifically, 7 had Mexican citizenship but did not select Mexico as their main country

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

			of activity whereas 6 did not have Mexican citizenship even though they selected Mexico as their main country of activity.
South African sample	Total: 28	All selected respondents included in this sample had South African citizenship (first or second citizenship) and selected South Africa as their main country of activity.	3 respondents were not included in the sample because they did not match the selection criteria. Specifically, 1 had South African citizenship but did not select South Africa as their main country of activity whereas 2 did not have South African citizenship even though they selected South African as their main country of activity.
East-Asian sample	Total: 32	The number of respondents with South Korean citizenship (first or second citizenship) and professional activity in South Korea was small (5) to allow for a representative and reliable analysis. Therefore, the team decided to create a regional sample. All selected respondents included in this sample had either South Korean or Japanese, Taiwanese, Philippines, Thai, Indonesian, Singaporean, Hong Kong, and Malaysian citizenship (first or second citizenship) and selected South Korea or South Korea, Japan, Taiwan, Philippines, Thailand, Indonesia, Singapore, Hong Kong, and Malaysia as their main country of activity.	1 respondent was not included in the sample because they did not match the selection criteria. Specifically, the respondent had Singaporean citizenship but worked in the United States of America.
Turkish sample	Total: 114	All selected respondents included in this sample had Turkish citizenship (first or	3 respondents were not included in the sample because they did not match

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

		second citizenship) and selected Türkiye as their main country of activity.	the selection criteria. Specifically, these 3 respondents had Turkish citizenship but did not select Türkiye as their main country of activity.

Table 1 - Sample, Respondents, Selection Criteria

In terms of gender, most respondents (61.4%) were male [Figure 1]. Conversely, female respondents were 36.9% and 1.6% of respondents were non-binary/third gender.

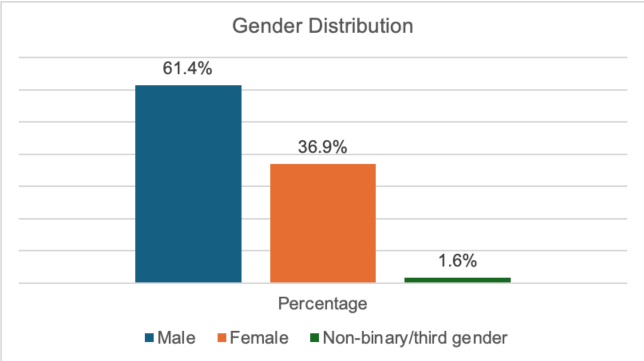


Figure 1 - Respondents by gender

In terms of age, although most respondents were between 35 and 44 years old, the distribution is broadly balanced between younger, middle aged, and older respondents [Figure 2].[1]

[1] Only one respondent (0.2%) was between 18-24 years old. Therefore, we did not include this category in the chart.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

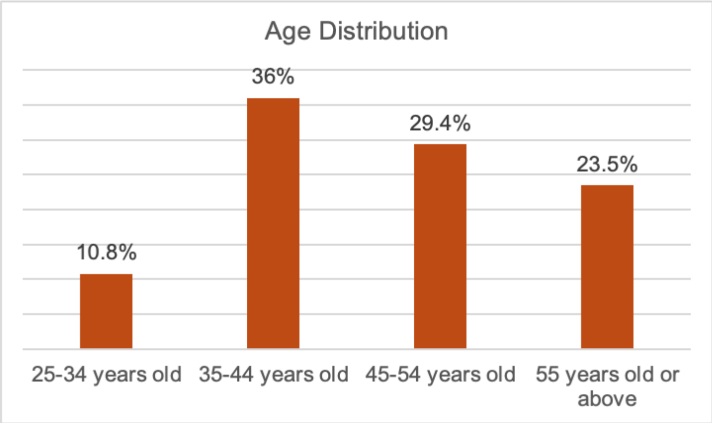


Figure 2 - Respondents by age

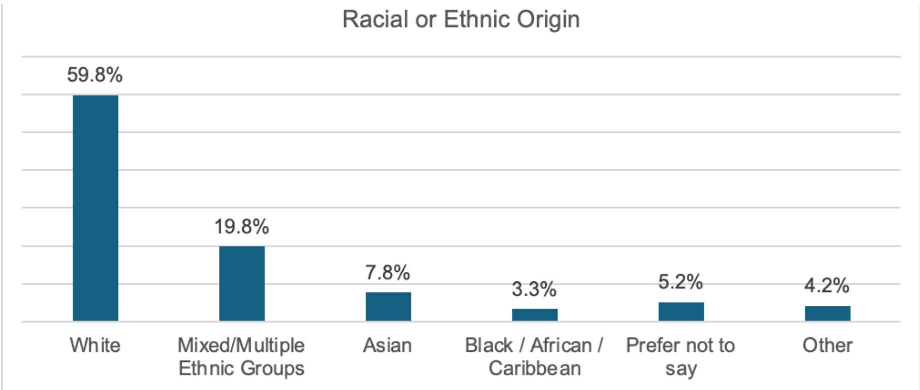


Figure 3 - Respondents by racial or ethnic origin

In terms of racial or ethnic origin [Figure 3], the vast majority of respondents identified as "White" (59.8%). The second most frequent answer was "Mixed/multiple groups", which was indicated by almost 20% of respondents. Moreover, it should be noted that among the 4.2% of respondents that answered "Other", interviewees indicated ethnicities such as: Latin American, Afro-mexican indigenous white, Turkish, Alawite, Arab, Sefardic mediterranean mixed with hungarian and mexican, Mestizo (referring to persons of European and Indigenous ancestry), and Caucasian. In practice, this reinforces the presence of respondents that have mixed/multiple racial or ethnic groups but not enough to make the survey balanced.

Considering the fact that the survey focused on non-European respondents, the significant presence of individuals identifying as white is relevant and justifies a brief intersectional analysis (Crenshaw, 1989) to ascertain to what extent race/ethnicity intersects with other social categories and might be shaping the experiences and views of respondents regarding the EFI.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

However, the data are inconclusive in this regard. Regarding the intersection between gender and ethnicity [Figure 4], there is a balanced representation of female and male respondents among Asian individuals (51.5% male and 45.5% female) and among those from Mixed/Multiple Ethnic groups (46.4% male and 50% female). Black/African/Caribbean and White ethnicities are predominantly more represented among male respondents (57,1% and 66.9% respectively), whereas non-binary respondents exceeded 3% of the distribution for Asian and for Mixed/Multiple Ethnic groups. This distribution shows a more balanced gender representation among Mixed/Multiple Ethnic groups and Asian respondents, compared to White and Black/African/Caribbean groups, which are predominantly male. While both female and male respondents are represented across all ethnicities, non-binary respondents are less represented overall. This reveals that the sample is broadly balanced across categories. For an intersectional analysis of a sample of survey questions, which further confirms this finding, please see Section 8.2 Intersectional Analysis.

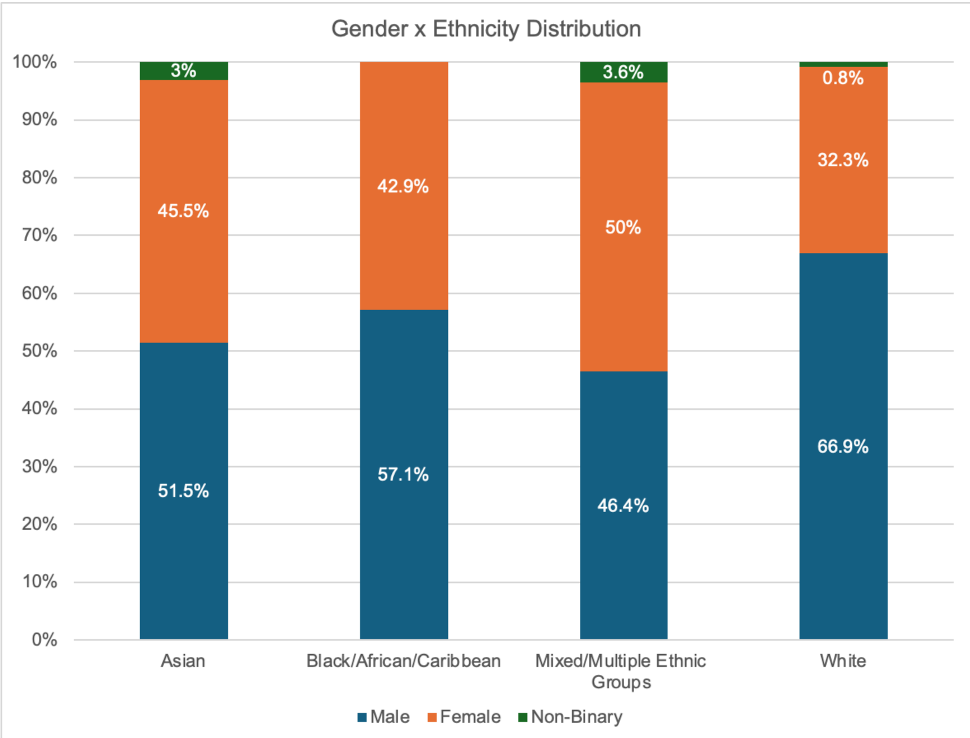


Figure 4 - Respondents by gender and ethnicity

Ideally, survey respondents would have included more professionals with even more diverse sociodemographic characteristics. To achieve this goal, each partner circulated the survey among their contacts and with relevant networks several times. Unfortunately, it was impossible to find more respondents.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

1.2.2 Interviews

Regarding the interviewees, data gathering took place at different times. A total of 99 semi-structured interviews, both in person and online, were held. The interviews were transcribed and analysed with NVIVO (EUR, Liège) and MAXQDA (KHAS) and the analysis was conducted using thematic analysis (all partners). In doing so, these interviews revealed patterns of needs and priorities.

In Argentina, 17 interviews took place between December 2023 and January 2024 in Spanish. In Brazil, 16 interviews took place between September 2023 and July 2024 in Portuguese. In Mexico, 14 interviews took place between May 2024 and October 2024 in Spanish. In South Africa, 18 interviews took place between December 2024 and January 2025 in English. In South Korea, 17 interviews took place between March 2024 and October 2024 in English. In Türkiye, 16 interviews took place between April 2024 and July 2025 in Turkish. These stakeholders work across the film industry. To support a transnational analysis across the value chain of the film industry and assure confidentiality, we anonymised all interviews and categorised them into 6 distinctive groups [Table 2]:

- **DIR/PRO:** Directors/individual producer and association and groups representing producers.
- **DIST/SA:** Individual distributor or sales agent and associations.
- **EXH:** Exhibitors, that is, cinema theatres and broadcasters.
- **FF:** Representatives working directly with film festivals, such as programmers, and responsible for the industry section on a festival.
- **FUNDER/POL:** Public funders, policymakers, regulators, national institutes and professional associations.
- **O:** All other categories.

Category	Interviewees
DIR/PRO	AR 5, BR 7, MX 4, SA 13, SK 6, T 6 = total 41
DIST/SA	AR 2, BR 4, MX 2, SA 1, SK 4, T 1 = total 14
EXH	MX 3, SA 1, SK 1, T 4 = total 9
FF	AR 4, BR 1, MX 2, SK 3, T 2 = total 12
FUNDER/POL	AR 4, BR 2, MX 3, SA 3, SK 1, T 3 = total 16
O	AR 2, BR 2, SA 1, SK 2 = total 7

Table 2 - Categories and Interviewees

The table above presents the number of interviewees per professional category. For more details, please see Section 7.3. Interviewees: Categories and Section 7.4 Interviewees: List.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Although having a more balanced sample would have been ideal, this distribution corresponds in any case to the original intentions of the report: to reflect on the views of non-European film professionals.

1.3 Case Studies

The chosen case studies provide insights into key international film markets in different world regions with which the EU has existing relationships with the potential, however, for stronger cultural, industrial and economic ties. Regarding Argentina, Brazil and Mexico, besides accounting for more than 80% of the region's fiction films market, they have strong historical, cultural and linguistic ties with European countries such as Spain and Portugal and there are on average 40-50 co-productions between Europe and Latin America framed by 27 co-production agreements between EU countries and Latin America. Regarding South Korea, it is the fourth largest market in the world in terms of box office revenues; however, European productions are squeezed between Hollywood and Korean films. While it proved challenging to secure a sufficient number of South Korean respondents — reflecting the limited engagement between EFI and South Korean professionals — the survey broadened its scope to include East Asian countries. This wider perspective not only addressed practical constraints but also enriched the analysis, allowing for the identification of both similarities and differences between South Korea and the broader East Asian context.

As for the South African film industry, despite a steady growth in the last years, it remains a niche producer that is often dependent on American partners. Finally, Türkiye has a particular relationship with Europe's film industry – as a fund recipient, co-producer, and partner in distribution and exhibition. Although these markets have relationships with the European Film Industry, such links could be strengthened. Any policies in this direction require detailed knowledge of local needs and understanding of the EFI. This report contributes to such efforts.

The research developed in Argentina, Brazil and Mexico was developed by researchers from the University Institute of Spanish Cinema (IUCE-UC3M) and the Audiovisual Diversity Research Group (DivAv-UC3M) at the University Carlos III of Madrid (UC3M), the research focused on South Korea was developed by the the Center for International Relations Studies (CEFIR) at the University of Liège (ULIEGE), the research focused on Türkiye was led by Kadir Has University (KHAS), and the research done in South Africa was led by Erasmus University Rotterdam

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

(EUR).[2] The results were triangulated with market data and policy documents associated with the local film sectors.

1.4 Literature Review

The data gathered and analysed in this report aims to understand how non-European film professionals perceive, namely, the Europeanness of the European Film Industry (EFI) and its circulation and distribution in international markets. This research is framed by a desire to strengthen mutual understanding on the one hand and to reinforce the role of the EU as a global actor – in terms of film policy but also more broadly – in a sustainable manner on the other hand. This requires ensuring that the development of international European film policies take into account the views and the need of non-European actors. In academic terms, such a stance can be described as a **decentering EU film policy**. In making this claim, we are following the strategy originally identified by Keukeleire and Lecocq (2018), which is in turn influenced by Onar and Nicolaïdis (2013) – who, in their foundational article, argued for the need to provincialise Europe by questioning a Eurocentric approach to scientific knowledge and, simultaneously, engage, that is, learn from other perspectives. By examining the views of non-European film professionals, this report contributes to the latter.

Although the decentering agenda was originally developed for foreign policy understood in a strict sense, the EU's international film policies and initiatives can be understood as elements of the Union's audiovisual diplomacy and global cultural action (Vlassis, 2020; Dâmaso, 2025) and, therefore, as embedded within the cultural dimension of EU foreign policy. The framework proposed by Keukeleire and Lecocq (2018) is built around several categories of decentring, namely spatial, temporal and disciplinary. This report contributes to these efforts by examining "different spatial/material contexts" and "different developmental trajectories and pathways to 'modernity' (hybridity)" as well as to "learning through [...] area studies [...] and local empirical work", respectively (Keukeleire and Lecocq 2018, p. 279) – here understood as pathways to the development of lively and sustainable domestic film ecosystems that recognise their different needs, identified through bottom-up evidence gathering – as is evident in particular in Sections 2, 3 and 4.

[2] The UC3M team would like to acknowledge the contributions of the researchers Dr. Leandro González (Universidad Nacional de General Sarmiento, UNGS) and Dr. Argelia Muñoz Larroa (Universidad Autónoma de México, UAM-Cuajimalpa) for their invaluable work in the case studies of Argentina and Mexico, respectively. We would also like to thank Ignacio Catoggio and Michel Salazar, representing the Ibero-American Audiovisual Observatory (OIC) of the Conference of Audiovisual and Cinematographic Authorities of Ibero-America (CAACI), for their help in disseminating the survey among entities and professionals in the Latin American film industry. The EUR team would like to acknowledge the work of Avril Joffe (University of the Witwatersrand), who led the interviews in South Africa and helped to disseminate the survey among South African film professionals. The ULIEGE team would like to acknowledge the contribution of the researchers Lucile Coenen, Dealan Riga, Solenn Houard and Pauline Bissot for their invaluable work in the case study of South Korea.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Informed by the decentering approach, previous research based on REBOOT (Dâmaso et al, forthcoming) revealed the existence of shared challenges in these six markets, particularly regarding the weak position of the EFI therein and the limited circulation of European film due to, namely, sustained difficulties in securing windows of exhibition in local audiovisual markets. To address these challenges, more detailed knowledge of these markets is required – addressing the "epistemic othering" (Keet, 2014) of non-European film professionals that has characterised scholarly literature and policy debates on this topic. The data gathering process that led to this report – a mixed-methods approach aimed at collecting robust insights – responds to this need.

In taking this stance, the report joins an emerging epistemological shift in European studies, which is taking place alongside several complex trends – namely, the reinforcement of globalisation and its sociocultural impact. As Mongin (2007) has written, heightened commercial exchanges made possible by the creation of global markets have led to increasing reinforced knowledge of multiple ways of living and, at the same time, to increased social fragmentation and narratives that celebrate cultural closedness: "at a cultural level, we witness a double process of unification and fragmentation that mirrors the connection between liberalism and the demand for security, between opening and closing. Markets homogenize behaviours, technological integration plays a major role, and in turn the identity-based factor that puts forward a community-oriented factor rooted in ethnicity, religion, and civilization, gains traction" (Mongin 2007, no page). In this context, and paradoxically, trust-building is more important than ever. The decentering of European film policy and, more broadly, of European global cultural action supports better understanding of the stakeholders that are likely to be impacted by such policies and action and, in doing so, the development of more impactful policies and more sustainable relationships.

In cultural studies, the decentering approach has an older tradition that has also gained traction in recent times. As others have written, "decentering is a process where the central concepts and propositions in the research do not originate in, or privilege, a single culture, but are derived from, and are relevant to, multiple cultures" (Rivenburgh and Manusov, 2011). The EU's own international film policy, particularly the circulation of European film through the EUNIC network, has also been examined using this framework – focusing, however, on the decentering not of Europe but of the EU's Member States (Pellino, 2023). Aligned with these efforts is also a growing body of work concerned with the decolonisation of EU global cultural policy (e.g. Dâmaso, 2025; Joffe and Magkou, 2025) and film policy. To give an example, as has been written about African film making, there is a need "to decolonize film distribution and exhibition practices in Nigeria in the 21st century" because "contemporary film production and distribution processes preserve a colonial mindset that fails to recognize and implement cultural and new technological diversity" (Fagbile, 2023; also see Karam, 2023 and Sendra, 2023). Other literature has taken a similar angle regarding the decolonisation of cinema in South Korea (Jinsoo, 2018; Park, 2020), Latin America (Seguí et al., 2023), and in Türkiye (Akdede, 2025).

The data gathered for this report should also be understood as aiming to advance current debates regarding **the EU's global audiovisual policy.** The EU has long positioned itself as a global normative actor, using cultural diplomacy as a strategic tool to promote values such as cultural diversity, freedom of expression, and democratic governance (Portolés, 2019). This approach was reinforced with the adoption of the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, which the EU actively champions in its

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

external relations. The European Agenda for Culture in a Globalizing World (2007) further consolidated this commitment, recognising culture as a central pillar of the EU's foreign policy (Loisen & De Ville, 2011; Vlassis, 2016).

As a promoter of the 2005 Convention, the EU seeks to embed cultural norms and audiovisual cooperation within broader economic and political frameworks (Vlassis, 2020). Audiovisual policy has thus become a key dimension of the EU's cultural diplomacy, used to strengthen ties with partner countries and regions. Through technical cooperation agreements and international cultural instruments, the EU encourages the adoption of regulatory models aligned with its own standards. This is evident in its partnerships with South Korea (Loisen and De Ville, 2011; Vlassis, 2016) and with the Latin American region (Fernandes, 2025).

These actions demonstrate the EU's support for the development of audiovisual policies beyond its borders. However, the outcomes of these initiatives remain contested. Scholars have pointed to a structural ambivalence in the EU's international audiovisual strategy, which often merges cultural goals with trade objectives. While promoting diversity in rhetoric, the EU has also been criticised for using cultural cooperation clauses to legitimise economic interests in bilateral trade agreements (Pauwels and Loisen, 2016). Furthermore, these initiatives have been challenged for adopting a top-down approach, often lacking meaningful engagement with local stakeholders and failing to consider local policy contexts and priorities (Vlassis, 2016; Fernandes et al., 2021).

In the current context marked by the growing influence of VOD platforms in the audiovisual market, the EU's regulatory efforts have yet to resonate significantly beyond its borders (García Leiva et al., 2025). Additionally, evidence suggests that the EU's normative influence is weakening in regions such as Latin America, where VOD platforms are increasingly shaping policy debates and agendas (Fernandes, 2022; Fernandes and Albornoz, 2023).

Alongside these criticisms of the EU's global audiovisual policy, **structural changes to the global film market** further reinforce the need for its reframing. Streaming services are influencing not only the development (or lack) of national regulatory frameworks in various countries but also transforming **power relations across the production, distribution, and exhibition sectors**. These challenges are further amplified in a global market dominated by Hollywood. Although other players, such as Bollywood, Nollywood, and Chinese cinema, have emerged in recent years, Hollywood's supremacy remains firmly in place. The arrival of streaming services has created opportunities to somewhat challenge the long-standing dominance of traditional Hollywood studios over global media flows and consumption patterns (Smits, 2024). Still, even if it is true that digital technologies have expanded the scope of media distribution and consumption, promising a more democratic and diversified media landscape (Jezierski, 2010), the impact on the EFI has been mixed. Although US-based global streaming services like Netflix, Disney+, HBO Max, and Prime Video, have opened up opportunities for selected European productions to reach wider audiences than was previously possible, they have also significantly altered viewing habits, exerting an even greater impact on cinema consumption patterns that were already in transformation (Alvaray, 2023; Albornoz and Krakowiak, 2023; Falicov, 2019).

This shift has disrupted the economics of traditional film distribution, impacting exhibitors, film distributors and broadcasters in the EFI and globally. The staggered release patterns of film –

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

involving multiple exploitation windows – beginning with theatrical, home video (e.g. DVDs), pay-TV and broadcast has collapsed in the streaming era (Ulin, 2019; Chalaby, 2025). Some films now transition directly from theatrical to streaming services (e.g. SVODs or TVODs), bypassing intermediate windows like movie theatres, pay-TV and free-to-air television entirely (Doyle et al., 2021; Ulin, 2019), while others are either launched exclusively on streaming services or adopt a hybrid release model combining a release both in theatres and on streaming services. Even if releasing films in cinemas remains the most common strategy (Smits, 2025), increasingly frequent straight to VOD release strategies have been criticised by exhibitors as disruptive to their business.

As for distributors, although they are not affected by US-based streamers in the same way as exhibitors (since blockbusters from Hollywood studios have been always handled by their subsidiaries in each foreign market) they are nonetheless impacted in other ways. It has become increasingly challenging for independent distributors to gauge the commercial potential of the streaming market when planning releases. Securing deals with the most powerful US streamers is difficult while smaller, local services generate limited revenue. Even though top-grossing mainstream titles can benefit substantially from the shift to streamers, for the vast majority of non-mainstream films the economic return of this market change is limited (Smits, 2025). Independent distributors have historically relied on buying film rights to exploit them locally, often tailoring their releases to fit their own audiences. The streamers' global acquisition strategies have undermined this model. When a streamer like Netflix secures worldwide IP rights to a title, it bypasses local distributors, reducing their ability to profit from those films as noted by Smits (2025) in the European context – and across varied international markets as explored in this study. As a result, US streamers have often reinforced existing inequalities in film circulation at both national and international levels.

By way of contrast, national broadcasters are challenged by US streamers in three fronts: advertising revenue, viewership and content. The collapse of the traditional film distribution windowing model means that broadcasters are bypassed when new titles are released – that is, they either go straight to streaming services without a theatrical release or they have such a release but then move to streaming without airing on free-to-air or pay TV. This shift has created a bottleneck for local broadcasters, who now have less access to premium content. As major studios withhold content within proprietary streamers and limit external licensing opportunities, the scope of content available to broadcasters has significantly narrowed, reducing their competitiveness in a rapidly evolving media landscape. In terms of advertising revenue, all the main SVODs services have introduced ad-supported subscription plans, further exacerbating existing disparities already in place (Chalaby, 2025). As a result, broadcasters faced decreasing audience numbers and advertising revenues. Although many have tried to adapt by either launching their own streaming services or partnering with existing ones, the shift was not merely economic. By providing extensive catalogues and algorithm-based curation, streaming services have reshaped audience behaviour, programming structures, and content expectations (Innocenti and Pescatore, 2023).

Indeed, streamers determine the availability and visibility of films in their services, with some titles being given more attention than others (Lobato and Scarlata 2022; Smits 2022). Setting aside the fact that the European films featured on these US-based streaming services predominantly originate from the major production countries – namely the UK, France, Spain

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Italy, and Germany, a trend that is also reflected, to some extent, in the theatrical distribution of European films in the international market – 'visibility' and processes of 'discoverability' and 'prominence' become increasingly important to recommend films to the audience and enhance the circulation of films. As Albornoz and Gallo (2024) have noted, streamers determine not just what content is available but also when and to whom. That is, visibility – or discoverability – has emerged as a new bottleneck in distribution. As noted by Meir and Smits (2024), availability is not the same as visibility. Being available on a VOD service does not automatically guarantee it will reach an audience. Discoverability is often subject to algorithmic curation, which is largely opaque and commercially driven and tends to favour content with proven global appeal, usually US-made (Smits, 2022), sidelining culturally specific or linguistically diverse works.

In addition, the model applied by US streamers when commissioning audiovisual works from local companies has altered the financing and production landscape of some countries. In the UK or Spain, for example, US streamers make substantial investments in the local audiovisual industry and are known for giving more creative freedom and flexibility than local broadcasters (Albornoz and Krakowiak, 2023), allowing producers to explore innovative narratives and formats (Kang, 2024; Cuelenaere, 2024). Given the exposure that these SVOD service providers offer local productions to worldwide audiences, producers can gain significant industry recognition if a feature or a show is a success.

Yet, despite these notable advantages, US streamers typically demand all-encompassing rights, across formats and territories, when commissioning content – resulting in a full transfer of intellectual property (IP) (Meir and Mitric, 2025; Chalaby, 2023; Doyle, 2016; Doyle et al., 2021) and limiting local producers' ability to profit from their own back catalogues or build long-term value. Without IP rights, production companies are excluded from financial returns, even if their content reaches international success (Meir and Mitric, 2025; Chalaby, 2025). As debates on the influence of streaming services continue to unfold, the protection of IP rights has emerged as a key element in securing the future of the EFI. European ownership over creative content is essential not only for the long-term economic sustainability of local producers, but also for preserving artistic freedom and the cultural diversity that embodies Europe's rich and pluralistic heritage.

Many of the challenges related to the increased participation of US streamers in the EFI were noted in the six markets studied. In this context, **international co-productions** are seen as an important tool serving not only as an alternative financing mechanism but also as a means to achieve broader international distribution while enabling producers to retain IP rights. International co-productions have multiple dimensions and objectives from an economic, cultural and political perspective (Mitric, 2025). While co-productions function as a way of expanding film budgets to increase competitiveness on a global scale, joint production efforts can also facilitate the creation of works with greater production value and wider distribution reach. Beyond economic advantages, co-productions have the potential to carry creative and cultural benefits. Films that circulate internationally extend the visibility of transnational narratives fostering encounters with diverse audiences. In addition, financial partnerships may result in more substantive creative collaborations, involving sustained dialogue between producers or the development of narratives that integrate elements from multiple national cultures (Bondebjerg, 2018).

Over the past decades, European co-production policy has extended its influence well beyond the continent, reflecting the interplay of Europeanisation and globalisation in reshaping audiovisual collaboration. By extending the European film policy framework to non-European contexts, the model enables international producers to access European funding and integrate into established networks (Mitric, 2025, Vinuela 2019). As seen in this study, this transnational reach has prompted bilateral treaties between European nations and countries as diverse as South Korea, Türkiye, and South Africa, and encouraged the adoption of European film policies in Latin America. EU initiatives further reinforce the strategic use of co-production as both a cultural and geopolitical instrument, potentially fostering creative exchange while extending Europe's audiovisual influence globally (Mitric, 2025).

At the same time, as noted by Mitric (2025), international co-productions are a unique category of audiovisual productions, defined by treaty regulations and policy frameworks encompassing multiple dimensions including political, economic, legal, creative, artistic, and technical aspects. Compliance with these regulations must be evident both in their content and in their production processes. This situation can generate tensions and introduce unnecessary obstacles in the collaboration between European and non-European partners. As indicated by the results of this study, some regulations and policy frameworks governing international co-productions may be perceived by non-European partners as inefficient, impose additional costs, or result in decisions that do not optimally serve the project's creative objectives. Furthermore, co-productions involving European and non-European partners can, at times, expose structural inequalities and a Eurocentric perspective, as non-European collaborators often encounter difficulties in accessing and interpreting specific co-production treaties.

Additionally, it is important to highlight the continued importance of **film festivals and markets** as key platforms for the international circulation of works, integral to the European film industry's infrastructure. As Marijke de Valck (2007) outlines, festivals have evolved from national showcases to transnational systems embedded within global film culture. Central to this are "business festivals" (Peranson, 2008), which function as industry-oriented hubs featuring film markets where European producers, sales agents, and distributors negotiate rights and secure international deals. These festivals serve as alternative distribution networks, especially for films that fall outside mainstream commercial circuits (Peranson, 2008), and contribute to the visibility of a distinct European cinema often defined in opposition to Hollywood (Elsaesser, 2005). By facilitating both cultural exchange and commercial opportunity, festivals operate as key nodes in what Dina Iordanova (2016) terms the transnational infrastructures of film, supporting the circulation, recognition, and sustainability of European productions.

Finally, alongside Europe's political, cultural, and economic changes, **the concept of Europeanness** and its relation to cinema has been a contested discussion ground. Thomas Elsaesser (2005) famously identified two tensions in European cinematic identity: the need to take into account cultural, linguistic, and historical diversity within Europe, and the desire to challenge the global dominance of Hollywood. This dual challenge reveals an appealing desire for a united "European cinema" and its cultural autonomy vis-à-vis Hollywood but a problematic vision that may overlook the plurality of national and regional film traditions within Europe.

With a focus on plurality, Mary Harrod et. al. (2015) propose a more flexible, pluralistic notion of Europeanness in their edited volume. These scholars argue that Europeanness does not refer to

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

an inherent aesthetic or thematic property in films but to an unstable signifier produced through institutional and discursive practices such as film festivals, funding schemes, and critical reception. This approach aligns with current discussions on transnationality and European cinema (Palacio and Türschmann, 2013; Nagib, 2014; Radovic, 2018; Jones, 2024; Meir and Smits, 2024) that highlight cross-border collaborations, co-productions, and the circulation of films across different cultural and linguistic contexts, which challenges the articulation of European cinema within national frameworks.

Recent scholarship has further illuminated the industrial and policy dimensions that shape European cinema. *Transnational European Cinema* (Bergfelder et al., 2020) and *The Co-Production Landscape in Europe* (Hammett-Jamart et al., 2022) highlight how industrial structures like transnational co-production agreements and EU cultural policy instruments like Eurimages form what is defined as European cinema. In parallel, *European Cinema in the Streaming Era* (Lobato and Lotz, 2023) showcases the impact of digital distribution and production platforms such as Netflix and MUBI on the visibility and circulation of European films. These writers argue that the collaboration between the global market and Europe's national and regional film production ecosystems further dissolves the boundaries of Europeanness.

However, the discourse of transnational and institutional fluidity also attracts critical reflections. In particular, Hans Kundnani (2023) warns that discourses of diversity and transnationality in European cinema may conceal structural exclusions or reproduce sanitised, market-friendly versions of European identity. Kundani criticizes the persistence of racialised and post-colonial hierarchies under the guise of 'Eurowhiteness."

Consequently, the concept of Europeanness and its relation to cinema remains a fluid and contested terrain, shaped by a complex interplay of historical, cultural, industrial, and political factors. While cross-border co-productions and digital streaming point towards the increasing transnationality of European cinema, rising contestation over migration, identity, and belonging make what and who constitutes "Europeanness" an ever-lingering question.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

2. International Markets: Case Studies

This section describes the six non-EU markets surveyed, that is, it provides general socioeconomic data on each market, identifies key trends in each local film industry trends, and provides an introduction to the relations between the EU and each local film market.

2.1 Argentina

2.1.1 General Information

In Latin America, perhaps no other country has as rich a cinematic tradition as Argentina [Table 3]. Over the past several decades, the country has remained a prominent player in the region – its film schools have been the training ground of renowned directors, screenwriters and cinematographers, while its production companies regularly produce high-quality films and television content that reach international audiences and have secured a place in global cinema (Olavarría et al., 2021). Globally, it ranks as the tenth-largest market in terms of feature film production and is the only Latin American country to make the top ten list, a notable feature especially when considering the substantial size and economic power of Brazil and Mexico. Furthermore, Argentine cinema is well-regarded worldwide, garnering numerous awards at international film festivals, including the highest number of Academy Awards by a Latin American country. It also hosts the most prestigious film festival and market in Latin America, Mar del Plata Film Festival and Ventana Sur. The country produces an average of 200 films annually and generates substantial domestic box office revenues, making it one of the fastest-growing audiovisual markets in the region. Argentina is also one of the three most significant fiction producers, representing more than 80% of films produced in Latin America, alongside Mexico and Brazil (Schroeder Rodríguez, 2020).

Argentina's economy, one of the largest in Latin America (World Bank, n.d.a), has a GDP of approximately USD 646.8 billion in 2023. It is a vast country within its 3.66 million square kilometres territory (INDEC, n.d.b), a population of roughly 47 million and an employment rate of roughly 44% (INDEC, n.d.b). Most of the population is concentrated in urban areas, with the greater Buenos Aires holding 13.4 million people (CEPAL, n.d.). A report by the National Institute of Cinema and Audiovisual Arts – INCAA (2022) on the economic impact of the audiovisual sector reveals that the industry accounted for 5.2% of Argentina's GDP in 2022, highlighting the significance of the Argentine film industry. Despite this, the country's audiovisual sector has weakened, nearly a decade of economic instability has slowed the development of its film industry.

According to the European Audiovisual Observatory (EAO), cinema attendance in Argentina declined from 40.6 to 36.1 million tickets sold in 2024. Box office revenues dropped to € 86.3 million, screen numbers remained the same as per the previous year: 954. For the second year in a row, Argentina lost its position as the third-largest market in Latin America by admissions, with Colombia surpassing it with 49.7 million tickets sold in the same year (EAO, 2025). 241 national films were released in 2024, achieving a market share by admissions of 3%, down from 7.6% in 2023 (EAO, 2025). In terms of box office revenue, this figure is even lower, with national

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

films accounting for approximately 2%. This marks the second lowest market share by admissions since 1994, the year Argentina enacted the Cinema Promotion and Regulation Law, when it stood at just 1.8%, surpassed only by the 2.1% recorded in 2021. No national film exceeded 200,000 viewers in 2024. The national film with the largest audience was *El Jockey* (Ortega, 2024), which attracted 119,162 admissions (Rodríguez, 2025).

Since 2022, the INCAA has stopped releasing its annual report, meaning there is no official data on market share by country of origin. Nevertheless, the Sindicato de la Industria Cinematográfica Argentina – Animación, Publicidad y Medios Audiovisuales (SICA APMA, 2024) reported that, in 2024, US films captured 84.7% of viewers, domestic films accounted for 3% and European productions attracted 9% of total cinema attendance, with almost two million more viewers than the previous year. Of that total, the three European countries with the largest market shares in 2024 were the UK with 6.5% (2,271,935 viewers), Ireland with 0.9% (327,101 viewers), and France with 0.6% (206,365 viewers) of the overall cinema audience.

General Data	2024
Population (million)*	47
Total area (km2)*	2,780,400
Official language	Spanish
Gross box office (million €)**	86.3
Admissions (million)	36.1
Average ticket price	2.4
Average admissions per capita	0.8
Screens	954
Screens per 100 inhabitants	2.1
National feature films***	241
National market share	3%

Table 3 - General Data – Argentina

Source: EAO, 2025.
*INDEC (n.d.a.). **Box office revenues in 2024 totalled AR$ 85,475 million. Euro values, based on official exchange rates, may overstate the actual economic value due to discrepancies with market rates. ***National feature films released in 2024.

The notable decline in the market share of local productions can be partly attributed to government policies introduced under President Javier Milei's administration since December 2023, that have negatively impacted the local film industry. These include the dismantling of INCAA, the elimination of a screen quota for domestic films, substantial cuts to production grants and changes to film financing programs, which now tie financial support to box office performance. The Argentine film industry seems to be caught in a perpetual paradox: on the one hand, the country boasts a robust ecosystem, with experienced production companies that uphold high technical and creative standards. On the other, the sector's growth is tempered by

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

significant challenges, including recurring cycles of inflation, a fluctuating currency, a stagnated GDP rate, economic reforms and policy changes.

2.1.2 Exhibition and distribution

Further exacerbating the situation, a significant degree of concentration can be observed in the distribution segment: out of the 33 distribution companies that released films in 2024, seven accounted for 97.8% of the market share in Argentina. Out of those subsidiaries of three major studios, United International Pictures (UIP)[3], The Walt Disney Company Argentina, and Warner Bros., accounted for 88.4% of the viewers and 90.2% of the box office revenue. None of the 20 most-watched films in Argentina were released by local distributors (SICA APMA, 2024).

Disney recorded the highest number of viewers in 2024 with 14,907,830 (42.7% of the market share). The highest-grossing film of the year, *Inside Out 2* (US), attracted 43.4% of Disney's total audience and 41.9% of its overall box office revenue. Additionally, Disney had six films featured in the list of the 20 most-watched movies. Disney was followed by UIP, which encompasses releases from Universal, Sony, and Paramount, with 12,376,484 viewers (35.4%), and Warner Bros. with 3,601,739 viewers (10.3%). Other notable distribution companies included BF Distribution (1,026,821 viewers), DIGICINE (893,123), and Diamond Films (623,124). The remaining companies grouped as Others accounted for a combined total of 1,483,306 viewers (SICA APMA, 2024; Rodríguez, 2025).

The exhibition park is also highly concentrated, with foreign multiplex cinemas comprising 59.4% of cinema attendance and 64.6% of box office revenue (SICA APMA, 2024). Cinemark-Hoyts (US)[4] holds the leading position among cinema chains, capturing about 40% of the country's annual box office revenue and audience share. Cinépolis (Mexico) and Showcase Cinemas (US) follow, each securing approximately 10% of the market, with 81 and 76 screens, respectively. The dominance of foreign companies – mostly from the US – within the distribution and exhibition sectors significantly constrains opportunities for the dissemination of not only domestic productions but also non-mainstream films more broadly, regardless of their country of origin.

When assessing other outlets, local broadcasters show limited interest in acquiring non-mainstream films – an interest that is even more constrained in the case of European productions. During 2024 free-to-air TV broadcasted films from only 11 countries. Out of those, 80.8% were from the US, 8.2% were domestic productions, 7.3% were from European countries, and 6.3% were from other countries. Nearly two-thirds (62%) of the European films broadcast on free-to-air television during the year originated from the UK, representing 4.5% of all films aired (SICA APMA, 2024).

On pay-TV, several European channels are available in Argentina, including *France 24, TV5MONDE* (France), *Rai Internazionale* (Italia), and *TVE Internacional* (Spain). Additionally, *Europa Europa*, a channel dedicated to European films and series, is owned and distributed by

[3] UIP is a joint venture of Paramount Pictures and Universal Pictures that distributes their films outside the US-Canada.

[4] In 2011, Cinemark purchased the ten complexes (95 screens) of Hoyts in Argentina from the Linzor fund (made up of Argentine-Chilean capital). Cinemark itself already operated ten locations (80 screens).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

AMC Networks International (US-Argentina). Despite Argentina maintaining one of the highest pay-TV penetration rates in Latin America, 64.3% in 2023 (OBITEL, 2024), European channels continue to appeal to niche audiences and have limited viewership. The pay-TV segment in Argentina has remained stable, despite the introduction of streaming services in the country. This is largely due to a long standing habit by Argentinians to pay for television access, which emerged in response to an underdeveloped free-to-air analogue broadcasting (Mastrini et al., 2023).

Nevertheless, audiovisual OTT services have a strong presence, driven by US-based global streamers. The popularity of these services has significantly altered viewing habits and impacted traditional cinema consumption patterns. As of March 2024, Argentina had 109 OTT services in operation, including 40 hybrid services, 32 SVOD, 33 AVOD/FVOD, three TV Everywhere, and one TVOD/validated VOD platform. An analysis of content availability on these services during the first quarter of 2024 showed that 44% of the films originated from the US. This was followed by productions from India (11%), the UK (8%), Mexico (8%), and Spain (6%), while domestic films represented only 4% (IFT, 2024a). In the SVOD segment, although data for 2024 is not yet available, in the first quarter of 2023, Netflix was the leading SVOD provider, holding a market share of 35.8%, followed by Disney+ (15.4%), HBO Max (13%), Star+ (12.8%), and Prime Video (10.9%) (OBITEL, 2024).

Although the introduction of streaming services has been seen as an opportunity to showcase productions that otherwise would not have a window of exhibition, it has also brought its own set of challenges. For local distributors, streaming services have reduced the revenue that could be generated from films. US-based global streamers not only refrain from acquiring films through local distributors, preferring instead to secure global or at least regional rights by purchasing directly from international sales agents, but have also contributed to the marginalisation of physical media formats, such as DVDs and Blu-rays. As a result, the acquisition of rights tends to bypass local intermediaries. One notable exception is MUBI (UK), a SVOD service founded in 2007 by Argentine filmmaker Eduardo Constantino Jr. and Turkish entrepreneur Efe Cakarel, which does engage with local distributors, albeit typically at relatively modest price points.

In addition, the US-based global streamers have progressively expanded into local audiovisual production, emerging as key players in the sector. Their involvement has reshaped market dynamics, impacting not only distribution and exhibition but also the production landscape. With comparatively larger budgets and the capacity to offer premium rates to local talent and service providers, streamers have contributed to rising production costs. This dynamic has created competitive imbalances for local and independent producers, some of whom struggle to compete financially within this new cost structure.

2.1.3 Trends and challenges

Through interviews with 17 key stakeholders within Argentina's film industry, conducted in December 2023 and May 2024 from major institutions, such as INCAA, RECAM (Reunión Especializada de Autoridades Cinematográficas y Audiovisuales del MERCOSUR), CAIC (Cámara Argentina de la Industria Cinematográfica), UltraCine, French Embassy, German Films, and festivals and markets like (Ventana Sur, Encuentro del Cine Europeo, and Festival de Cine

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Alemán) – key insights emerged regarding the challenges faced by the local film industry. These include limited exhibition space for independent films, the need to strengthen distribution and promotion support programs, and the importance of revising current policies and establishing regulations for streaming services.

Concerning the **limited exhibition space** in the country, it is clear that, like the rest of the Latin America region, Argentina struggles with **Hollywood's dominance at the box office**. This difficulty primarily stems from the prominent presence of the majors that prioritise Hollywood blockbusters and other local and foreign films with significant commercial potential. Films distributed by the majors, backed by Hollywood studios, their promotional power and have an aggressive release strategy, launching several copies and occupying a substantial share of screens, in a manner that is interpreted by some as exploitative, and that independent distributors simply cannot match. Another significant aspect is that multiplex cinemas organise their exhibition calendar based on the majors' releases, leaving local independent distributors, who handle most domestic and foreign films, to schedule their screenings in the remaining slots.

I believe this is a sector that needs support, regulations, or incentives that allow for more diverse, quality content to be consumed and exhibited, giving it a real opportunity to reach audiences on screens. The reality is that in Argentina, as in other countries in Latin America and around the world, audiovisual concentration is enormous.

AR Int5, DIST/SA

Given this scenario, it is unsurprising that numerous interviewees (distributors in particular) have mentioned the need for additional screens or alternative venues to showcase non-mainstream films. Non-mainstream films, including European ones, seem to be mostly confined to specialised art house or independent outlets, film festivals, and a few pay-TV channels and streaming services like MUBI. Notable exceptions include films attaining international acclaim by securing prestigious festival awards and films that have a partnership either with Hollywood studios or a transnational VOD service, as they are likely to be exhibited. Interviewees also noted that the traditional press has ceased its coverage of cinema showtimes and reduced the number of critics´ reviews of non-mainstream films. This **lack of coverage by traditional media** further restricted the avenues through which non-blockbuster films were previously promoted and is believed to have a direct impact on their discoverability and potential consumption.

Now, we find that people are unaware when new films are released. They don't know when our films premiere. The habit of checking for movie releases on Thursdays in the newspaper or on the website has diminished. Additionally, the concentration of advertising means that films with strong promotional campaigns are more likely to succeed.

AR Int6, DIST/SA

As for public funding, it is the backbone of the Argentine film industry. A significant portion of films, especially independent or arthouse movies, are financed by the subsidies granted by the INCAA through the Film Development Fund, the primary financial support mechanism for national audiovisual works. State funding for cinema in Argentina is unique, relying on several funding sources: a 10% tax on movie ticket sales, an outdated 10% tax on DVD sales, and a

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

government levy on broadcasters collected from the National Communications Entity (ENACOM). This dependency has made the film industry more vulnerable to political and economic shifts, especially when public funding is delayed, reduced, or restructured, as it happened in August 2024 with the elimination of advanced subsidies through Decree 984/2024. Interviewees emphasised the need to strengthen support programs and institutions tied to the audiovisual sector, while also calling for a thorough review and update of existing policies.

As for the weaknesses, I truly think that today it is very difficult to solely talk about the economic and financial aspects. Public resources allocated to cinema have been decreasing over the past five or six years. Now, it seems that funding is almost nonexistent with this new government (Javier Milei 2023 - current), which presents significant challenges. In a country with limited public funding, the films that get made are those demanded by platform executives.

AR Int13, DIR/PRO

In addition, the nation's cyclical economic crises have significantly impacted the production sector, creating challenges such as difficulties in securing external funding. Producers need to navigate complex financial instruments and tax regulations to maximise returns on limited capital while adhering to strict legal requirements. The sector is highly regulated, requiring compliance with several institutional reporting obligations to entities such as INCAA and other governmental bodies. Furthermore, access to private financing remains limited, with **funding largely dependent on public support** provenient from the Cinematographic Development Fund managed by the INCAA. This dependence became apparent as numerous projects were put on hold or canceled following funding cuts enacted by the Milei administration. Still, about 90% of national film production typically originated from medium-scale or project based production companies that rely heavily on public subsidies to carry out their projects (Diéguez Coba, 2022). The inherent risks associated with filmmaking, like high costs, extensive human resources, and prolonged production timelines, are typically borne by production companies operating with minimal financial margins. When projects encounter financial difficulties, the impact can be particularly severe, given the industry's limited access to diverse funding sources.

Interviewees also highlighted the **need to regulate streaming services** in Argentina, similarly to what has already been done in the EU. While acknowledging that the arrival of US-based global streamers has expanded private investment opportunities and broadened the audience for local productions, it has also introduced a new set of challenges, particularly when it comes to **IP rights and creative control of the works**. The **cost of hiring professionals** in the local market has risen exponentially, as streamers are able to offer higher rates, thereby pricing out independent producers.

The federal inequality in our country becomes severely exacerbated when public funding disappears. As for the production companies working with platforms, there are very few of us, and we are all based in Buenos Aires. The impact of this type of production is distorting for the industry because the financial power of these productions is significant. When other productions without such funding have to compete with them, they encounter a production environment that has become accustomed to a different wage scale. The same thing is happening in Brazil and Mexico: once cases of high-budget

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

production are established, it becomes very difficult to work with top-tier technicians and to compete with the salaries that original platform productions are able to offer.

AR Int13, DIR/PRO

To further complicate matters, many domestic productions have migrated abroad. Industry stakeholders, particularly executives from US-based global streamers attribute this shift to multiple obstacles such as regulatory challenges, limited tax incentives and foreign exchange restrictions. Since 2019, international productions have increasingly shifted to neighbouring countries such as Uruguay, which launched the state-backed Programa Uruguay Audiovisual (PUA) to strengthen its audiovisual sector. The initiative offers tax incentives and financial benefits to attract international audiovisual productions, positioning Uruguay as a highly competitive alternative to Argentina. Foreign productions are exempt from Uruguay's 22% VAT and can access a cash rebate: 25% for investments between USD 300,000 and USD 3 million (up to USD 750,000), and 20% for higher amounts (up to USD 1 million) (Respighi, 2025; Peñoñori 2023).

Navigating these financial and regulatory landscapes requires a delicate balance between artistic vision and economic feasibility, a challenge that continues to shape the evolution of Argentine cinema. Industry stakeholders emphasised that **current audiovisual policies fail to address the role of US-based global streamers**, lacking any regulatory framework that mandates these companies to reinvest in the national film industry or to meet content quotas for the inclusion of domestic productions, practices that are already in place in various European countries.

Although no formal regulations have been implemented to date, the Argentine government has sought to address the transformations introduced by streamers by developing a state-run service of its own. INCAA, together with the Argentine Satellite Solutions Company (ARSAT) have launched Cine.Ar Play in November 2015, a VOD service developed to focus on local audiovisual productions, providing free access to users. As noted by Albornoz and Krakowiak (2023), this initiative aims to address the circulation barriers encountered by most Argentine films due to the widespread prevalence of American audiovisual content in both theatrical and television outlets, whether free-to-air or subscription-based. There are certainly limitations to the reach of the service and its ability to diffuse local works on a national and international level, but it is undeniable that this is an important initiative and the first one launched by a Latin American country.

The **lack of support programs specifically for distribution and promotion** was also highlighted during the interviews. The vast majority of grants by INCAA are concentrated on film production, leaving distribution and promotion in the hands (and funds) of distributors. The challenges related to distribution and promotion are not unique to Argentina; they are evident across Latin American and EU countries. In response to this issue, the Ibermedia Program has introduced a new support line in 2025 dedicated to distribution and circulation, aiming to enhance the reach and visibility of Ibero-American films.

In the case of European films, support programs for distribution and promotion are available, often contingent on certain national film institutions — e.g. French films benefit from incentives provided by Unifrance, German productions receive support from German Films. However,

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

interviewees expressed concerns regarding the **complexity and bureaucratic nature of these schemes**. In addition, many local distributors noted a consistent decline in the financial support offered by these European public institutions over the last years. It was also mentioned that the payment of these subsidies is often delayed several months after the initial expenditure.

Finally, another concern raised regarding international co-production agreements with European countries was the **lack of clear, accessible information about available agreements and funding opportunities for non-European professionals**. It was suggested that consolidating and centralizing this information would help producers more easily navigate and understand the requirements and opportunities available to them.

Consistent with the insights drawn from the interviews, the survey results [Figure 5] highlight increased funding access, improved distribution networks, and improved exhibition sector as the three primary needs according to Argentine film professionals.

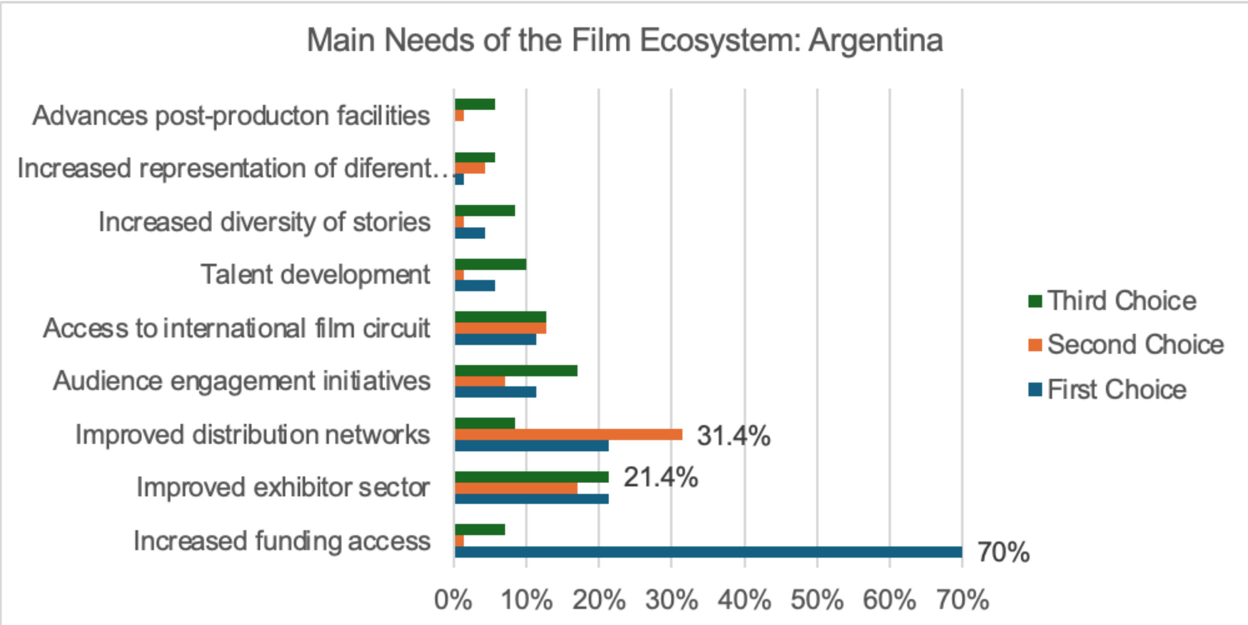


Figure 5 - Main needs of the Film Ecosystem – Argentina

2.2 Brazil

2.2.1 General information

Whether due to the sheer size of the country or its Portuguese-speaking population, Brazil tends to stand apart culturally from its Spanish-speaking neighbours. It is the largest country in Latin America in terms of land area (8.5 million square metres) and the largest economy in the region with a GDP of approximately USD 2.17 trillion 2023 (World Bank, n.d.b). In the audiovisual

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

realm, Brazil, as the world's largest Portuguese-speaking nation with a population of approximately 211 million people [Table 4], has a sufficiently large domestic audience to sustain its industry independently. The audiovisual sector adds an estimated USD 5 billion to the national GDP (MinC, 2025).

Most of its production targets the national audience, enabling significant local content creation. This strength is particularly apparent in television fiction, where Brazilian *telenovelas* achieve notable success both at home and internationally, bolstering the country's cultural influence worldwide. It is no coincidence that TV Globo, Brazil's largest television network owned by Grupo Globo, is the largest media conglomerate in Latin America and one of the biggest exporters of *telenovelas* in the world.

The Brazilian cinema industry has also experienced several periods of notable artistic and commercial achievement. From the Cinema Novo movement of the 1960s, to more recent successes such as the Oscar-nominated *Central do Brasil* (1998), *Cidade de Deus* (2002), and *Ainda estou aqui / I'm Still Here* (2024), Brazilian cinema has repeatedly its capacity both for artistic recognition and box office success. In addition, as part of the Brazil-France season — to celebrate 200 years of diplomatic relations between the two countries — and in recognition of its vibrant audiovisual industry, Brazil was the Marché du Film's 2025 Country of Honour, which is part of the Cannes Film Festival.

General Data	2024
Population (million)*	211
Geographical area (km2)**	8,510,418
Official language	Portuguese
Gross box office (million €)	436.9
Admissions (million)	125.3
Average admissions per capita	0.6
Average ticket price	3.4
Screens	3,510
Screen per 100 inhabitants	1.7
National feature films	197
National market share***	10.1%

Table 4 - General Data – Brazil

Source: EAO, 2025.
*World Bank. **IBGE. ***ANCINE, 2025.

2.2.2 Exhibition and distribution

Similarly to Argentina, the distribution sector is dominated by US major companies. In 2024, the combined audience share of the four leading companies — Disney, Warner Bros., Sony, and Paramount — amounted to 82.5% of total market share (measured in tickets sold), despite these

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

companies releasing only 22.1% of all films exhibited that year (ANCINE, 2025). Disney led the market with 48.1 million viewers, followed by Warner Bros. (29.4 million), Sony (17.6 million), and Paramount (8.3 million). In addition to the US majors, five Brazilian distribution companies ranked among the top ten list in 2024. Paris Filmes led among them with 7.6 million viewers, followed by Imagem Filmes (3.6 million), Downtown Filmes (1.89 million), H2O Films (1.74 million), and Sato Company (478,000) (ANCINE, 2025).

While the exhibition space is not as concentrated as distribution, multiplex cinemas control 60.5% of all screens in Brazil. Among the international players there are Cinemark (US), Cinépolis (Mexico), and United Cinemas International - UCI (US)[5] which together account for 33.5% of all screens in Brazil. Cinemark alone holds 17.7%, followed by Cinépolis with 11.7% and UCI with 4.1% of all screens. While Brazilian multiplex chains among the top ten list accounted for 27% included Kinoplex (5.7%), Cinesystem (5.2%), Araujo (4.4%), Cineflix (4%), Grupo Cine (2.7%), Moviecom (2.6%), and Centerplex (2.4%) (ANCINE, 2025). The remaining share is divided among smaller exhibitors, many of them family-run businesses, with only a few screens each.

Most cinema theatres are concentrated in the Southeast region of the country, specifically in the state of São Paulo, which alone hosts close to a third out of the 3,510 screens available in the country. Notably, 88% of all cinemas in Brazil are located inside shopping centres (ANCINE, 2025), a pattern that reflects the increasingly centralised and commercialised nature of the country's exhibition network, shaped by the multiplex model. These factors limit attendance: the high concentration of cinemas in a few cities means that over 86 million Brazilians live in towns without a single movie theatre (ANCINE, 2025). Additionally, the predominance of cinemas in shopping malls makes them less accessible to many segments of the population, and the high ticket prices charged by major cinema chains further restrict regular attendance.

In light of this context, contemporary European films have faced significant obstacles to gaining visibility within Brazil's commercial exhibition circuit. In the post-pandemic context, exhibitors have prioritised franchises and blockbusters to attract a perceived guaranteed audience, further constraining the exhibition space for films from other countries, including those from Europe. Nevertheless, European cinema has long held cultural prestige in Brazil. Filmmakers from France, Italy, Germany, and Spain are historically well-regarded by local cinephiles. Similarly to what is observed in Argentina, European films also circulate in a non-commercial circuit, with numerous festivals and cultural events organised by European embassies and cultural institutions. Among the most prominent events are: the Festival Varilux de Cinema Francês, the Semana da Europa, the Festival de Cinema Italiano, and the Mostra de Cinema Alemão: Elas dirigem!

As for traditional broadcasters, there is minimal interest in showcasing European films. According to the last study conducted by ANCINE in 2016 on free-to-air television, 83.2% of the content broadcast was domestically produced. While pay-TV has European channels available such as *TVE Internacional* (Spain), *RAI Italia* (Italy), *Deutsche Welle-DW* (Germany), and *RTP Internacional* (Portugal), its numbers have been declining. According to data from the Agência

[5] Starting in 2005, UCI in Brazil became part of National Amusements Inc. (NAI), a longstanding American cinema chain with 74 years in the market. NAI operates more than 1,500 screens with complexes in the US, the UK, and Latin America.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Nacional de Telecomunicações (ANATEL), the pay-TV sector in Brazil has experienced a significant decline in subscribers over the past decade. In 2014, the number of subscribers reached 19.5 million; by 2025, this figure had decreased to 7.9 million, representing a loss of more than half of its audience (ANATEL, n.d).

Brazil is the leading country in streaming consumption among Latin American countries and the second consumer of streaming services worldwide, with 124 VOD services available (MinC, 2024). Despite the lack of reliable information, Globoplay (Grupo Globo) appears to surpass Netflix regarding the number of users (Statista, 2023), when taking into account both paying subscribers and users of its ad-supported tier. Globoplay leads with 30 million users, Netflix follows with 15.3 million, Disney+ with 8 million, and HBO Max with 3.8 million. When it comes to higher user penetration, according to Just Watch, in the fourth trimester of 2024 Netflix ranked first with 25%, followed by Prime Video (20%), Disney+ (15%), HBO Max (13%), Globoplay (12%), Apple TV+ (7%), and MUBI (3%) (Vargas, 2025). Regarding the country of origin of content available, the vast majority of films offered in March 2024, across 109 OTT services, come from the US (45%), followed by India (12%), the UK (8%), France (7%), and Brazil (6%) (IFT, 2024a).

2.2.3 Trends and challenges

Between September 2023 and July 2024, 16 interviews were conducted with industry stakeholders representing key institutions and initiatives — including Cinema do Brasil, the São Paulo State Audiovisual Industry Association (SIAESP), and Spcine — major film festivals – such as Mostra São Paulo –, media outlets – like *Carta Capital* — and film professionals — filmmakers, producers, distributors and directors.

The interviews revealed various trends and challenges encountered by the local market. Many of the same challenges encountered in the Argentinian case are also present in Brazil, notably the **lack of exhibition space** for independent films (including European works) and the need for **better support for distribution and promotion**. The challenges most frequently cited were: a sector reliant on public funds, the **need to regulate streaming services** and to **update international co-production agreements.** The importance of public education and the necessity to cultivate a larger audience that prioritises and engages with domestic films were also highlighted, as the Brazilian public has greater exposure to television than to cinema.

Concerning the **reliance on public funding**, the Brazilian film industry, as in much of Latin America, remains highly dependent on public funding and political cycles. A reliance that comes with its own set of challenges, as the discontinuity of policy and funding mechanisms, stemming from frequent shifts in government priorities, has led to the dismantling of key support programs and institutions. This is a longstanding issue, as the local film industry has been marked by cycles of growth and decline, largely influenced by changing political administrations and inconsistent public policy (Bahia, 2023; Olavarría et al., 2021). While the distribution and exhibitor sector are still healing from the impact of the COVID-19 pandemic, the production sector has faced significant challenges due to the reduction in public investment, particularly in infrastructure and professional training, contributing to skill shortages and slow industry growth

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

(Morais et al., 2025). To give an example, in 2019, the funding allocated to ANCINE in Brazil was cut by 43%, and its financing activities largely ground to a halt while the MinC was abolished.

[With Jair Bolsonaro's government, 2019-2022] We went through a period of —if not outright destruction— at least a clear attempt to dismantle the cultural market as a whole, and the film industry was no exception. The fiscal incentive mechanisms we had in place, especially at the federal level, which accounted for a significant portion of film financing in Brazil, were virtually wiped out by Bolsonaro's far-right administration. As a result, a major gap emerged during those four years of government. With the change in federal leadership [Lula da Silva, since 2023], a reconstruction plan is now underway, but it is progressing gradually. At present, Brazil is in a phase of slowly rebuilding these mechanisms, restoring trust, and reclaiming space in a sector that was also hit hard by the pandemic. These two major setbacks – the political dismantling and the health crisis – combined to effectively remove audiences from cinemas and severely disrupted the industry. At the same time, as happened globally, we've seen the rise of streaming platforms, which have become major players in the film market, both in production and distribution. Their emergence has disrupted the parameters we previously operated within. In this context, Brazil is currently grappling with three main challenges: the reconstruction of its national production market, the re-engagement of audiences and the consumption market, and the need to regulate video on demand platforms.

BR Int15, DIR/PRO

The current government led by Lula da Silva (2023 -) seems set to change this situation. Recent developments include initiatives like the Paulo Gustavo Law[6] that has provided vital funding to the industry and the reinstatement of quotas for the screening of domestic films. Exhibitors with over 200 screens must allocate 16% of their screenings to local films, while smaller exhibitors with only one screen are required to reserve 7.5% of their screenings. This law also limits a single film, typically a US blockbuster, to 50% of an exhibitor's screenings. If the limit is exceeded, the exhibitor must compensate by increasing domestic film screenings above the quota within the year.

Furthermore, the two cities with the highest concentration of film and audiovisual production companies in Brazil, São Paulo and Rio de Janeiro, have implemented tax rebate programs aimed at attracting productions to their territories. In São Paulo, Spcine has been administering rebate calls since 2021, targeting both national and international productions with significant global outreach. The rebate covers 20% to 30% of eligible expenses incurred within the city and state of São Paulo (Prefeitura de São Paulo, 2025). In Rio de Janeiro, RioFilme, an agency linked to the Secretariat of Government and Public Integrity of the City of Rio, has launched cash rebate initiatives since 2022. Under this scheme, producers can receive a reimbursement of 30% of production expenditures made in the city. If the city of Rio de Janeiro serves as the main location for the project, the rebate increases to 35% (RioFilme, n.d.).

[6] Established in 2022, the Paulo Gustavo Law represents the largest federal investment in Brazil's cultural sector to date. It allocates approximately € 486.8 million (R$ 2.7 billion) specifically to the film and audiovisual industries, with funds distributed to states and municipalities throughout the country under the administration of the MinC (Figueiró, 2025).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Although these are important developments, they don’t seem to be enough to address persistent challenges in the local audiovisual sector. A study by Olsberg SPI (2024) emphasised the need to establish a federal incentive to attract major productions to the country. According to this study, while tax incentives for shootings of foreign feature films managed by Spcine and RioFilme are important, they are too small to attract large-scale productions and are primarily intended to benefit the jurisdiction in which they are implemented, rather than other regions. Regional inequality continues to be a major obstacle to the expansion of Brazil’s audiovisual industry. The Southeast has traditionally been the centre of Brazil’s audiovisual production and received most of public funding. In 2023, it accounted for 66.7% of all production companies and 79.8% of distribution companies that released films between 2009 to 2021. According to ANCINE (2023), the Southeast region also received 52.6% of all FSA funding in 2023. Meanwhile, regions like the North and Northeast face structural challenges, including a lack of adequate infrastructure and of economic incentives.

Brazilian cinema is characterised by cycles of interrupted industrialisation and public policies. Instability deeply affects the country's institutions – more so, in my view, than in Europe. In Europe, for instance, institutional structures seem to have a slightly stronger layer of protection. It's hard to imagine something like France’s CNC (Centre National du Cinéma) being dismantled and recreated repeatedly, as we often see with institutions in Brazil, which are frequently under attack. One of Brazil’s core vulnerabilities is that audiovisual production is not a societal consensus, nor is it widely embraced by the local political elite. The legitimacy of the sector is constantly questioned and debated, often in cyclical fashion, forcing it to be redefined time and again.

BR Int11, DIST/SA

Several interviewees also highlighted the critical need for more effective financing programs and public support, as well as the exploration of additional funding avenues to sustain the growth of the audiovisual industry. Distributors consistently emphasised that most **public funding is concentrated on production**, with the distribution and exhibition sectors largely relying on their own resources. The need to implement programs focused on **audience development** was also emphasised, with interviewees noting that Brazil has a strong tradition in television (BR Int9, FF), which tends to make the public more resistant to formats that deviate from familiar norms. Another frequently cited concern was the high cost of movie tickets, viewed by many as a barrier preventing wider access to cinema and disproportionate to the country’s reality (BR Int9, FF). Several participants stressed the importance of public policies that subsidize ticket prices and invest in audience formation from an early age, ideally within the school system, as a crucial step toward cultivating viewers who are open to alternative narratives beyond Hollywood blockbusters and more attuned to Brazilian cinema. Participants also highlighted that the mandated screen quota for national films, reinstated in 2024, is poorly enforced. They noted that exhibitors frequently do not respect this mechanism, and when they do, domestic films are relegated to unattractive screening times, a practice that undermines attendance and limits its impact.

Indeed, the **distribution and exhibition sectors seem to be the Achilles’ heel** (BR Int1, DIR/PRO) of the Brazilian film industry. Interviewees repeatedly pointed out the size of Brazil’s exhibition infrastructure as a challenge, both because of the country’s large size and the uneven

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

distribution of cinemas, largely concentrated in the southeastern region. Some producers have mentioned that the number of distributors available for independent films (or any non-mainstream production) for that matter is small and that there is “a bottleneck: distributors can’t keep up with the volume of films they already have, and there aren’t that many of them to begin with. So, in this post-pandemic context, it’s truly a significant challenge” (BR Int1, DIR/PRO).

Another major need is state support. I believe this is a responsibility of the State, not just a particular government – one that looks at audience development and cultural outreach through cinema. We need a network of exhibition circuits, and we need to support exhibitors by subsidizing ticket prices and supporting Brazilian distribution. As of today, there hasn’t been a public funding call for distribution since 2018 through the FSA. We’ve had billions of reais invested in production, both from the FSA and the Paulo Gustavo Law as initial support, but very little has gone toward distribution. Distributors take on financial risk; they bet on their films. But we often need more help to be able to take greater risks and show that we have high-quality content.

BR Int 10, DIST/SA

The rapid growth of streaming services in Brazil has prompted discussions among policymakers regarding its regulation, particularly concerning quotas for domestic content. However, such quotas have not been implemented, partly due to uncertainties about replicating models from traditional pay-TV in the streaming context. As noted by García Leiva et al. (2025), in 2011, the Conditional Access Services Law was established in Brazil, outlining a range of responsibilities for pay-TV operators, such as mandatory content quotas, investment duties, and ownership limitations. Although the law doesn’t explicitly cover SVOD services, ANCINE defined VOD as a service that offers a catalogue of audiovisual content for on-demand viewing. This definition has fuelled debates over whether SVOD platforms should be required to support domestic audiovisual production financially.

These discussions began in earnest in 2015 when ANCINE proposed a set of regulatory measures. Early proposals considered requiring that 20% of VOD catalogues consist of Brazilian content, with half of that coming from independent producers, along with mandatory investments in independent national productions either through direct funding or commissioned work (De Marchi and Diamante, 2023; Bizberge, 2020). However, the focus of the debate gradually shifted toward requiring financial contributions from streamers to the Audiovisual Sector Fund (FSA).[7]

Netflix films and produces with a very limited number of production companies. I don’t have the exact figure, but the number I had was seven. Maybe it has reached 15 now in Brazil, but we have around 8,000 production companies in the country. So, they’re working with about 1%. That’s a very low number for a country that we know is their third-largest market. That’s something to be concerned about. In that sense, there should at least be a regulation requiring them to produce locally. Of course, out of those 8,000, many are sole proprietorships. The bureaucratic system is also a problem – many

[7] In April 2024 the Senate approved the initiative 2331/2022 that would require VOD platforms, content-sharing sites, and streaming services from traditional broadcasters to contribute up to 3% of their revenues to the FSA. However, the initiative has yet to advance further in Congress.

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

companies aren't really companies, they're just individuals. But to apply for grants, you need to have a legal entity (CNPJ). That's already a flaw in the system. So if you're trying to filter... There are many issues. I think everything is quite unstructured.

BR Int11, DIST/SA

Despite the absence of local content quotas, streamers continue to invest in local content production. Brazilian producers frequently mentioned streaming services as an alternative to public funding, though numerous interviewees advocated for regulatory measures for these companies. The introduction of quotas for domestic works, similar to the EU model, were also mentioned. Furthermore, smaller local production companies expressed concerns about retaining IP rights when collaborating with streamers, given the significant financial support required from these companies, even when public funding is provided.

In the case of local streaming services, Brazil is planning to launch its own public service, Tela Brasil, in the second semester of 2025, with a focus on domestic productions managed by the MinC (2025). Those services owned by local broadcasters, such as Globoplay, prioritize their own content. Content aggregators, such as Sofa Digital, that resell niche content to smaller SVOD services, are among the few willing to buy European films from local distributors in Latin America. It is also worth noting that during the COVID-19 pandemic, some local independent distributors and exhibitors in Brazil launched their own SVOD services to promote their catalogues. Most of these services didn't survive, but their attempts highlight the limited visibility of non-mainstream films in general and European productions in particular.

Another issue mentioned during the interviews was the necessity to **revise existing co-production agreements.** While the Government seems intent on strengthening international co-productions as a strategy to increase Brazil's presence in the international film market, Brazil is still playing catch-up in terms of the quantity and diversity of its co-productions. Historically, Argentina and Mexico have had stronger ties and more formalised frameworks for international co-productions, particularly in Europe and within Ibero-America. Many of Brazil's existing international co-production agreements are outdated and fail to meet the current needs of the industry and its professionals, thereby hindering effective collaboration. This issue has been highlighted by industry stakeholders, who emphasize the necessity for modernised international co-production agreements that address contemporary challenges.

Under Brazilian law, if no formal international co-production agreement exists between Brazil and another country, the ANCINE may still grant a film Brazilian status, making it eligible for national funding, provided that the Brazilian co-producer holds at least 40% of the film's rights. Additionally, at least two-thirds of the artistic and technical crew should be Brazilian nationals or individuals who have resided in Brazil for a minimum of three years. If the foreign producer holds the majority stake, the film can only attain Brazilian status if the international partner permits the Brazilian production company to commercially exploit the film (Figueiró, 2025). When a co-production is made under an official agreement, the rules are more flexible: the Brazilian producer can hold between 20% and 80% of the property rights, crew hiring requirements vary by agreement, and the Brazilian share of the budget doesn't necessarily have to be spent in Brazil (Figueiró, 2025).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

These requirements pose challenges for local producers seeking international co-productions and underscore the need for **more bilateral agreements** as well as the update of existing ones. Currently, Brazil maintains such agreements with only six European countries: Spain, Portugal, France, Germany, Italy, and the UK. Given the crucial role international co-productions play in promoting the circulation of feature films, expanding the number of agreements is essential to **foster greater collaboration and access to international markets**. After all, bilateral co-production agreements simplify the process of securing financial resources and the bureaucratic procedures involved in a feature film production.

Closely aligning with the insights from the interviews, the survey results [Figure 6] identify increased funding access as the main priority for Brazilian professionals, followed by an improved exhibition sector and audience engagement initiatives when considering mentions across all three choices.

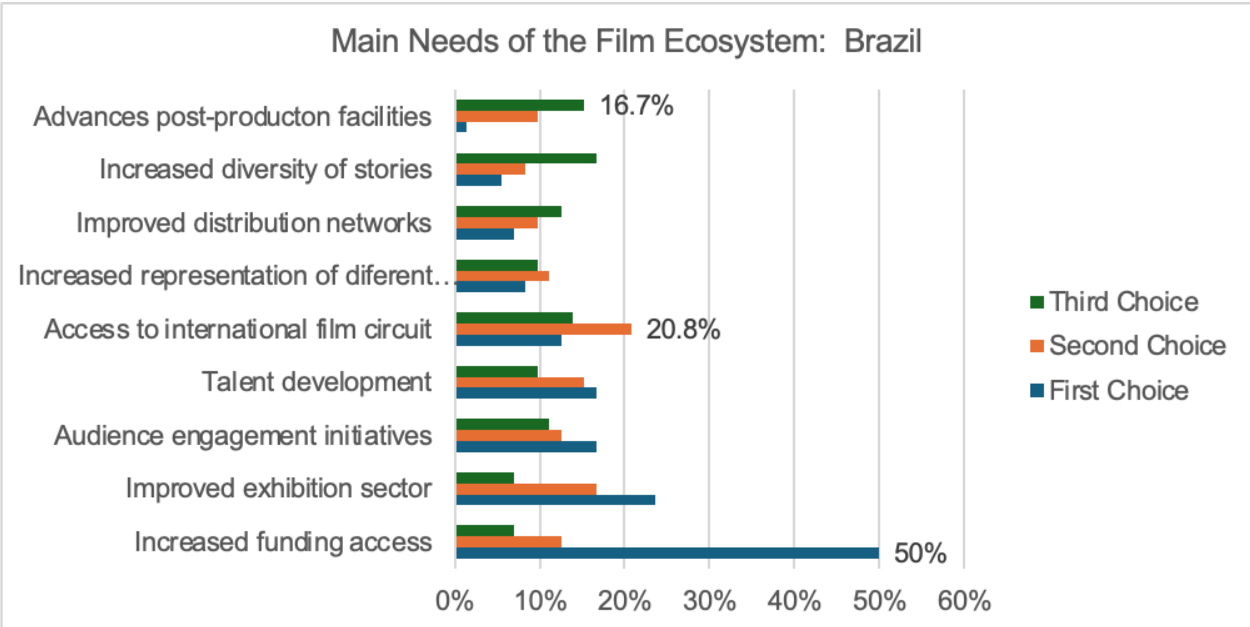


Figure 6 - Main needs of the Film Ecosystem – Brazil

2.3 Mexico

2.3.1 General information

Mexico is the biggest cinema market in Latin America, taking fourth place worldwide when it comes to admissions, behind China, India, and the US-Canada; and ahead of Brazil, despite having a smaller population. Mexico also ranks among the world's leading film markets in terms

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

of box office takings – occupying ninth place in the top ten list in 2024 with € 747 million – and the number of screens in its territory – in 2024 it ranked fourth in the top ten with 7,383 screens. With a geographic area of 1,964,375 square kilometres (INEGI, n.d.) and a population of 129.7 million people (World Bank, n.d.c), the country has a GDP of USD 1.79 billion and an economically active population of 60.9 million people in 2024 (World Bank, n.d.c). The audiovisual sector directly contributed approximately € 6.57 billion (MX$ 138.7 billion) to the Mexican economy in 2022 (Oxford Economics, 2024) [Table 5].

General Data	2024
Population (million)*	129.7
Geographical area (km2)**	1,964,375
Official language	Spanish
Gross box office (million EUR)	746.5
Admissions (million)	208.2
Average admissions per capita	1.6
Average ticket price	3.6
Screens	7,383
Screens per 100 inhabitants	5.6
National feature films	112
National films share***	4.5%

Table 5 - General Data – Mexico

Source: EAO, 2025.
*World Bank (data from 2023). **INEGI. ***IMCINE, 2024.

The Mexican audiovisual market is one of the most dynamic and rapidly growing industries in the region. As one of the largest content producers in Latin America, Mexico has a rich tradition in audiovisual production, particularly in television. It is internationally recognised for its *telenovelas* and the dominance of Grupo Televisa (now TelevisaUnivision), owner of the country's largest broadcaster. In the realm of film production, Mexico is regarded as a key production hub, boasting a robust infrastructure and a highly skilled workforce. The proximity to Hollywood combined with the United States-Mexico-Canada Agreement (USMCA)[8], has had a profound impact on the country's film industry. While this proximity has, on the one hand, facilitated greater collaboration between American and Mexican filmmakers and made Mexico a prime location for Hollywood productions, it has also made it even harder for local productions (or any other, for that matter) to compete for screen time and viewers. In 2024, a total of 467 films were released in theatres. Out of those, 141 were American, 119 were European and 112 were Mexican – representing a 18% increase compared to the previous year (IMCINE, 2024). Cinema attendance in Mexico decreased by 5% in 2024, with 208.2 million tickets sold (EAO, 2025). Out of those, European titles accounted for 4.9% of the market (10,144,033 tickets sold), domestic

[8] In 2020 this trade agreement replaced the North American Free Trade Agreement (NAFTA).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

films took 4.5% (9,294,008 tickets), and US titles represented 87.4% (181,947,936 tickets) (IMCINE, 2024) [Table 6].

Country/Region	Tickets Sold	%	Films Released
Mexico	**9,294,008**	**4.46**	**112**
Mexico	8,221,404		92
International co-productions	1,072,604		20
US	**181,947,936**	**87.39**	**141**
Europe	**10,144,033**	**4.87**	**119**
Spain	1,222,229		24
France	1,515,887		37
UK	6,697,257		22
Germany	102,081		8
Other Europe	606,579		28
Latin America	**597,770**	**0.29**	**37**
Other Countries	**6,215,220**	**2.99**	**58**
TOTAL	**208,198,967**	**100 %**	**467**

Table 6 - Ticket sales and films released in commercial exhibition complexes by country/ region of origin – Mexico, 2024

Source: IMCINE (2024: page 175).

2.3.2 Exhibition and distribution

As has also been observed in Argentina and Brazil, a significant degree of **concentration** can be observed in the **Mexican distribution sector**, with five majors accounting for 81.8% of the box office market share in 2023 with 132 films - Walt Disney Studios (28.6%), UPI (16.2%), Warner Bros. (14.7%), Sony Pictures (13.9%), and Paramount Pictures (7.8%) (CANACINE, 2024). Other distributors include Diamond Films (4.6% of the box office revenue), Cinepolis Distribution (2.8%), Videocine (2.1%), and Corazon (1.3%).

The **exhibition park in Mexico is also highly concentrated**, with two Mexican companies accounting for nearly 92% of the total screens: Cinemex, with 2,709 screens, and Cinépolis, wich 4,146 screens (CANACINE, 2024). The latter is the biggest exhibitor in the country and Latin America, and the third largest internationally.

Established media outlets in Mexico offer little visibility to European films, given that national productions comprise the bulk of content shown. The free-to-air TV landscape in Mexico has traditionally been dominated by two major private companies: Televisa and TV Azteca. Televisa

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

is part of the transnational conglomerate TelevisaUnivision Inc., established following Televisa Group's acquisition of a majority share in Univision Communications (2022). Prior to the merger, Univision led the distribution of Spanish-language radio and television content in the US and Puerto Rico. The integration of both companies gave rise to the largest Spanish-language media and content corporation in the world.

TelevisaUnivision controls several major broadcast channels (*Las Estrellas*, *Canal 5*, *FOROtv*, *Univision*, *UniMas*) and has strategically expanded into the streaming landscape through ViX. This service was a merger of Televisa's Blim TV, Univision Now, and PrendeTV into a single app offering a free ad-supported (AVOD) tier and a paid premium tier, ViX Premium (formerly Vix+). According to Ampere Analysis (2025), ViX has increased its subscriber base by 70% over the last three years. TelevisaUnivision announced that ViX had reached 7 million paying subscribers by the end of 2024. The service is projected to experience a further 18% growth in 2025, reaching approximately 10.5 million paying subscribers. Significantly, ViX has also become the third global streaming service to attain profitability.

TV Azteca, on the other hand, is part of Grupo Salinas, a diversified conglomerate with significant interests in commercial and financial sectors (including Elektra, Banco Azteca, and Seguros Azteca), telecommunications (Total Play), and television. The company manages four national free-to-air TV channels in Mexico and maintains affiliated networks in the US (Azteca América) and Central America (TV Azteca, n.d.). In 2023, TV Azteca entered into two significant partnerships: one with Paramount's AVOD service Pluto TV, to oversee its expansion across Latin America, and another with the Spanish Grupo Prisa (Albornoz et al., 2020), to incorporate sports content from AS.COM and the Spanish news outlet *El País*, enhancing its sports programming offerings (TV Azteca Internacional, 2024; Grupo Salinas, 2025).

There are also public broadcasters which have a more cultural and educational focus. Some of the channels with a wider audience include: *TV UNAM*, managed by the National Autonomous University of Mexico (UNAM); *Canal 22*, managed by the Mexican Secretariat of Culture; *Canal Once*, operated by the National Polytechnic Institute; and *Capital 21*, run by Mexico City's government. All of these outlets have limited budgets and operate under a mixed funding model that includes advertising revenue[9] in addition to public funding.

One of the only public channels that focus more on arthouse and *cinéma d'auteur* is *Canal 22*. Meanwhile, *Channel 22.2*, branded as *MX Nuestro Cine*, emerged from a collaboration between *Canal 22* and the Mexican Film Institute (IMCINE). The channel has a weekly viewership estimated at 2.5 million and focuses on domestic and Iberoamerican films. In addition to its broadcasting activities, *Canal 22* has actively partnered with a wide range of national and international film festivals, including FICUNAM, the Film Showcase for the Defense of Land and Water, Cine Hecho en Jalisco, the MIX Festival, Shorts México, DocsMX, Macabro, the Morelia International Film Festival, Ambulante, the Tour de Cine Francés, and the Morelia Music Festival (Secretaría de Cultura del Gobierno de Mexico, 2023).

In the case of pay-TV, although subscription rates in Mexico have been declining since 2018, the service still reaches 46% of the population as of 2024 (Piedras, 2025). The availability of

[9] Public broadcasters in Mexico operate under regulatory constraints that restrict conventional commercial advertising and protect editorial independence.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

European channels is limited, with a few European signals such as *France 24* (France), *TVE Internacional* (Spain), *Televisión de Galicia* (Spain), and *CincoMAS* (Spain) as part of the offering. However, their viewership remains niche.

Concerning streaming services, US-based global streamers control the market. An analysis of the country of origin of content offered across 108 OTT platforms in Mexico revealed that 47% originated from the US, followed by works from India (10%), Mexico (9%), the UK (8%), and Canada (6%) (IFT, 2024a).

According to data from the Instituto Federal de Telecomunicaciones (IFT), by 2024 Mexico's SVOD market is expected to exceed USD 3.29 billion in value, nearly five times its 2018 value of USD 686 million. In terms of market share in 2024, Netflix continues to be the leading platform with 51% of total revenue and 31.7% of subscribers. Meanwhile, Disney+ held 8.5% of revenue (the share is bigger if we consider subscribers of the Combo+, that is Disney+ and Star+, which held 4% of revenue) and 6.7% of users, while HBO Max ended up with 8.8% and 6% respectively. Prime Video ended up with 15.2% of total users but no data was available regarding the revenue. Paramount+ accounted for 9.7% of subscribers and 6% of total revenue (IFT, 2024b).

A notable development in 2024 was the transformation of the SVOD service FilminLatino into Nuestro Cine MX, now dedicated exclusively to local productions, and managed by the IMCINE.

Beyond figures, European cinema is well-regarded among Mexican cinephiles, with several festivals, showcases and events exhibiting European films. Some of the more prominent ones include the Festival de Cine Europeo and the Tour de Cine Francés, the latter in partnership with Cinépolis, the main exhibitor in Mexico.

2.3.3 Trends and challenges

Nevertheless, it is evident that many of the challenges observed in Argentina and Brazil are also prevalent in Mexico. A total of 14 semi-structured interviews were conducted in October 2024 in Mexico, with representatives in a range of key organisations within the Mexican film industry. Key organisations consulted included IMCINE, COMEFILM (Mexican Film Commission), CANACINE (National Chamber of the Cinematographic Industry in Mexico), and Cineteca National. The interviewees also included organisers of major events, such as the Tour de Cine Francés, the Semana de Cine Alemán, or the International Horror Film Festival of Mexico City; and broadcasters such as *Canal 22*. The representatives of these organisations, alongside film professionals from the production, distribution, and exhibition sectors, provided valuable insights into the current state and challenges of the Mexican audiovisual industry.

According to the interviewees, several recurrent challenges shape the current landscape of the Mexican film industry. While acknowledging the widespread **dominance of Hollywood** at the box office (a common issue across Latin America) most interviewees pointed to **deeper structural issues in the areas of distribution, promotion, and exhibition**. Many expressed frustration over the limited number of screens available for Mexican or non-blockbuster films, with some participants highlighting the **urgent need for an independent exhibition circuit**.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Others professionals described a disconnection between public funding for production and the lack of support for getting those films seen. In addition to these, international co-production was another topic mentioned, with comments to not only **modernize existing agreements** but also to ensure they are backed by financial resources and to ensure that information is made more accessible to professionals in the field. A few interviewees also spoke of the importance of training programs, both to equip professionals with tools for internationalization and to meet the industry's growing need for skilled crews and support services. Finally, the need for **public formation**, helping audiences recognize and value Mexican cinema, was mentioned as an often-overlooked yet **vital component** of a healthier film ecosystem.

Regarding the lack of screens available for Mexican films, it might be surprising to learn that independent local distributors struggle to secure space for their productions in the domestic market, given that Mexico holds the fourth position worldwide in both audience size and the number of cinema screens (EAO, 2025). A closer look reveals the duopoly of Cinepolis and Cinemex effectively shaping what is shown across the country. Additionally, the USMCA facilitates Hollywood's access to the domestic market. With commercial exhibition chains primarily structuring their screening schedules around blockbuster releases, leaving independent distributors to program their films within the remaining available slots. In light of this scenario, local independent distributors have limited opportunities when showcasing non-major productions.

The main problem, which exists in all markets, is the battle for screen space. [...] We depend on the gaps left by North American films to get programmed. We are subject to that. As for strengths, we could point to the existence of the Cineteca Nacional, which is a stronghold for us. Without the Cineteca Nacional, there would be countless films we would never have known.

MX Int3, DIST/SA

The Cineteca Nacional founded in 1974 has become a key reference in the preservation, exhibition, and dissemination of cinema in Mexico. The institution, dependent on the Mexican Secretariat of Culture, operates three venues in Mexico City, primarily dedicated to the exhibition of independent cinema. It is highly regarded amongst Mexican distributors and has a loyal following among the city's cinephiles, as reflected in its consistently high ticket sales. Unlike traditional commercial cinema chains, like Cinepolis and Cinemex, the Cineteca Nacional offers prolonged runs of eight weeks for every film, providing an extended opportunity for these films to reach a wider audience. In 2024, Cineteca Nacional's three venues registered 1,245,145 admissions, 20% more than the previous year, including 226,481 admissions for domestic films (IMCINE, 2024).

Despite Cineteca Nacional's efforts, attendance figures for Mexican films remain low; among the top five Mexican films screened in the three venues operated by Cineteca Nacional, none surpassed 14,000 tickets sold, whereas the top five foreign films drew between 47,033 and 97,456 tickets. Out of the top five foreign films, four were co-productions involving European countries or featured European participation: *Robot Dreams* (2023, Spain/France), *Perfect Days* (2023, Japan/Germany), *Poor Things* (2023, Ireland/US/UK) and *The Substance* (2024, France/UK/US).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Any independent effort is overshadowed by Hollywood. Anything. Mexican cinema, European cinema that reaches Mexico, or any foreign cinema that isn't American or from Hollywood… The duopoly of Cinépolis and Cinemex also controls release dates, and that affects us as independent cinema. Why? Because even if it's an independent distributor, they will not want to release a good European film in the summer because they won't get screens. So, there's a disconnect between distribution and exhibition.

MX Int12, EXH

While Cineteca Nacional is a vital venue for independent and domestic cinema, its presence is limited to just three locations in Mexico City, which is insufficient to accommodate the exhibition needs of independent distributors. Indeed, **local distributors carry a high risk** when acquiring rights not only to domestic productions but any independent film. Given that these films usually don't draw large crowds or run for extended periods in theatres, distributors frequently struggle to make a profit. In addition**,** local distributors **lack sufficient capital for extensive promotional activities**, limiting the visibility of the films distributed.

Some independent distributors across the region are attempting to partially overcome these limitations by establishing partnerships to acquire foreign films with rights across Latin America, subsequently dividing distribution responsibilities based on their respective territories. This collaborative approach enables them not only to buy films at a better overall price compared to individual rights purchased for each distributor's respective region and enhance their leverage when negotiating with sales agents, but also to use digital aggregators to commercialise films to niche streaming services, expanding the reach of these productions in the region and lowering the risk.

Look, in Mexico, broadcast TV offers very few opportunities. Public television is limited to **Canal 11** ***and*** **Canal 22*****, they might buy five or ten films one year and then not purchase anything for the next three. And that's it, just those two. Private broadcast networks don't buy this kind of content. As for VOD, transactional services do work, but they haven't really become a viable alternative. Since the decline of home video, we've had a steady income stream, but it's smaller. And it's extremely difficult to sell this type of film to the major streaming platforms like Netflix, Prime Video, or ViX - they're simply not interested in this kind of content.***

MX Int5, DIST/SA

Other exhibition outlets show little interest in screening films handled by local independent distributors, further restricting their potential to generate profits or recover investments. Participants frequently highlighted the **lack of promotion** as a significant issue, noting that national films receive **insufficient marketing support** and that many are not distributed at all.

The circulation and visibility of Mexican cinema frequently depend on state-funded support mechanisms, since limited access to commercial theaters often makes the distribution of domestic films financially univiable. EFICINE 189, represents a key mechanism in this context, functioning as a fiscal incentive under the Mexican Income Tax Law that allows private companies to invest part of their tax obligations in film projects in exchange for a reduction in

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

income tax. It operates through three main branches: Production, financing the making of films; Distribution, supporting their release and circulation; and Exhibition, promoting access to national cinema in theaters.

In 2025, EFICINE Distribution saw an increase to its annual budget, rising from close to € 2.35 million (MX$ 50 million) to approximately € 3.05 million (MX$ 65 million) (Secretaría de Cultura del Gobierno de México, 2025). Curiously, prior to 2023, the amount of funds executed by EFICINE Distribution was well below the fixed annual allocation due to limited demand. As a result of a backlog of feature films produced in previous years that had not yet been exhibited, EFICINE Distribution received an unprecedented number of applications in 2023, fully utilising its allocated budget for the first time that year (Secretaría de Hacienda y Crédito Público, n.d.).

FOCINE, on the other hand, fosters support to the promotion of Mexican cinema through two types of calls: one for film festivals or audience-development events, including national films in their programming, and another for equipping theaters that screen domestic films. The fund is also available to cinemas, festivals, traveling showcases, film clubs, and other outlets that screen Mexican films.

In addition, Mexico City, through PROCINE CDMX, has a support grant of up to € 12.000 (MX$ 250.000) for festivals and events showcasing domestic productions.

In 2024, FOCINE and EFICINE 189 issued four initiatives aimed at supporting the distribution and exhibition of Mexican films. These efforts resulted in 101 grants being awarded: 48 for exhibition programs, 10 for both permanent and travelling cinemas, and 43 for the distribution of national productions (Secretaría de Cultura del Gobierno de México, 2024). While PROCINE CDMX supported 16 events.

Nevertheless, interviewees indicated that public funding for distribution and promotion is often overlooked noting that existing resources fall short of covering the substantial expenses they entail. According to many interviewees, although Mexico produces a considerable number of films, **the central issue remains the insufficient mechanisms for their effective promotion and distribution**. In addition, the impact and reach of these initiatives are frequently limited as some of the grants focus on small-scale initiatives, constraining large-scale distribution and international outreach. In the case of European films, there are distribution support programs for European films available in Mexico, which are considered important and beneficial. However, they are frequently viewed as bureaucratic and challenging to navigate.

The difficulties, well, I think that the industry, and I would put that in quotes, is mainly dependent on government support. That's one side, for production. A lot is produced, yes, that's true. A lot is produced, right? Because, well, you can even see in the film yearbooks and all that, there are many movies, but they don't get released or seen. That's where the other part comes in, right? Many times these are festival films, I mean, they go there, even win awards, and are a great source of pride, but no one else sees them. In terms of exhibition, I believe what is needed is a lot of promotion.

MX Int13, FF

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

With regard to incentives aimed at film production, both EFICINE Production and FOCINE provide financial support for the development and production of films. EFICINE Production is one of the main mechanisms available to Mexican filmmakers, and amounts **allocated through this mechanism had not been revised over the past decade**. In 2025 the mechanism registered an adjustment, with its annual budget rising from € 30.47 million (MX$ 650 million) to € 35.14 million (MX$ 750 million) (Secretaría de Cultura del Gobierno de México, 2025). The situation is further complicated by new administrations frequently dismantling existing programs rather than maintaining or improving them, resulting in **fluctuations in both the availability and funding of support initiatives**.

We will never succeed in bringing in other types of films if we don't guarantee their exhibition. The EFICINE Production and the EFICINE Distribution programs are wonderful government initiatives, but they don't guarantee the films will actually be shown. This makes the whole thing somewhat futile, because you produce more than you can exhibit. What happens? Many films end up "in the can," shown just once or never really getting a theatrical run. It's pointless to produce 125 or 150 films in Mexico if 70 of them just sit on the shelf.

MX Int3, DIST/SA

In addition, there are the **Program for Scriptwriting and Project Development Support** (Programa de Estímulo a la Escritura de Guion y Desarrollo de Proyectos), the **ECAMC** (Estímulo para la creación audiovisual en México y Centroamérica para comunidades indígenas y afrodescendientes), the **CAPP** (Centro de Apoyo a la Postproducción) and some other types of public support for the industry.

The Program for Scriptwriting and Project Development Support is a tool aimed at supporting the development of fiction and animation scripts, as well as documentary storylines. Each year, IMCINE offers financial support based on the stage of each project. Projects in the writing phase receive funding to complete their scripts, while those in the development stage are supported in building a production package they can present to potential collaborators, investors, or apply to national and international production grants. The scriptwriting support grants range from approximately € 4,200 to € 5,150 (MX$ 90,000 to MX$ 110,000), depending on the type of assistance provided, including direct grants, rewriting, and storyline consulting.

The ECAMC is a program designed to promote greater inclusion of Indigenous and Afro-descendant creators in cinematic production, serving as a funding and training platform. The Ministry of Culture, through the IMCINE, announced the results of the 2025 Call for Proposals. In this seventh edition 16 projects were selected: 12 from Mexico and 4 from Central America. The projects will receive support throughout the year in the form of workshops, advice and a cash prize. Eight are feature films and eight are short films, with seven projects in production and nine in post-production of the film-making process (IMCINE, n.d.a).

Finally, the CAPP is an initiative by IMCINE designed to strengthen the post-production phase of films by Indigenous and Afro-descendant filmmakers. Through annual residencies for projects supported by ECAMC, it fosters community-based cinema and cultural diversity (IMCINE, n.d.b).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Although public programs and incentives are in place, several interviewees emphasised that while such funding is vital for film production, there is a need for more diversified support mechanisms, particularly those targeting independent films or mid-career directors who have yet to achieve broad recognition. Others professionals mentioned the need to have resources specifically allocated for international co-productions. Interviewees also identified a need for more information available on international co-production frameworks.

Well, the needs, I believe, are financing for independent films, meaning they don't have to depend on platforms or on a fund that is increasingly restricting itself only to already established directors. It seems to me there is a huge gap for mid-career directors who aren't necessarily established yet, but there are very few funds available. I also think there's a need for much more information about international co-production mechanisms.

MX Int14, DIR/PRO

Some participants emphasised the importance of educating the Mexican public to value and engage with non-Hollywood films. Although cinema-going is accessible and Mexico maintains the fourth-largest audience globally, Mexican audiences tend to favor Hollywood productions in theatres. National content, by contrast, achieves greater engagement through television, reflecting the country's deep-rooted tradition of *telenovelas*, a pattern similarly observed in Brazil. The absence of a mandated screen quota for domestic films in Mexico was also identified as a factor exacerbating this issue.

And going back to Mexican cinema, the Mexican film industry does not have a screen quota. That is, if a Hollywood movie arrives and can occupy all the screens, there's no law that prohibits an American film from having, say, 50 out of 60 screens.

MX Int7, FF

Although mentioned less frequently, a few interviewees referred to the need for training, albeit in different areas. Mexico's film industry benefits from a skilled workforce, but insufficient to meet all needs. The country has highly capable technicians, directors, production designers, and cinematographers, which has helped it become a major hub for foreign productions. However, significant talent gaps persist in critical areas such as screenwriting, as well as in support services linked to on-set operations – catering, logistics, and more. The country currently participates in the training category of the Ibermedia Program focused on strengthening the professional skills of key players in the audiovisual sector, namely students, exhibition professionals, and screenwriters. In terms of professionalizing screenwriters in the region, the Ibermedia Program has supported Cine Qua Non Lab, a screenwriting revision workshop that serves as a dedicated space for development and mentorship.

The needs are very clear in light of the boom and growth of the film industry in Mexico. There is a recognised urgent need to have a trained and professional crew that can participate in film productions. This high demand has caused experienced individuals to be continuously working on one production, and when another arises, that same person is already committed.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

MX Int9, FUNDER/POL

Training programs tailored for film industry professionals were also highlighted as essential for facilitating internationalisation. These programs would help participants assess their strengths and weaknesses while providing valuable opportunities for networking and knowledge exchange. By equipping professionals with the necessary skills and insights, such initiatives could enhance their ability to navigate international markets and expand their reach beyond national borders.

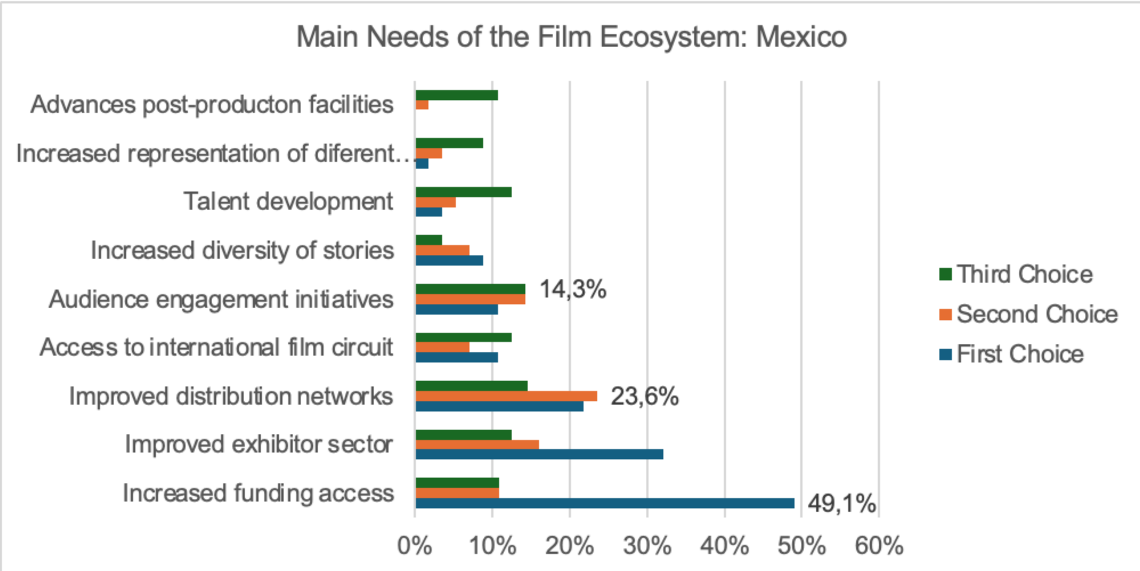


Figure 7 - Main needs of the Film Ecosystem - Mexico

The interview findings closely align with the results from the quantitative data [Figure 7]. Increased funding access ranked highest, followed by improved exhibition sector and improved distribution networks. Results indicate that funding is perceived as the most pressing need within the local film sector and confirms that mechanisms ensuring access to screens, fair programming slots, and audience development are crucial to ensure domestic films reach the audience.

2.4 South Africa

2.4.1 General information

South Africa has the oldest and biggest film industry in Africa, with its origins traceable to the late 20th century. According to a 2020 report, the South African film industry had a R 5.5. billion yearly contribution to the national GDP and grew by 15% from 2013 to 2020 (PwC, 2024). With a

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

developing film infrastructure and increasingly qualified crews, the industry is recognised as a competitive production destination: South African film production crews have collaborated with successful international productions such as *Mad Max: Fury Road, Blood Diamond, and Lord of the War.* However, a 2024 box office analysis revealed that the film industry continues to rely heavily on international markets for revenue generation and film distribution (NFVF, 2024). Moreover, local content production faces significant challenges in achieving commercial success: "feature film production and cinema attendance are declining without significant transformation of access to the means of film production or to distribution and exhibition" (Brown, 2021). Therefore, the South African film industry remains mostly a provider and, more broadly, a niche producer in the global film industry (Bernard and Tuomi, 2008).

South Africa has a population of around 64 million people (European Audiovisual Observatory, 2025) [Table 7]. The country has nine provinces, of which Gauteng, which includes Johannesburg, is the most populous. The South African population is composed of people of different ethnicities. According to official reports, over 80% of the population is Black African, 8.4% belongs to the Coloured group, White people are 7.1%, and 2.7% are Indian/Asian (Stats SA, 2024). With an economy based on key sectors such as "manufacturing, retail, financial services, communications, mining, agriculture and tourism" (South African Embassy to the Kingdom of the Netherlands, n.d.), the country's GDP was estimated to be just over 403 billion U.S. dollars in 2024 (Statista, 2024). However, the country continues to face significant challenges: more than 55% of the population lives in poverty (The World Bank, 2023) and it has one of the highest levels of inequality in the world (IMF, 2020). The majority of South Africans live in urban areas and cities, with Cape Town, Durban, and Johannesburg being the most populous (Statista, 2023).

General Data	Figures
Population (million)	62 (2022)
Total area (km2)	21.22
Official languages	Sepedi, Sesotho, Setswana, siSwati, Tshivenda, Xitsonga, Afrikaans, English, isiNdebele, isiXhosa and isiZulu
GDP per capita (USD)**	6,766.5
Gross box office (million R)*	126,6
Admissions (million)	34,5
Average ticket price (USD)	4,6
Average admissions per capita	0,7
Screens	800+
National market share*	4% (2021)

Table 7 - General Data – South Africa

* NFVF (n.d.b). ** World Bank (2022)

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

This is reflected in the film industry, which is highly concentrated in metropolitan areas (Visser, 2014). In fact, more than 70% of the domestic film and television industry is based in the Gauteng province and, in particular, in Johannesburg. The industry is also concentrated in the Western Cape province, mainly in Cape Town (Visser, 2014). Altogether, the South African film industry offers a wide array of pre-production, production, post-production, and distribution opportunities, and at least 25,000 people are estimated to work in it. Several incentives initiatives and organisations, such as the South African Film and Television Production and Co-production Incentives (SA Film), the Foreign Film and Television Production and Post-Production Incentive (Foreign Film), and the South African Black Filmmakers Incentive, support local and international film production and talent development (The DTIC, n.d.b.). The National Film and Video Foundation (NFVF), created in 1997 through an act of Parliament, Act 73 of 1997 (Botha, 2003), is a governmental foundation acting under the Department of Sport, Arts and Culture (DSAC), which supports the development and promotion of the industry. The foundation provides funding for filmmaking development and commissions research on the film industry, playing a crucial role in the local industry. Even though some describe it as a new film industry giant (Saul 2020), South Africa remains mostly a production hub – circa 94.6% of the industry's value chain.

2.4.2 Exhibition and distribution

According to the European Audiovisual Observatory (2025), in 2024 South Africa had 6.4 million admissions and a Gross Box Office of 31.8 million euros. This makes it the highest market in Africa, followed by Egypt (GBP 31.4 million), Morocco (GBP 11.9 million) and Anglophone West Africa, which includes Nigeria, Ghana, Liberia and Sierra Leone (7.2 million). However, these robust numbers coexist with a fragile market. First, 2024 admissions are "down 16 percent compared to 2023 and far below the 18.5 million admissions recorded in 2019", which can be explained by "broader economic pressures, combined with the growing popularity of global streaming services" (European Audiovisual Observatory, 2025, p. 71). Second, the domestic market share further reinforces the assessment of internal market vulnerability. As has been written elsewhere, "in 2017 the market share for domestic films was 4%, the market share for SA produced films in the first half of 2018 was 3% (NFVF, n.d.c.). Due to the impact of the COVID-19 pandemic, the market share of SA produced films has reduced to 1%" (NFVF, n.d.c.).

More recently, according to 2024 data, it decreased to 0% (European Audiovisual Observatory, 2025). Third, the number of domestic films in production reiterates this analysis. In 2021, out of the 104 locally and internationally produced films (a decrease caused by the COVID-19 pandemic (NFVF, n.d.c.), there were 9 South African films. More recently, in 2024, only 3 national feature films were released. Among them, there have been internationally recognised films such as *My Octopus Teacher* – South Africa's first Netflix Original documentary, which won the best documentary at the 2021 Oscars. European film circulates namely in the Cinema Nouveau chain – a collection of 26 screens across South Africa and one of the world's only chains dedicated to arthouse cinema.

In 2024, all top 10 films (by admissions) in the country were American (Deadpool and Wolverine, Moana 2, Inside Out 2, Bad Boyds: Rise or Die, Despicable Me 4, Kung Fu Panda 4, Dune: Part Two, It Ends with us, Gladiator II, Wicked) – see European Audiovisual Observatory (2025).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

South Africa's dependency on international productions is particularly noticeable in comparison with Anglophone West Africa, Egypt and Morocco, whose national market shares are respectively 46%, 71% and 46%. That is, as the virtually nonexistent market share of domestic productions reveals, locally produced content faces significant challenges competing with dominant US productions. Despite this, and even though "attendance levels [remain] substantially below pre-pandemic figures" (European Audiovisual Auditory 2025, p. 72), South Africans go regularly to one of the country's 617 screens, "159 fewer than in 2019" (European Audiovisual Observatory, 2025, p. 72).

Regarding the main film distribution channels, South Africa offers both free-to-air television services and pay-TV service providers such as DStv (Tengeh and Udoakpan, 2021). Over the past decade, the growth of broadband internet access has made VOD platforms widely available in South Africa. While traditional TV remains important in the country, US VOD platforms have become increasingly popular. Netflix launched in South Africa in 2016 and quickly became the dominant platform, holding a 67.9% audience share by 2019, followed by Amazon Prime with a 9.2% share (Statista, 2022). Of the few platforms that prioritised European content, BritBox, a BBC and ITV platform offering British content, had to close in 2024 due to intense competition from local and international providers. MUBI, on the other hand, remains available and continues to gain users, holding its ground against leading streaming services (Monzon, 2025). In recent years, local streamers such as Showmax, Video Play, SABC+, and eVOD have also obtained popularity in the market (Mzekandaba, 2024). The dependency on American productions is also noteworthy.

South Africa's historical relations with European countries go back four centuries, when the country was dominated first by Dutch settlers and later by British ones. Under British control, South Africa played a role in supporting the expansion of the British Empire across the continent and assisted Western powers during the World Wars (Fioramonti and Kostopoulos, 2015). In the apartheid era, European countries joined the UN-led international campaign against apartheid only in the 1970s. Subsequently, South Africa's relationship with EU Member States began to intensify in the post-apartheid era (Dâmaso, 2025). The year 1994, which corresponds to the advent of democracy in South Africa, marks the start of the EU and South African relationship. South Africa is now one of Europe's strategic partners (Fioramonti and Kostopoulos, 2015), providing a gateway to the rest of the African countries, and the EU is South Africa's "biggest trading partner and leading foreign investor" Delegation of the European Union to the Republic of South Africa, 2025). This international partnership comprises a wide range of areas, such as "economic, trade, and investment relations, energy, environment, research and innovation, good governance" (Directorate-General for International Partnerships, 2025), and culture and cultural heritage preservation (Delegation of the European Union to the Republic of South Africa, n.d.). Both sides recognise the importance of cultural diversity and support efforts to promote understanding between different cultures. This is shown through initiatives such as the European Film Festival in South Africa. Since 2013, the EU Delegation organises every year, together with the EU National Institutes for Culture, the European Film Festival, which screens the best of European cinema in South Africa. In 2024, the eleventh edition of the festival took place from the 10th to the 20th of October and screened 14 European films in South Africa's major cities, Johannesburg and Cape Town.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

2.4.3 Trends and challenges

The interviews highlighted several trends and challenges faced by the local market, particularly structural changes to the sector, including in terms of audience preferences, limited cultural diversity in the domestic market and barriers to independent film, and underfunding and difficulties regarding the incentive and rebate scheme.

This analysis results from data gathered via 19 interviews – some face-to-face and others online over Zoom. Although anonymity was provided, it should be stated that this group of stakeholders combines film professionals (filmmakers, producers working for independent, large and international entities, including the EU Film Festival, directors, actors…) and policymakers working or having worked in a wide range of organisations in the South African film industry (e.g. NFVF, KZN film commission, Wesgro – the tourism, trade and investment promotion agency for Cape Town and the Western Cape).

Recent and ongoing structural changes to the sector, including in terms of audience preferences, were mentioned by several interviewees. Like other film markets, South Africa has seen the gradual decline of box office numbers and, simultaneously, increased support for streaming services – a tendency bolstered by the COVID-19 pandemic. As one interviewee stated, “the whole film industry is in a little bit of a crisis here in that we're not going to cinemas anymore” (SA Int1, DIR/PRO). The challenge of reaching audiences is an issue acknowledged by film professionals and stakeholders alike. However, it is also a driver that supports new collaborations and initiatives.

> ***We know that actually theater audiences outside of Africa and Africa in general are much more strong and prevalent than [ours]. So [...] our intent is [...] to do partnerships with international broadcasters, giving us, you know, wider audiences.***
>
> **SA Int8, DIR/PRO**

The shift from theatrical to streaming distribution (and, more recently, production) is not evaluated in the same way by all interviewees. Some of them spoke positively of the interest shown by Netflix in the South African film industry, which is seen to give “filmmakers [...] your regular work [...], it helps them make the films that they've always wanted to make” (SA Int16, FUNDER/POL) and as supporting the ongoing geopositioning of South African film industry (“Netflix and their investment in Africa [...] is [...] an opportunity to move away from Europe as a dominant partner” (SA Int12, DIR/PRO).

However, other stakeholders are weary of becoming potentially dependent on streamers. That is, while in the short-term international streamers bring investment and opportunities to South Africa – an opportunity that is being used by some to rethink the industry – the sustainability of this paradigm shift remains in question among South Africa film stakeholders.

Another key challenge relates to **limited cultural diversity in the domestic market, which is compounded by multiple barriers to independent films**.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Like several other case studies surveyed in this report, the South African film market is characterised by a stark division between commercial cinema on the one hand and arthouse or independent film on the other hand. This results from the conflation of several factors, including the concentration of distribution channels, limited funding to support independent producers, and the general role of the local industry as a servicer of other international film industries. These issues, in turn, reinforce the difficulty of building audiences, strengthening industrial capacity, and developing and distributing independent South African films. As a professional stated,

I'm a bit of an art house fan, you know, watch exceptional sort of films coming out of Europe and other parts of the world [...]. I think with the landscape in South Africa, and I'm talking purely exhibition now [...] they are really looking [...] at films that they know are gonna give them their return on investment.

SA Int16, FUNDER/POL

To escape this cycle of causality, film professionals and stakeholders highlight the importance of co-production opportunities – namely by establishing a stronger presence in international festivals and markets.

Finally, structural **underfunding and difficulties associated with the incentive and rebate scheme** were also mentioned by several interviewees.

Although there's widespread recognition of structural public underfunding in the South African film industry, as was just mentioned, the interviews revealed significant disagreement regarding recent domestic policies to support it. Funding to support film professionals is available from the National Film and Video Foundation (NFVF) and film commissions as well as broadcasters. Existing rebates for film production and co-production, that is, both their technical mechanisms (such as the need for filmmakers to demonstrate cash flow) and practical implementation (particularly, lack of transparency and regular delays), are particularly controversial. As an interviewee stated:

The industry is up in arms with DTI. They're not paying the incentives. They're not paying the rebates, which means countries have now stopped. They go elsewhere for rebates [...]. If the incentive and the repay doesn't pay, which means for your next project, you don't have the money to invest and put your skin in the game because you have to get the money, pay everything, and then get your bit as a producer so that you then have the cash to put your skin in the game on the next project.

SA Int18, DIR/PRO

Alongside the severely limited private film funding circuit in South Africa, the lack of functioning public support reinforces the weak sustainability of the industry.

Because of the decrease in incentive issues, the uncertainty, the people feeling that the service industry sees that our incentives are unreliable.... It's almost like we're back to square zero there. I mean, the American system, for instance, hasn't got money for

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

funding per se, but what they have is a lot of people in private investment who want to put money into the diaspora.

SA Int2, FUNDER/POL

The results of the survey are aligned with the qualitative data. When asked what the main needs of the South African film ecosystem are [Figure 8], most professionals chose increased funding access as the main need (67.9%), followed by improved distribution networks and access to the international film circuit. Reinforced distribution was also the clearest second choice of most respondents (25%). These findings highlight that funding is perceived as the most critical need for the support of the local film industry.

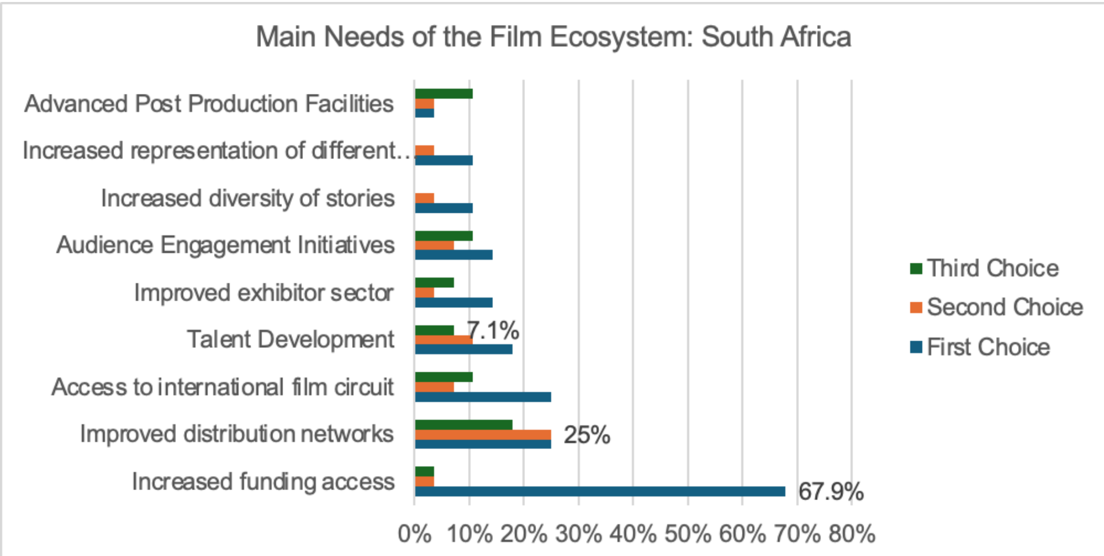


Figure 8 - Main needs of the Film Ecosystem – South Africa

2.5 South Korea

2.5.1 General information

South Korea has emerged as one of the most significant national film markets globally, characterised by a strong domestic industry and consistent box office performance, ranking fourth worldwide in terms of box office revenues (MPAA, 2020). While initially dominated by foreign films, particularly from Hollywood, the South Korean market underwent a substantial transformation in the late 1990s (Ryoo, 2008). This shift was driven by targeted government intervention, including policy reforms that liberalised film distribution and production, alongside a

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

broader industrial strategy aimed at promoting national content (Parc, 2017; Lee, 2022). As a result, South Korean cinema successfully reinforced its position in the domestic market and regained a significant share of national box office revenues (Lee, 2022).

South Korea, with a population of approximately 51.6 million (European Audiovisual Observatory, 2025) and a total area of 100,378 km², is one of the most densely populated and technologically advanced countries in East Asia. In 2023, the country's GDP was estimated at USD 1.71 trillion, supported by an active workforce of approximately 29.7 million individuals (World Bank, 2024). Its film industry is characterised by high market share and admission per capita as illustrated in Table 8.

General Data	2024
Population (m)*	51.6
Geographical area (km2)**	100,378
Official language	Korean
Gross box office (m EUR)	809
Admissions (m)	123
Average admissions per capita	2.4
Average ticket price (USD)	6.6
Screens	3.296
Screen per 100 inhabitants	6.4
National feature films	604
National market share***	58%

Source: European Audiovisual Observatory, 2025.

Table 8 - General Data – South Korea

2.5.2 Exhibition and distribution

Production in South Korea is marked by sustained volume, with a total of 604 feature films released in 2024 (European Audiovisual Observatory, 2025). This level of output is supported by a hybrid financing system in which film production is typically backed by a combination of public subsidies and private investment. Central to this system is the *Motae Fund*, established in 2000 in response to the limited appeal of public subsidies for private investors (Lee, 2022). Motae prioritises support for small and medium-budget films and independent productions, covering approximately 50% to 60% of a film's budget. Venture capital (VC) companies contribute between 1% and 10%, while private companies provide up to 40%. VC firms working with Motae are required to invest at least 60% of each fund into priority areas, though they may balance risk by allocating the remainder to lower-risk or non-cultural sectors (Lee, 2022). In parallel, the

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Korea Fund of Funds (KFoF), established in 2005 under the Special Measures for the Promotion of Venture Businesses Act, provides a stable capital source for venture investment, including in the audiovisual sector. Unlike Motae, KFoF mainly targets projects with high commercial potential and attracts investors seeking stronger market returns (Parc et al., 2022). According to professionals, the industry is broadly divided between commercial production, largely reliant on private capital, and independent production, which draws more significantly on public support. In both segments, international co-productions remain relatively rare.

This emphasis on highly commercial productions is also reflected in the structure and performance of the exhibition sector, where market concentration and vertically integrated players shape access to screens and audience exposure. According to data from the European Audiovisual Observatory (2025), South Korea recorded 3,296 cinema screens in 2024, corresponding to 6.4 screens per 100,000 inhabitants. The average ticket price was EUR 6.6, contributing to a gross box office revenue of EUR 809 million and a total of 123 million admissions, with an average of 2.4 admissions per capita, one of the highest worldwide. The domestic industry maintains a substantial and consistent market share, accounting for 58% in 2024, while US films captured 35% of the market. Together, South Korean and US productions dominate the theatrical landscape, leaving only a marginal presence for other international content, 6% for other foreign productions and just 1% for European films. This concentration is further reflected in the 2024 box office rankings: all of the top 20 films by admissions were either South Korean or US productions, with two US–UK co-productions included, *Wonka* and *Wicked*. The highest-grossing film was *Exhuma*, a South Korean title, with 11,914,784 admissions, followed by *The Roundup: Punishment*, also from South Korea, with 11,502,779 admissions. In third place was *Inside Out 2*, a US production, with 8,799,013 admissions.

The exhibition sector in South Korea is highly concentrated and dominated by large private conglomerates, most notably CJ Group and Lotte Shopping (Yoo and Jeon, 2022). These companies operate under a vertically integrated model, controlling the entire audiovisual value chain, from production and distribution to exhibition. CJ CGV, the exhibition arm of CJ Group, is the largest cinema chain in the country, followed by Lotte Cinema and Megabox. Together, these three operators account for the vast majority of screens and admissions nationwide, shaping both the programming and accessibility of theatrical content. Important to note that these conglomerates extend far beyond the film sector. CJ Group is active in food services, retail, logistics, and biotechnology, while Lotte is one of South Korea's largest industrial conglomerates, with investments spanning from department stores and finance to chemicals and tourism.

The South Korean model, reliant on private investment and the pursuit of commercial success, presents both strengths and structural vulnerabilities. According to Parc et al. (2022), the low level of public subsidies combined with the consistently high quality of South Korean films suggests that strong industry performance is not necessarily dependent on state support. However, the same model also concentrates power within a few vertically integrated conglomerates, limiting diversity and marginalising smaller players (Yoo and Jeon, 2022). These underlying tensions were further exposed during the COVID-19 pandemic, which had a profound impact on the industry. Professionals reported that many films were not released and the investment in production dropped significantly. At the same time, the VOD platforms benefited from the context, experiencing a sharp increase in subscriptions and viewership, and changing the consumer behaviour, as cinema attendance became less frequent and more event-driven for

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

many Koreans (European Audiovisual Observatory, 2025). This context challenges even more the presence of EU film in South Korea.

One of the most important policy instruments in the EU–South Korea audiovisual relationship is the Protocol on Cultural Cooperation, annexed to the 2010 EU–Republic of Korea Free Trade Agreement. The protocol aimed to facilitate collaboration in the audiovisual sector, but it has been criticised by its top-down approach (Vlassis, 2016) and modest implementation (Loisen and De Ville, 2011; Gagné, 2016). A co-production treaty between the EU and South Korea, signed in 2010, formalises these provisions, granting co-produced films dual nationality and facilitating their access to national markets. Despite this, the actual number of co-productions remains low, as noted by the European Commission's Domestic Advisory Group in 2014, there has been a lack of co-productions carried out under the conditions outlined in the protocol, and its potential remains underexploited due to insufficient promotion and limited industry engagement (European Commission, 2014).

Among EU Member States, France has been the most active partner. It signed a bilateral co-production agreement with South Korea in 2006, which grants national status to joint productions in both countries and requires each party to contribute between 20% and 80% of the film's financing. As of 2025, only ten feature films have been produced under this treaty (Unifrance, n.d.). In addition, France and South Korea have deepened cooperation through the creation of the France–Korea Film Academy in 2023, a joint initiative by KOFIC and CNC to foster professional exchange and project development through workshops held during major festivals such as Cannes and Busan. While these bilateral initiatives show targeted progress, they remain exceptions within a broader EU–Korea framework that continues to face significant gaps between policy intentions and practical outcomes (Yoon and Zamorano, 2023).

2.5.3 Trends and challenges

The interviews revealed several interrelated trends and structural challenges affecting the South Korean film industry. Among the most prominent were the deep divide between the commercial and art house sectors, the concentration of the exhibition sector, and the current challenges faced by the film industry after the COVID-19 pandemic combined with political changes that reduced the public investment in the industry.

This analysis is based on qualitative data collected through interviews and fieldwork in South Korea. A total of 17 in-depth interviews were conducted between March and October 2024, online, in person and in a written format, with key stakeholders across the audiovisual sector. Although anonymity was granted, it is important to note that the interviewees represent a cross-section of film professionals with experience in both domestic and international markets. Participants included representatives from public institutions such as the Korean Film Council (KOFIC), researchers, organisers of major film festivals, such as Busan International Film Festival and Busan International Short Film Festival, as well as producers, distributors, sales agents, and broadcasters. Establishing contact with South Korean stakeholders proved challenging, which in itself reflects the limited engagement between EU and South Korean professionals and a broader tendency within the South Korean industry to remain relatively closed to external networks. Additionally, participant observation was carried out at the 2024

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Asian Contents & Film Market (ACFM), held in Busan from 5 to 8 October. Fieldnotes were taken during networking events, panel discussions, and interactions at exhibition stands, with particular attention to EU and national-level promotional efforts. From this data, key trends and challenges emerged.

A recurring theme across the interviews was the clear and **deep division of the South Korean film industry into two largely disconnected sectors: commercial and art house cinema**. This structural divide shapes everything from funding access to distribution and exhibition. As one producer described, “In Korean cinema we say all the time: ‘You are in art house film or you are in commercial film’; it's very, very different” (SK Int3 DIR/PRO). This distinction is not merely conceptual but deeply institutionalised, with minimal interaction or crossover between the two spheres, as another interviewee explained “There's a huge divide between the independent cinema industry and the commercial industry. They won't even know any of the indie filmmakers. It's really difficult for our artistic filmmakers to survive” (SK Int6 DIR/PRO).

Commercial productions benefit from access to private investment, often from major conglomerates, enabling faster production cycles and market-oriented decision-making. Interviewees noted that the presence of a high-profile actor or a commercially viable script can trigger immediate financial backing, resulting in films being made with minimal time for development or pre-production. As one producer explained: “When your script is ready and if one of the famous actors or actresses is in your film, normally the investment comes with that. So suddenly you can make your film. You don’t have much time for pre-production because the money comes suddenly — you must do it right now” (SK Int3 DIR/PRO).

In contrast, the art house and independent sectors face persistent and multi-layered difficulties, particularly in accessing production financing and securing distribution channels. While the commercial strand of the South Korean industry is thriving with strong domestic market share, independent filmmakers operate under increasingly precarious conditions. Several interviewees noted that public subsidies, which traditionally supported smaller and more diverse productions, have been shrinking. At the same time, the dominance of vertically integrated conglomerates, who control production, distribution, and exhibition, constrains the availability of screen space and financial support for alternative content. As one interviewee observed, “Only a few selective major conglomerates are dominating the Korean industry, which is kind of preventing the growth of the local film industry in some sense” (SK Int9 O).

This imbalance has broader implications for the diversity of content produced and made available to audiences. Independent producers not only struggle to finance their projects but also face significant barriers in reaching viewers, given the prioritisation of commercially viable titles within the distribution and exhibition circuits. Moreover, the few independent filmmakers who manage to gain access to the mainstream industry often face pressures to compromise their creative vision in order to meet market demands. As one respondent explained: “It's very difficult for them to move on to the mainstream side because when they advance to the mainstream scene, they will be getting a lot of... not requests, but it's almost like demands from the investors as well as the producers. At the same time telling them that I know you want to say this and talk about this and that, but that's something the audience will not like” (SK Int5 FF). As a result, the range of stories, voices, and aesthetic approaches circulating in the public sphere is narrowing. Although South Korea boasts one of the most successful commercial film industries globally, the

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

ecosystem as a whole remains heavily skewed toward mainstream productions and Hollywood imports.

A second recurring topic that emerged from the interviews relates to the **structure of the exhibition sector, which is dominated by a small number of large conglomerates controlling the majority of cinema chains in South Korea**. These vertically integrated groups oversee not only production and distribution but also the operation of most multiplex screens, giving them considerable influence over what content reaches audiences. This market configuration prioritises commercially driven films while marginalising works that are independent. As one interviewee explained, “The big corporations own cinemas, they invest in film production and they distribute, there is a market integration which can be seen as very problematic, and actually it's problematic in terms of diversity” (SK Int8 O).

The dominance of market-oriented decision-making in programming limits opportunities for less commercial content to be screened, regardless of its artistic or cultural relevance, which also affects the distribution of European films. Several participants highlighted the lack of space for independent and arthouse productions and the pressing need to diversify the types of films shown in theatres, as one exhibitor noted “while South Korean cinema is known for its strong genre films and blockbusters, there is a need for more diversity in the types of films being distributed, including art-house, independent, and documentary films” (SK Int7 EXH). This situation also reinforces the divide discussed previously between commercial and independent filmmaking. With limited access to screens, independent producers face yet another barrier in sustaining their work and reaching broader audiences. The structural dominance of a few corporate players in exhibition not only limits content diversity but also deepens existing inequalities across the South Korea film industry.

Finally, the **third key topic identified is the current challenge that South Korean film industry is facing due the impact of the COVID-19 pandemic and the political change that resulted in decrease of public investment in the sector**. Interviewees shared that the production landscape has become increasingly cautious, with many films postponed or cancelled due to concerns about box office performance. As one producer explained: “There are still around 50 commercial films that didn't distribute in cinema theatres until now because it's from a big company, but they couldn't because it risked too much” (SK Int3 DIR/PRO). Audience numbers have declined, influenced both by pandemic-era habits and the growing dominance of VOD platforms. As Kim (2022) shows, the influence of US-based platforms like Netflix has reshaped industrial practices in South Korea by challenging local broadcasters, retaining talent and IP. While these platforms contribute to the production and international circulation of Korean content, they are also perceived as undermining the long-term competitiveness and autonomy of the South Korean film industry.

As a result, conglomerates have also reduced their investment in new productions, choosing to wait for more stable market conditions before committing to financing, as a producer explained “ “For the last two years, big companies they’ve not been funding almost like nearly any film because of the COVID” (SK Int6 DIR/PRO). This context has fostered a highly risk-averse production logic and exacerbated the challenges for diversifying the production. One interviewee explained: “During the coronavirus period, most of the Korean companies, the production and distribution companies, really hesitated to invest in new projects... That’s why most producers

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

and distributors, rather than making something kind of challenging or various genre films... we are now thinking first how to recoup the money" (SK Int15 DIST/SA). In this context, commercial formulas dominate, leaving little room for diverse and innovative content.

The situation is even more challenging for independent producers, as the current crisis is compounded by a political shift that has resulted in the dismantling of key public support mechanisms. Independent and art house productions, which have long relied on public funding to sustain their activities, are now facing a sharp decline in available resources. Interviewees expressed concern that the disappearance of support schemes "We used to have... every ticket that you buy at the cinemas, a small percentage of it would go back and be funded for independent filmmaking, film festivals... But now that funding is stopped, so it's really difficult" (SK Int5 FF). For some, the impact of these funding cuts is perceived as even more damaging than the pandemic itself "the film industry is almost dying after COVID. People say that it's worse than during the COVID—back then, we had government support, funds, and now there's no fund" (SK Int1 DIR/PRO). These current challenges are intensifying the structural issues already present in the South Korean film industry. The growing dominance of commercial logic, combined with the decline in public funding, is deepening the divide between mainstream and independent cinema. As access to production, distribution, and exhibition becomes more restricted, the space for diverse and innovative content continues to shrink, reshaping the industry.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

The survey results reinforced the analysis drawn from the interviews. As indicated in Figure 9, respondents identified increased funding access as the most pressing need (37.5%), followed by calls for improved distribution networks (21.87%), and talent development (21.87%), which align with the findings on South Korea's highly concentrated exhibition sector and the current challenges in producing films, particularly for independent cinema.

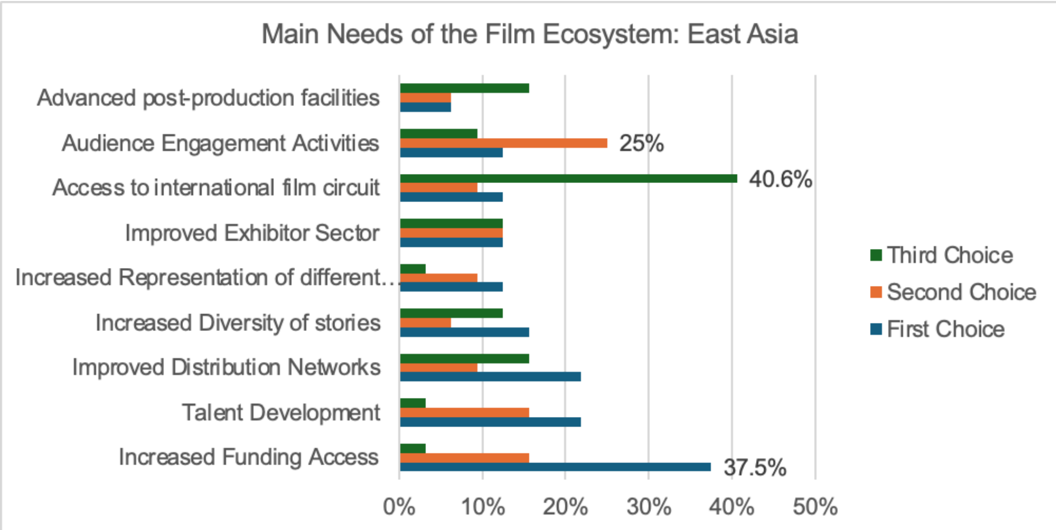


Figure 9 - Main needs of the Film Ecosystem – East Asia

2.6 Türkiye

2.6.1. General information

In the 2000s, the Turkish film industry – once a major force and among the world's leading producers in the 1960s and 1970s – experienced a significant revival. By 2014, it had become the second-largest growth market in Europe and the seventh-largest theatrical market globally (European Audiovisual Observatory, 2014). However, this revival was disrupted by the COVID-19 pandemic, which had a profound impact on film industries worldwide. Since then, Türkiye's cinema sector has struggled to recover and has yet to return to its pre-pandemic levels.

As of 2024, Türkiye's population exceeded 85 million (TÜİK, 2024), and its GDP per capita was around USD 12,500 – indicating a moderate national income compared to other upper-middle-income countries (World Bank, 2024) [Table 9]. However, in recent years, the country has faced severe economic instability, marked by inflation rates exceeding 65% by late 2023. This was largely driven by currency depreciation, rising import costs, and expansionary monetary policies. Consequently, income inequality has deepened, as reflected in the Gini coefficient, which was recorded at 0.427 in 2022 (OECD, 2025), indicating a substantial wealth gap within the population.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

In 2023, Türkiye had 2,618 cinema screens, offering a total of 286,603 seats. By 2024, the number of screens increased by 6%, reaching 2,776 with a seating capacity of 317,274 (TÜİK 2024). However, this figure still falls short of the country's peak in 2018, when the highest recorded number of screens stood at 2,858 in the last decade (TÜİK 2024). More than 20% of all cinema screens in Türkiye are located in Istanbul. The majority of these theatres are operated by major cinema chains. The leading chain in terms of venue numbers is CGV Mars (which also functions as a distributor), operating 84 cinemas. Pink follows with 20 venues, Cinegold ranks third with 16, and Avşar (also a distributor) is fourth with 10 cinemas (Box Office Türkiye, 2023).

General Data	2024
Population (m)*	85.6
Geographical area (km2)*	783,356
Official language	Turkish
Gross box office (m EUR)	139
Admissions (m)	32.5
Average admissions per capita	0.4
Average ticket price (EUR)	4.3
Screens	2.384
Screen per 100 inhabitants	2.8
National feature films	223
National market share	56.9%

Source: European Audiovisual Observatory, 2025.

Table 9 - General Data – Türkiye

Over the past 20 years, a total of 6,320 films have been released in Türkiye, averaging approximately 316 films per year (Box Office Mojo 2024). In the past three years, the share of domestic productions in Türkiye's total film releases has notably increased. In 2022, 177 domestic films were released (TÜİK 2023). This was followed by 147 local films in 2023 (TÜİK 2024), and a significant rise to 295 domestic productions in 2024 (TÜİK 2025).[10]

[10] Reliable data on movie statistics in Türkiye is notably difficult to obtain. For instance, Box Office Türkiye reports the number of domestic productions for the aforementioned years as 132, 93, and 135, respectively. However, these figures differ from those provided by the Turkish Statistical Institute (TÜİK). One possible explanation for this discrepancy is that TÜİK may include films released on digital platforms in its data. Nevertheless, this assumption remains speculative, as TÜİK does not explicitly clarify its data collection methodology in this regard.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

2.6.2. Exhibition and distribution

In Türkiye, film production can broadly be categorised into two sectors: mainstream and arthouse. While mainstream productions dominate box office revenues, Türkiye's arthouse cinema has gained international acclaim. Notably, domestic films have topped the annual box office rankings in 18 of the last 20 years (Box Office Mojo, 2025), underscoring Turkish audiences' strong and consistent preference for local productions. Türkiye consistently ranked first among UNIC (International Union of Cinemas) member countries in domestic market share, with local productions accounting for over 50% of ticket sales for a decade until 2022 (SEYAP, 2022).

Between 2017 and 2025, the film distribution landscape in Türkiye experienced significant transformations, particularly when comparing the pre-pandemic and post-pandemic periods. Prior to the pandemic (2017–2019), the market was primarily dominated by international companies such as CGV Mars Dağıtım, UIP Türkiye, and Warner Bros. Türkiye. CGV Mars, originally a Turkish company under Mars Cinema Group, was acquired by South Korea-based CJ CGV in 2016. Following the acquisition, the company continued to play a significant role in the domestic market by distributing Hollywood blockbusters and high-grossing Turkish films.

Hollywood film distributors, particularly UIP Türkiye (representing major US studios such as Universal, Paramount and Sony) and Warner Bros. Türkiye, held a powerful position in the Turkish market during the pre-pandemic period. From 2017 to 2019, their combined market share often exceeded 40%, driven mainly by the popularity of Hollywood blockbusters. In 2019, CJ ENM, another South Korean company, rapidly gained ground. While CJ ENM is a South Korean media conglomerate, its Turkish branch has primarily focused on distributing low- to mid-budget Turkish productions, with genre-based content such as comedies, family and horror films.

In the post-pandemic period (2021–2025), the share of Hollywood distributors such as UIP Türkiye and Warner Bros. Türkiye has decreased, while the distribution landscape has come to be dominated by Turkish and South Korea-based companies. TME Films, a Turkish distribution company, emerged as the leading player by 2025, mainly due to its strong focus on Turkish productions. A90 Pictures, another Turkish company specialising exclusively in domestic content, climbed rapidly in the rankings and has remained consistently within the top five since 2023. Meanwhile, the Turkish branches of the South Korea-based distribution companies CGV Mars and CJ ENM maintain their positions among the top five distributors.

As mentioned, these companies mainly distribute Turkish and Hollywood productions. The top five distribution companies rarely distribute European films, which usually account for no more than two or three titles per year. In contrast to the commercial focus of these dominant players, Bir Film and Başka Sinema represent a more niche yet culturally significant segment of the Turkish film distribution landscape. Both companies are known for specialising in independent cinema covering European titles. Bir Film, active since the early 2000s, has consistently served as a key distributor for international independent productions in Türkiye. It has a small market share ranging from approximately 1% to 4%. Başka Sinema, launched as both a distribution initiative and a network of independent cinema venues, operates a model that combines exhibition and distribution. Between 2022 and 2025, its market share remained below 1%.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

In Türkiye, the majority of cinema venues are located inside shopping malls. This trend accelerated in the 2000s with the rise of multiplex culture and the expansion of urban shopping malls (Tüzün, 2013). "As of 2018, 80% of the total number of screens in Türkiye are located in cinemas operating within shopping malls. Looking at the İstanbul market (where more than 20% of screens are located in the country), 88% are located in cinemas operating within shopping malls" (Özdurak 2020, 8). This mall-based model has significantly shaped the exhibition structure, creating a highly monopolised market. As of 2023, CGV Mars Cinema Group (owned by South Korea-based CJ CGV) controls the largest share of the market, operating 84 venues, far ahead of its competitors. It is also a film distributor company, thus controlling exhibition and distribution channels. Other exhibitors such as Pink (20 cinemas), Cinegold (16 cinemas), and Avşar (10 cinemas) remain comparatively small players in the market (Box Office Türkiye 2023). The programming of these cinemas tends to favour commercial, high-turnover productions such as Turkish comedies, animations and Hollywood blockbusters.

In contrast, independent Turkish films and European arthouse cinema struggle to secure exhibition space within mall-based multiplexes. As a result, despite being appreciated and closely followed by Turkish cinephiles and filmmakers, European films generally fail to achieve commercial success in Türkiye. Nevertheless, they maintain visibility through film festivals, which remain one of the primary platforms for European cinema. The most prominent festivals include the İstanbul Film Festival, the Antalya Golden Orange Film Festival, and the Adana Golden Boll Film Festival. In addition to festivals, European films are screened in several independent cinemas. One notable initiative is the aforementioned Başka Sinema, a distribution and exhibition company founded to create an alternative model for independent cinema in Türkiye. Başka Sinema operates through a network of independent theatres in metropolitan areas such as Istanbul, Ankara, and Izmir, where most European titles in theatrical circulation are screened. However, its impact remains modest due to its limited geographic presence and lower commercial reach.

Turkish audiences also engage with European cinema outside traditional cinema venues through digital platforms such as MUBI, Netflix, HBO Max (formerly Blutv) and via museums and cultural institutions that curate film programs throughout the year. These include institutions like İstanbul Modern, Pera Museum, Salt Beyoğlu, Salt Galata, SİNEMATEK/Sinema Evi and the French Cultural Institute, which regularly organise screenings, retrospectives, and thematic film events. These venues contribute to the sustained cultural presence of European cinema, especially among urban, educated, and cinephile audiences.

Both international and national digital platforms also shape Türkiye's film landscape. Global services like Netflix, Disney+, Prime Video, and MUBI operate alongside local platforms such as BluTV (now rebranded as HBO Max after its acquisition by HBO), Gain, Exxen, Puhu TV, and tabii. Like film viewing habits in cinemas, Turkish audiences prefer to watch films and series produced in Türkiye on digital platforms. "Analyzing available data of film releases on digital platforms (between April 2022 and September 2022), Türkiye's local productions are in first place in the most-watched movies and TV series. European content had a 16% market share. The majority of European content on Turkish digital platforms, 42%, were French productions, followed by films produced in the United Kingdom with 26%" (Dâmaso et al, forthcoming). As in many other countries, the use of IPTV and subscriptions to digital platforms has steadily

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

increased, a trend expected to continue. By 2018, about 40% of viewers in Türkiye were already consuming television content online (Twentify, 2018).

2.6.3 Trends and challenges

The interviews highlighted several trends and challenges faced by the Turkish film industry, particularly the sharp divide between mainstream and arthouse cinema, the lack of public funds for arthouse filmmaking, and the absence of a comprehensive cinema policy to support the development of Türkiye's film industry. These concerns were not only recurring but also interrelated, forming the backbone of how industry professionals conceptualise the current landscape.

This analysis is based on qualitative data collected through interviews in Türkiye. A total of 16 in-depth interviews were conducted between March 2024 and July 2025, both online and in person, with film professionals across the audiovisual sector. In order to ensure diversity, these included producers with experience in European co-productions; directors who have worked on both arthouse films and TV series for digital platforms; festival directors and organisers; distributors and cinema owners; film programmers and curators; representatives from digital platforms; policymakers from the public sector; and members of professional unions.

One of the most prominent themes that emerged from the interviews was **the deeply entrenched division between mainstream and arthouse cinema**. Interviewees repeatedly described the sector as operating within two largely disconnected spheres. As one director said, "We need to divide the sector into two. One of them is the films that survive entirely on box office revenues. The other is arthouse films" (T Int3, DIR/PRO). Similarly, a producer echoed this sentiment, observing: "When we think of Türkiye's national film industry, unfortunately it is like a divide... There is a system of independent films that are mostly produced through foreign co-production mechanisms. And then there is a mainstream structure that is more audience-oriented. Unfortunately, these are a bit too separated" (T Int10, DIR/PRO). This notion of a bifurcated ecosystem thus emerged as a shared framework through which many participants interpreted the dynamics and disparities of the Turkish film industry.

This divide becomes particularly visible when examining audience engagement patterns. As previously noted, Turkish cinema has historically enjoyed strong domestic box office numbers. However, the vast majority of ticket sales are concentrated around mainstream productions. In contrast, Turkish arthouse films struggle to find audiences at home despite gaining considerable recognition at international festivals. This contrast was strongly criticised by an experienced producer, who drew comparisons with Europe's more integrated audience model:

> ***I am extremely against the distinction between festivals and box office films… the most important instrument of the European film industry is the audience, that is, it has an audience... Their (Europe) mainstream audience can also go to an arthouse movie and they don't think of such sharp distinctions between them. So this is reflected in your return, in your financing.***

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

T Int12, DIR/PRO

This audience polarisation, several interviewees argue, is deeply rooted in the broader societal perception of film and culture in Türkiye**, which they associate with a long-standing anti-intellectual discourse** (Gençoğlu, 2018; Vatansever 2018; 2020). A festival director articulated this view as follows:

> ***The term 'art film' has been deliberately associated with pejorative expressions like* entel dantel[11]*, which began to erode the language in the 1990s. As part of a broader policy to alienate people from art and culture, this led to a public backlash. The idea of 'the elite' was fabricated as a result.***
>
> **T Int5, FF**

While Türkiye is a long-standing member of Eurimages and benefits from its co-production funding, there is not any institutional support to ensure that these co-produced films are accessible to local audiences. As one producer remarked, "It is an oxymoron that we are a member of Eurimages but the country's Ministry of Culture does not lift a finger for the films made with that support to meet with the audience" (T Int9, DIR/PRO).

Closely linked to this divide between mainstream and arthouse cinema is another persistent challenge highlighted in the interviews: **the lack of adequate public funding mechanisms for arthouse filmmaking**. While mainstream Turkish films gather box office revenues, arthouse filmmakers with limited ticket sales need to find national and international funds to make their films. Arthouse filmmakers in Türkiye often turn to European co-production opportunities to finance their films, these avenues typically require initial national-level support – making the Ministry of Culture, as the sole public funding body, a gatekeeper. As one interviewee explained, "Everything is focused on the support of the Ministry of Culture. This creates something very one-sided. If you don't get support from the Ministry of Culture, it's not possible to apply for other funds in Europe... it's actually an impossible cycle" (T Int1, EXH). Even experienced directors, who might be assumed to have easier access to resources, face increasing difficulties in securing production budgets, "Even established directors find it very difficult to secure their budgets," the same interviewee noted" (T Int1, EXH).

However, financial scarcity is not the only obstacle before arthouse filmmakers in Türkiye. Many interviewees emphasised that **Türkiye's primary public film funding – the Ministry of Culture – is heavily politicised**, exerting control not only over what projects get funded but also over what kinds of stories can be told. One director described the situation as a pressing concern: "It is an instrument of power that is now directly in the hands of the political power. It can be used indirectly, directly as censorship. Our most fundamental need is for the public fund to become independent, politically independent." (T Int3, DIR/PRO).

[11] *Entel dantel* is a colloquial and somewhat mocking Turkish expression used to describe someone perceived as pretentiously intellectual or overly cultured. It carries connotations of artificiality, snobbery, and detachment from the ordinary public, often deployed to delegitimize artistic or intellectual engagement.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Some of the interviewees emphasised that **this situation has been noticed by Eurimages. In recent years, Eurimages has responded to such concerns by reforming its selection procedures**. As one cinema owner and distributor observed, “Eurimages also realised this more or less, so probably as of last year they changed this system and switched to a system of professional evaluation boards instead of the representatives of the countries being officially appointed by the ministries of culture of the countries. It is much better. You don't know who is evaluating it, but it's not sent by the Ministry of Culture. So it is not linked to anything political. Because in the past years, unfortunately the Ministry of Culture of the Republic of Türkiye could reach out to Eurimages to prevent a project from getting support if there was something in the project that it deemed objectionable” (T Int4, DIST/SA). **A director also noted:**

> ***Eurimages has been evaluating film projects from Türkiye that do not receive public institution support and that several films have received Eurimages support without the support of the Ministry of Culture in recent years, I applied to Euroimages without getting support from the Ministry of Culture.***
>
> **T Int13, DIR/PRO**

The absence of a comprehensive cinema and cultural policy in Türkiye is also frequently mentioned by the interviewees as a fundamental barrier to the development of the film sector. They emphasised that the sector operates in a fragmented environment, lacking strategic planning, regulatory clarity, and institutional continuity. Even a producer/distributor expressed hesitation in referring to Türkiye as having a film industry, stating, “I don’t even think we have a film industry. Every step is improvised. There is no consistent structure, no long-term planning. Everything changes depending on political will or individual efforts” (T Int2, EXH/PRO). Another producer highlighted how this policy gap undermines the development of the sector’s legal and institutional framework: “First of all, we need a well-functioning cinema and copyright law. We need a law that is not just on paper, but a law that regulates and facilitates the sector in a comprehensive way with its regulations and institutions” (T Int9, DIR/PRO). In a similar vein, another producer described the lack of policy as both structural and historical: “First of all, there is no cinema policy in Türkiye. There is no culture and art policy. There is no cinema policy at all. Therefore, since there is no cinema policy, there is a lack of goals. So there is no institution that determines needs. Therefore, I think there are policies that change according to the spirit of the period, depending on who is in charge, institutions, etc.” (T Int11, FUNDER/PRO).

In addition to the qualitative insights, the survey results [Figure 10] further underscore the Turkish film industry’s perceived needs. The most prominent concern emerging from the interviews — the scarcity and politicisation of public funding — aligns directly with the survey’s top-ranked priority, increased funding access (38% first choice). Likewise, the interviews’ emphasis on the structural fragmentation of the industry, lack of institutional continuity, and policy vacuum resonates with the survey’s high ranking of talent development (26%) and increased diversity of stories (24%). Importantly, the latter is not only about expanding thematic and genre variety but is also intrinsically linked to the ability to produce films freely and access transparent, depoliticised funding mechanisms — concerns repeatedly voiced by interviewees concerning censorship and political interference. Medium-ranked survey priorities, such as access to the international film circuit and improved distribution networks, are also mirrored in the interviews’ focus on the mainly Turkish arthouse cinema’s lack of exhibition and distribution

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

within the country and the absence of systemic initiatives to bridge local and global film markets. The interviews and the survey underscore the need for concrete policy measures that improve funding mechanisms, protect creative freedom, and strengthen the industry's structure.

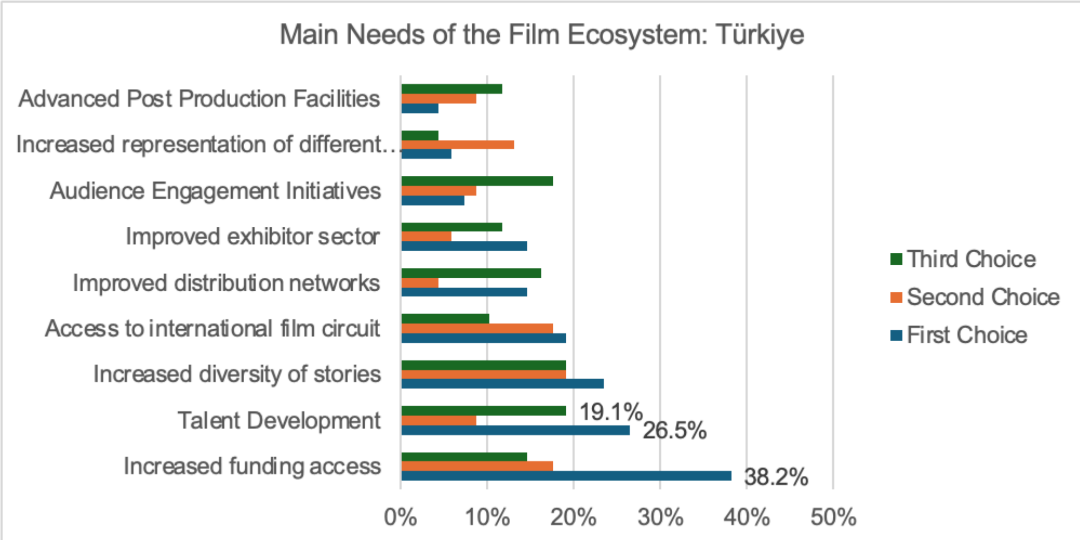


Figure 10 - Main needs of the Film Ecosystem – Türkiye

2.7 Common analysis

Although these markets have many particularities that reflect their histories and contexts, the data also reveal shared trends and challenges. When asked what the main needs of their film ecosystems are, most respondents (45.9% as first choice) identified as the key priority significantly ahead of other options increased funding access [Figure 11]. As for the second need, the responses were distributed more evenly – but led nonetheless by improved distribution networks (17.2%). The third second need was access to international film circuit (13.6%). One should also mention the option of an improved exhibition sector, which was chosen by a high number of respondents. Moreover, and broadly, there is consistency of the second and third ranking category, signalling that these needs are considered important but not as much as the highest priority.[12] This is confirmed by the selected sample [Figure 77; see Section 8.1 Extra Data].

[12] Additionally, a small number of respondents indicated in writing, under the option Other, the following local needs: quality of the product, international mindset, [to be] very self-sufficient, less (sic) collaborative (co-productions friendly) industry structure, education initiatives for film, appreciation for the young, artistic freedom, access to TV/VoD for independent productions, and distribution financing.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

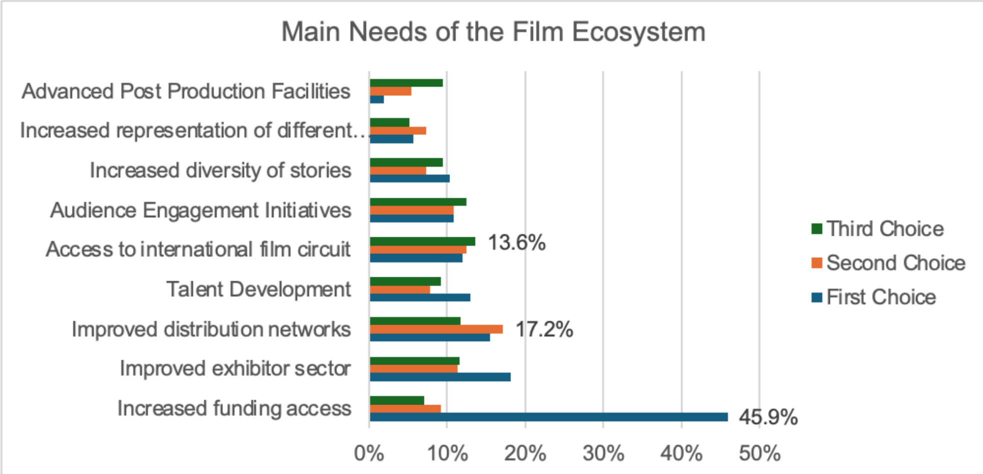


Figure 11 - Main Needs EFI

This echoes the findings of the quantitative and qualitative data across the six case studies. Regarding the first need for funding access, in South Korea this primarily concerns independent and artistically driven cinema, which faces persistent financing challenges (see Section 2.5 South Korea). Focusing on the second and third needs (improved distribution networks, and talent development) as well as the issue of an improved exhibition sector, they reiterate the absence of strong exhibition and distribution networks in Argentina (Section 2.1), Brazil (Section 2.2), Mexico (Section 2.3) and South Africa (Section 2.4) and the need for more screens across the territory (particularly in Argentina, Brazil, and South Africa). More broadly, these findings are aligned with the desire for audience-building strategies and other policies to create space for productions beyond US blockbusters (reiterated by film professionals and stakeholders in all three Latin American countries, South Korea, and South Africa). Indeed, in the case of Mexico and South Korea, although the overall number of cinema screens is relatively high, access to exhibition space for non-mainstream or independent films remains limited.

Türkiye reflects similar structural challenges, although with a different emphasis (Section 2.6). Similarly to other cases, the most frequently cited need by Turkish film professionals was increased funding access, highlighting ongoing financial constraints. Talent development and increased diversity of stories also ranked highly, pointing to creative and representational concerns. While improved distribution networks and exhibition infrastructure were less prominent than in Latin America countries or in South Africa, they still featured among the top three choices for many respondents, suggesting continued obstacles for non-mainstream films – particularly arthouse Turkish and European films – in reaching wider audiences.

These findings contribute to addressing the need for the EU's international film policy to be more grounded on robust data regarding local policy contexts and priorities (Vlassis, 2016; Fernandes et al., 2021).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

3. EFI in International Markets

This section summarises the data gathered through interviews with local film professionals and through the international online survey regarding how they perceive 'European cinema' and the EFI, and what is specific about it, and how they assess the presence of the EFI in international markets. Additionally, the views of interviewees regarding the EFI are examined according to their role in the supply chain (directors, producers, festival programmers and fund managers, distributors, exhibitors, funders, film festivals, co-production markets, etc). Although an effort was made to avoid a strong overlap with chapter 4, which focuses on film festivals and co-production markets, this chapter makes clear that such programmes and initiatives are indissociable from the imaginaries of EFI.

3.1 Argentina

When asked about European cinema or the EFI in Argentina, most interviewees spoke about it in a way that felt both obvious and complicated at the same time. On one hand, Argentinian industry stakeholders have a clear image: ***cinéma d'auteur*** and **art cinema**. These terms reflect the prestige of key historical movements such as the French ***nouvelle vague*** or the ***neorealismo italiano***. Both concepts are also largely shaped by patterns of access and circulation, as it reflects the European films that usually reach the region. Those are the ones from the biggest producing markets: **France, Italy, Spain, and Germany**. Countries with robust cultural diplomacy initiatives, established international co-production networks, and greater access to prestigious film festivals and funding resources.

As such, Argentinian professionals often use European cinema as a stand-in for these dominant national cinemas, reinforcing certain hierarchies while excluding others. This selective visibility has real implications: it shapes both audience expectations and industry practices, influencing which films are acquired for distribution, which co-production partners are sought, which film festivals are attended, and which aesthetic frameworks are valued. The term European cinema serves not only as a **geographic label** but also as a **strategic marketing one**, often associated with **auteurship, artistic innovation, and perceptions of high culture and quality,** whether justified or not.

> ***Quality cinema, awards, festivals, great auteurs, tradition, adult audiences, specialty theatres in Argentina – and mostly French cinema, Italian cinema, I'd say maybe a bit of Spanish cinema, a bit of German cinema, but those, I'd say, are the main coordinates for me of what represents the tradition, because in the end, that's the kind of cinema linked to tradition that comes to mind when I think of European cinema in Argentina.***
>
> **AR Int 5, DIST/SA**

Other concepts such as **film festivals** and **cultural diversity** frequently emerged in both the interviews and the survey as key elements in the definition of European cinema. This perception appears to be closely linked to the way European policies and programs are viewed, namely, as

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

being committed to the **preservation and promotion of cultural heritage and diversity**. Furthermore, many professionals expressed the view that European films contribute meaningfully to the enrichment of the audiovisual landscape in their country.

When talking about the EFI, the perception is that it is **a sector strongly supported by public policies and dependent on public institutions.** Argentina views the EU, and France in particular, as a model to follow in terms of regulatory frameworks. With clear ideas on how to support the film industry and all its sectors (production, distribution, exhibition), as well as a strong commitment to preserving and promoting their cultural heritage and diversity.

The mention of **France** is unsurprising, given the longstanding cultural ties between the two countries. As mentioned by one of the interviewees, “The Argentine law is an imitation of the French law, with significantly less strength, but with some similar mechanisms”, and he goes on to explain that: “France, and Europe more broadly, but especially France, beyond exporting its cinema, exported its regulatory framework” (AR Int1, FUNDER/POL). He also notes that this strategic effort is visible in the strong presence of the French Embassy in Argentina’s audiovisual sector.

Their aim is to influence local regulation and encourage the adoption of European-style policies. This isn’t just a matter of national interest; they see it as a way to create a small breach in a dam, that is, to open up space in a global market that is heavily dominated by the United States. From the perspective of regulation, they see a real opportunity

AR Int1, FUNDER/POL

The EFI is also closely associated with support programs such as **Eurimages, Creative Europe - MEDIA**, as well as main film festivals and markets like the **Cannes Film Festival, the Berlinale and the European Film Market**. Distributors in particular highlighted the comprehensive nature of public support in Europe, noting that public funding extends across the entire film industry value chain, including targeted programs for the distribution and exhibition sectors.

A production that is more closely associated with public policies or, in some cases, dependent on institutions that promote production, which is different from what happens in other countries. In France, which is often a big supporter for us, the European framework is seen as a place where production, exhibition, diversity, and audiovisual education for children have been promoted.

AR Int5, DIST/SA

With regard to the results of the survey conducted, the words Argentinian professionals associated with the concept of the EFI [Table 10] are consistent with the interview data, as terms such as international coproductions, *cinéma d’auteur*, state support, art cinema, and cultural diversity accounted for the highest number of mentions.

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Word that describes the EFI	Count	Percentage
International co-productions	53	76%
Cinéma d'auteur	52	74.3%
State support	45	64%
Art cinema	36	51%
Cultural diversity	34	49%
Regional integration	23	33%
High culture	21	30%
Freedom of expression	18	25.7%
Multilingualism	17	24.3%
Competitive	12	17.1%
Successful	11	15.7%
Experimental	10	14.3%
Non-commercial	7	10%
Slow cinema	6	8.6%
Uncompetitive	5	7.1%
Very hard to define	3	4.3%
Blockbusters	0	0%
Uncompetitive	0	0%

Table 10 - Best defining word EFI – Argentina

When asked what the main strengths of the EFI are [Figure 12], the majority of Argentinian professionals surveyed (70 responses were obtained) answered: film festivals in Europe and beyond (72.9%) followed closely by international co-productions (70%). In addition, a majority of responses identified public support as one of the EFI's main strengths (55.7%). By contrast, terms such as distribution and worldwide circulation of films produced within the EFI received some of the lowest levels of recognition among respondents (20%, respectively), followed closely by IP arrangements (17%).

Given these results, it is unsurprising that Europe is regarded as an ideal partner for **international co-productions** by Argentinian professionals. "The EU is a strategic partner in co-production; while our historically natural partner has been Spain, Europe is a natural partner for co-production and, on the other hand, also for the distribution of national films" (AR Int2, FUNDER/POL). Producers and policymakers have highlighted that co-productions with European partners are seen as an effective way to have access to financing grants from other countries and reach different markets, and offer better chances at European film markets.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

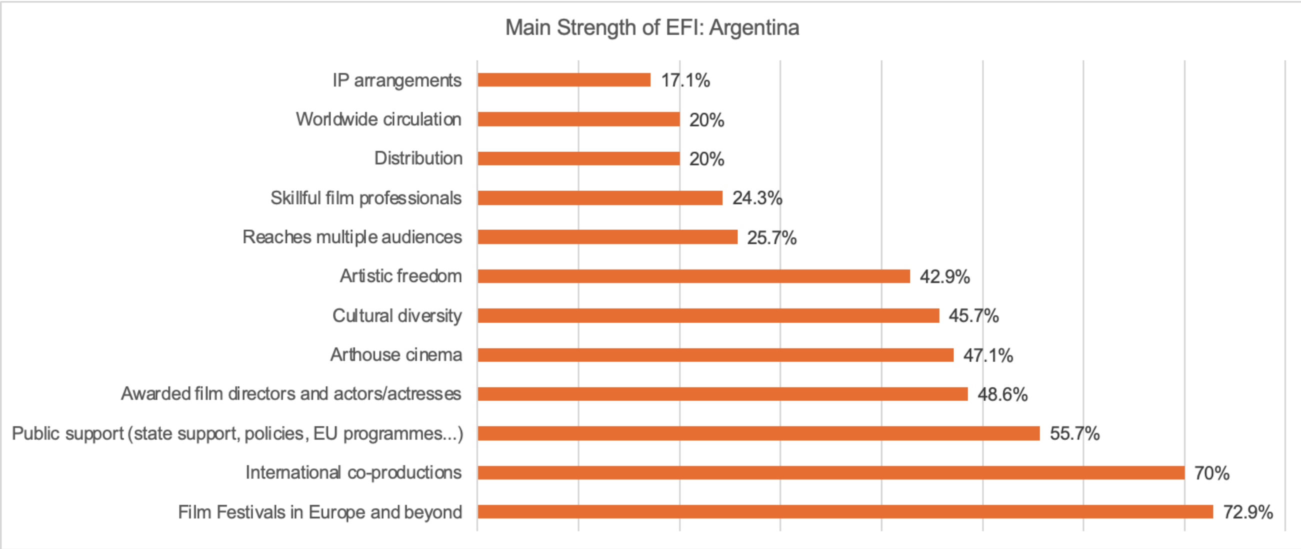


Figure 12 - EFI Main Strengths – Argentina

When Argentinian film professionals were asked to rank the main outlets in which European cinema circulates the most in their country [Figure 13], most respondents (60 answers in total) indicated the importance of film festivals and thematic weeks dedicated to a European country, director or actor/actress When taking into account mentions across all three choices.

With regards to commercial circuits connecting Europeans works to their potential audience, the majority of respondents emphasised the central role played by arthouse cinemas. Streaming services were also frequently mentioned, with the SVOD service MUBI receiving the highest number of mentions followed by Netflix which accounted for nearly half as many mentions in all three options. Conversely, other American VOD services were not perceived as prominent channels for the circulation of European movies.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

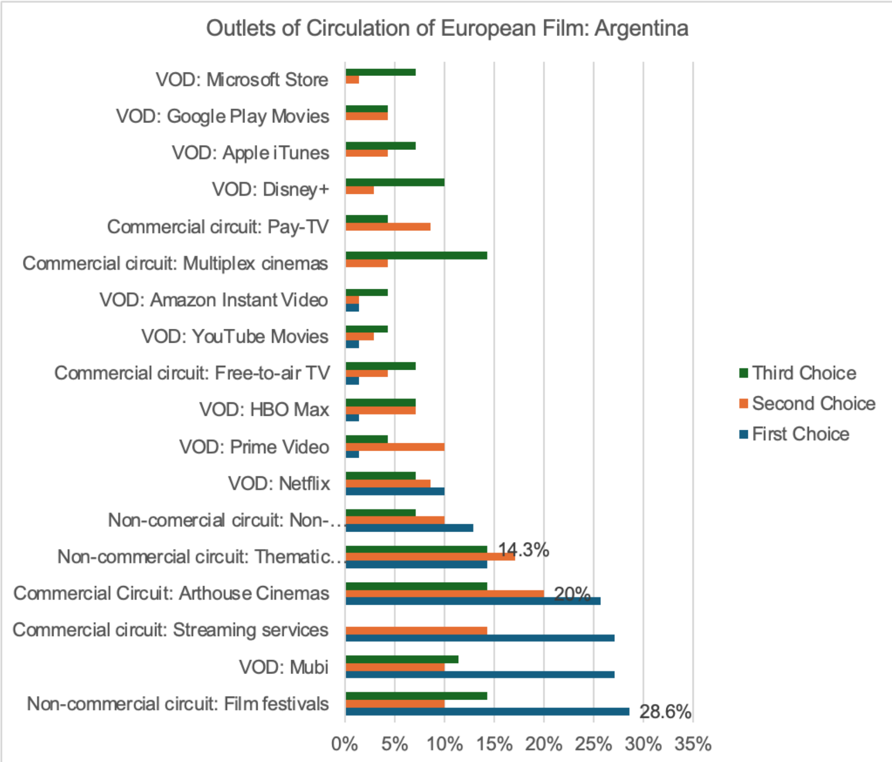


Figure 13 - Outlets of Circulation of European Film – Argentina

Concerning the challenges facing European film distribution in the Argentine market [Figure 14], most participants (70 answers in total) identified competition from Hollywood films as the main obstacle (57.1%). This result highlights the US film industry's strong hold on the domestic market. Although none of the other options have received as many mentions, limited marketing budgets was the most selected second (17.1%) and third choice (18.6%) while complex distribution agreements was also cited frequently when considering the total responses across all three categories.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

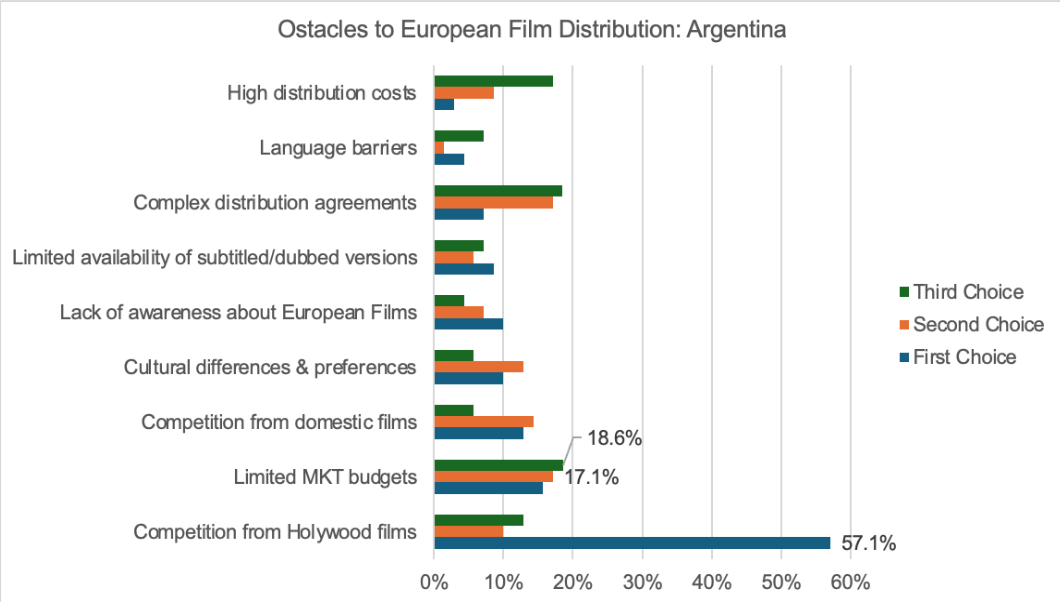


Figure 14 - Main Obstacles to European Film Distribution – Argentina

These quantitative findings are further supported by insights from the interviews, in which participants noted the existence of funding specifically designed to promote and distribute certain European feature films, alongside the absence of comparable support mechanisms for works from other regions. This indicates that the film authorities of a select group of European countries (Unifrance, France; German Films; Germany; Cinecittà's Film Distribution Fund, Italy) recognize the challenges faced by international distributors in marketing and distributing films globally and have implemented support programs to mitigate these obstacles.

In this context, it is noteworthy that Argentine professionals demonstrate a high level of familiarity with the programmes and incentives offered by the EU [Figure 15]. The majority of respondents (57 answers in total) reported being somewhat aware or very aware of them. The combined total of these two options, around 74%, indicates a high level of familiarity with existing programmes and incentives among a professional body with extensive experience in international co-production and participation in the main European film festivals.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

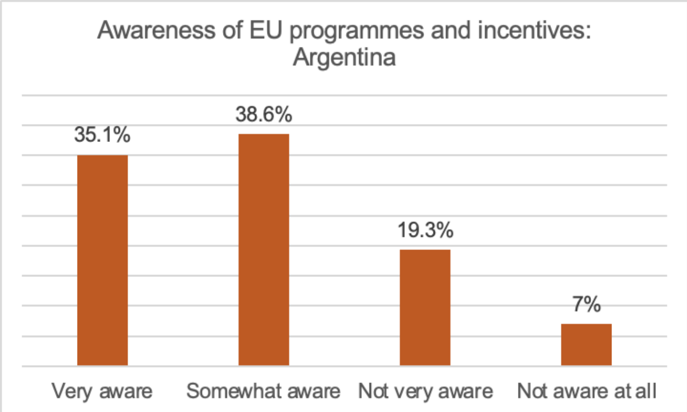


Figure 15 - Awareness of programmes or incentives provided by the EU – Argentina

In relation to the effectiveness of EU programmes and incentives [Figure 16], the survey revealed that three-quarters of the participants (48 answers in total) rated these programmes as somewhat effective or very effective.

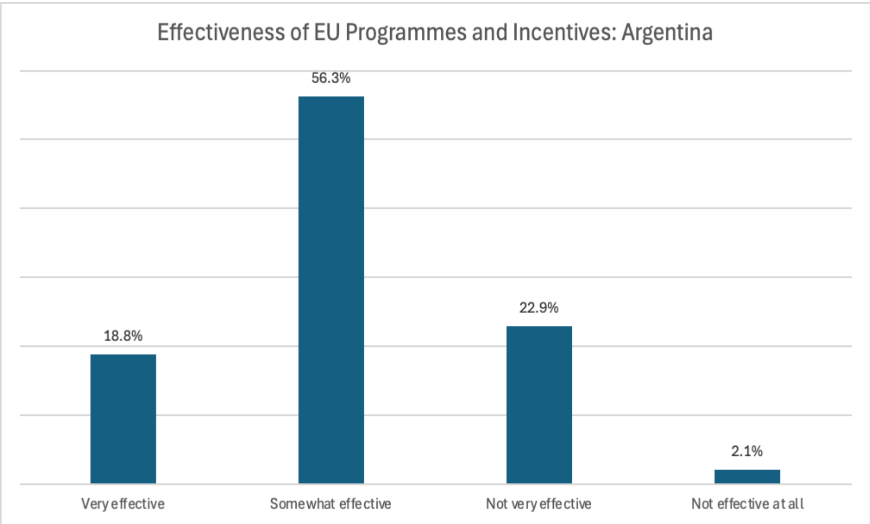


Figure 16 - Effectiveness of programmes and incentives provided by the EU – Argentina

The survey conducted among Argentinian professionals reveals that most respondents (57 answers in total) don't have non-European international partners (54.4%), highlighting the relationships between the Argentinian professionals surveyed with European companies and professionals [Figure 17]. This fact may explain the high percentages obtained among Argentine

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

professionals surveyed regarding both their knowledge of European programmes and incentives for the film industry and the effectiveness of these supports.

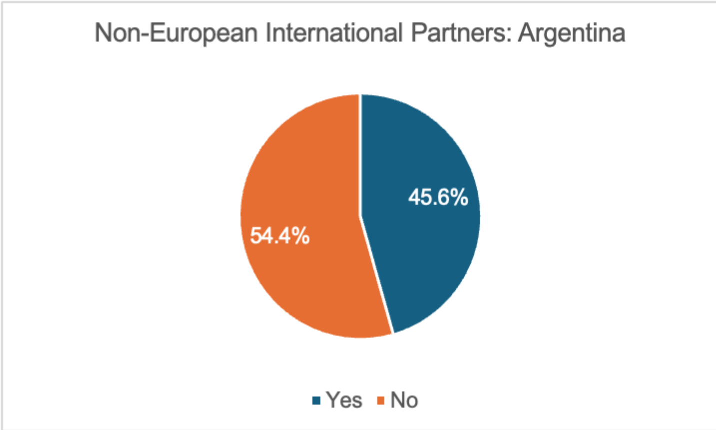


Figure 17 - Respondents with non-European international partners – Argentina

When asked to identify their main non-European international partners [Figure 18], the vast majority of Argentinian respondents (26 altogether) selected Latin American players, followed by American players like the Sundance Institute or independent producers. In contrast, other options offered as answers (African, Asian or Chinese players, for instance) obtained very low percentages.

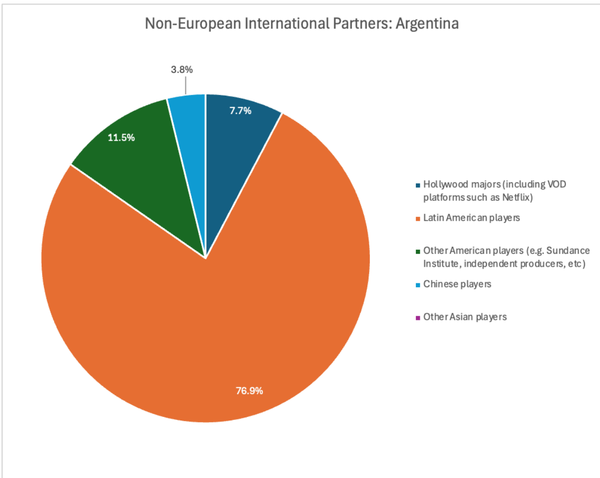


Figure 18- Non-European international partners – Argentina

Finally, when Argentinian professionals asked to compare their experiences collaborating with other international partners outside of the EU [Figure 19], the majority of respondents (26 answers in total) stated they found them similar. Only a minority of the responses received indicate that their experiences were worse or much worse.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

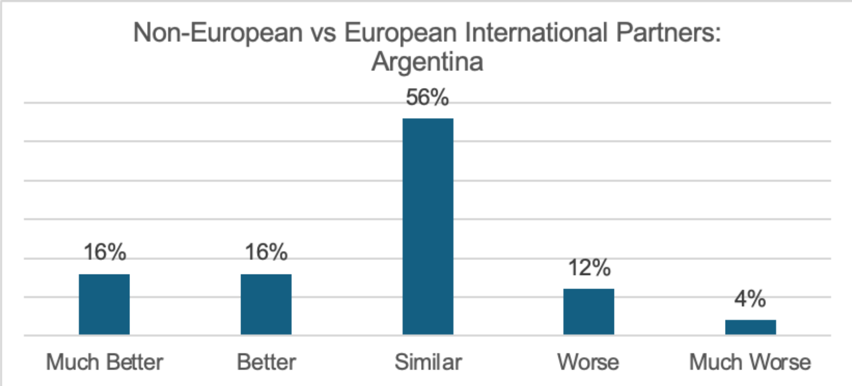


Figure 19 - Comparison of experiences with non-EU partners – Argentina

Insights from the interviews partially reinforce the patterns observed in the quantitative data. In discussions concerning non-EU actors, other Latin American countries were frequently identified as co-producing partners. US streaming services were also mentioned with notable frequency.

Regarding the relations with other countries, one of the participants described a meeting organised by the Chinese Embassy and the Chinese exhibitors' association to explore the acquisition of Argentine films for the Chinese market. The INCAA also participated in the Shanghai Film Festival, hosted Chinese delegations at Ventana Sur market and the Mar del Plata International Film Festival, and expressed interest in strengthening bilateral relations. As for India, an initial meeting between authorities of the INCAA and the Indian National Film Development Corporation (NFDC) took place at Cannes in 2023. It is worth noting that one Argentinian distributor pointed out that their film acquisitions from China and India were conducted through European sales agents.

South Korean collaboration was noted primarily through funding from South Korean film festivals; however, these partnerships were largely commercial and lacked the cultural and professional exchange characteristic of formal co-productions. The Middle East featured through the LatinArab Festival, held in Argentina, Chile, and Brazil - which includes a co-production forum.

Despite these international connections, Argentinian film professionals **predominantly engage in collaborations with Latin American and European partners**. Several interviewees observed that collaborations with other foreign countries often stem more from the individual efforts and networking capabilities of experienced Argentine producers than from formal institutional initiatives.

Although European cinema has traditionally been highly appreciated and well regarded in Argentina, it appears to be gradually losing its prominence. This trend has been documented in local media. A 2023 news article reported that European films (excluding high-budget British productions co-produced with Hollywood studios) are struggling to attract more than 10,000 viewers in Argentine cinemas. Additionally, experienced local distributors estimate that the audience for European films has declined by more than 70% in recent years (Battle, 2023). Occasionally, certain European films break through, but this tends to occur in hybrid spaces,

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

where popular cinema intersects with platform-produced content, or when a film gains momentum following success on another screen or through the presence of a well-known name. However, these cases are exceptions rather than indicative of a meaningful representation of those national cinemas in the Argentinian market.

> ***At this point, the presence of European cinema in the market seems less the result of cultural strength and more a default outcome. Whereas it once represented a substantial and intentional offering – an important body of work that helped shape audience tastes – today its position seems to be sustained simply because there is no stronger competitor. Still, this feels like a temporary situation***
>
> **AR Int5, DIST/SA**

Ultimately, the interviews and results from the survey indicated that Europeanness is perceived not only as a form of cultural heritage and a distinctive cinematic style (art film and/or *cinéma d'auteur*), but also as an institutional model marked by **extensive state involvement, comprehensive public policies, strong film festivals networks**, **co-production agreements** and a firm commitment to the preservation of culture and diversity. Europeanness in the context of cinema is often **defined in opposition to Hollywood**, in the dichotomy between art and commerce. However, participants acknowledge Europe's production is more heterogeneous and multifaceted than the prevailing image implies. Nonetheless, their framing continues to be influenced by historical constructs linking Europe with **art film and *cinéma d'auteur* traditions**, rather than contemporary cinematic realities. Given that many interviewees occupy multiple roles within the film industry, it becomes challenging to associate a single, fixed understanding of Europeanness with any specific professional position.

3.2 Brazil

The perception of European cinema in Brazil closely mirrors that in Argentina, reflecting similar cultural and industry-related associations. European films are often associated with ***cinéma d'auteur* and art cinema**, as well as with notions of **quality** and **tradition**. Many participants associated it with **rich cinematic traditions** (BR Int2, PRO/DIR) and **well-crafted, thoughtfully made, with high-quality productions** (BR Int3, PRO/DIR). European cinema is regarded as a reference point for what quality cinema looks like.

Other interviewees talked about the **formative role** European cinema played in their lives from an intellectual, aesthetic, and even personal level. The term was often explained in **opposition to Hollywood,** emphasizing that European films are more thoughtful, that is not just entertainment but invites some form of reflection (BR Int5 DIS/SA and EXH). **Diversity** was another key characteristic highlighted in discussions about European cinema. Interviewees pointed out that its film industry holds **'a broader vision'** that embraces **'all types of films'** (BR Int8 DIR/PRO).

Other professionals emphasised the plurality of European cinema, not only in terms of cinematic styles, but also in its **range of languages, genres, and stories.** This plurality was also

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

frequently positioned in contrast to Hollywood's more homogenous and formula-based productions.

You have a kind of cinema that manages to be plural and also, I would say, counter-hegemonic. A cultural, political, and intellectual counterpoint to Hollywood cinema throughout its history. I believe it establishes itself as a space of resistance, of asserting plurality, freedom, and diverse worldviews. It's a cinema of auteurs, but not only that, though it does value the auteur tradition, the director-driven vision, which today includes more women than in the past. I think it's a cinema marked by many qualities, qualities that are deeply relevant for us, as Brazilians, to reflect on our own cinematic formation and identity.

BR Int12, FUNDER/PO

It is evident that the European films most accessible to Brazilian professionals, which largely shape their understanding of European cinema, primarily originate from **France, Italy, Spain, Germany, and, sometimes, Portugal.** France stands out as the first European cinematography that came to mind when talking about European cinema in many interviews. "I think of French films. Even though we know there's a large production in Italy, Spain, Portugal, and Germany as well, the first thing that comes to mind is France, because that's where cinema originated" (BR Int11, DIST/SA).

One of the Brazilian film producers mentioned a degree of creative stagnation in contemporary European cinema, describing it as more traditional and less responsive to emerging voices when compared to the innovative and fast-evolving landscapes of Latin American or Southeast Asian cinema.

When I say I find European cinema a bit less fresh, I mean it feels more stagnant, maybe? There's very high artistic and technical quality, but I'd say it's a bit more predictable.

BR, Int1, DIR/PRO

The EFI, on the other hand, was associated with a model of stability and institutional strength, marked by its **extensive public funding**, **high production output**, and **strong festival networks.** European policies towards its audiovisual industry are seen as examples of **real political engagement in the cultural sector**, frequently cited as a reference. Brazilian interviewees highlighted the stringent regulatory framework governing the European audiovisual sector, particularly with regard to streaming services, as well as its strategic emphasis on **public education and audience development**, both viewed as key factors contributing to its success.

Interviewees also emphasised the **strategic public policies** in Europe that support not only film production but also promotion, distribution and exhibition – a contrast to Brazil, where the majority of public funding is allocated almost exclusively to production. This perception was exemplified by the mention of past initiatives such as **Europa Cinema Mundus**[13], that financially

[13] The Europa Cinema Mundus was a program that used to offer support for theatrical programming based on circulation and exchange between MEDIA countries and non-MEDIA member states. This initiative ran from 2011 to 2013. The MEDIA Mundus Program, which existed between 2011-2013, also had lines

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

supported cinema theatres in Brazil to screen European films, thereby fostering audience development and circulation. Such perspectives reveal a recognition among Brazilian distributors and exhibitors of the European film ecosystem as robust, strategically supported, and oriented toward sustainable international cultural exchange.

In addition, distributors have indicated the significance of support programs that subsidize promotion and distribution expenses for selected European films. They view such initiatives as further evidence of the comprehensive public backing enjoyed by the EFI and regard these programs as crucial to the international success and visibility of European cinema.

And if you had asked me over ten years ago what European cinema meant to me – back in the position I held then in the distribution and exhibition sectors – I would have said: support. Because for many years, we received funding to distribute and exhibit European films in Brazil. That's a chapter I love to talk about, which is the story of Europa Cinemas.

BR Int6, FUNDER/POL

International co-productions was another term associated with the EFI, it is viewed as a strategic necessity for both the EU and Latin America: coproductions are considered not only to drive industry collaboration and professional exchange but also to open financing opportunities and facilitate circulation on both sides. From the viewpoint of Brazilian producers and distributors, the EFI is perceived not only as **diverse** and **artistically rich**, but also as a potential partner in **transnational exchange**. Unlike the US model, which is often associated with commercial formulas and market concentration, Europe is seen as a pluralistic space where multiple cinematic forms coexist, including *cinéma d'auteur*, genre experimentation, and culturally rooted narratives.

Unlike what we think of the American audiovisual industry, when we think of the European audiovisual industry, we see it as a space of diversity, where all kinds of cinema fit. And I think a lot about internationalisation, both for Brazilian projects that can have international projection, and for European projects that can find synergies with the Brazilian industry.

BR Int10, DIST/SA

These qualitative insights are corroborated by the survey results, which indicate that Brazilian professionals associated the following words with the concept of the EFI [Table 11]: *cinéma d'auteur*, international coproductions, arthouse cinema, state support, and cultural diversity.

---

focused on distribution, promotion and even co-production with countries outside of Europe (Europa Creativa MEDIA, 2011).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Word that describes the EFI	Count	Percentage
Cinéma d'auteur	54	75%
International co-productions	48	66.7%
Art cinema	45	62.5%
State support	37	51.4%
Cultural diversity	31	43%
High culture	26	36%
Regional integration	24	33.3%
Successful	24	33.3%
Multilingualism	23	32%
Freedom of expression	17	23.6%
Competitive	16	22.2%
Experimental	16	22,2%
Non-commercial	12	16.7%
Slow cinema	9	12.5%
Very hard to define	3	4.2%
Blockbusters	2	2.8%
Uncompetitive	2	2.8%

Table 11 - Best defining word EFI – Brazil

When asked what the main strengths of the EFI are [Figure 20], almost all Brazilians professionals surveyed (60 responses were received) answered: arthouse cinema (95.8%). Also, most of the responses pointed out the following as strengths of the EFI: film festivals (66.7%), international co-productions (65.3%), and public support (56.9%). Interestingly, IP arrangements was the least selected option, despite interview participants often highlighting the mechanisms established by certain European countries as well as the robust support from public entities that enable European film professionals to more effectively safeguard their IP rights.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

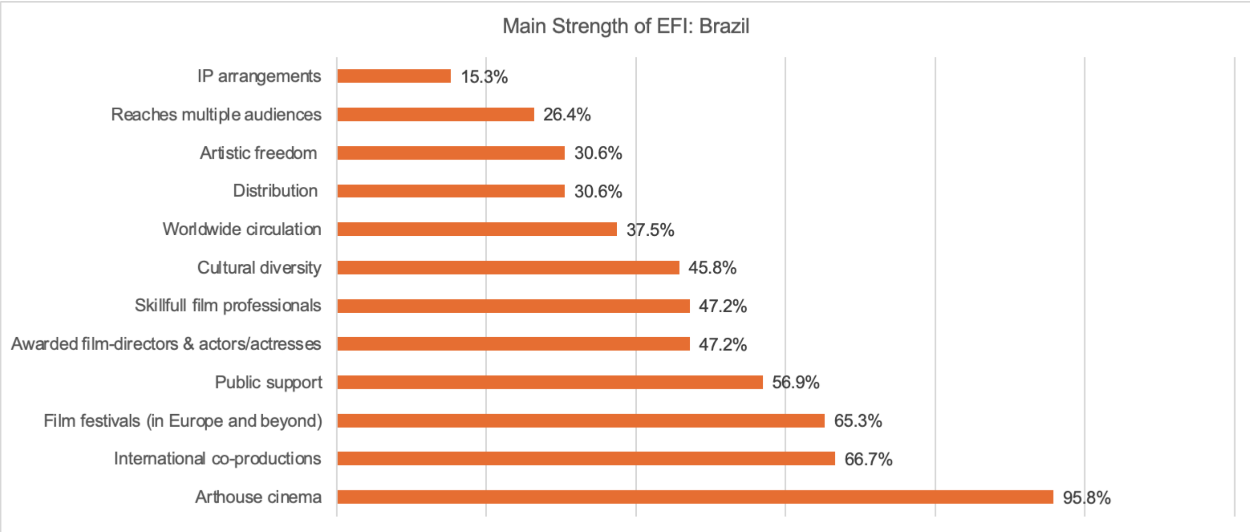


Figure 20 - EFI Main Strength – Brazil

When Brazilian film professionals were asked to identify the primary outlets for European cinema in their country [Figure 21], most respondents (60 answers in total) highlighted arthouse cinemas and streaming services within the commercial circuit. In the case of the SVOD services, MUBI received the highest number of mentions as a first-choice option, whereas Netflix led in total mentions. By contrast, other US-based global streaming services (Prime Video, Disney+, etc.) were not perceived as significant pipelines for the circulation of European films. Regarding non-commercial exhibition circuits, the survey underscores the importance of film festivals and thematic weeks dedicated to the cinema of specific European countries.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

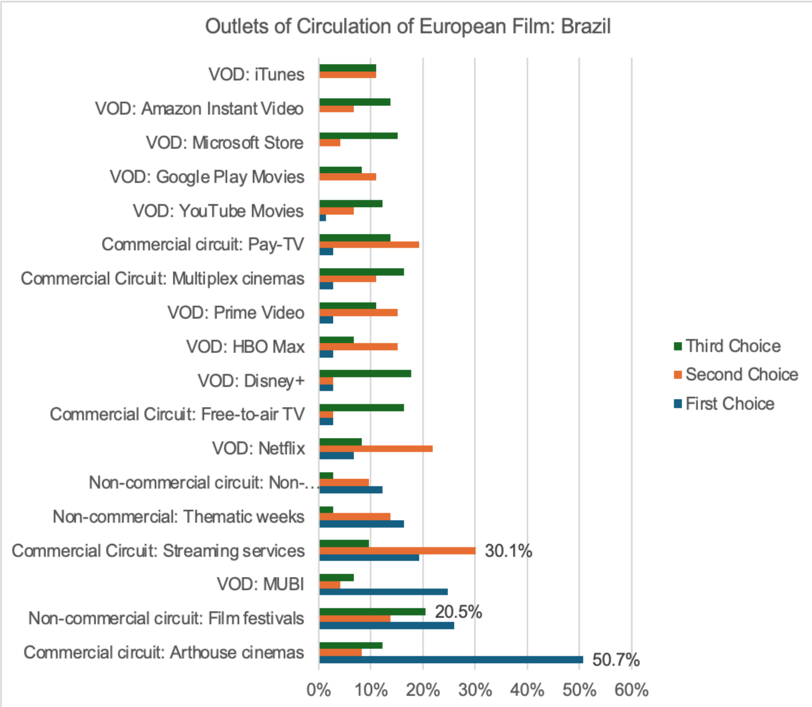


Figure 21 - Outlets of EU Film Circulation – Brazil

In the Brazilian market [Figure 22], competition from Hollywood (51.4%) was identified by most participants (72 answers in total) as the primary obstacle to the commercial circulation of European feature films, mirroring the strong dominance of the US film industry observed in Argentina. Other first-choice barriers included complex distribution agreements (15.3%), limited marketing budgets (13.9%) and restricted availability of subtitled or dubbed versions (12.5%). Considering total mentions, limited marketing budgets and cultural differences emerged immediately after Hollywood competition. These barriers are closely followed by high distribution costs and lack of awareness about European films.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

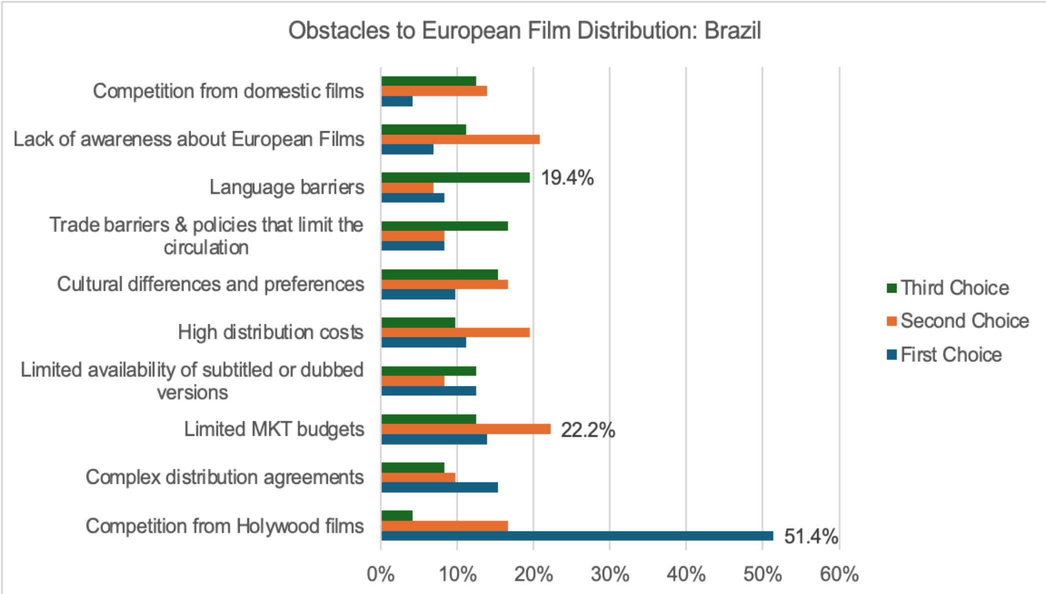


Figure 22 - Main Obstacles to European Film Distribution – Brazil

As for the awareness of programmes or incentives provided by the EU [Figure 23], in Brazil the majority of respondents (58 responses in total) are somewhat aware (34.5%) or very aware (20.7%) of them. In contrast, almost half of respondents claimed that they were either not very aware (32.8%) or completely unaware (12.1%) of existing programmes.

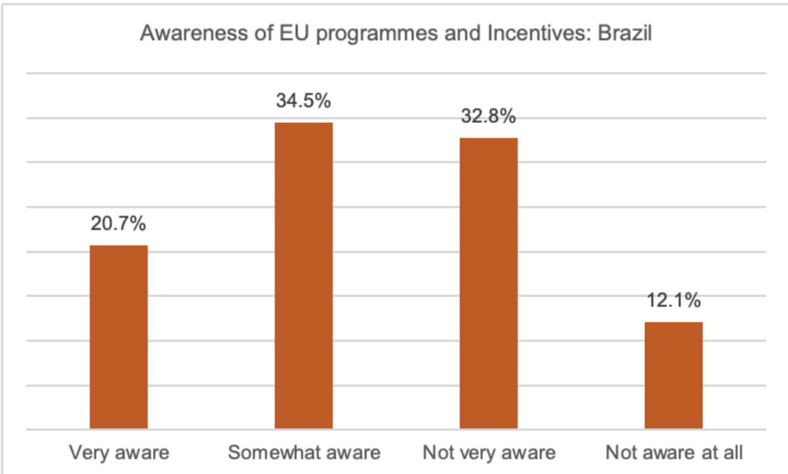


Figure 23 - Awareness of programmes or incentives provided by the EU – Brazil

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

With respect to the perceived effectiveness of EU programmes and incentives [Figure 24], the responses of Brazilian professionals differ from those of their Argentine counterparts. Approximately half of the respondents (50 answers in total) rated these programmes as not very effective (48%) or not effective at all (2%), while the remaining half considered them somewhat effective (40%) or very effective (10%).

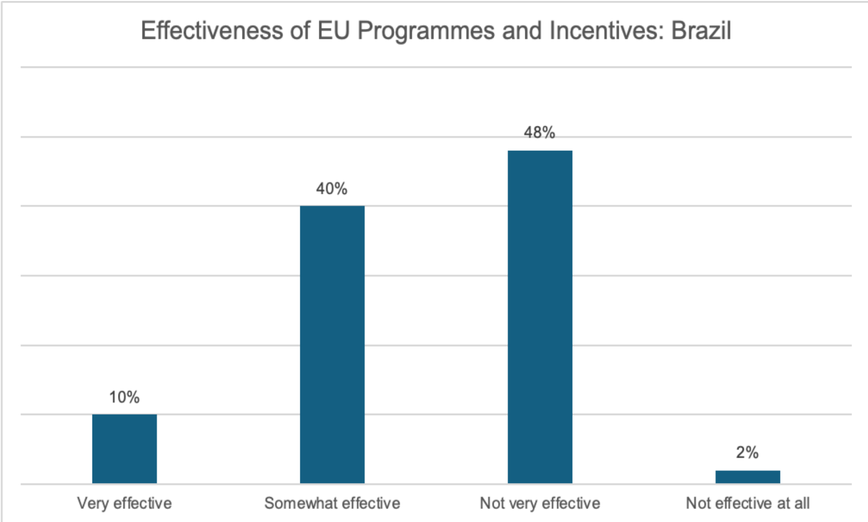


Figure 24 - Effectiveness of programmes and incentives provided by the EU – Brazil

With regard to collaborations or investments involving **non-EU partners**, interviewees mentioned **other Latin American countries** as co-production partners and the Ibermedia Program (which does involve both Spain and Portugal), indicating either direct experience with or indirect knowledge of these efforts.

Several participants referenced experiences with **US streamers,** either through their own direct involvement or by citing cases of other producers engaged in projects for these services. Despite the recent co-production agreement signed with **China**, the majority was unaware of any programs or forms of investment involving the country. The same can be said in relation to **India**, although the country was the 'focus country' at the festival Mostra Sao Paulo in 2023, which showed Indian films and had debates and meetings between Brazilian and Indian producers. **South Africa** was also mentioned by one participant due to a collaboration between Spcine and the South Africa's National Film and Video Foundation (NFVF), to launch a new call for funding Afro-diasporic film projects during the Producers Network, at the 2023 Marché du Film (Spcine, 2024). **South Korea** was also mentioned, primarily as a successful industry model to be studied or replicated in terms of national policy and strategic approaches, rather than in reference to any formal programs or official collaborations between the two countries.

Notwithstanding these isolated cases, it appears that Brazilian industry stakeholders are generally aware of or engaged in collaborations **primarily with Latin American or European partners.**

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

These qualitative findings are reinforced by survey results, which indicate that most Brazilian professionals (58 respondents in total) maintain non-European international partnerships (70.7%), highlighting the significance of relationships with professionals and companies from other Latin American countries since these account for 75% of responses (41 respondents in total) [Figures 25 and 26].

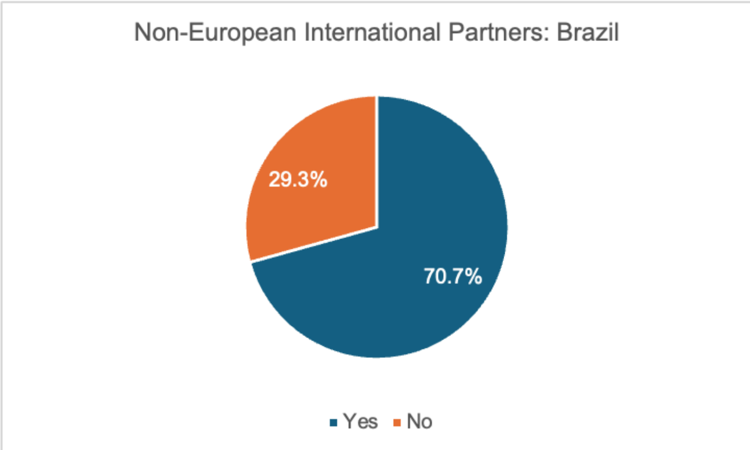


Figure 25 - Respondents with non-European international partners – Brazil

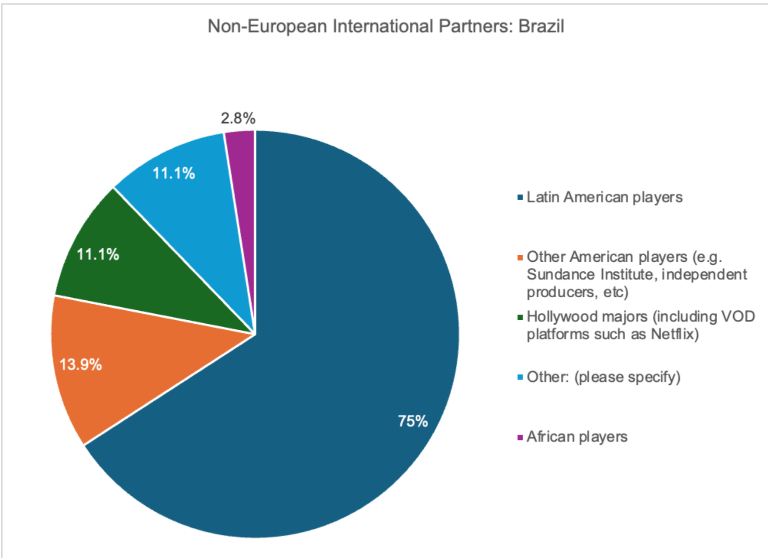


Figure 26 - Non-European National Partners – Brazil

Finally, when asked to compare their experiences collaborating with other international partners outside of the EU [Figure 27], about half of Brazilian respondents (40 responses in total) stated they found them similar, while nearly a third of the respondents found them better. Only a minority of the responses received indicate that their experiences with non-EU partners were

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

worse. Collectively, these results suggest that Brazilian professionals perceive collaborations with non-EU partners as largely comparable to, or in some cases more favorable than, those with European partners, reflecting the growing significance of transnational networks beyond Europe.

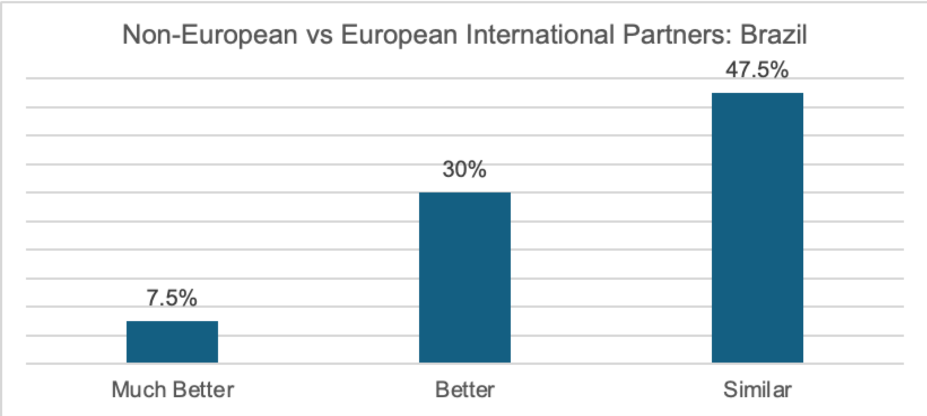


Figure 27 - Comparison of experiences with non-EU partners – Brazil

Drawing from interviewees perspectives and the survey results, **Europeanness** is frequently employed as a marketing construct to connote notions of quality, tradition, cultural sophistication, and intellectual depth. These terms are associated with Europeanness as a specific mode of storytelling, often linked to notions of art cinema and auteur cinema. This framing positions European cinema in marked contrast to Hollywood, seen as culturally elevated and implicitly exclusive, catering to a more affluent and culturally literate segment of the population. Hollywood (and its blockbusters) on the other hand, are defined as mass entertainment elaborated for popular consumption. It is also associated with a film industry characterised by robust public policy frameworks and institutional support, reflecting a model grounded in sustained political commitment to the audiovisual sector and its cultural diversity. The overlapping roles held by professionals across the film value chain complicate efforts to define Europeanness according to specific industry positions.

3.3 Mexico

Interviewees' reflections on European cinema in the Mexican context were broadly consistent with the patterns identified in responses from Brazil and Argentina. On one hand, Mexican professionals have a clear image: they immediately think of ***cinéma d'auteur*** and **art cinema**. On the other hand, participants appeared aware that such perceptions may be reductive or outdated, recognising that contemporary European cinema is, in fact, **diverse** and encompasses a broad spectrum of genres that do not necessarily conform to traditional conceptions.

It's interesting, perhaps even odd, because American cinema tends to be understood almost exclusively as commercial, focused on action, comedy, or chick flicks. European

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

cinema, on the other hand, is perceived as arthouse by default. I remember reading recently that France is now producing more action films and exploring new genres, which shifts the traditional view we've had of French cinema being mostly romantic comedies or dramas. This kind of diversification is important for us in Mexico to be aware of. We've often categorised French cinema as romantic or dramatic, and German cinema as dealing with darker or more intense themes.

MX Int1, FUNDER/POL

European cinema was frequently associated with notions of **quality, artistic creativity**, and **audacity**. A type of filmmaking that offers a different perspective, that opens up minds (MX Int7, FF). The terms **multicultural** and **diversity** were also used to describe European films. This automatic association of European cinema with notions of quality was perceived by participants as functioning almost like a 'marketing label' rather than an objective assessment, regardless of its accuracy.

I would say that traditionally European cinema is, sometimes rightly and sometimes not, seen as synonymous with quality cinema. That is, for cinephile audiences, just the fact that a film is French, for example, already gives it a kind of extra value, regardless of the film itself

MX Int11, EXH

One participant in particular noted that the streaming service MUBI, known for its emphasis on art and independent cinema, and the exhibitor Cineteca Nacional, similarly dedicated to this type of cinema, strategically positioned themselves with a cultural and intellectual status to attract specific audiences. A strategy that could be used more effectively to promote European cinema in Mexico.

I believe European cinema could take a similar approach (to MUBI and Cineteca), because you're not going to compete with Hollywood by trying to be more entertaining. That's a battle you can't win – they've spent decades perfecting that formula. But what you can do is develop a marketing strategy that builds a sense of cultural or intellectual status around watching European films.

MX Int7, FF

Other interviewees also highlighted the dichotomy between European cinema and Hollywood as a way to define or describe European cinema. The **historical significance** of European cinema was another point consistently noted and the word **tradition** was consistently used. Although participants often referenced seminal directors, actors/actresses, and historical cinematic movements when articulating their understanding of European cinema, many acknowledged that contemporary Mexican audiences, particularly **younger demographics**, are **no longer familiar with classic European cinematic movements and directors**.

In the case of contemporary European cinema, the diminished public recognition of its filmmakers and actors (apart from selected figures such as the Spanish director Pedro Almodóvar) suggests a declining familiarity between European cinema and the Mexican

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

audience. According to some participants, this erosion of cultural resonance may help explain the declining audience engagement with European cinema and its status as **niche cinema**.

The problem with all European cinema is that, except for very few cases, European names mean nothing to the Mexican audience at this point. I mean, the exception might be, now, Almodóvar, maybe two or three others, but even the actors mean nothing to the general public, absolutely nothing. For cinephiles there are names, yes, although not many anymore either. The close connection with that cinema has been lost. At one time, you'd say [Jean-Paul] Belmondo and everyone knew who Belmondo was, or [Marcello] Mastroianni, not to mention Sofia Loren. Now the current names have no impact. I think that's the fundamental issue, and it has to do with the fact that it has ultimately become a very niche cinema, except for very few cases.

MX Int12, EXH

Film festivals were mentioned often when attempting to define European cinema and the EFI with European films being labelled as **festival films** (MX Int14, DIR/PRO). This pattern points to a wider trend in circulation, wherein European films known and viewed in Mexico are largely those endorsed by the festival circuit, particularly through official selections or awards at prominent European festivals, the alternative seems to be European films that were chosen by streaming services for some specific reason.

European cinema, Cannes, I mean, basically films from Cannes, Venice, Rotterdam, so, festival films. And I think that also has to do with the fact that there are very few European films seen here that aren't festival films or that maybe Netflix or some platform has bought for some reason.

MX Int14, DIR/PRO

In the case of the EFI, apart from film festivals and markets, it was also associated with **public funding bodies** and as shaped by **strong public policies and institutions**. Some participants have mentioned the fact that European countries never handed over TV monopolies to the private sector, keeping them under state control. This structure has enabled the implementation of numerous programs, incentives, and funding schemes designed to preserve the distinct identity of European cinema. For them, one of the most valuable lessons from the **European model** is how it effectively articulates these support systems to give each local industry a clear identity and sustainable future, allowing for the production of diverse and culturally significant films. Key markets like **France, Germany, Spain, and Italy** stand out as examples of countries that support the local film industry while maintaining its **diversity.**

What I think has been very defining for the industry is that they never gave out the TV monopoly to the private sector, so they kept it within the state. So that they were able to implement so many programs, incentives and funds to keep the identity of the European film intact. What comes to mind when I think of the European industry is the opportunity to learn how to articulate these funds and support systems that can give each local industry identity and a future.

MX Int6, DIR/PRO

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Participants emphasised that **European film policies encompass all segments of the industry**, including distribution and exhibition, an aspect they identified as a key contributor to its overall success. As in the cases of Brazil and Argentina, France was frequently cited as a leading example. Frequent references to programs such as MEDIA and Eurimages indicate a strong awareness among Mexican film professionals of European support mechanisms, with international co-productions also highlighted as a key term when attempting to define the EFI.

France invests heavily in its cinema, because it requires broadcasters, platforms, public and private television to invest in its films. After that, there's the fact that France obviously has large exhibition chains like Gaumont and Pathé, well, I used to say no, but there are many independent cinemas as well. So, there are a variety of exhibition venues in France. France also supports the exhibition of its own films. Regarding distribution, it's very easy to see French films worldwide. Why? At the American Film Market, for example, 40% of what's exhibited is French. So it's easier. And this is also true at Cannes, Berlin, and all the festivals, where there is good support for distributors. It's a good way to find out what films are being made. There are many (French) sales agents, more than from other countries. It's not really about whether the government is more left or right wing; there's a cultural policy that is more or less consistent and that clearly understands its objectives.

MX Int5, SA/DIST

Consistent with the interview findings, survey results indicate that most Mexican professionals associated the following words with the concept of the EFI [Table 12]: *cinéma d'auteur*, art cinema, international coproductions, state support and cultural diversity. This convergence of qualitative and quantitative evidence indicates that, despite the presence of commercially-oriented European films, film professionals tend to view European cinema through the lens of artistic, co-produced, and culturally diverse works circulating primarily in festival and arthouse contexts.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Words that describes the EFI	Count	Percentage
Cinéma d'auteur	44	80%
Art cinema	38	69.1%
International co-productions	35	63.6%
State support	33	60%
Cultural diversity	26	47.3%
Multilingualism	23	41.8%
Freedom of expression	21	38.2%
High culture	16	29.1%
Non-commercial	14	25.5%
Regional integration	12	21.8%
Competitive	10	18.2%
Experimental	10	18.2%
Slow cinema	8	14.5%
Successful	6	10.9%
Blockbusters	2	3.6%
Very hard to define	2	3.6%
Uncompetitive	1	1.8%

Table 12 - Best defining word EFI – Mexico

When asked what the main strengths of the EFI are [Figure 28], the majority of Mexicans professionals selected international co-productions (89.1%), film festivals in Europe and beyond (70.9%), arthouse cinema (61.8%), public support (58.2%), and cultural diversity 56.4%). Reinforcing the niche status of European cinema, reaching multiple audiences, and worldwide circulation were among the lowest-ranked choices.

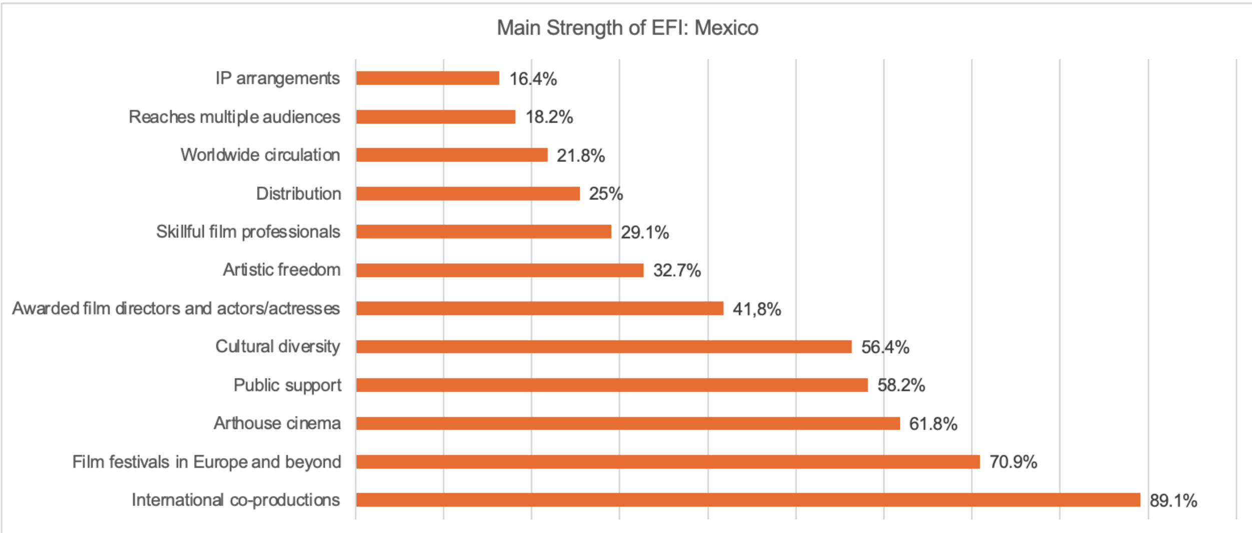


Figure 28 - EFI Main Strength – Mexico

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

When Mexican respondents were asked to rank the primary outlets for European cinema circulation [Figure 29], most participants identified arthouse cinemas (55.4%) and the SVOD platform MUBI (26.8%) when considering first-choice selections only. When total mentions across all three categories are considered, both arthouse cinemas and streaming services emerge as key channels within the commercial circuit. Among the streaming services, Netflix received the highest number of overall mentions, even though MUBI ranks first in terms of first-choice mentions. Within the non-commercial circuit, film festivals are identified as the most prominent outlet, followed by thematic weeks dedicated to European cinema, when considering mentions across all three choices.

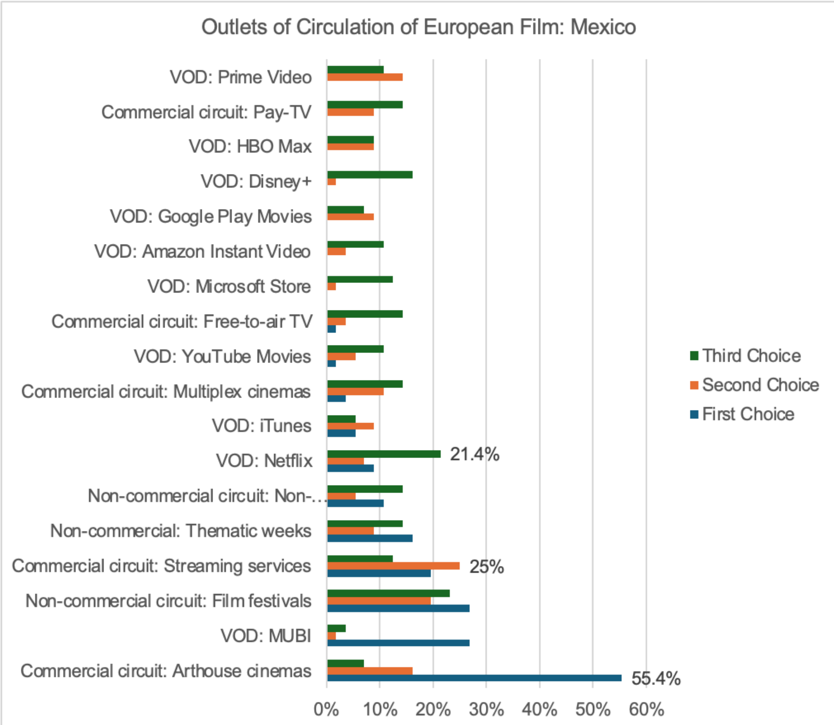


Figure 29 - Outlets of EU Film Circulation – Mexico

Regarding the barriers to European film distribution in the Mexican market [Figure 30], the survey data support the insights gathered through the interviews. Respondents selected competition from Hollywood as the main obstacle (74.5% based on first-choice responses only), followed by limited marketing budgets, complex distribution agreements and competition from domestic films, when considering mentions across all three categories. As observed in the Argentine and Brazilian cases, these results underscore the dominant position of the US film industry within the Mexican market.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

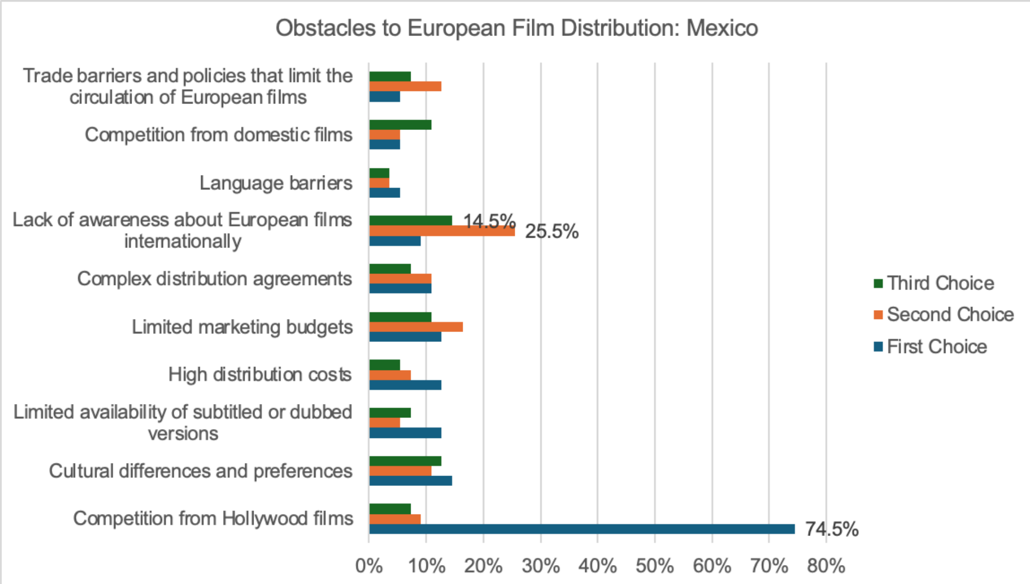


Figure 30 - Main Obstacles to European Film Distribution – Mexico

As for the awareness of programmes or incentives provided by the EU for the film industry [Figure 31], in Mexico the majority of respondents (49 respondents in total) are somewhat aware (30%) or very aware (26%) of them. In contrast, almost a third of respondents (28%) claimed to be completely unaware of existing support.

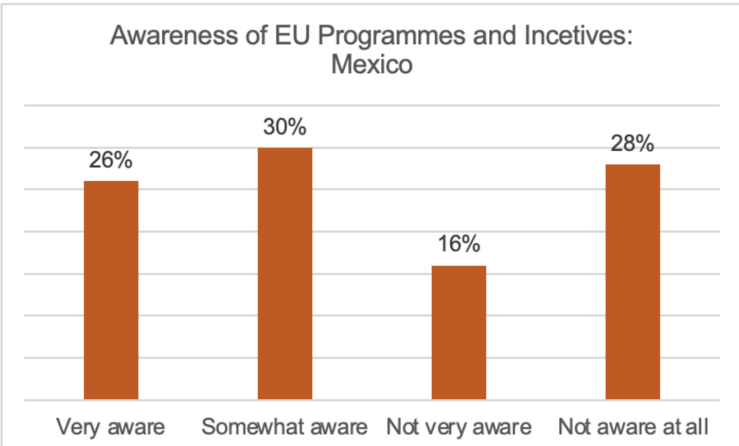


Figure 31 - Awareness of programmes or incentives provided by the EU – Mexico

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

When asked about the effectiveness of EU programmes and incentives [Figure 32], responses in Mexico (33 answers in total) were relatively close: half of the respondents considered the programmes somewhat effective (50%) or very effective (8.8%), while more than 40% viewed them as not very effective. The results suggest that perspectives among respondents are mixed.

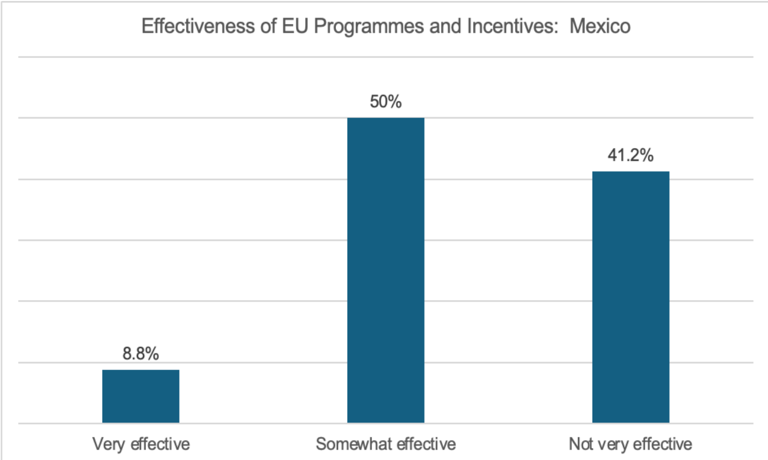


Figure 32 - Effectiveness of programmes and incentives provided by the EU – Mexico

Within this context, distributors interviewed have pointed out the existence of **funding initiatives** in certain European countries **aimed at incentivising foreign distributors** to take risks on the acquisition and circulation of European films. According to them, these programs help mitigate financial risks, making it easier and less risky to distribute European works in Mexico. While **budget constraints and bureaucratic hurdles** remain, such as extensive paperwork and relatively small funding amounts, these supports are still crucial in encouraging distributors to take chances on European cinema. Additionally, events like dedicated screenings in European countries provide distributors with valuable exposure to European films, helping them identify titles that might resonate with audiences in their own markets.

Countries like France, Spain, Italy, Switzerland, and Germany all have programs that support foreign distributors – those of us who take the risk of buying films from their countries. So, there's support for P&A (prints and advertising), and that always helps. It reduces the risk involved in distributing a film. After all, every time we buy the rights to a film, it's a gamble – we hope it does well, generates profit, and keeps fuelling our business so we can keep buying these kinds of films. When those countries help you, especially by lowering your initial investment, I think that's crucial. Of course, their budgets are limited – we understand that – but it still helps. On top of that, these key countries host screening events where you spend two or three days in a cinema watching only Spanish, French, or Italian films. That helps us get to know their cinema better, see what could be interesting for our markets, and take the risk of bringing those films in.

MX Int5, FF

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Survey respondents were also inquired about whether they have non-European international partnerships [Figure 33]. Nearly half of all respondents indicated having non-European international partners (51%), and the remaining ones indicated not having them (49%). These results show that Mexican film professionals maintain professional relationships with partners beyond Europe.

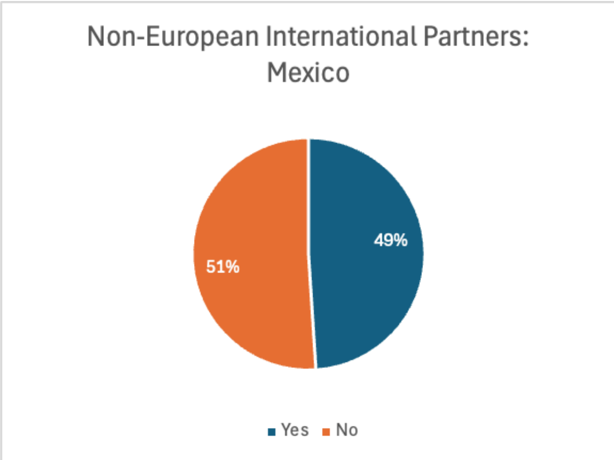


Figure 33 - Respondents with non-European international partners – Mexico

When asked to identify their main non-European international partners [Figure 34], the vast majority of Mexican respondents (24 for this question) selected Latin American players (81.8%), followed by Hollywood majors, including SVOD services such as Netflix (13.6%). In contrast, the other options offered as answers (African, Asian or Chinese players, for instance) obtained very low percentages.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

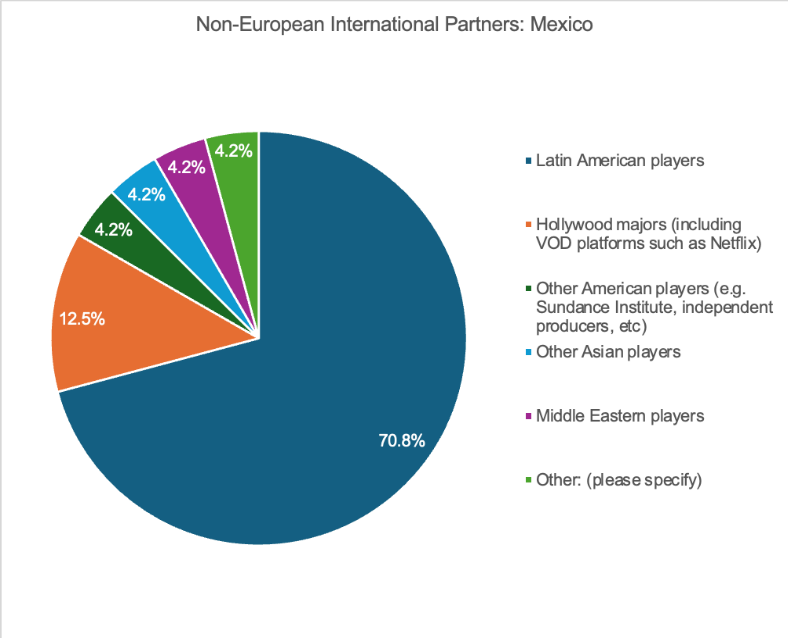


Figure 34 - Non-European international partners – Mexico

Finally, when asked to compare their experiences collaborating with other international partners outside of the EU [Figure 35], Out of 23 Mexican respondents, 65.2% stated they found them similar, while 17.4% found them better, and 13% of the respondents considered them worse. These results show that Mexican professionals perceive collaborations with non-EU partners as largely comparable to or even more favorable than those with European partners.

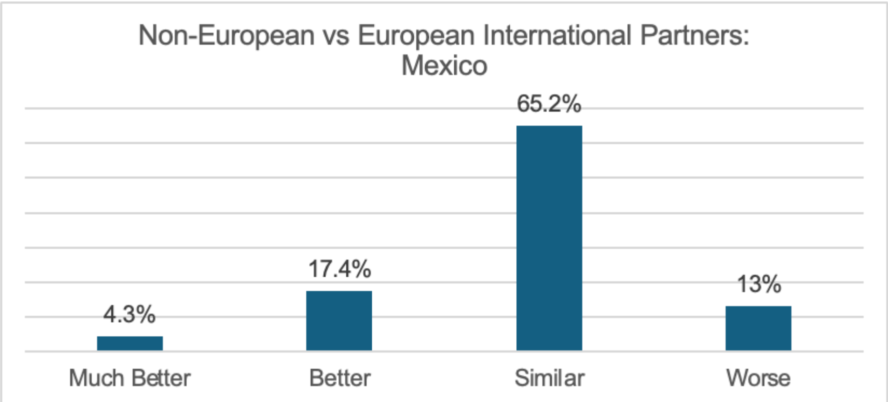


Figure 35 - Comparison of experiences with non-EU partners – Mexico

Based on the interviews and survey results, Europeanness is associated with quality, sophistication, and auteur-driven or art-house storytelling. It is perceived as grounded in a rich cultural heritage, offering films with complex narratives and artistic ambitions. Moreover, it is

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

closely tied to public funding, an industry that sustains every segment of the production and distribution chain and benefits from strong institutional frameworks. Europe is therefore seen both as a creative ideal, anchored in auteurism and expressive freedom, and as a practical framework for film production and distribution through co-production and state-supported mechanisms. Since many interviewees occupy multiple roles in the film industry, associating a singular, fixed idea of Europeanness to a specific professional position proves difficult.

3.4 South Africa

In South Africa, the interviews revealed that the EFI tends to be associated with **arthouse** (SA Int8, DIR/PRO; SA Int4, DIR/PRO) and "more artistic than commercial" films (SA Int9, O) whose "cinematic styles are very realist [...] very topical on societal issues" (SA Int14, DIR/PRO). **Storytelling** was highlighted by several interviewees, even though there was a recognition that other types of film are also produced in Europe "it's arthouse, it's quite [...] engaging stories, you know, they really tend to go a lot of in depth in terms of telling their very personal stories at times" (SA Int16, FUNDER/POL). Some interviewees also mentioned cultural heritage and specific cultural references – "I always think Shakespeare something, and then I thought *Game of Thrones*, and then I think *Vikings*" (SA Int13, DIR/PRO). These cultural references reflect Europe's **cultural diversity**:

> ***Guy Ritchie comes to mind, movies like* Snatch*, I think The Office, Death at the Funeral, and also some Spanish movies.***
>
> **SA Int15, DIR/PRO**

Film festivals were also mentioned. Similarly, one interviewee mentioned **policy and regulation structures, and co-productions**: "European film, when you talk about what comes is fragmentation, that's number one. And number two is: overpopulated by Hollywood projects [...]. Three: they are a well regulated body [...]. They have amazing structures when it comes to the regulations of the film and television industry [...]. They are one unit" (SA Int12, DIR/PRO). Finally, several interviewees highlighted the **relationship between Europe and Africa.** One interviewee argued that it is unbalanced: "the structures in Europe have been set up so that the benefit goes to European filmmakers rather than African filmmakers" (SA Int10, DIST/SA).

Other interviewees also focused on this relationship but with a more positive perspective, highlighting the possibility of learning and skills development. Another stated that a more balanced and mutually beneficiary relationship could be developed between African and European film: "I would love to get to the standards that they are in and the support that they have [...]. I don't know whether for them coming to Africa and doing films, they are able to do that. To hire more staff and save money at the same time and… to showcase our areas more" (SA Int19, DIR/PRO). Indeed, opportunities to develop knowledge exchange have intensified in recent years. Speaking of a recent exchange with an Eastern European country, one interviewee stated: "there was a great reception and they were really keen to listen [...]. We also had an opportunity to have an engagement with the Netherlands" (SA Int2, FUNDER/POL).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

The qualitative research reveals, therefore, that **Europeanness is understood as a storytelling type or film style, diverse cultural heritage and references, a complex structure characterised both by fragmentation and co-productions that is balanced by policy structures**. Moreover, an ambiguous position vis-à-vis Europe began to emerge. As the quotes above make clear, each type of answer combines several roles in the supply chain. Therefore, it is not possible to say that the views of South African professionals differ according to their position in the value chain.

While the survey confirms these findings, respondents highlighted in particular international co-productions (picked by 68% of respondents), state support (64.3%), art cinema (50%), freedom of expression (39%), cultural diversity (36%), and cinéma d'auteur (36%) [Table 13].

Word that describes the EFI	Count	Percentage
International co-productions	19	68%
State support	18	64.3%
Art cinema	14	50%
Freedom of expression	11	39%
Cultural diversity	10	36%
Cinéma d'auteur	10	36%
High culture	11	39.3%
Multilingualism	10	36.7%
Regional integration	8	28.6%
Non-commercial	7	25%
Experimental	6	21.4%
Successful	7	25%
Very hard to define	5	17.9%
Slow cinema	4	14.3%
Competitive	4	14.3%
Blockbusters	1	3.6%
Uncompetitive	0	0%

Table 13 - Best defining word EFI – South Africa

Similarly, when this subsample was asked what the main strength of the EFI was, most respondents selected international co-productions (78.6%), film festivals in Europe and beyond (67.9%), arthouse cinema and public support (state support, policies, EU programmes…) (64.3%), and distribution (46.4%) [Figure 36].

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

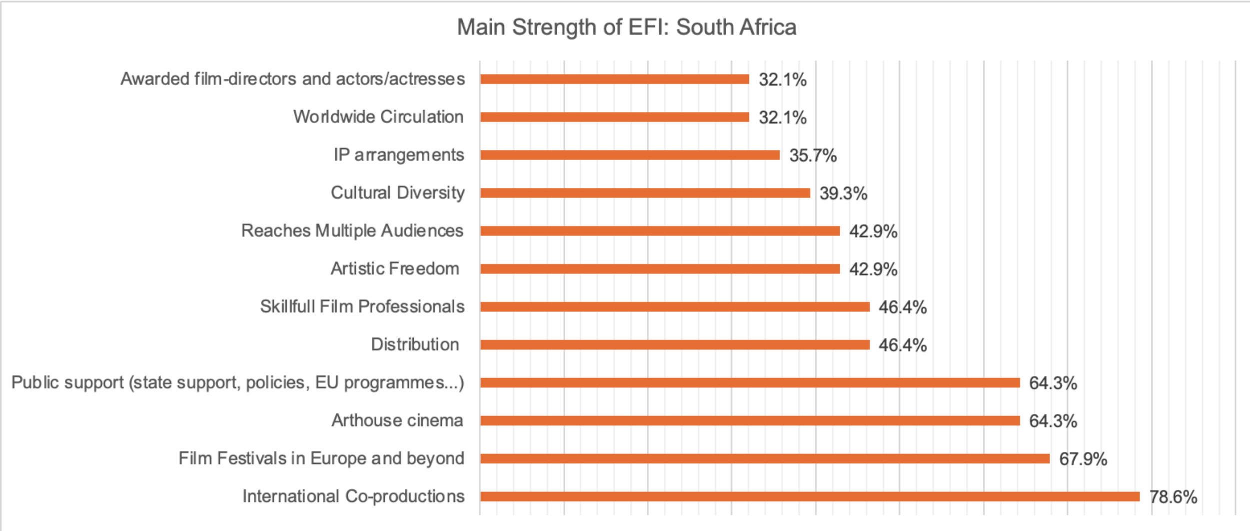


Figure 36 - EFI Main Strength – South Africa

When South African respondents were asked to rank the main outlets in which European cinema circulates the most [Figure 37], most respondents selected Netflix as their first option (32.1%), arthouse cinemas as their second choice (17.9%) and non-commercial avenues in their place (21/4%). Importantly, a significant percentage of interviewees also selected films festivals and streaming services as their first option. Platforms like Amazon Instant Video and Apple iTunes received fewer top rankings, indicating that they do not contribute as much to the circulation of European film.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

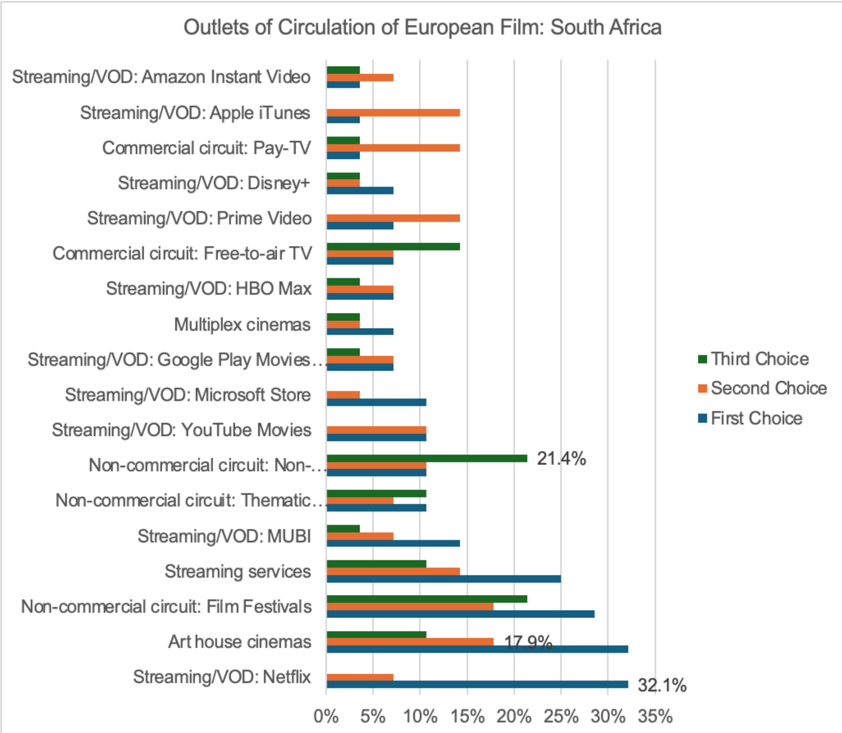


Figure 37 - Outlets of EU Film Circulation – South Africa

Regarding the obstacles to European film distribution [Figure 38], South African respondents selected competition from Hollywood films as the main obstacle (60.7%), followed by lack of awareness about European films internationally (28.6%), and language barriers (21.4%), which is closely followed by cultural differences and preferences (17.9%). These results highlight the US film industry dominance and the perceived cultural difference between South Africa and European countries.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

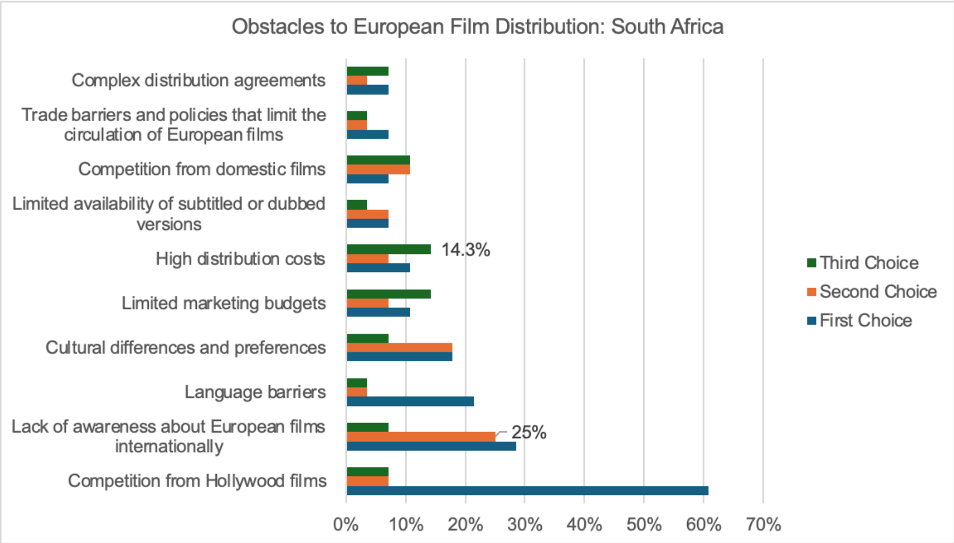


Figure 38 - Main Obstacles to European Film Distribution – South Africa

As for the awareness of EU programmes in the case studies under analysis, in South Africa the majority of respondents (58.4%) are somewhat and very aware of them [Figure 39].

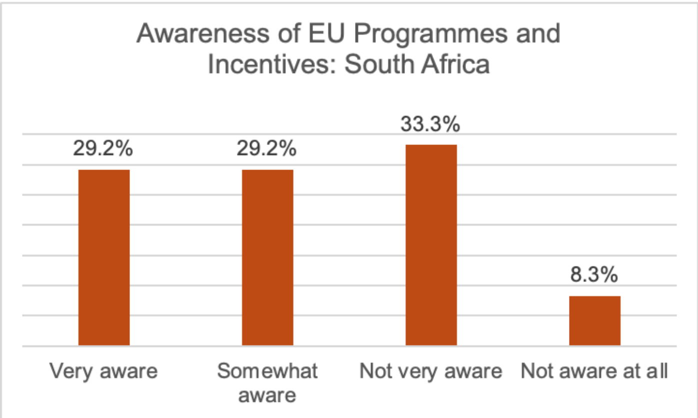


Figure 39 - Awareness of programmes or incentives provided by the EU – South Africa

When asked about the effectiveness of EU programmes and incentives [Figure 40], South African respondents were almost evenly split. Nearly half of the respondents (45.5%) considered the programmes somewhat effective, while 40.9% viewed them as not very effective. These findings suggest that opinions are divided.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

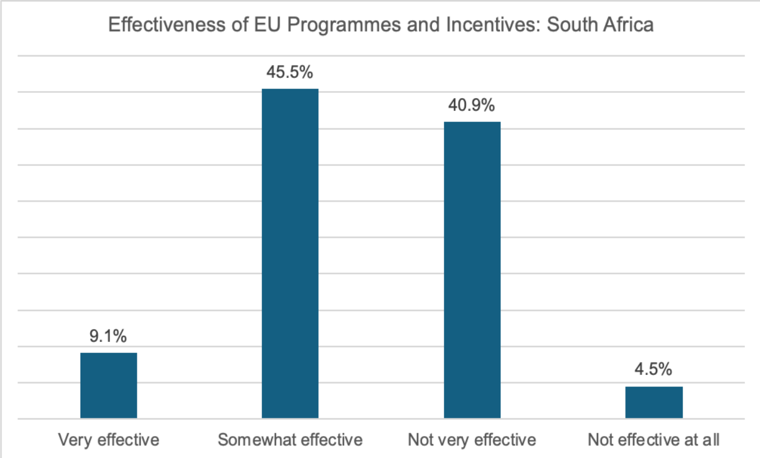


Figure 40 - Effectiveness of programmes and incentives provided by the EU – South Africa

Regarding collaborations or investment from other non-EU actors, most South African interviewees had either direct experience or indirect knowledge of such initiatives. For this reason, the analysis of international collaborations with non-EU actors is longer than in the case of the other case studies.

Russia emerged in interviews as a potential exhibitor and distributor that is slowly but increasingly engaging in conversation with South African film professionals. This is aligned with the fact that, in 2006, South Africa and Russia entered into a strategic partnership, which was upgraded into 2013 to a comprehensive strategic partnership (Geldenhuys, 2015). This strengthening of relations has been the goal of both parties. On the one hand, Russia aims to develop a "new politico-diplomatic and economic rapprochement with developing states with emphasis on Africa through South Africa". On the other hand, "South Africa took advantage of its bilateral and multilateral [...] relations with Moscow to serve as a gateway for Russia into Africa" (Amusan, 2018). This has resulted in an intensification of trade relations and investment flows between both parties across "political, economic (mining and energy sectors) and security factors." (Nkuka and Shai, 2020). She statements made by interviewees suggest that Russia's engagement has also begun to extend to audiovisual policy and relations.

Russia was also mentioned in the context of the **BRICS Film Festival,** which has been held since 2016. Although the BRICS have now extended to BRICS+ (as is discussed below), this diplomatic group began to cooperate in 2009 and originally included the four main emerging market economies Brazil, Russia, India, China (BRIC). It subsequently extended to South Africa in 2011, indicated in the Sanya Declaration, in which it is stated that "China and Russia reiterate the importance they attach to the status of India, Brazil and South Africa in international affairs" (BRICS 2011). Since the first joint statement issued in 2009, this group has increased cooperation with the aim of supporting their shared goals and redefining the global order (BRIC, 2009). Despite such a focus on common interests and prosperity, "within the BRICS countries, South Africa continues to have a trade imbalance with Brazil, India and China, and a cultural trade surplus with Russia" (South African Cultural Observatory, 2017, 1). Nonetheless, the BRICS Film Festival conveys and supports the development of a common strategic narrative

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

that "empowers the BRICS group in the 'battle of narratives'" (van Noort, 2017). This festival gives film professionals the possibility to exhibit films to new audiences without taking on high costs. It also allows professionals to exhibit films from South Africa – for example, in the Moscow International Film Festival. However, it remains a relatively closed circuit: "the BRICS thing seems to be very political; certain people have access to those conversations" (SA Int7, PRO). Another interviewee highlighted the fact that these festivals haven't yet translated into sustainable distribution circuits:

I engaged the year it was in China, the year it was in India, and the year it was in Moscow… The problem is that […] there's no distribution panels between the two […]. You can't see any of those films in South Africa or in Brazil or in China. Unless it's at the film festival.

SA Int4, DIR/PRO

Another interviewee mentioned discussions around "a BRICS treaty which has never been taken on" (SA Int18, DIR/PRO).

According to interviewees, Russia is also involved with the South African film industry through conversations around broadcasters and how to distribute Russian content through African broadcasters.

I was in Namibia [...] and [...] Sputnik was there talking to everybody that would listen to them and say, how can we get Russian content onto your platforms [...]? It's interesting that South Africa took them off, or DSTV, […] it was the satellite company that DSTV uses, which is a European based satellite company, wouldn't allow RT onto there [...]. It wasn't a South African decision, it was the Europeans. I didn't understand that.

SA Int11, EXH

This quote suggests the hypothesis – whose testing would require further research – that Russian film stakeholders might be working to increase support for RT among South African filmmakers and to decrease support for European stakeholders. This would be aligned with Russia's efforts to "build influence in Africa" (Clifford and Gruzd, 2022, p. 2) and "create media narratives that portray itself as an ally, at the same time discrediting Africa's traditional partners" (Clifford and Gruzd, 2022, p. 16).

India was also mentioned by interviewees. South Africa and India signed a Strategic Partnership in 1997, establishing South Africa as "India's first strategic partner" (Ministry of External Affairs, 2024, p. 1). Since then, the partnership has intensified across several dimensions and "bilateral trade between India and South Africa has witnessed significant growth" (Narang, 2024). Although data reveal that "the film and television sector, as part of the Audio-visual and Interactive Media domain, does not appear have a significant export profile as yet" (South African Cultural Observatory, 2017, 24), the trade imbalances in terms of cultural products between South Africa and India are "enormous" (South African Cultural Observatory, 2017, 27). In other words, this strategic partnership hasn't yet been strongly reflected in South African–Indian media relations, and cultural relations are disproportionately skewed towards

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

India. This imbalance was reflected in statements made by interviewees. The desire for Indian content by South African viewers can be confirmed by the existence of regular Bollywood screenings in the South African market: “Avalon Cinemas here, the one in Kilani has two screens that runs a new Bollywood movie every month” (SA Int11, EXH). At the same time, another film professional argued that although “South Africans seem to have a big appetite for Indian movies”, they are “not fully involved in any work”. However, this is something that they want to change:

We have now consciously decided that we're going to do more Global South–South relationships and now this is going to force us to now look at how we can work with India, how we can work with China or anyone else in the South.

SA Int10, DIST/SA

These statements reveal a limited and currently ad hoc network of partnerships between South African and Indian film professionals. In any case, South African stakeholders recognise the potential film market in India. Another interviewee mentioned the existence of a Memorandum of Understanding with India (Cariforum Region, 2009, p. 71), which has positively supported a small number of animated films (SA Int2, FUNDER/POL). This interest in further collaborations expressed by film professionals is reflected in institutional partnerships, including “some exchanges with festivals and training. There's been a lot of training opportunities for our students with India” (SA Int2, FUNDER/POL). However, the desire from India film stakeholders for investment in South Africa was deemed as limited (SA Int11, EXH). For now, co-productions with India require European partners: “I'm having to go through Europe to try and do a film set in India. Because we don't have a co-production treaty. So I'm literally having to go to a UK co-producer” (SA Int4, DIR/PRO). However, considering the desire for further collaboration between South African and Indian film industries, it is not surprising that, as another film stakeholder stated, a potential collaboration arrangement between South Africa and India is currently under discussion:

There is a draft currently floating with India. It's been floating for some time now.

SA Int9, O

Regarding **Asia** more broadly, exports from South Africa to Asia have been increasing steadily, reaching a maximum of 63102.46 ZAR Million in March of 2022 (Trading Economics, n.d.). In the film industry, interviewees suggested that there is space for more growth. Regarding **China**, relations with South Africa were formalised in 1998 and have gradually strengthened ever since. Indeed, “South Africa was the first African country to sign a Memorandum of Understanding (MoU) on the Belt and Road Initiative (BRI) Cooperation with China” (Akinola and Tella, 2022). China has invested significantly in Africa, leading to what has been described as “a potential replacement to the continent’s traditional trading partners and [...] a shift for Africa from old dependency to a new one” (Lisimba, 2020). However, in the case of South Africa–China relations, scholars see a pattern that questions “the conventional resource extraction and infrastructure financing that define China's ties with other African countries. South Africa is home

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

to the largest and oldest Chinese community in Africa, hosts a number of Confucius Institutes at its universities [...] and accommodates an active Chinese media sector. For example, in 2013, two Chinese state-backed companies bought a 20 percent stake in Independent Media, South Africa's second largest media company" (City Press 2020). Chinese firms have also been involved in media production and distribution in South Africa, including content production and the training of journalists (Madrid-Morales and Wasserman, 2017)" (Akinola and Tella, 2022). In response, some South Africans express a concern "by what they perceive as neo-colonial influence and an erosion of their democratic ideals" (Bradley, 2016).

In any case, several interviewees stated that there is a conversation with Chinese stakeholders; however, it has so far stayed at the level of "discussions and programs, but nothing in terms of agreements" (SA Int9, FUNDER/POL). This highlights the existence of an ad hoc but emerging network of relations between the South African and Chinese film industries: one interviewee stated that they worked on a co-produced action film; another on short documentaries for China TV; another mentioned a Chinese film festival; others mentioned China when asked about funding for recent or ongoing projects. One interviewee shared the experience of pitching a series for a Chinese funder: "we pitched a drama series on a brief we were given [...], which [...] sounded like it was being financed by China, and it had to be about something which would be interesting to Chinese audiences" (SA Int1, DIR/PRO).

> ***It's the agenda, the main agenda for China and they say that publicly they want a better story told about China in Africa. I don't know if you watch CCTV or see the other news channel on DSTV [...]. The cultural programs are amazing [...]. And the Chinese are doing co-productions in not just film but other areas as well.***
>
> **SA Int11, EXH**

Despite these emerging relations, another interviewee suggested that industrial and business relations between South Africa and China are limited due to the former's advanced film industry: "there'll be a shooting with Netflix and Film Africa has been servicing it, which is a Chinese-focused story. But in terms of partnerships, co-production with China, it hasn't happened yet, but I think it has a lot to do with the fact that […] our industry's very advanced […]. And therefore, we're not […] desperate enough to kind of give it away" (SA Int8, PRO). Such soft power strategy is also evident in China's financial commitment to the BRICS Film Festival (SA Int2, FUNDER/POL).

Brazil was also mentioned. Relations between Africa and Brazil were particularly strong during the 2003-2010 government of Luiz Inácio "Lula" da Silva (Erthal Abdenur, 2018, pp. 196-197). With Brazil, professionals tend to consider that there are real partnerships, whereas in other cases, South African film professionals tend to take the role of service providers: "It's more them servicing the content than them getting funding. […] We don't have what I would call a product, I would say, outside of Brazil. I know there were one or two collaborations. […] But they were not official" (SA Int9, O). This informality was confirmed by another interviewee:

> ***We've had the Brazilians come […]. For example, the NFEF had formed a fund with a Brazilian organisation called Spcine […], and this was available to filmmakers, and […] they don't have to officially be part of the treaty to activate that fund.***

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

EUROPEAN FILM COMPETITIVENESS

SA Int10, DIST/SA

Nonetheless, a co-production treaty was signed with Brazil – a relationship that is seen as a model for an expansion of film relationships between South Africa and other Global South industries. “I know Brazil was signed at some point […]. And we signed our first continental treaty with Nigeria in 2021, followed that up with Kenya in 2022. And we're having what I would say exploratory discussions. We're looking at the Caribbean” (SA Int9, O).

The expansion of the BRICS to **BRICS+** was also mentioned. One interview stated that: “We have **Saudi Arabia** and others coming in. It really depends on who has the ability to respond to industry [needs] quickly enough” (SA Int2, FUNDER/POL). Such investment is consistent with its increasing engagement in the region (Ani, 2025). Another interviewee also mentioned Saudi Arabia as a recent investor:

> ***They suddenly had lots of money that they are investing in African films… They've got a fund. They've got a residency. And they give cash prizes […] through their pitching program. They're building their film industry […]. But they are working a lot with the MENA regions, but they've extended to all of Africa… And […] they […] have African representation in the selection committee.***

SA Int10, DIST/SA

When asked if they’d worked with **US** co-producers or funders, one interviewee stated that they have done features with an American TV channel. Interviewees also mentioned Sundance. However, the vast majority of answers mentioned Netflix, with whom several interviewees had or have had partnerships. This echoes a report by Netflix, which states that between 2015 and 2022 the company “invested in 170+ licensed titles, commissioned 16 Netflix Original South African series” (Netflix, 2023, p. 22). However, the idea that the relationship with Netflix isn’t built on the basis of a collaboration was mentioned by several interviewees. One stated:

> ***The African division is based out of Amsterdam. But it does have something very American about it, about Netflix, I must say […]. It's sort of very marketing focused.***

SA Int1, DIR/PRO

Another reiterated this: “I've only sold things to them […]. You pick projects, you pitch a project, they decide whether they like it or not” (SA Int7, PRO). Moreover, Netflix’s way of working is not necessarily seen in a positive light. One black female interviewee detailed a former experience as contentious: “a white African guy […]. I remember him saying to me, "Nah, you know the reason why you guys are the Head of Departments, it's because of the DTIC [diversity and inclusion policy] thing" [...]. Even some of the actors, they'll ask me to get them coffee as the main first lady” (SA Int15, DIR/PRO). This might be connected to what others have described as Netflix’s “focus on black women leads” in South Africa (Smit, 2023). Another interviewee stated that, even though a film on which they had worked was available on Netflix, it could not be accessed in South Africa, highlighting the low interest of the company in promoting South African productions (SA Int5, DIR/PRO). More broadly, interviewees highlighted the fundamental domestic market imbalance regarding South African and other film industries. This confirms what

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

others have noted, as mentioned in the literature review: “the impact of these platforms is positive on local creative ecosystems, despite power asymmetries at play” (Chalaby, 2025).

Survey respondents were also asked if they have non-European international partnerships [Figure 41]. In this case, 62.5%respondents indicated having non-European international partners, and 37.5% indicated not having them. These results confirm the findings of the interviews.

Figure 41 - Respondents with non-European international partners – South Africa

When asked to identify their main non-European international partners [Figure 42], South African respondents most frequently selected American players (33.3%), such as the Sundance Institute or independent producers, followed by African players (26.7%). Hollywood majors and other unspecified players were each selected by 20% of the respondents. While options such as Chinese, Indian, Latin America, Middle Eastern, and other Asian players were provided, none of the respondents selected them. These results suggest that South African film professionals tend to mainly collaborate with American and African partners, with limited engagement in other global regions – a trend to which the interviews add further detail.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

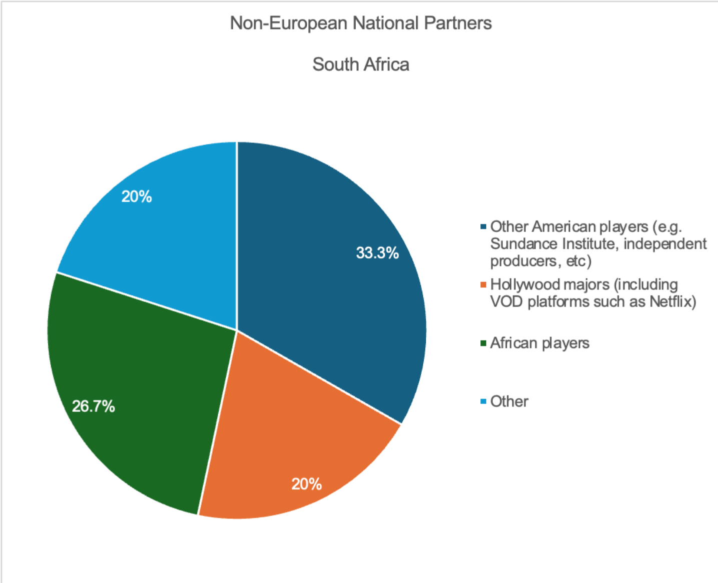


Figure 42 - Non-European international partners – South Africa

Finally, when asked to compare their experiences collaborating with other international partners outside of the EU [Figure 43], 64.3% of respondents stated they found them similar, while 7.1% found them better, and 38.6% of the respondents considered them worse. This also echoes the findings of the interviews.

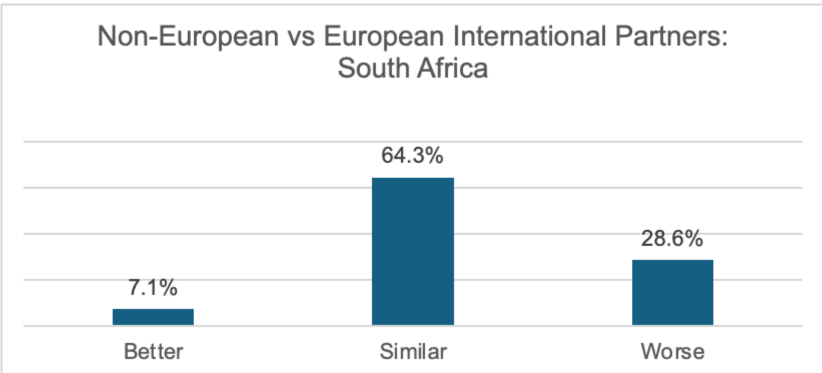


Figure 43 - Comparison of experiences with non-EU partners – South Africa

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

3.5 South Korea

In South Korea, interviewees consistently associated the EFI with **arthouse** cinema, a perception that was shared across all categories of professionals in the audiovisual supply chain. Among all professionals and stakeholders interviewed the characterisation was clear: "European film is arthouse film" (SK Int10 FF). While the content of this label varied—described as "difficult" (SK Int6 DIR/PRO), "beautiful" (SK Int3 DIR/PRO), "sensitive" (SK Int5 FF), "socially engaged" (SK Int4 FUNDER/POL), "intellectual" (SK Int8 O), or "creative, artistic, unique, thought-provoking" (SK Int17 DIST/SA)—there was consensus that European cinema represents a strong artistic vision. Interestingly, even commercial European films will be associated with arthouse cinema in South Korea, as a a public representative explained "In general, European films are considered as arthouse films, even a comedy film, in France it's a commercial film but in South Korea, it was considered as an arthouse film" (SK Int4, FUNDER/POL).

The EFI was also closely associated with strong **public support mechanisms**, including co-production models and funding schemes that are perceived as fostering creative risk-taking and talent development. The role of public support is perceived as positive and important in fostering diversity and innovation, as a interviewee summarise "European film policy is also seen as a good reference, very important, particularly police making in France, how they protect domestic films and how they kind of support film makers and artists, cultural workers in general"(SK Int8 O).

Interviewees also indicated how these characteristics differed from South Korean cinema: "European cinema is to be honest, not that familiar to the Korean audiences, the European cinema and Korean cinema style, are very different [...] the Korean film, it looks very conservative, but the European cinema looks like a very free and artistic" (SK Int15 DIST/SA). Which is perceived as a result of the EU policies and support schemes: "It seems like you guys have a quite established relationship of supporting those new talents and always bringing out the new voices to the markets internationally" (SK Int16 DIST/SA).

The EFI was also strongly associated with the international **film festivals**, particularly with the three major festivals — Cannes, Berlin, and Venice. Interviewees frequently referenced these events as emblematic of European cinema's global visibility and cultural prestige. Europeanness is therefore understood as arthouse cinema, often linked to creative freedom, thematic diversity, and strong public support. Co-productions and film festivals are also strongly associated with the EFI, which is perceived as distinct from the commercially-oriented model dominant in South Korea.

Despite the generally positive perception of the EFI among South Korean professionals, its actual **presence in the local market remains limited**, both in terms of the number of European films distributed and the level of professional interaction between the two industries. As discussed in section 2.5, the characteristics and structural challenges of the South Korean film market, particularly the dominance of commercial productions, the concentration of the exhibition sector, and audience preferences, pose significant barriers to the circulation of European films.

European titles are often granted only limited theatrical releases, as one interviewee explained, "European films often have limited theatrical releases in South Korea, with fewer screens and

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

showtimes compared to domestic productions or Hollywood blockbusters. This can make it harder for these films to gain visibility and build word-of-mouth buzz" (SK Int7 EXH). The limited screen availability directly affects the presence of European films in South Korea.

Korean film market is not characterised by diversity, it means we have exhibitor part driving by the commercial films and some arthouse theatres for some arthouse films, for example we have only overall, the 50 to 38 screens for art house films, it means other screens will be screened for Korean commercial films or American blockbusters. So the market is very small.

SK Int4, FUNDER/POL

Distributors are also hesitant to take financial risks on European titles, often viewing them as unprofitable: "It's very difficult to see European film, especially in South Korea, because all the time we distribute only commercial film. Because European film we consider like arthouse movie, so it doesn't make money. That's why Korean distributors don't try to take the risk to show more various movies from Europe" (SK Int3 DIR/PRO). Moreover, unlike Korean films, European productions do not benefit from local public funding schemes that could help offset distribution costs. As one respondent put it, "You have to buy the film with a lot of money and then you have to distribute it with a lot of money. But then, if these are not Korean films, then you don't have any support from the government" (SK Int1 DIR/PRO). In this context, several professionals (1, SK Int10 FF, 26) underscored the importance of EU-level support mechanisms to facilitate the circulation of European films in South Korea. France was often cited as a model for its support system, which helps facilitate the distribution and exhibition of French films in South Korea. One producer (SK Int1 DIR/PRO), drawing on previous experience in the exhibition sector, referred positively to an earlier EU initiative that supported theatres screening European films, a programme that is no longer active but was described as effective and worth reintroducing.

These barriers are compounded by **audience preferences**, which are shaped by a fast-paced, trend-driven media environment and an established appetite for domestic and Hollywood blockbusters. Interviewees repeatedly mentioned that unless a European film features a well-known director or star or have been awarded in a major film festival, it is unlikely to attract attention: "European films like usually people remember only a few directors who are well known. So there should be a star or known director to attract people, even though it has a good story and it's a good movie. It's not easy to attract people to the movies." (SK Int11 DIST/SA)

Our audience is quite fast, reactive to the trends on social media campaigns, everyone wants to see films which are on trends, and they go for the cinema tickets on the opening day, even during the weekday. They are quite fast, and the word of mouth came out of, you know, those early days. If we can make some good campaigns with these targets, it really goes well, but otherwise it doesn't

SK Int16 DIST/SA

However, some interviewees suggested that the current context may offer new opportunities for increasing the visibility of European films in South Korea. Changing audience habits, particularly

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

the decline in cinema attendance for mainstream commercial titles, may open space for more diverse content. As one interviewee observed, “In Korea, I think people who watched movies for fun are not coming to the theatre anymore. So, like commercial movies compared with art house movies, sometimes art house movies have more admissions... There is a really big gap between art house movies” (SK Int11 DIST/SA). This shift in viewing patterns is encouraging some distributors to reconsider the value of European titles. For example, one participant explained, “*Anatomy of a Fall*, when we distributed it in Korea, the box office number was not that big. But it always had the attraction from the audiences because of the high quality... the mise en scène, the concept. That’s why, rather than buying very big U.S. studio titles, we are now thinking of acquiring some European titles, Southeast Asian titles... very artistic and independent, as a portfolio” (SK Int15 DIST/SA).

In addition to changes in theatrical strategy, some interviewees pointed to the role of VOD platforms in expanding access to European content, as a distributor explained:

People need to pay a lot to buy the European film, to distribute in Korea. But it’s really not easy to recoup the money... Still, I think European films are not that familiar to the Korean company or the Korean audiences. But the situation is becoming better because there are so many OTT platforms. So there is more opportunity to watch European film and drama series and many variety shows

SK Int15, DIST/SA

Another interviewee reinforced this point, noting that “while European cinema has traditionally found its audience in art house cinemas and film festivals, OTT platforms like Netflix are becoming increasingly notable for their role in distributing European films in South Korea” (SK Int2, DIR/PRO).

Regarding the connection between the two industries, interviewees consistently described it as **underdeveloped**, both in terms of professional networks and institutional collaboration. Most participants indicated limited awareness of existing mechanisms for cooperation, including co-production opportunities or EU-supported initiatives. The presence of European film professionals in South Korea was perceived as minimal, and sustained dialogue between the two sectors was largely absent. This weak engagement was attributed not only to a lack of strategic outreach but also to persistent **language and cultural barriers**, which were mentioned extensively across interviews. As one respondent put it, “The language barrier and the cultural barrier. They don't know. They're not aware of the system. So, I guess that's the same problem probably with Europe and Korea. It's just like we don’t know each other. We don’t know how each other’s system works” (SK Int6 DIR/PRO).

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Word that describes the EFI	Count	Percentage
International co-productions	26	81.3%
Art Cinema	25	78.1%
State support	20	62.5%
Cultural Diversity	18	56.3%
Cinéma d'auteur	18	56.3%
Freedom of expression	16	50%
Multilingualism	11	34.4%
Slow Cinema	10	31.3%
Non-commercial	9	28.1%
Regional Integration	8	25%
High Culture	8	25%
Experimental	8	25%
Uncompetitive	4	12.5%
Competitive	3	9.4%
Successful	3	9.4%
Very hard to define	1	3.1%

Table 14 - Best defining word EFI – East Asia

The survey conducted with East Asian professionals shows that the EFI is primarily associated with international co-production (81.3%), followed by art cinema (78.1%) and state support (62.5%) as indicated in Table 14. When read alongside the findings from South Korea, these results confirm the strong association of the EFI with arthouse cinema and cultural diversity. However, the prominence of international cooperation contrasts with the data coming from interviews. While some South Korean professionals associate the EFI with co-production, it is not a central aspect of their relationship with Europe.

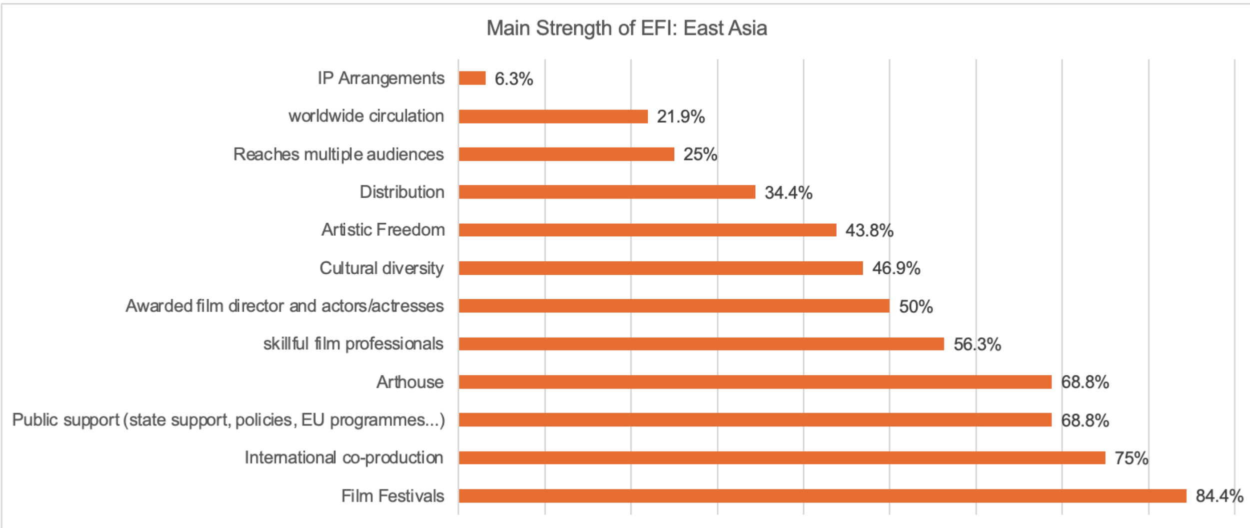


Figure 44 - EFI Main Strength – East Asia

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

When asked about the main strengths of the EFI [Figure 44], East Asian professionals highlighted film festivals (84.4%), international co-production (75%), and public support (68.8%) as illustrated in Figure 45. The emphasis on festivals resonates with data coming from interviews, where festivals are recognised as a crucial channel for the circulation of European films and for networking between the two industries.

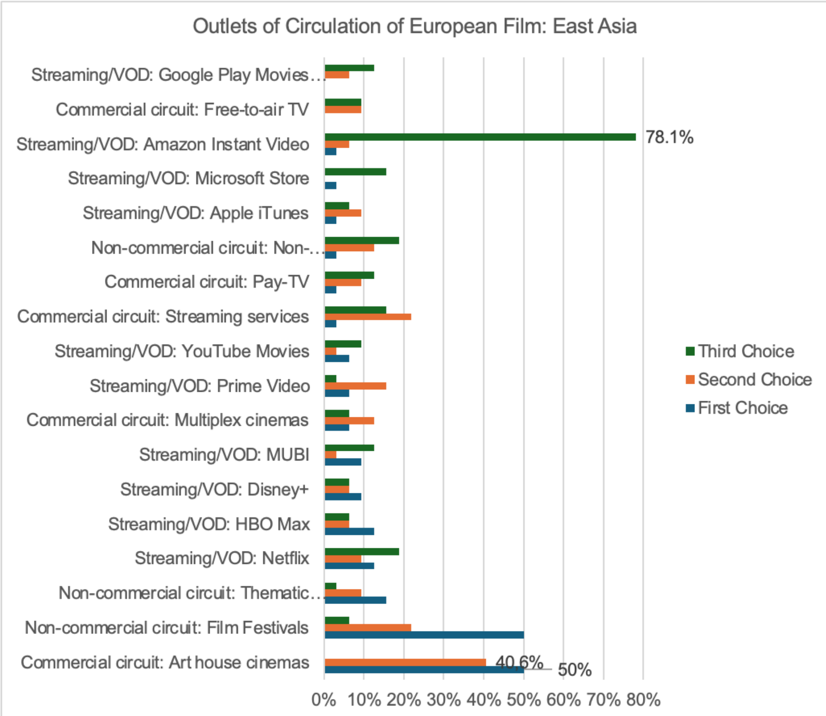


Figure 45 - Outlets of EU Film Circulation – East Asia

In the view of East Asian respondents [Figure 45], their first choice in indicating where European cinema circulates most prominently was through arthouse cinemas (50%) and film festivals (50%). Free-to-air and pay television were ranked much lower, reflecting their limited role in the distribution of European films in the region. While some VOD services – such as MUBI (9.4%), HBO Max (12.5%), Disney+ (9.4%), Netflix (12.5%), and Prime Video (6.3%) – were identified as important channels, others, including Amazon Instant Video (3.1%), Microsoft Store (3.1%), Google Play (0%), and Apple iTunes (3.1%), received few top rankings, indicating their comparatively low perceived relevance for the circulation of EU films.

In exploring the obstacles to European film distribution, the survey results [Figure 46] point to competition from Hollywood productions (43.8%) as the most significant barrier, followed by competition from domestic films (28.1%) and a lack of international awareness of European cinema (25%). These findings closely mirror the qualitative data, where South Korean interviewees emphasised the combined dominance of US blockbusters and local commercial films, alongside the limited visibility of European works in the local film market.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

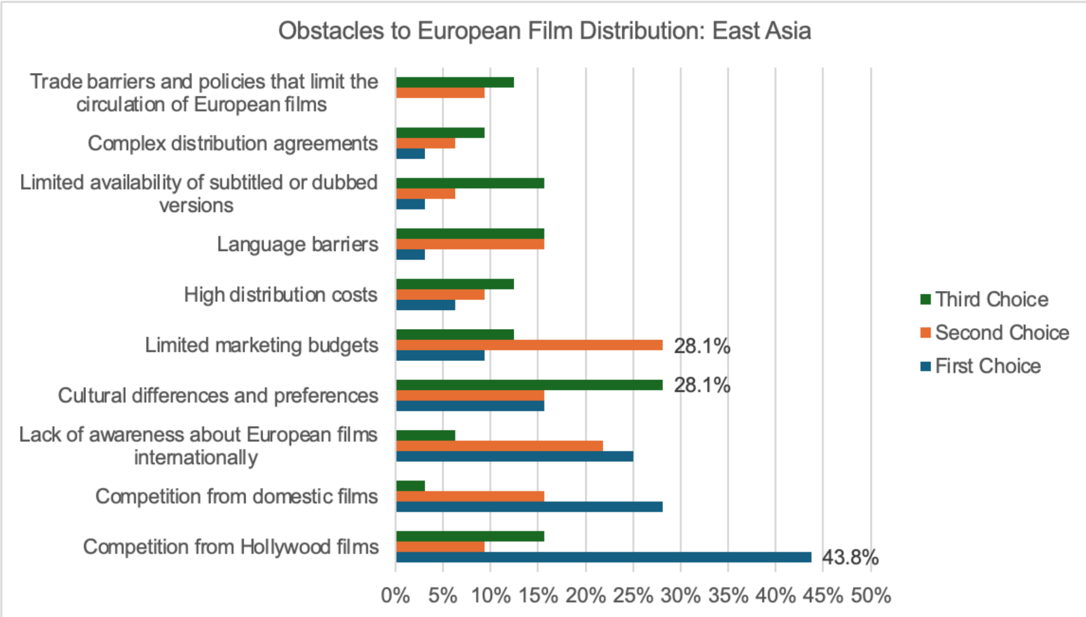


Figure 46 - Main Obstacles to European Film Distribution – East Asia

Finally, when asked about other international collaborations, interviewees did not mention any support schemes or structured cooperation frameworks with other countries. While some South Korean private companies are reportedly expanding their business in specific regions —such as the US, Vietnam, India, and Türkiye— the main focus of international collaboration remains firmly centred on the **US**. Several participants described the US as the ultimate reference point for global success, both economically and symbolically. As one interviewee noted, “I think there is a misconception in Korea that you have to succeed in America to really succeed... *Parasite* won the Palme d’Or in Cannes and did very well in the Korean box office. But it wasn’t really until it won the Academy Awards that everybody was talking about it” (SK Int5, FF). The US market is seen not only as the largest and most commercially attractive but also as a gateway to global visibility: “They are more excited about collaborating with the US because that collaboration can open up the global market... English-language speaking films” (SK Int8, O). This perception of Hollywood plays a strong aspirational role in Korean filmmakers. As one respondent put it, “The idea that Hollywood is still kind of this dominant centre of film and media production... is very seductive to Korean filmmakers who want to enter the global market. They kind of have to be legitimised by the Western market in order for their work to be recognised” (SK Int9, O). However, one interviewee highlighted a potential comparative advantage of working with European partners, noting that while collaborations with the US often lack flexibility.

When you are working with Americans you should not expect them to change to suit us, we always have to just follow what they have already decided, whereas Europe it's much more flexible and they are much more open to what comes from the local partners and that's something that I think it could be a much stronger point for European films.

SK Int5, FF

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

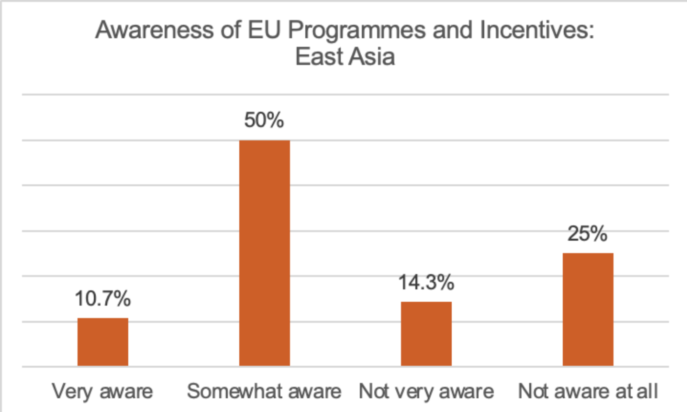


Figure 47 - Awareness of programmes or incentives provided by the EU – East Asia

When asked about their awareness of EU programmes and incentives [Figure 47], 50% of respondents reported being “somewhat aware,” while 25% were “not aware at all,” 14.3% “not very aware,” and only 10.7% “very aware.” These results suggest disparities across countries, as the South Korean interviews point to a widespread lack of awareness of such programmes.

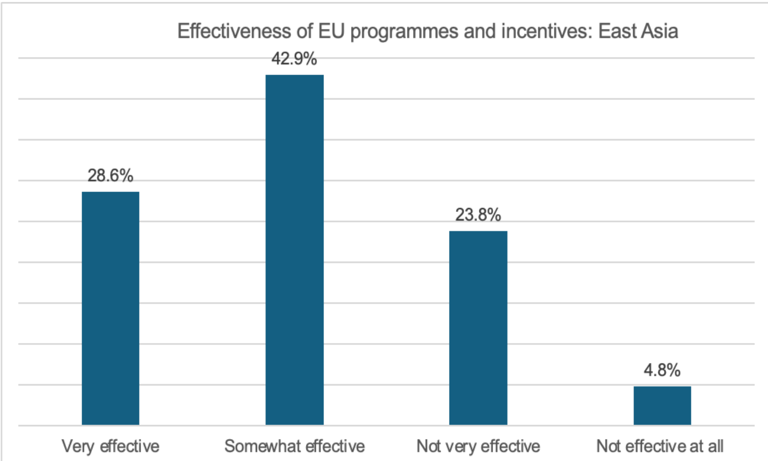


Figure 48 - Effectiveness of programmes and incentives provided by the EU – South Asia

When asked about the effectiveness of EU programmes and incentives [Figure 48], East Asian respondents mainly considered the programmes somewhat effective (42.9%), while 28.6% view it as very effective and 23.8% assess it as not very effective. The results indicate a mixed perception, with no clear consensus on their overall impact.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

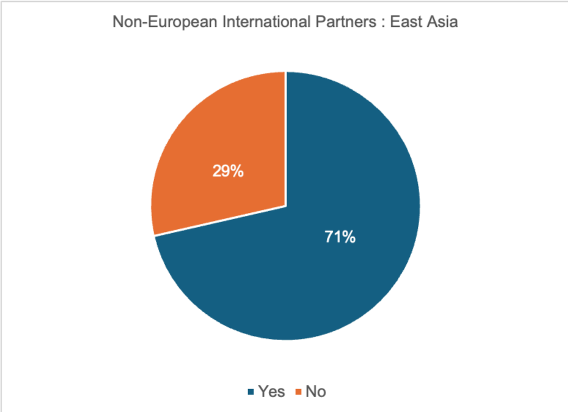


Figure 49 - Respondents with non-European international partners – East Asia

When asked about non-European international partners [Figure 49], nearly 71% of East Asian respondents reported such collaborations, while only 29% indicated no partnerships outside of Europe. This highlights the predominance of non-EU partnerships, confirming the findings from the South Korea case study, where limited engagement between the EFI and South Korean professionals was observed.

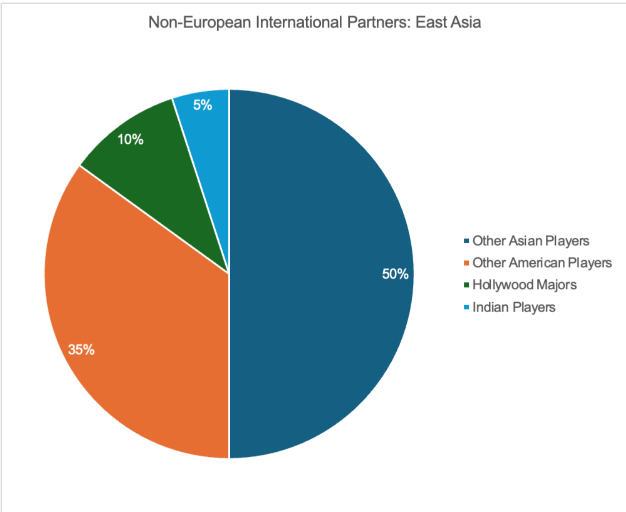


Figure 50 - Non-European international partners - East Asia

Among those who collaborate with non-European countries [Figure 50], the majority (50%) work with other Asian partners, followed by 35% with American companies and 10% with Hollywood majors, while Indian partners account for only 5%. This reflects a similar trend to that observed in the qualitative data from South Korea, where professionals showed a strong preference for collaborations with other Asian players and the US.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

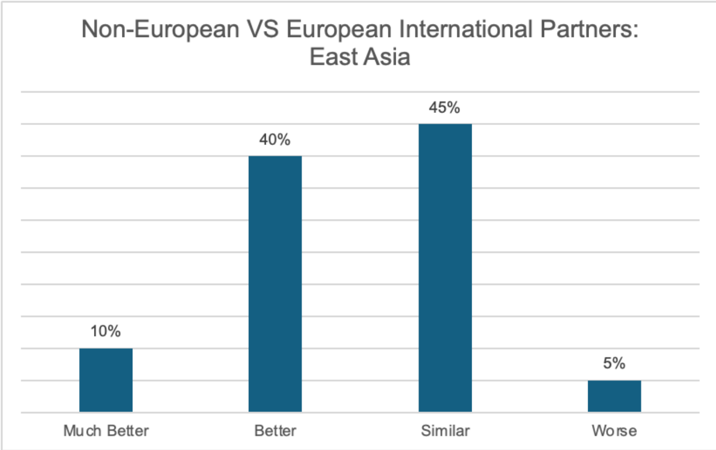


Figure 51 - Comparison of experiences with non-EU partners - East Asia

Finally, when asked to compare their experiences working with non-European partners to those with European partners [Figure 51], 45% of respondents indicated a similar experience, while 40% rated it as better and 10% as much better; only 5% considered it worse. These results suggest that partnerships with non-EU partners are generally valued more highly. However, given the already evident preference for non-EU collaborators—particularly from the United States and other Asian countries—it is difficult to make a direct comparison, as East Asian professionals are more frequently engaged with non-EU partners.

3.6 Türkiye

Türkiye's relationship with Europe is a complicated one. Kevin Robins suggests that Türkiye is perceived as "an in-between place," marked by "a particular kind of hybridity" that does not "conform to European standards" (1996). **It occupies a liminal position both geographically and culturally, straddling Europe and Asia**. Although it borders Eastern Europe, Türkiye is frequently excluded from that region as well; Dina Iordanova, describes Türkiye as "non-Eastern European" (2002). **This in-betweenness has been prevalent in the interviews**, with one interviewee summarising the practical problems arising from the country's position:

One of Türkiye's biggest problems is that every time we apply to a new institution for funding or support, we need to check the regulations to see whether we are considered Asian, European, or Middle Eastern. When we think we might be eligible, it turns out that we are not; it's very confusing.

T Int2, Exh/Pro

The interviewees agreed that they associate the idea of European cinema with independent filmmaking and/or arthouse cinema, using the two terms interchangeably. This came about despite their wider knowledge of popular European cinemas; one of the

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

interviewees specifically pointed out that they associate European films with "art films, festival films, arthouse films, niche films, even though we know this is not the truth (...); there are many commercial mainstream films made, especially in Germany and France, but these do not receive global distribution, they are aimed at their own audiences." (T Int4, Dist/Sa) **Festival and niche were adjectives repeated by other interviewees as well. Two of the interviewees, both producers, also added that European cinema makes them think of co-productions first and foremost.**

This perception of European cinema as synonymous with independent or arthouse filmmaking was echoed in the survey results [Table 15], where the most frequently selected descriptors included art cinema (71%), international co-productions (63%), freedom of expression (56%), cinema d'auteur (50%), and cultural diversity (47%). The overlap between the qualitative and quantitative findings suggests that, despite acknowledging the existence of commercially-oriented European films, Turkish film professionals primarily frame European cinema through the lens of artistic, co-produced, and culturally diverse works that circulate in festival and arthouse contexts. This association highlights how Europe functions as both a creative ideal—linked to auteur-driven storytelling and freedom of expression—and a practical funding and distribution model via international co-production frameworks and state support.

Word that describes the EFI	Count	Percentage
Art cinema	55	71%
International co-productions	49	63%
Freedom of expression	44	56%
Cinéma d'auteur	39	50%
Cultural diversity	37	47%
Multilingualism	35	44.9%
State support	29	37.2%
Successful	26	33.3%
High culture	23	29.5%
Experimental	21	26.9%
Regional integration	13	16.7%
Non-commercial	11	14.1%
Blockbusters	8	10.3%
Uncompetitive	4	5.1%
Very hard to define	2	2.6%
Slow cinema	7	1.3%
Competitive	16	1,3%

Table 15 - Best defining word EFI –Türkiye

When asked about the EFI, public funds, co-productions, and markets were the most frequently mentioned elements. One interviewee called the EFI "an industry that survives by relying on public funding," even though they also said "of course we know there is a vibrant market in Europe, especially the UK and France, and there is a financial network here that feeds off the market and feeds back into it." (T Int3, Dir/Pro) Another highlighted the fact that what is often called a "festival film" nonetheless is a "type of film that has created its own economy with its audience." (T Int12, Dir/Pro) Interviewees noted that such an economy for European films

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

does not exist in Türkiye. The distribution and exhibition of European films in Türkiye face significant challenges, which limit their access to local audiences. Interviewees who are leading distributors of European films in Türkiye pointed to primary obstacles, including censorship, the high cost of paying for film licences and the lack of audience for these films. One exhibitor gave the example of an LGBTQ-themed film being effectively blocked from release (T Int2, EXH). Beyond censorship, the highly competitive and short-term logic of film exhibition in Türkiye makes it difficult for arthouse and European films to stay in theatres long enough to reach their audiences:

So the audience is really non-existent… the theatre instantly removes those who do not work. And they are right. I mean, you can't say anything justified, because in today's conditions, the electricity bill, the salary.. When they say, "We don't do this job so that 3 people a day and 15 people a week can come to the theatre!" And if they can put another film in that theatre at that time and if there is a box office potential there, you can't say anything to them either. Therefore, the films (arthouse films) leave the theatres immediately.

T Int2, EXH

While some professionals believe there is a committed arthouse audience in Türkiye, they also acknowledge that it is small and underserved, "there is an audience, it is necessary to find and attract the audience and make them come to the cinema. So we all need to make an effort for this. It is not easy" (T Int4, DIST). Moreover, interviewees stressed that there is no financial or institutional support for screening European films. As one policymaker pointed out, two independent cinemas that previously benefited from subsidies were excluded in the most recent funding cycle (T Int16, FUNDER/POL). Supporting this perspective, a representative from Sinematek/ Sinema Evi, an institution that organises screening programmes focusing on film history, highlighted the significant financial burden their institution shoulders to keep European films visible:

We organise screenings in cooperation with the European Film Academy, but we pay for the film rights, subtitle costs, and venue expenses ourselves. Although this collaboration increases the visibility of European films, Sinematek essentially bears all the costs. It's as if we are wealthy enough to also take on the promotion of European films. Therefore, it is important to maintain a balance and consider such collaborations as opportunities to strengthen the local film culture, while being mindful of the financial constraints faced by institutions like ours. Our sustainability depends on a very fine thread—if that thread breaks, Sinematek's activities may no longer be possible.

Combined with rising ticket prices, this lack of support creates a situation in which European films are often relegated to the margins of Turkish cinema culture. Consequently, what is considered an economically viable "festival film" category in Europe often corresponds to niche, limited-access cinema in Türkiye.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

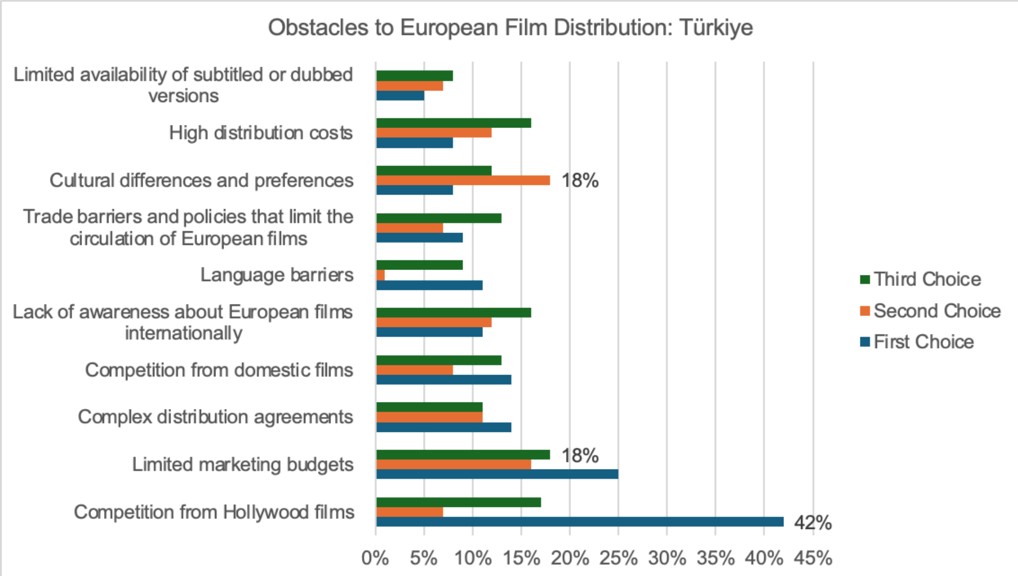


Figure 52 - Main Obstacles to European Film Distribution – Türkiye

These qualitative insights are complemented by the survey findings on the main obstacles to the distribution of European films in Türkiye [Figure 52]. When asked about the main obstacles for distributing European films in Türkiye, respondents identified competition from Hollywood films as the most significant barrier (42%). This competition was not raised in interviews but is crucial to acknowledge, given Hollywood's established distribution companies in Türkiye, such as UIP Türkiye and Warner Bros. Türkiye, which enables extensive marketing campaigns and strong audience pull for blockbuster releases. Alongside this, limited marketing budgets (25%) were noted, underscoring European films' disadvantage in promotion compared to Hollywood productions. Additional challenges identified in the survey were complex distribution agreements and competition from domestic films, each reported by about 14% of respondents. Although mentioned less frequently, these issues reflect concrete structural and institutional barriers described by interviewees, such as high license costs, limited audiences leading to cinemas' reluctance to screen European films, and the lack of consistent financial and organisational support for their distribution and exhibition in Türkiye.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

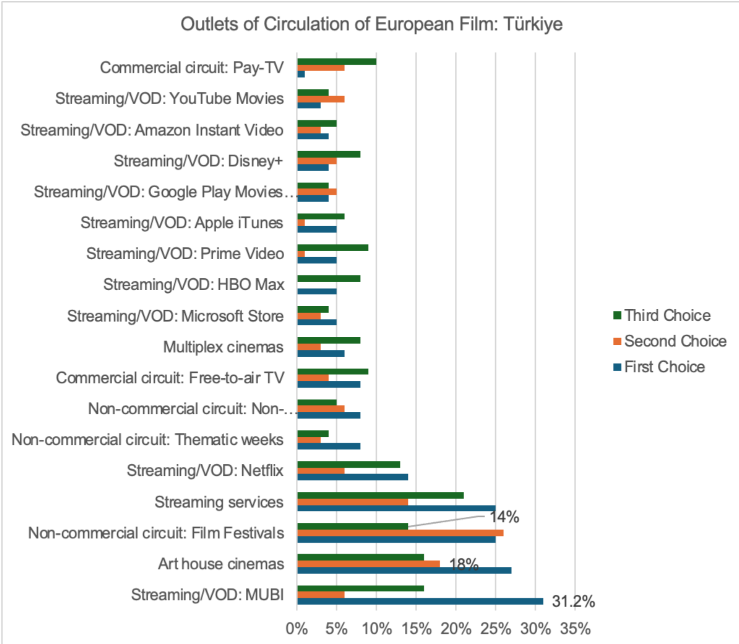


Figure 53 - Outlets of EU Film Circulation – Türkiye

When asked about the main outlets for the circulation of European films in Türkiye [Figure 53], the survey results reveal that they are most commonly screened in art house cinemas (27.3%), at film festivals within the non-commercial circuit (24.7%), and via streaming services (24.7%). Notably, among streaming platforms, MUBI stands out as the leading channel for European cinema with 31.2% recognition, indicating its significant role in providing access to these films. This aligns with interviewees' accounts, where film professionals frequently mentioned MUBI as the primary outlet through which Turkish audiences access European films, also highlighting MUBI's Turkish founder. This is further supported by a programmer from MUBI Türkiye:

> **We, along with Latin American countries, have been the region with the most subscribers for a very long time... Türkiye is one of the most active countries... The number may not be as high as in other countries, but it is a very lively audience that comments on everything. There is a very young and active audience on social media. They also love it and have embraced it, and MUBI grew after the pandemic thanks to this audience. I can say it's one of the most active regions alongside Latin America. Both in terms of numbers and engagement. Türkiye has one of the best audiences in terms of watching films, commenting, and being active on social media.**
>
> **T Int1, EXH**

More mainstream streaming platforms like Netflix (14%) and others (YouTube Movies, HBO Max, Prime Video, etc.) provide more limited exposure. The low presence of European films in multiplex cinemas (6%) highlights their restricted access to mainstream commercial theatres in

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Türkiye. This distribution pattern suggests that European films mainly reach niche audiences and cinephiles through film festivals, arthouse cinemas and digital platforms, facing challenges in attracting wider Turkish audiences.

The general attitude towards the EFI and its strengths was one of admiration in its independence, cultural diversity, and technical prowess such as "better-developed scripts" (T Int2, Exh/Pro) and "first of all, good mise-en-scéne, good acting, good direction" (T Int12, Dir/Pro) Nonetheless, one interviewee cited "Orientalism" and "looking down upon others" (T Int2, Exh/Pro) as qualities they associate with EFI, demonstrating the fraught relationship between Europe and Türkiye.

Survey findings complement these qualitative insights [Figure 54], revealing a nuanced understanding of EFI's strength from the perspective of film professionals in Türkiye. The highest-rated strengths were arthouse cinema (61.5%) and international co-productions (60%), highlighting European cinema's recognised artistic niche and collaborative nature. Cultural diversity (56.4%) and artistic freedom (52.6%) further emphasize the value attributed to creative plurality and expressive liberties within EFI. Public support through state funding and EU programmes (35.9%) and the prominence of awarded film directors and actors (47.4%) demonstrate an appreciation for institutional backing and international prestige. Skillful film professionals (34.6%) and worldwide circulation (34.6%) are also mentioned.

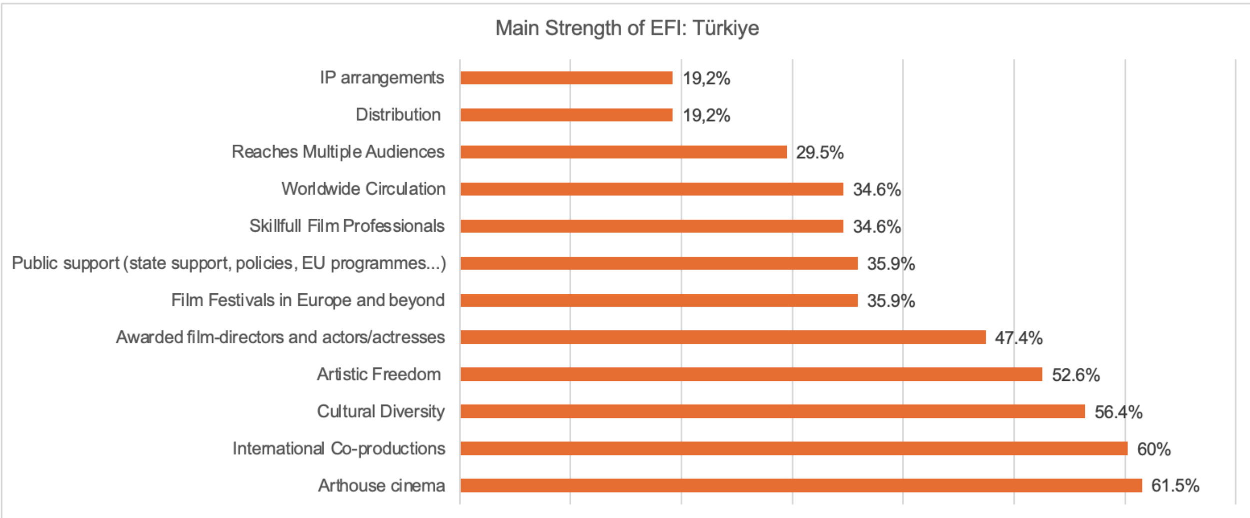


Figure 54 - Main Strength of EFI – Türkiye

When asked about awareness of programmes and incentives provided by the EU [Figure 55], although Türkiye is a member of Eurimages and arthouse cinema in the country collaborates predominantly with European partners through co-productions, survey results reveal a striking gap in awareness of EU programmes and incentives. Only 6% of respondents reported being "very aware," while 43% ("not very aware" and "not aware at all" combined) indicated limited or no familiarity, and 51% responded as "somewhat aware." This discrepancy suggests that, despite strong institutional and creative ties with Europe, information and communication

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

channels regarding EU funding opportunities may not be sufficiently effective. It may also reflect unequal access, with awareness concentrated among well-connected arthouse networks, while smaller-scale producers, emerging filmmakers, or those outside the international co-production circuit remain excluded.

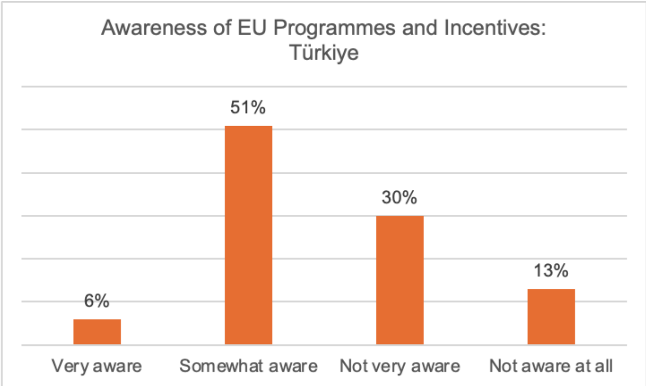


Figure 55 - Awareness of programmes or incentives provided by the EU – Türkiye

The survey results indicate a cautious perception of the effectiveness of EU programmes and incentives [Figure 56]. A majority of respondents (58%) described them as not very effective, while 32% considered them somewhat effective. Only a small percentage viewed them as very effective (5%) or not effective at all (5%). These results highlight the diversity of opinions and experiences, as the EU support mechanisms are not widely perceived as strongly effective, but rather as delivering mixed outcomes across the filmmaking community.

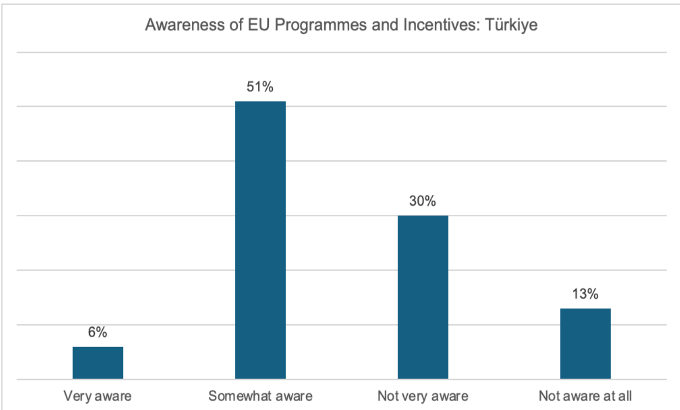


Figure 56 - Effectiveness of programmes and incentives provided by the EU – Türkiye

When asked about non-European international partners of Turkish filmmakers [Figure 57], nearly 79% of respondents reported having no such collaborations, while only 21% indicated

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

partnerships outside of Europe. This showcases the centrality of European countries as Türkiye's film industry, particularly arthouse cinema, primary international collaborators, reflecting long-standing institutional, funding, and cultural exchange networks. The finding also aligns with interviews, where Europe is mentioned as the primary sphere for collaborations, while non-European partnerships remain marginal.

Figure 57 - Respondents with non-European international partners – Türkiye

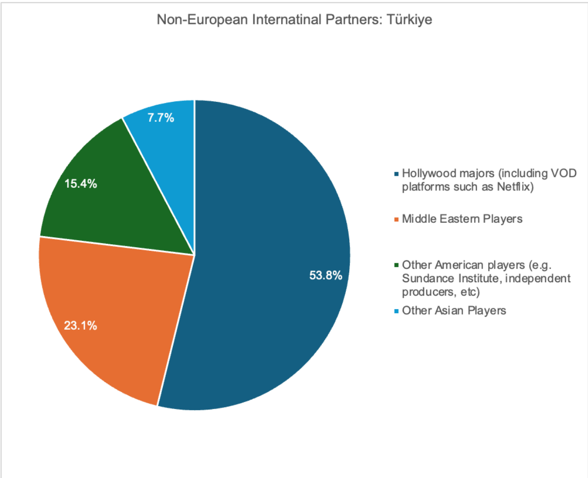


Figure 58 - Non-European international partners – Türkiye

Among the professionals who collaborate with non-European countries [Figure 58], the majority (53.85%) work with Hollywood majors, including VOD platforms such as Netflix. This high proportion could be explained by Netflix's production of original content in Türkiye in recent years, which fostered collaboration with the US-based industry players. Partnerships with Middle Eastern companies follow at 23.08%, a trend likely influenced by Türkiye's geographic proximity to the region and the long-standing export of Turkish TV series (*dizis*) to Middle Eastern markets

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

(Holleis, 2021). Collaborations with other American players account for 15.38%, while only 7.69% reported working with Asian partners, indicating that industry engagement beyond Europe and the United States remains both limited and regionally concentrated.

When asked to compare their experiences working with non-European partners to those with European partners [Figure 59], 38.46% of respondents reported that the experience was similar. However, 30.77% rated it as worse and 7.69% as much worse, suggesting that for a significant portion of professionals, collaborations outside Europe present more challenges or yield less satisfactory outcomes. Conversely, only 15.38% described their experience as better and 7.69% as much better. This distribution points to a general perception that European partnerships remain more advantageous overall—potentially due to more established co-production frameworks and the institutional support offered through EU funding mechanisms.

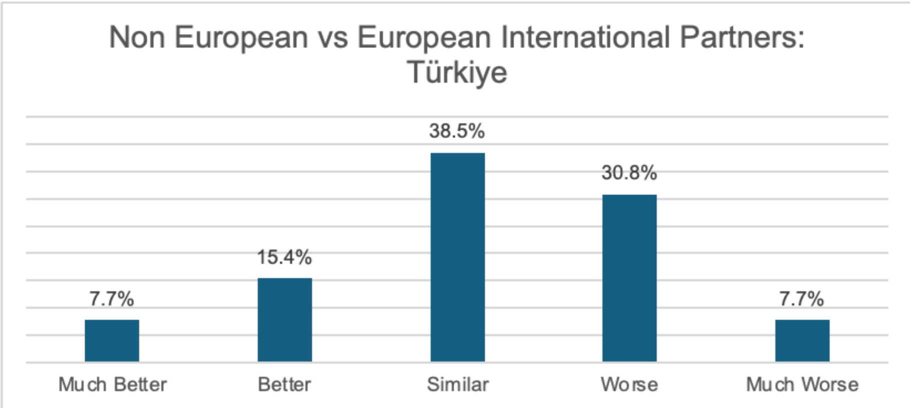


Figure 59 - Comparison of experiences with non-EU partners – Türkiye

Ultimately, film professionals in Türkiye see Europeanness in cinema in its cliche form of serious and dramatic arthouse films that are geared towards the festival. Having familiarity with the EFI however, allows them to critically approach their own understanding of EFI, as they highlight the fact that there are other forms of filmmaking in Europe. For most interviewees, Europe is especially significant as a production partner, as arthouse filmmaking in Türkiye relies heavily on European co-productions.

3.7 Common Analysis

When asked to define the EFI with one word (selected from a given list; see 7.1 Survey script), most respondents selected International co-productions (63%), *cinéma d'auteur* (60.1%), art cinema (57%), state support (51.2%), and cultural diversity (42.3%) [Table 16].

The selected sample (full international survey minus Turkish respondents) also confirms these trends [Table 18; see Section 8.1 Extra Data].

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Word that describes the EFI	Count	Percentage
International co-productions	267	62.7%
Cinéma d'auteur	256	60.1%
Art cinema	243	57%
State support	218	51.2%
Cultural diversity	180	42.3%
Freedom of expression	140	32.9%
Multilingualism	137	32%
High culture	121	28.4%
Regional integration	102	23.9%
Successful	85	20%
Experimental	81	19%
Non-commercial	71	16.7%
Competitive	63	14.8%
Slow cinema	52	12.2%
Uncompetitive	18	4.2%
Very hard to define	17	4%
Blockbusters	15	3.5%

Table 16 - Best defining word EFI

The results show that the EFI is associated with its industrial policy, evident in the selection of international co-productions and state support, and with its artistic approach, perceived as art cinema, and that both are marked by cultural diversity.

Similarly, when asked about the strengths of the EFI, almost 67% of respondents highlighted international co-productions (66.4%), film festivals in Europe and beyond (57.6%), public support (49.9%), arthouse cinema (47.5%), cultural diversity (47.1%), awarded film directors and actors/actresses (40.7%), and artistic freedom (38.6%) [figure 60].

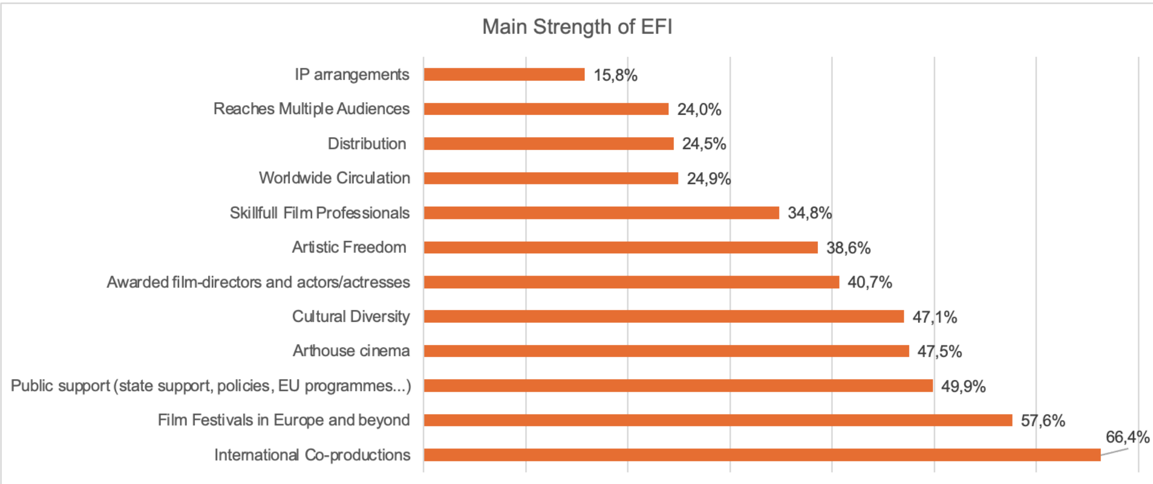


Figure 60 - Main Strength of EFI

This reinforces the idea that the EFI is understood as characterised by not only a specific approach to filmmaking (art house cinema) with high-quality film professionals (awarded film

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

directors and actors/actresses) but also an industrial and policy context that supports their development and work. This echoes the findings of the qualitative research developed in South Africa (Section 3.4), Argentina (Section 3.1), Brazil (Section 3.2), Mexico (Section 3.3), South Korea (Section 3.5), and Türkiye (Section 3.6). In the Turkish case in particular, the data suggest that international co-productions are aligned with a recognition of the importance of European partnerships for sustaining independent filmmaking – that is, the EFI emerges as a key partner to sustain a specific creative and collaborative ecosystem. This pattern is similarly observed in Argentina, Brazil, and Mexico. In Argentina, international co-productions is the word most frequently mentioned, reflecting the perception of European countries as ideal partners and co-productions with them as highly desirable. In Brazil, this factor ranks second, while in Mexico it is cited third, which could be a reflection of the greater frequency of co-productions with the US.

When Turkish respondents are removed from the sample we observe one minor difference [figure 61]. Respondents also recognise international co-productions (75.6%) as the main strength of the EFI. However, the second place is taken by film festivals in Europe and beyond (69.8%), closely followed by arthouse cinema (68.8%). In any case, this confirms that the strength of the EFI lies in the combination of its industrial policy with a specific cultural and artistic approach.

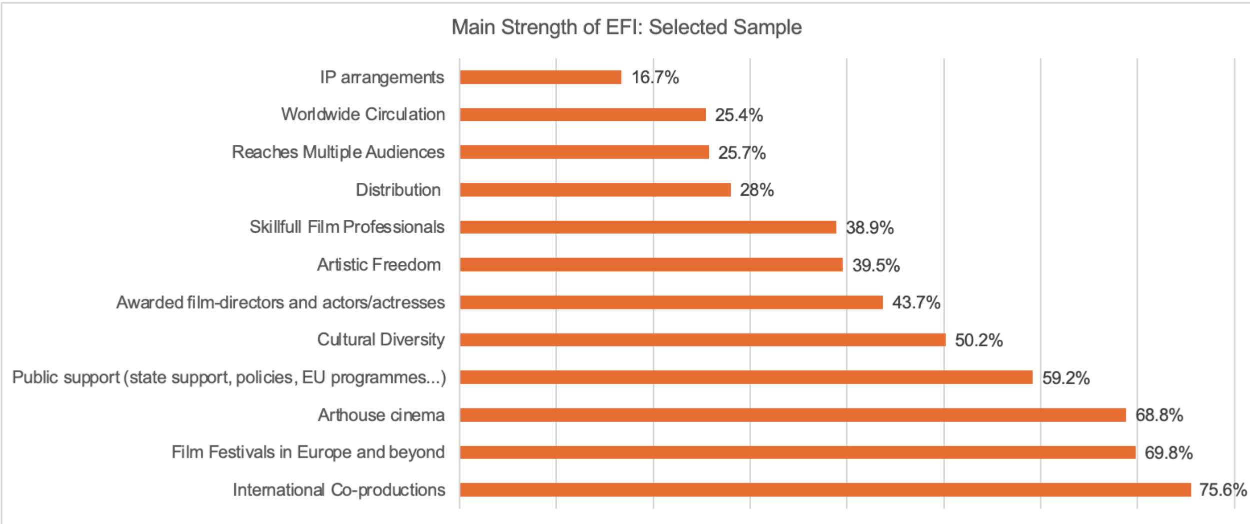


Figure 61 - Main Strength of EFI – Selected sample

Regarding the main outlets in which European cinema circulates the most, there is a clear concentration of first, second and third preferences in art house cinemas (35.1% as first choice), non-commercial circuit (film festivals, 15.5% as third choice), streaming/VOD (MUBIi), and streaming services (19.3% as second choice) [Figure 62].

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

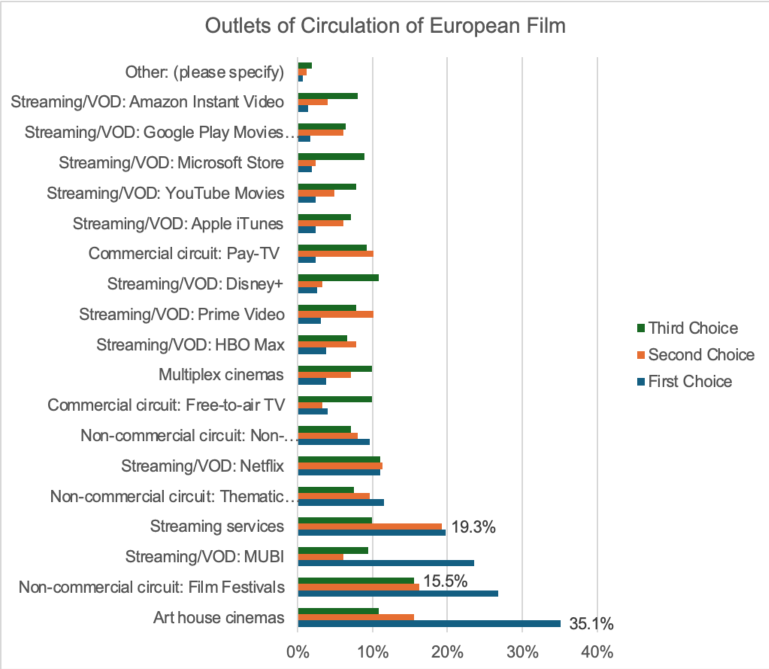


Figure 62 - Outlets of circulation of European film

In particular, arthouse cinemas, non-commercial circuit: film festivals, and streaming/VOD: MUBI were most often selected in the first place as the most recognised platforms for the circulation of European cinema, hinting at the importance of European film for the existence of a strong alternative circulation circuit composed of arthouse cinemas, independent film festivals and alternative streaming platforms. The selected sample shows a similar trend, confirming that art house cinemas, non-commercial circuit: Film Festivals, MUBI and streaming services are the most recognised platforms for European cinema circulation, and the limited role of Amazon Instant Video, Disney+, Microsoft Store, and Google Play Movies [Figure 78; see Section 8.1 Extra Data].

Streaming services in general, Netflix, Prime Video, and pay-TV also scored strongly, especially in the second ranking, suggesting the importance of these platforms to disseminate European cinema to wider audiences – echoing the multiple references to Netflix in interviews in Türkiye, South Korea, Brazil, Mexico, and South Africa. On this topic, it should be highlighted that in Brazil pay-TV also recorded a substantial number of combined mentions, particularly when second- and third-choice preferences are taken into account, resulting in an overall frequency comparable to that of MUBI. Despite not leading in mentions, Prime Video was regularly identified as the third most selected streaming service across Argentina, Brazil, and Mexico, surpassed only by MUBI and Netflix. Finally, Amazon Video, Disney+, and Google Play Movies received fewer top rankings, indicating that they play a very limited role in the circulation of European films. Again, the quantitative data echoes the data gathered through interviews.

The views of international film professionals are, therefore, aligned with the scholarship. Respondents seem to agree that releasing films in cinemas continues to be an important

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

strategy to support the dissemination of European film (Smits, 2025). However, they also indicate that streaming services have opened up opportunities for selected European productions to reach audiences (Alvaray, 2023).

This being said, when asked about the main obstacles faced by the distribution of European film [Figure 63], the vast majority of respondents (50.4%) selected competition from Hollywood as their first response. In second place one can find limited marketing budgets (13.4%), followed closely by lack of awareness about European films internationally (11.8%). The remaining responses were very closely distributed.

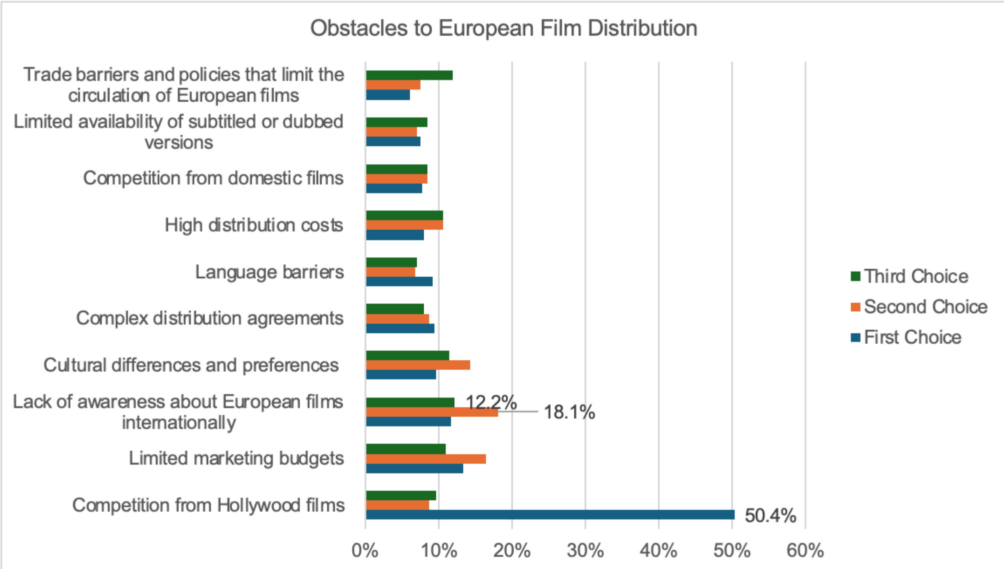


Figure 63 - Main Obstacles to European Film Distribution

This highlights, on the one hand, the significant power imbalance between European and Hollywood films that is reflected in interviews across case studies but also, on the other hand, the potential to address it with stronger marketing, support to local distributors, and strategies aimed at audience-building and shaping. When Turkish respondents are removed from the sample, no significant differences are observed [Figure 79; see Section 8.1 Extra Data].

This evidence adds nuance to the analysis of the implications of the previous figure. It reveals that, despite the opportunities created by streaming services to challenge traditional Hollywood studios (Smits, 2024) and transform power relations in the film sector, other Hollywood players have tended to take their place – a fact that non-European film professionals see as an obstacle to the distribution of European films.

This insight also echoes interviews in South Africa, where film professionals foregrounded the difficulty of accessing European films (Section 3.4 South Africa), South Korea, where the support for distributors and exhibitors were perceived as key in facilitating the presence of EU film in that market (Section 3.5), and in Türkiye, where film professionals highlighted the lack of funding from the EU to distribute and exhibit European films, which is vital considering the high cost of

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

film licenses due to inflation (Section 3.6). Furthermore, in Argentina (Section 3.1), Brazil (Section 3.2), and Mexico (Section 3.3), support for film distribution of certain European films remains insufficient to offset limited marketing budgets, small audiences, and the high costs and risks involved.

Finally, although the international survey does not highlight these issues, domestic film competition and cultural differences consistently appeared among the most cited barriers in the three Latin American contexts – standing out in Brazil, where they occupied the second and third positions in the aggregated ranking.

According to the survey, respondents tend to state that they know EU film initiatives and programmes. Indeed, 57.6% of respondents stated that they are either very aware or aware of such programmes, whereas only 42.3% believe that they are either not very aware or not aware at all of them [Figure 64]. This is confirmed by the analysis of the selected sample without Turkish respondents [Figure 80; see Section 8.1 Extra Data], although the results are slightly more positive (23.5% versus 19.8% in the very aware category).

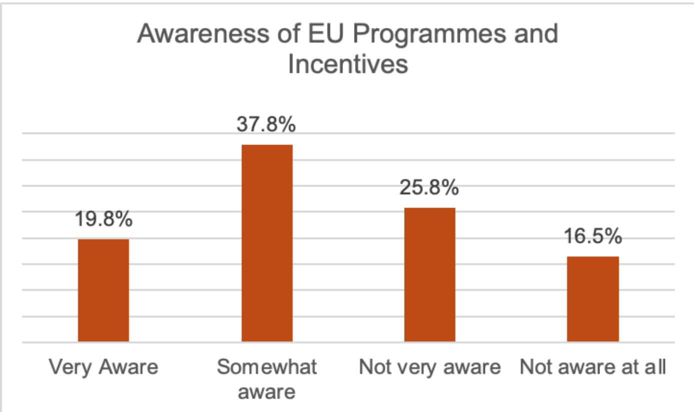


Figure 64 - Awareness of programmes or incentives provided by the EU

Regarding the effectiveness of these initiatives and programmes (Figure 65), most participants have a positive view thereof – although the sample is almost evenly divided. Indeed, 54.9% of respondents believe that such programmes and initiatives are either very or somewhat effective. When Turkish respondents are removed from the sample [Figure 81; see Section 8.1 Extra Data], a broadly similar trend emerges.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

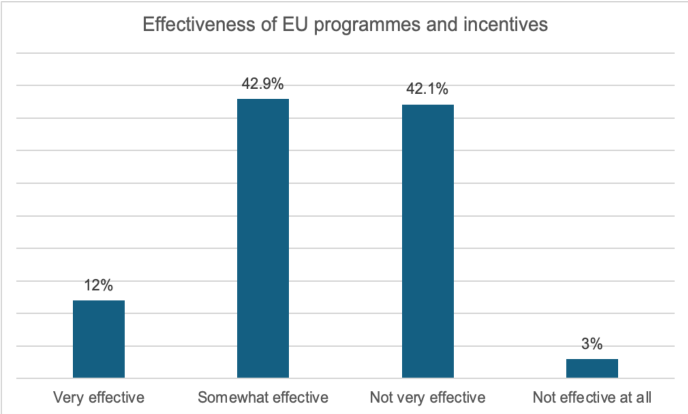


Figure 65 - Effectiveness of programmes and incentives provided by the EU

As to whether they have non-European International partners, respondents are also almost split: 52.9% state that they have non-European international partners and 47.1% do not. The selected sample (without Turkish respondents) confirms this scenario, although the positive answer receives 61.7% of all responses – see [Figure 82 and Figure 83; see Section 8.1 Extra Data].

When asked to identify who these non-European national partners are [Figure 66], the vast majority of respondents identified Latin American players, other American players, and Hollywood. This might result from the fact that three Latin American countries comprise about half of the sample. Additionally, Latin American countries frequently engage in co-productions and sustain strong professional networks across neighbouring countries.

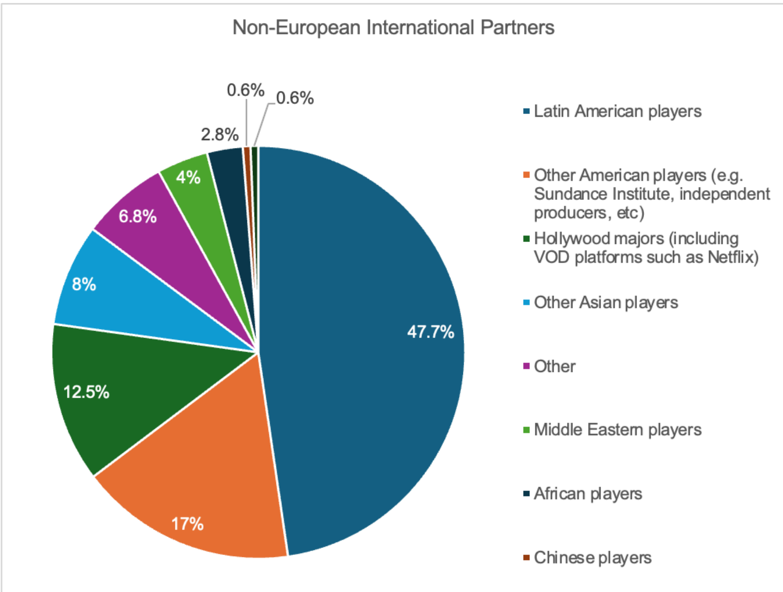


Figure 66 - Non-European international partners

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Moreover, the data reveal that collaborations with Asian, Middle Eastern and African players are limited (16% in total), with the exception of South Korea, where the main collaborators are from Asian countries. When Turkish respondents are removed, this general scenario is broadly confirmed. However, the option Other substantially increases [Figure 67].

That is, while European co-productions continue to be significantly influential beyond the borders of the EU (Mitric, 2025), European initiatives are increasingly challenged by collaborations of non-European professionals with non-EU international partners.

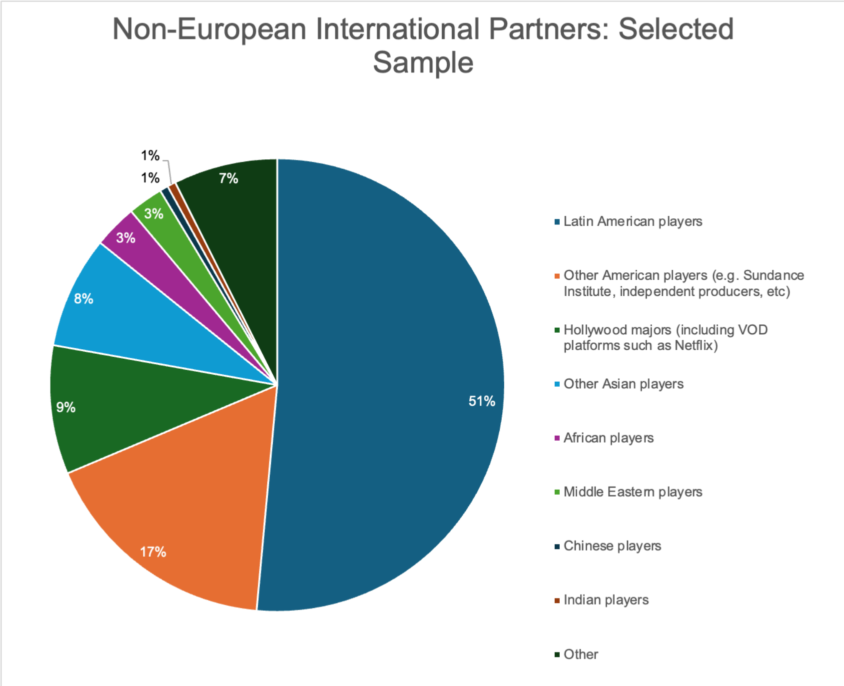


Figure 67 - Non-European international partners – Selected sample

When asked to compare their experiences in collaborating with other international partners outside of the EU [Figure 68], 51.3% of respondents stated they found these experiences similar, while 33% found them better. That is, more than half of respondents consider non-EU collaboration as comparable or even more positive than those with EU partners – echoing the findings associated with Argentina (Section 3.1), Brazil (Section 3.2), Mexico (Section 3.3), South Africa (Section 3.4) and South Korea (Section 3.5). This is particularly notable in the Turkish case (Section 3.6). The selected sample confirms these findings [Figure 84; see Section 8.1 Extra Data]. This should be seen as a point of concern.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

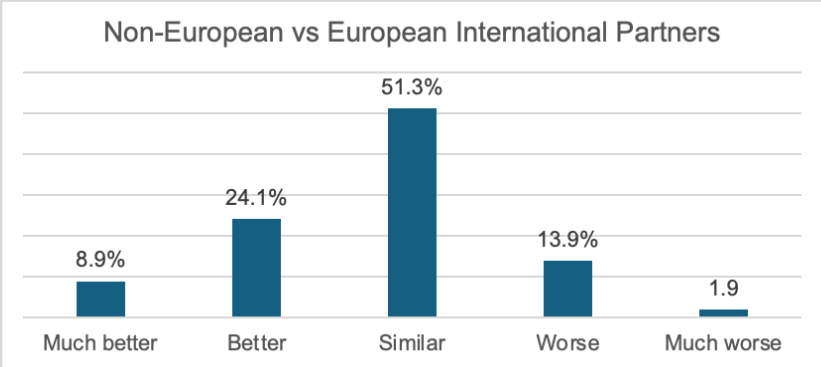


Figure 68 - Comparison of experiences with non-EU partners

What emerges from this data is a paradoxical image of European film and the EFI, with multiple strengths and weaknesses:

- As strengths, the survey highlights the EFI's industrial model (in particular, international co-productions and film festivals, the latter being very important for the circulation of European film beyond its borders), its policy model (based on public support), its professionals, and cultural diversity. In the case of South Africa's, Argentina's and Türkiye's surveys, artistic freedom also emerges as a particular strength – reflecting the particularities of the countries' political regimes. Regarding the interviews, in Brazil, Argentina and Mexico, interviewees emphasised auteur-driven storytelling and cultural heritage alongside the European model for funding and distribution through co-productions and state-supported initiatives. In South Africa, interviewees highlighted the EFI's storytelling and film style, diverse cultural heritage, and the EFI's complex structure. In South Korea, the EFI strengths are associated with access to public support, creative freedom and cultural diversity. In Türkiye, interviewees foregrounded EFI's well-functioning public funding mechanisms, prestigious film festivals and its film markets and qualified audience. Moreover, the survey suggests that EU programmes and incentives tend to be seen as effective.

- As weaknesses, when asked to compare their experiences in collaborating with other international partners outside of the EU, 51.3% of respondents stated they found these experiences similar, while 33% found them better. This should be seen as a point of concern. Moreover, the survey suggests that the EFI has limited recognition due to limited marketing budgets and that it has not yet found convincing ways to respond to competition from Hollywood. As for the interviews, some of them suggest that the relationship between the EFI and these industries is not always balanced – as mentioned by several South African interviewees and some Mexican participants. However, considering that interviewees were not directly asked about the EFI's weaknesses, these insights should not be generalised – rather, further research would be needed to test them.

Analysed differently, according to non-European film professionals and stakeholders, the EFI is:

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- mostly associated with international co-productions (70.1%), *cinéma d'auteur* (69.8%), state support (60.8%), art cinema (60.5%), and cultural diversity (46%);
- respected for its cultural particularities but limited in its recognition among the wider public;
- recognised as the result – to a significant extent – of complex forms of state and European intervention and support that are, however, burdensome in bureaucratic terms, hindering international collaboration with independent and/or small-scale non-European film professionals;
- dependent on traditional distribution formats and limited in outreach and commercial success – with VoD platforms, especially American-based, emerging as both potential outlets of circulation and a source of increased competition for attention and partnerships;
- failing to respond to strategic approaches with, arguably, the aim of replacing the centrality of Europe in the global film ecosystem – both by international VoDs and as is evident in the emerging but already combined strategy of the BRIC in South Africa;
- mainly perceived in reference to large Western countries, such as France and Italy in the South Korean case, and France, Italy, Spain, and Germany in all three Latin American countries – with France being by far the most frequently mentioned.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

4. Film festivals and Co-Production Markets

The data analysis, combined with the literature review, confirms the importance of film festivals and co-production markets for both the circulation of the EFI and for the six markets studied. This section summarises the findings of the interviews and survey in this regard. Moreover, the section examines how local film professionals take the 'Europeanness' of the EFI in account when they build their strategies in terms of funding, co-production, and distribution of works.

4.1 Argentina

European cinema is highly sought after and prestigious. We not only have the Cannes Film Week, which obviously features European films, along with films from other countries, but here in Argentina, we also have the French Cinema Week, the Italian Cinema Week, and the German Cinema Week. It's very common to see European films in various cycles or settings. Particularly, there is a very eager art film circuit, including director retrospectives.

AR Int2, FUNDER/POL

According to film professionals in Argentina, film festivals and co-production markets play several cultural, social and industrial roles. These initiatives are part of a non-commercial circuit intertwined with diplomatic efforts, by European embassies and cultural institutions, organizing events like European film weeks, film festivals and exhibitions, which have symbolic importance. While non-commercial initiatives are relevant to disseminating European films and culture, they don't seem to translate into a significant increase in the circulation of European films within the commercial circuit.

4.1.1 Film Festivals

Local film festivals, in particular, appear to provide crucial space for European cinema, especially independent, non-commercial films, enabling them to reach a wider audience across the country. Argentine film festivals, such as the Mar del Plata International Film Festival and the Buenos Aires International Independent Film Festival (BAFICI) are key in showcasing European cinema. In the case of the Mar del Plata International Film Festival, this festival is recognised as a Category A event, aligning it with prestigious European film festivals such as Cannes, San Sebastián, Berlin, and Venice. It is organised each year by the INCAA and is the only competitive feature film festival recognised by the International Federation of Film Producers Associations (FIAPF) in Latin America, and the oldest in this category in the Americas.

Together with the BAFICI, both events not only **provide a platform for European films to reach Argentine audiences**, but also **foster dialogue between European and Argentine filmmakers**, enhancing collaboration. While European cinema maintains a presence at various film festivals in Argentina, the participation of EFI professionals has noticeably diminished over

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

time. Interviewees noted that it is now rare for producers, directors, or cast members of these films to attend prominent local festivals.

These are festivals that cannot afford to cover the costs for international guests. Moreover, because they lack a strong market component, they hold less significance for the industry. In its early years, Ventana Sur attracted many major European industry players. However, that has not been the case in recent editions. This shift has been noticeable, particularly in the last three or four post-pandemic editions. One contributing factor is that, at one time, the INCAA covered all expenses, including business-class flights and high-end accommodation, making it appealing for professionals to attend, partly for market participation and partly for tourism.

AR Int5, DIST/SA

There is also Ventana Sur, Latin America's leading audiovisual market, organised by the INCAA in partnership with the Cannes Film Festival's Marché du Film and held in Buenos Aires, Argentina, for the first 15 editions, highlighting Argentina's significance in the international film market, particularly with European partners. After a brief relocation to Uruguay in 2024 due to political issues, it will return to Buenos Aires in December 2025 and will alternate between both countries from 2026 onwards.

In addition to mentioned festivals (the Mar del Plata International Film Festival and the BAFICI), there are other initiatives such as the Encuentro del Cine Europeo (European Film Festival), organised by the EU Delegation in Argentina, in collaboration with the embassies and cultural institutes of EU member states accredited in the country, that further promote European films. During the 2024 edition, screenings were held in several locations across the country (Buenos Aires, Córdoba, General Pico, Neuquén, Resistencia, Rosario, San Juan, San Miguel de Tucumán, Ushuaia, and Vicente López), offering both in-person and online viewing options in order to reach a broader audience (CineUE Argentina, n.d.).

Embassies and cultural centres from different European countries also boost their national cinema with thematic weeks and cycles organised throughout the year, showcasing films by country of origin to cater for niche audiences. During these events, distributors often organise releases to leverage the promotional boost provided during these cycles. For instance, the Centro Cultural of Spain in Buenos Aires city (CCEBA) together with the Spanish Embassy has been organising Espanoramas for the past eight years, a thematic week that aims to highlight the quality and diversity of Spanish filmmaking, strengthening cultural ties between both countries (CCEBA, 2024).

German Films with the support of the Embassy of the Federal Republic of Germany and the Goethe-Institut also organises the Festival de Cine Alemán each year in Buenos Aires city, showcasing a selection of contemporary German films; the initiative is celebrating its 25th anniversary this year (Festival de Cine Alemán, n.d.).

Organised by the French Institute of Argentina - French Embassy in Argentina, there is also the Festival de Cine Francés. There is also the free online event My French Film Festival organised by Unifrance since 2010 and accessible through the festival's website.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Other additional initiatives organised by various European institutions occur annually in Argentina; however, the events highlighted above are among the most prominent and regularly held.

One interesting initiative coming from the private sector is the MUBI Fest. In September 2023, the first edition of this event took place in Buenos Aires as part of an initiative by the streamer MUBI. The festival aims to bring films to the big screen in various Latin American cities, including Bogotá, Mexico City, Santiago, and São Paulo. The inaugural edition featured a program of 20 titles, including feature films such as *Aftersun* (2022, UK/US) and *Close* (2022, Belgium/Netherlands/France), as well as the short film *Extraña forma de vida* (2022, Spain/France). It also showcased cult classics by renowned directors like Andrei Tarkovsky, Aki Kaurismäki, and Wim Wenders, alongside new films making the festival circuit that year. The event is currently in its third edition in Buenos Aires city.

It is obvious that film festivals as well as thematic weeks are **important tools for the dissemination and promotion of European films in Argentina**. They also serve as important spaces for **cultural exchange, professional networking and industry development**. Although their primary objective remains diplomatic, promoting Europe's cultural diversity and shared values, they also provide a meaningful alternative in a film market overwhelmingly shaped by Hollywood influence. Nevertheless, their impact is constrained by limited geographic and demographic reach, as activities are primarily concentrated within specialised circuits in Buenos Aires city.

While all these festivals and events share common goals, their structures are not standardised. Each event is 'unique': it has to adapt its format based on available resources, local conditions, collaborations with embassies, cultural centres and industry partners. Some of them are organised by the EU Delegation while others are organised by external bodies. As a consequence, organisers face several challenges that hinder the effectiveness of these initiatives. Limited or non-existent promotion budgets complicate efforts in attracting a wider audience unfamiliar with contemporary European directors and actors. This lack of recognition often results in lower attendance at screenings.

This situation is compounded by **local distributors' reluctance in investing in European films**, perceiving them as **financially risky**. High screening rights further restrict organisers, forcing them to select films based on affordability rather than what would be well received by local audiences. The expenses associated with dubbing and subtitling further exacerbate these challenges, as these processes are essential for making foreign-language films accessible to local audiences but can be prohibitively expensive. Moreover, the involvement of multiple institutions in these initiatives introduces bureaucratic complexities, often making the execution process cumbersome.

On an industrial level, how can we create something that gives us more access to European cinema here? I believe there are two key points. First, easier access. I had a Belgian film that I couldn't get… because of the price. I had two or three options, but none were affordable. The same thing happened with a Spanish film – not the first time either; it also happened last year. The films we want or hope to get are inaccessible because of the prices. Second, how do we reactivate the local audience? In my opinion,

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

policies are moving in the opposite direction. [...] When policies push for mass, superficial content, how do we bring audiences back? From our side, we need to reactivate the audience; from their side, they need to make access easier. Right now, we lack access, between travel restrictions and the high cost of screening rights, we're limited.

AR Int7, FF

Additionally, **European film festivals** were frequently mentioned when discussing the EFI and attempting to define it. Festivals like the Cannes International Film Festival, the Berlin International Film Festival, the Venice International Film Festival, and the San Sebastian Film Festival were constantly pointed out when talking about the EFI. They are seen by Argentine film professionals as an **opportunity to showcase their work to international audiences, gain visibility, and establish connections** with European producers, distributors, and funding bodies. This exposure can lead to international co-production agreements, distribution deals and an opportunity to showcase their productions in the international market.

Some of the mentioned festivals also have funding schemes, as in the case of the Hubert Bals Fund and the World Cinema Fund, that provide financial support to Latin American filmmakers, enabling the production of films that might otherwise lack resources. These funds are pivotal in supporting projects that offer unique cultural narratives and innovative storytelling, thereby contributing to the diversity of international cinema.

Furthermore, since the early 2000s, the *Fonds Sud Cinéma* functioned as a consistent, albeit unofficial, source of support for Argentine cinema (González, 2021). Following its replacement in 2012 by the *Aide aux Cinémas du Monde* (ACM), Argentina continued to receive notable attention, with the program supporting Argentine projects more frequently than those from other countries between 2012 and 2017 (Vinuela 2019).

France's main coproduction tool is [Aide aux] Cinémas du Monde, a funding program managed by the CNC (National Centre for Cinema and the Moving Image) and co-financed by the CNC and the Ministry of Foreign Affairs. Although the fund is open to projects from around the world, Argentina has been the leading beneficiary, receiving more support than any other country—twice as many projects were approved compared to the second most-funded nation.

A Int12, O

Another important aspect of European film festivals is the prominence given to certain works which certainly impact the decision of distributors and exhibitors when deciding which feature films to buy or screen. This happens on both sides of the Atlantic: **recognition in a renowned film festival for a Latin American feature film will potentially help its distribution** in Europe, and European titles that are awarded are also more likely to circulate in Latin America.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

4.1.2 Co-Production Markets

Argentina currently has international co-production agreements with 13 countries including Germany, Spain, France, and Italy (INCAA, n.d.). The country is part of the Ibermedia Program[14] and the Latin American Film Co-production agreement[15], that includes Spain. Furthermore, the reactivation of conversations around the EU-Mercosur trade agreement, aiming to reduce tariffs and promote sustainable practices, indicates a significant commitment to deepen EU-Latin American relations.

A study conducted by ICEX-España Exportación e Inversiones has highlighted that the most common co-production partners for Argentine producers are Latin American and European countries, with Spain standing out due to the long historic cooperation between the two nations (Diéguez Coba, 2022). The study also indicated that while **Spain remains Argentina's most significant co-production partner,** Spanish national productions that are not co-produced with local partners struggle for market presence. This is noteworthy given the deep-rooted historical, cultural, and linguistic ties between these two countries. This apparent disconnect raises questions about the dynamics of cultural proximity and the factors that shape audience reception and circulation flows in the country.

According to the interviews conducted, Argentinian producers perceive their European counterparts – particularly in comparison to international competitors such as the US – as **more bureaucratic and heavily dependent on public funding mechanisms**. It was also noted that European co-production processes and negotiations are often slower due to the **involvement of multiple public institutions and complex administrative requirements.** In contrast, collaboration with American partners was described as more agile, primarily because they rely on private investment and involve fewer regulatory constraints. However, several producers acknowledged a trade-off: while Hollywood studios were seen as primarily profit-driven, **European partners often supported a more artistic and creative vision**, placing less emphasis on the commercial potential of a cinematographic project. This was viewed as a positive aspect of working within the European model, despite its slower pace.

Regarding broader international collaborations, **South Korea** has been mentioned in relation to co-productions with Argentina. As Rud (2018) notes, this collaboration has evolved organically, primarily driven by the efforts of a few independent stakeholders. In the absence of formal co-production agreements, it has been sustained by the initiative of a small number of non-state actors. Some of these productions have been supported by awards from Korean film festivals, such as the Jeonju International Film Festival (JIFF).

[14] Approved by the Fifth Ibero-American Summit of Heads of State and Government (1995), the Ibermedia Programme was launched in 1998. Its mission is to work towards the creation of an Ibero-American audiovisual space through financial aid and calls for proposals open to all independent film producers in the member countries of Latin America, Spain and Portugal. In 26 years, 33 calls for proposals have been issued and more than 134 million dollars have been invested in the audiovisual sector.

[15] Argentina is part of the Latin American Film Co-production Agreement, along with Brazil, Colombia, Costa Rica, Cuba, the Dominican Republic, Ecuador, Mexico, Nicaragua, Panama, Peru, Spain, Uruguay, and Venezuela.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

However, the Argentina-South Korea partnership is primarily financial in nature, as the lack of institutional frameworks prevents them from the exchange of expertise, technology, and creative talent that embodies structured coproduction agreements. Rud (2018, p. 6) goes on to highlight the crucial role of European film festivals in enabling such partnerships or validating co-productions between Argentina and South Korea: "The Western prestige lent by the European International Film Festivals to novel Latin American directors is still a leading entry point for their films. As a matter of fact, it is only after its exhibition in major European festivals that Argentine films are able to reach Korean public institutions and private companies."

Apart from these exploratory efforts involving one of the emerging film industries (South Korea), it was found that **India** and **China** have not yet established a significant presence in the region's co-production landscape. The majority of Argentina's international co-productions continue to involve partners from other Latin American countries, Europe, and the US.

International co-productions have become increasingly vital in helping local film industries diversify their funding sources and expand access to international distribution channels. This approach is renowned among local producers as it reduces the financial risks of filmmaking and facilitates access to funding and support from other countries, as well as a broader audience for films. As a result, international co-production forums play a key role in fostering these collaborations. Argentine film professionals, in particular, are active participants in international audiovisual markets held abroad, which serve as important platforms for connecting Latin American and European cinema. For example, the Europe-Latin America Co-Production Forum, held annually at the San Sebastián Film Festival (SSIFF), facilitates collaboration between filmmakers from both continents, while strengthening international co-production and distribution networks (SSIFF, 2024).

There is also Fantastika, an Ibero-American co-production forum dedicated to horror and fantasy genres that was established in 2021 by the Asociación de Productores Audiovisuales de Cataluña (PAC, Spain) and the Asociación de productores independientes de medios audiovisuales de Argentina (APIMA). In the 2025 edition, the event has extended its reach by incorporating Macabro FICH (Mexico) and Fantasolab (Colombia) into its organizing team.

Other significant developments are the partnership between the Sitges International Fantastic Film Festival of Catalonia (Spain), or the Quirino Awards Co-Production and Business Forum. The latter, held annually in Tenerife (Spain), serves as a strategic meeting point for professionals from Latin America, Spain, Portugal, and Andorra, aiming to co-produce, co-develop, and distribute animated projects across the region (Premios Quirino, n.d.).

In addition, most well-known film festivals in Europe have an industry side that organise activities dedicated to the international co-production of films, such as the Co-production Day at the Marché du Film, the Berlinale Co-Production Market held during the Berlin International Film Festival, and the CineMart at the Rotterdam Film Festival.

Although Europe is considered an ideal partner, Argentinian producers have raised concerns about the impact of certain funding conditions tied to European grants. These included mandatory requirements such as filming or post-production in a specific country or including a designated percentage of actors of a certain nationality. Such stipulations were seen as limiting

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

and, in some cases, detrimental to the efficiency and budget of a cinematographic project. Many pointed out that equivalent production services could be sourced in Argentina at comparable quality but significantly lower cost and turnaround time. Another important consideration is that film professionals typically approach Europe not as a single co-production landscape, but as a collection of distinct national systems, each evaluated on its own merits.

4.2 Brazil

As in Argentina, European feature films in Brazil often find their audience through non-commercial circuits, either through local film festivals or special showcases organised by European embassies and cultural institutes. Two of the country's most prestigious international events are the São Paulo International Film Festival (Mostra SP) and the Rio de Janeiro International Film Festival (Festival do Rio).

4.2.1 Film Festivals

Mostra SP, a landmark in Latin American cinema, programs a diverse selection of international films and hosts the Audiovisual Ideas Market, a space where filmmakers, producers, and industry experts from around the world convene to **share knowledge and forge creative partnerships** (Mostra SP, n.d.). The 2024 festival edition introduced a dedicated children's and youth segment, Mostrinha, alongside panel discussions on engaging younger audiences and expanding their access to a broader range of audiovisual works.

Likewise, Festival do Rio also has a strong presence of European films in its programme. It also integrates a dedicated industry segment, RioMarket, which runs concurrently to the festival. Like most industry events, Rio Market is designed to strengthen professional networks and ignite international co-production partnerships and distribution agreements (Rio Market, n.d.).

A recent initiative focused on independent cinema is MUBI Fest, and had its first editions in São Paulo (2022, 2023, and 2024), the 2025 edition took place in Rio de Janeiro. The initiative later expanded to other cities such as Buenos Aires and Mexico City among others. The first edition had the support of the Museum of Image and Sound (São Paulo) and the British Embassy.

In addition to **supporting the circulation of European films**, local film festivals also play a crucial role in **audience development** by exposing viewers to more diverse content than what is typically found in the commercial circuit. Initiatives such as the mentioned Mostrinha also demonstrate how festivals can **engage and educate audiences** from an early age, making films from different cultural and national backgrounds more accessible and **fostering long-term interest in foreign cinema**.

I believe this is about audience development. In Brazil, film festivals have also suffered a lot in recent years, even though they are, of course, major platforms for the dissemination of European and global cinema.

BR Int1, DIR/PRO

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Out of the initiatives organised by embassies or cultural centres, some of the most notable ones are The Varilux French Film Festival, organised through a partnership between the Varilux brand (Essilor), the French Embassy in Brazil, the Alliance Française, Air France, the Accor hotel Group, and key sponsors such as Pernod Ricard/Lillet, and more recently AXA and Michelin. The event is one of the most important French film festivals outside the hexagone, and it has expanded from its origins in Rio de Janeiro and São Paulo into a truly national event, presenting in more than 60 cities and attracting more than two million viewers over the years. It organises free outdoor screenings and special masterclasses (including VR programs and talks by critics like Jean-Michel Frodon), as well as a unique lab for Franco-Brazilian screenwriting collaboration (Festival Varilux de Cinema Francês, 2024). Unifrance organises My French Film Festival as well, an online event that also is showcased in some VOD services in Brazil like Belas Artes à la Carte, and Filmicca.

There is also the Festival de Cinema Italiano, an annual, hybrid event organised by the Italian Embassy in São Paulo and the Italo–Brazilian Chamber of Commerce (Italcam), with support from the Italian Ministero dei Beni e delle Attività Culturali e del Turismo (MiBACT), the Istituto Luce Cinecittà, and ANCINE. It offers free in-person screenings at cinemas, cultural centres, and universities across 18 Brazilian states, as well as a geo-blocked online platform. By bringing Italian films – often unavailable in commercial theatres – to regions with limited or no cinema infrastructure, the festival plays a vital role in expanding their distribution and accessibility throughout Brazil (Festival de Cinema Italiano, 2024). Along similar lines, the Mostra de Cinema Alemão: Elas Dirigem! is a free, Portuguese-subtitled showcase of German feature films directed by women. Organised by the German Consulate General in São Paulo in partnership with the Goethe-Institut and Sesc São Paulo, the series runs at seven venues: the Sesc unit in São Paulo city and six additional Sesc locations across the state (Representacoes da Republica da Alemanha no Brasil, 2025).

Finally, there is the Mostra de Cine Europeu (European Film Exhibition) which is the film component of the Semana da Europa (Europe Week), a multidisciplinary cultural festival held in Brasília. Organised by the EUNIC in Brazil[16] in partnership with the Delegation of the EU and its member-state embassies, Semana da Europa offers free concerts, culinary events, workshops, and, through the Mostra de Cine Europeu, a curated selection of contemporary and classic European films. By celebrating Europe's artistic plurality on and off screen, this initiative fosters meaningful cultural exchange between Europe and Brazil (Goethe-Institut Brasília, 2025).

Initiatives spotlighting other European countries also occur, but they tend to take place on an ad hoc basis or as one-off events rather than as established, recurring programmes. Numerous other initiatives organised by various European institutions take place each year in Brazil, although the events previously mentioned remain the most prominent and regularly held.

Collectively, these initiatives, whether local film festivals or showcases led by embassies and cultural centres, **significantly broaden the reach of European cinema** in Brazil. Events hosted

[16] EUNIC is the European network of national-level organisations engaging in international cultural relations. Together with partners worldwide, it brings to life cultural collaboration in more than 100 countries through a network of 140 clusters, drawing on the experience of our members from all EU Member States and associate countries.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

by embassies, cultural institutes, and the EU Delegation share a common goal: to project the cultural heritage, values, diversity, and creative output of European countries, and in some instances the EU as a whole. In doing so, they serve diplomatic, cultural, and to a lesser extent commercial aims, reinforcing the EU's presence and influence in the region while offering a valuable alternative for both film professionals and audiences within a market largely dominated by Hollywood. However, their reach remains limited, with activities largely confined to niche circuits in major urban centres such as São Paulo and Rio de Janeiro.

Much like the situation in Argentina, the mentioned events in Brazil exhibit a **lack of uniform structure** and **rely heavily on partnerships** with embassies, cultural institutions, and industry stakeholders to secure necessary resources. Common challenges persist across both contexts, including insufficient funding for promotion, the prohibitive cost of screening rights, limited audience familiarity with contemporary European filmmakers and actors, and difficulties in obtaining dubbed or subtitled versions of films. Furthermore, programming decisions are frequently shaped more by financial constraints than by preferences of local audiences. The high costs of screening rights were also mentioned by organisers of local film festivals as an impediment to showcasing European films.

I don't really know what the solution is, because world sales agents depend on this for their livelihood. They're thinking: 'Well, we're not selling films anymore, so let's make the festivals pay.' Festivals have almost become part of the exhibition circuit. But the issue is that festivals already have to handle subtitling, which is a significant cost, since they need to translate and subtitle the films to Portuguese. And they're not going to distribute the film afterward, so they have no way of recovering that investment. It creates an illusion that this model is sustainable.

BR Int9, FF

4.2.2 Co-Production Markets

Brazil currently has bilateral co-production agreements with 13 countries, six of them European: France, the UK, Portugal, Spain, Italy, and Germany. Historically, the country with which Brazilian producers have worked the most is Portugal. This is the most sought-after nation by Brazilian producers in the overall ranking, behind only Argentina and France.

At the multilateral level, Brazil is a part of the Ibero-American Cinematographic Integration Agreement, and the Ibermedia Program. In recent years, international co-productions rose from six in 2006 to 48 in 2024 (Figueiró, 2025).

Looking at the number of international co-productions from 2002 to 2024, Brazil was involved in the co-production of 503 films with other countries. Portugal appears as the country involved in more co-productions with Brazilian companies (99), followed by France (93), Argentina (93), the US (40), Germany (35), Uruguay (35), Chile (35), Spain (31), the UK (20), and Canada (19) (Figueiró, 2025). In 2024, a total of 48 co-productions were recorded, the highest number to date (EAO, 2025).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Recently, Brazil has increased its investment in international co-productions, as evidenced by the ANCINE, and the Regional Development Bank of the Extreme South (BRDE) announcement of a public call for international film co-productions, supported by the Audiovisual Sector Fund (FSA), with a total budget of approximately USD 24 million (R$ 120 million) (MinC, 2025). An additional USD 24 million (R$ 100 million) was allocated to the 2023 FSA/BRDE International Co-Production Call, bringing the total to roughly USD 44 million (R$ 220 million), the largest amount ever invested through this fund (Agência Gov, 2024).

Brazil signed cinematographic co-production agreements with France and China in 2017, and with South Africa in 2023. As of mid 2025, these agreements are in the process of being integrated into the national regulatory framework (MinC, 2025). Moreover, the Portuguese Instituto do Cinema e do Audiovisual (ICA) and ANCINE have approved a new edition of the Luso-Brazilian Protocol for 2025. Under this agreement, both institutions commit to co-finance at least four films per year, ensuring that at least two projects feature minority Brazilian participation and two feature minority Portuguese participation. Each organization will contribute to this end approximately € 350,000 annually (ANCINE, 2025b).

In Brazil, one of the main co-production markets is Rio Market, which is the industry arm of the Rio de Janeiro International Film Festival, and stands as one of the most important audiovisual markets in Latin America. Through pitching sessions, one-on-one meetings, panels, workshops, and networking events, Rio Market actively facilitates connections between producers, distributors, sales agents, financiers, broadcasters, and representatives of national and international film commissions and funding bodies. The event fosters dialogue between Brazilian creators and global industry players – particularly from other Latin American countries, Europe and North America.

There are a few other events such as Brasil CineMundi, a market and networking hub connecting Brazilian filmmakers, particularly independent directors and producers, with international partners (producers, distributors, festival programmers, and funding bodies) to foster co-productions and project circulation; and the Audiovisual Ideas Market, the industry side of Mostra which holds talks and professional exchanges among local and international producers. Beyond that, the Paris Brazilian Film Festival, which takes place in Paris, holds the France–Brazil Audiovisual Forum which organises panels on international cinema and television co-production.

European festivals and markets remain highly valued by Brazilian film professionals **as key avenues for securing international co-production agreements**, distribution deals, and expanding their presence in the international film industry. For Brazilian producers in particular, European film festivals play a **critical role in the ecosystem by embracing and promoting Latin American works**. Success at these events, exemplified by awards, not only validates the films artistically but also generates essential support for future projects, further reinforcing Europe's role as a strategic ally for Latin American filmmakers striving for both **cultural expression and international visibility**.

Nonetheless, many interviewers have emphasised the growing challenges in accessing these events in recent years, underscoring the importance of the grants given by the ANCINE to enable participation and ensure continued engagement in the international audiovisual market.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Indeed, Cinema do Brazil, dedicated to fostering the international presence of Brazilian cinema, actively participates in prominent European film festivals and markets. Its engagement includes producing a comprehensive catalogue for each featuring the production companies selected, their projects in development, and featured films. The program's presence extends to key events such as the Cannes Film Festival and the Marché du Film, Berlinarle and the European Film Market, CineMart International Co-production Market (an industry component of the Rotterdam Film Festival), the Euro-Latin American Co-production Forum at the San Sebastian Film Festival, and Venice Production Bridge, among others.

Similarly to Argentina, despite the strong appeal of coproductions with European partners, Brazilian producers have voiced reservations regarding some of the stipulations associated with European film funding. Requirements, such as localising parts of the production process in the donor country or fulfilling nationality quotas, are seen as limiting creative and logistical autonomy. Producers emphasised that high-quality services are available domestically, offering more cost-effective and timely solutions.

Importantly, co-productions with Europe are also not approached as a singular, unified opportunity; instead, they are navigated strategically, with each national system weighed individually for its specific advantages and limitations. Nevertheless, when compared to other countries, the EFI is perceived as a co-production partner that prioritises artistic merit over commercial considerations. This stands in contrast to countries such as the US, which is often viewed as being primarily commercially driven and less receptive to more auteur-driven or culturally nuanced narratives.

4.3 Mexico

Similarly to what could be observed in the Argentinian and Brazilian cases, international film festivals and co-production forums play a crucial role in facilitating the circulation of European films and fostering audiovisual collaboration between Mexico and some European countries. These events serve as important cultural and industry hubs where films are not only showcased to different audiences but also where key stakeholders such as filmmakers, producers, distributors, and policymakers, can network and initiate partnerships.

4.3.1 Film Festivals

Film festivals in Mexico, such as the Guadalajara International Film Festival (FICG)[17] and the Morelia International Film Festival (FICM), provide significant exposure for European cinema, offering opportunities for European films to reach Mexican audiences beyond traditional commercial circuits. In the case of the FICM, there is a partnership with the Semaine de la Critique (Critics' Week) of the Cannes Film Festival. This collaboration facilitates the exchange of cinematic works between the two festivals, allowing Mexican filmmakers to showcase their

[17] The FICG is a week-long film festival held each March in the Mexican city of Guadalajara since 1986. The presence in Guadalajara of delegates from other important festivals from around the world has helped Mexican cinema to have a strong international presence in the last twenty years.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

works on an international stage and bringing notable selections from Critics' Week to Mexican audiences.

Other notable initiatives include: the Macabro FICH, the International Documentary Film Festival of Mexico City (DocsMX), the FICUNAM, and the Ambulante Documentary Film Festival (Ambulante Gira de Documentales). Macabro Film Festival, a Mexican genre film festival specializing in horror, fantasy, and thriller cinema, focuses on showcasing both national and international films and is supported by institutions such as IMCINE, Cineteca Nacional, and the National Autonomous University of Mexico (UNAM). DocsMX, on the other hand, is a prominent cultural event dedicated to presenting the best of national and international documentary cinema. FICUNAM, organised by the UNAM, features a wide range of films, encompassing both Mexican and international productions. Finally, Ambulante Documentary Film Festival showcases a curated selection of national and international documentaries to diverse cities across Mexico, screening in public spaces, universities, theaters, and cultural centers, often reaching communities with limited access to documentary films.

Additionally, Mexico City has hosted two editions of the MUBI Fest, similar to Brazil and Argentina, although the 2025 edition was cancelled.

The films typically shown at festivals are European. So, what we see at festivals in Mexico tends to be Mexican, European, and occasionally some Latin American films. At Morelia, for example, it's mostly European and Mexican cinema.

MX Int4, DIR/PRO

There are various initiatives organised by European embassies and cultural centres to further facilitate the circulation of European feature films across Mexico. A particularly noteworthy initiative is the Tour de Cine Francés, regarded by Unifrance as the world's most important traveling French film festival. Established nearly three decades ago through a partnership between the Mexican distributor company Nueva Era Films, the Cinepolis exhibition chain, the French Embassy, and the Mexico's Alliances Françaises network, this itinerant festival uniquely combines commercial and cultural dimensions. Unlike many regional festivals, the Tour de Cine Francés extends its reach beyond major capital cities, touring 73 cities in Mexico and 15 cities across Central America (Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua). Its film selection prioritises commercially appealing French films that typically do not gain distribution in Mexico, as opposed to independent or festival-oriented titles. The festival's impact is reflected in its audience figures, with 253,000 spectators in 2023 and a peak attendance of 420,000 in 2018 (Unifrance, 2024).

Unifrance also organises each year My French Film Festival, an online event that showcases a curated selection of French movies with screenings accessible via VOD services like Morelia's Film Festival, CIND!E, Claro Video, TV5MONDE, and Nuestro Cine MX (Más Cultura, 2025). In the case of Nuestro Cine MX (formerly Filmin Latino), this service often has collaborations with other film festivals and has featured films from Ambulante and FICUNAM, among others.

In addition, there is the Festival de Cine Alemán, organised by the Goethe-Institut in Mexico City. After 23 years, the event evolved from a thematic week (Semana de Cine Alemán) to a full

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

fledged festival in 2024. The event expansion included screenings across multiple venues in Mexico City and a tour featuring a special selection of films from the festival in Guadalajara, Monterrey, Puebla, Guanajuato, Playa del Carmen, and Tijuana (Goethe-Institut Mexiko, 2024).

Another case worth noting is the European Film Festival, it is organised by the EU Delegation in Mexico, together with EU member state embassies and the Mexican Secretariat of Culture. This annual cultural event is hosted at the Cineteca Nacional in Mexico City and other states through the Cineteca Circuit. Beyond showcasing Europe's cinematic diversity, the festival aims to act as a cultural bridge, promoting shared values such as gender equality, environmental protection, and intercultural dialogue (EU Delegation in Mexico, 2025)**.** This event has been characterised as "missing an interesting opportunity" as "local delegations aren't given the opportunity to choose films based on the audience they know - the Mexican audience. Instead, the European delegation decides" (MX Int7, FF). As a consequence, local delegations and embassies are often reluctant to commit financially to film fees, as they do not have direct control over the selection process. According to the interviewee, this situation limits the event's effectiveness and local audience engagement.

As for **European film festivals**, they are instrumental in **fostering the internationalisation of Mexican cinema** through the promotion and exhibition of their works. Success, particularly award recognition, at these European events not only confers artistic validation but also cultivates crucial support for subsequent projects. Despite this significance, escalating difficulties in accessing these festivals have been noted due to rising costs and insufficient funding opportunities to attend such events.

Interviewees also noted that European film festivals are essential in **defining the European films that circulate in Mexico**, mentioning that distributors are more likely to buy a title if it has been selected or awarded at one of the festivals. Conversely, European film festivals are seen as placing more emphasis on non-arthouse films, shifting programming away from more experimental or niche works. The inclusion of titles from Hollywood studios or US-based global streamers in film festivals such as Venice or Cannes has led to structural changes in festivals worldwide, privileging big-budget productions and altering programming priorities.

Yet, as one participant noted, the so-called Oscar-ification of festival winners can increase their distribution potential, enabling wider audience engagement through traditional streaming services and pay-TV channels.

European cinema here basically means films that have gone through the festival circuit - Cannes, Venice, Rotterdam, etc. That's the kind of European content we typically see. Very few European films are accessible here if they haven't been part of festivals, unless perhaps they've been acquired by platforms like Netflix. For example, I find it incredibly difficult to access films available on the **BBC** ***or*** **Arte** ***– they're simply not accessible here. There's a lot of European content that doesn't make it to festivals but is still of high quality, yet there aren't clear distribution channels for it. So, when we talk about European cinema here, it usually refers to films like*** **The Substance*****,*** **Anatomy of a Fall*****, or*** **The Zone of Interest** **–** ***all recent festival titles. That's what reaches us.***

MX Int14, DIR/PRO

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

4.3.2 Co-Production Markets

Mexico has co-production agreements with Spain, France, Switzerland, Venezuela, Senegal, Argentina, and Canada. The country also participates in the Ibermedia Program as well as the Latin American Cinematographic Co-Production Agreement.

Of the 48 international co-productions released in 2024[18], a total of 21 were with the US, and 24 were with European countries (Spain: 12, France: 5, and one with Germany, Austria, Greece, Poland, Switzerland, Belgium, and Norway). Only 20 out of 48 international co-productions were showcased in the commercial circuit: six with the US, six with Argentina, five with European countries, and one with Uruguay, Paraguay, and Ecuador (IMCINE, 2024).

European co-production agreements and other funding programs are considered important for Mexican cinema, providing funding and support for films. There is a **desire to strengthen co-production agreements** while acknowledging that many agreements **need to be updated to reflect current industry dynamics**.

Beyond Europe, the **US and Canada** were frequently cited by interviewees as important non-EU co-production partners (an observation supported by available data). The UK was also frequently mentioned in relation to co-productions with Mexico, unlike in the cases of Argentina and Brazil.

Some interviewees see Hollywood as the reference when thinking of a film industry. “It changes my perception, because as a Mexican living so close to the US, for us the film industry is Hollywood. That’s how we’re wired, we’re connected to see the film industry as Hollywood. So, when we compare it to the European industry, for us it already feels independent” (MX Int12, EXH).

Others see the EFI as having limited resources when compared to the financial power and global infrastructure of Hollywood. Producers generally characterised **collaboration with US industry actors as efficient and relatively free of bureaucratic hurdles**, especially in comparison to European partnerships. As one interviewed noted, “Compared to the US, Europe has very limited resources and falls far short when it comes to truly competing with American cinema” (MX Int4 DIR/PRO). In contrast, experiences with **Canada** were described as similar to the EFI due to the reliance on public funding mechanisms.

I think this is really the European Union coming together in the eighties, creating all these co-productions. The agreements and systems have largely stayed the same; the decision-making is probably rooted in the past. But the world has changed. Now you’re bringing in millennials, who can understand this from a nostalgic perspective. But when you bring in centennials, it won’t work, they’ll get bored and say: ‘Okay, I don’t want to do this’.

MX Int6, DIR/PRO

[18] Several countries might have collaborated on a single co-production.

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

When it comes to engagement with **India** and **China**, there was a lack of awareness among participants regarding formal co-production schemes or targeted funding programs involving Mexico. One distributor cited repeated invitations to the Macau Film Festival, which covered his expenses, while another producer referenced a co-production project between Mexico, Argentina, and Spain in which she was considering applying for support from a Taiwanese funding program. These cases, however, were perceived as isolated and not indicative of a broader trend.

Producers emphasised that many co-production agreements with European countries are bureaucratic in nature and include restrictive conditions that can hinder their practical implementation. These often involve requirements to allocate a fixed percentage of the budget within the partner country or to employ a specific number of professionals of that nationality. While such clauses aim to ensure mutual benefit, they can conflict with the realities of the Mexican industry, which possesses robust infrastructure and comparatively lower production costs. As a result, these stipulations may reduce the financial and logistical viability of collaboration, rendering certain international co-productions less attractive or even unfeasible from the Mexican perspective.

The infrastructure in Mexico is much more affordable for making films than in Europe. So that presents a competitive advantage here for Europe, but in Europe, for example, that's not at all competitive for Latin America. I mean, it's not worthwhile for anyone to go there. In fact, it's a bit strange, because right now I have a film that's probably going to receive funding; it already received some from Spain and probably will from Germany. More money will be spent on the film's post-production than on the entire shoot because the post-production has to be done over there, it's a condition. So these kinds of brutal imbalances in budgets happen, both because of rising costs and also because it's the only option.

MX Int14, DIR/PRO

Regarding audiovisual markets and international co-production forums, two key events should be mentioned: the Iberoamerican Co-Production Forum at the Guadalajara International Film Festival (FICG), and the Mestizo Lab co-production encounters. The Guadalajara forum, part of Mexico's most prestigious film festival, serves as a major hub for fostering collaborations across Iberoamerica. While Mestizo Lab, inaugurated in 2019, aims to strengthen partnerships between Mexican and Spanish film professionals. Its main objectives include creating a dialogue space, offering industry sessions, presenting project exhibitions, and conducting workshops focused on professional development in both countries. This annual event takes place at Casa de México in Madrid and operates in partnership with Estudios Churubusco.[19]

[19] Estudios Churubusco (Mexico City) is one of the oldest film studios in Latin America. Opened in 1945 following an agreement between RKO and Emilio Azcárraga Vidaurreta, it was acquired by the Mexican federal government in 1950 and merged with Estudios y Laboratorios Azteca to form Estudios Churubusco Azteca. Since 1958, they have been controlled by the Mexican government. They are considered one of the four major studios during the Golden Age of Mexican cinema (1936-1956), along with Estudios América, Estudios San Ángel, and Estudios Tepeyac. Together with the San Ángel studios

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Some of the initiatives present in Argentina and Brazil are relevant in Mexico as well. For instance, Fantastika, the Ibero-American Horror and Fantasy Co-Production Forum is now also hosted at the Macabro FICH serving as a platform for industry professionals, offering masterclasses, panels, and networking opportunities.

DocsMX also organizes parallel activities such as conferences, workshops, roundtables, and filmmaker-audience interactions, fostering a collaborative environment. Key initiatives include Doctubre, which brings documentaries to underserved regions in Mexico and Latin America, and DocsLab, a program supporting emerging filmmakers with labs in scriptwriting, editing, production, and distribution.

FICUNAM also hosts Aciertos: International Film Schools Meeting, fostering interaction among Ibero-American film students and fresh perspectives on contemporary filmmaking, alongside the Audience of the Future Seminar, which examines new ways to engage audiences and understand emerging media consumption patterns.

Finally to support the professional development of screenwriters in the region, Ibermedia has backed the Cine Qua Non Lab script review workshop, providing a dedicated space for skill-building and mentorship.

Beyond Mexico, other events hold significant importance in fostering Europe-Latin America audiovisual ties. These include the Europe-Latin America Co-Production Forum, held annually at the San Sebastián Film Festival. Since its inception in 2012, the Co-Production Forum has aimed to promote the development of film projects linking Europe and Latin America, while strengthening international co-production and distribution networks (SSIFF, 2024).

In addition, there is the Mexican film festival Viva Mexico, held in Paris, and the Biarritz Film Festival. Both events serve as platforms for fostering co-production meetings between Mexico and France. The Co-Production and Business Forum at the Quirino Awards held in Tenerife is also worth mentioning.

From the perspective of film professionals and industry stakeholders, co-production markets serve not only as **financial and creative collaboration spaces** but also serve a **cultural role** by facilitating the exchange of experiences, knowledge, and storytelling frameworks. Industrially, they **offer mechanisms for strengthening production capacities and market access**. Nonetheless, these same markets are perceived as perpetuating power asymmetries between the Global North and the Global South, where European norms are treated as the default.

Additionally, professionals identified numerous obstacles, both institutional and operational, including restricted access to co-production markets, limited visibility and clarity of co-production agreements, as well as bureaucratic complexities that hinder their implementation.

> ***Well, it's complicated. But at the same time, it’s a possibility. An industry that offers possibilities; but why complicated? Because it’s restricted, because it’s expensive. Many***

(now Televisa San Ángel), they are the only studios still in operation. It is estimated that 95% of films produced in Mexico since 2000 have used many of the services provided by the studios.

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

people don't have the chance to go to Cannes, for example. Or to Berlin. Or to Venice. But well, specifically to Berlin or Cannes, which are the main markets over there. That's what makes it complicated. I mean, it's expensive, but the possibilities are that there is openness. Well, let's see, let's see your story, let's see your proposal. We're interested in seeing what you're doing over there. Maybe it seems exotic, maybe it also seems eccentric. Like, there still exists this colonialist vision, right?

MX Int13, FF

Another challenge is the lack of clear understanding around the legal, logistical, and financial implications of co-producing with European countries. This **knowledge asymmetry** can result in uneven relationships, where European partners assume a shared understanding of industry norms that may not exist. This dynamic was identified not only as a logistical barrier but also as a reflection of deeper structural imbalances. The assumption that European norms are universal contributes to what one participant described as a colonizing and Eurocentric mindset, where the burden of adaptation falls disproportionately on international partners.

Another participant noted that European co-production models and funding programmes frequently operate under the assumption that Mexico lacks adequate technical resources, resulting in the allocation of funds and critical production activities abroad rather than leveraging the country's well-established and mature film industry. According to him, this pattern persists despite the presence of a highly equipped and professional domestic infrastructure (MX Int10, FUNDER/POL).

I've been to many (festivals or markets) as a guest, and it's always extremely enriching. I think the problems arise precisely when, at first, everything seems great – like, 'I want an Italian co-producer' – but we may not fully understand the advantages and disadvantages that might come with that. And there can be many disadvantages: it's far away, it may be much more expensive to co-produce in Italy – maybe not as much, but in Belgium, or France, for instance. And perhaps there really is an issue of Eurocentrism – a Eurocentric worldview toward cinema that comes from outside Europe or the US, where it's taken for granted that everyone knows how to produce. That's the problem I've encountered: a French producer, for example, might assume it's obvious that I should know all their rules. And I think that reflects a very colonizing and Eurocentric mindset that still persists among quite a few European producers. Of course, training programs and similar initiatives are extremely helpful in fostering cooperation. But I do think there's a need for a more intentional anti-colonialist approach – which is beginning to take shape, and people are finally talking about it. Still, it could be addressed in a much deeper and more critical way.

MX Int4, DIR/PRO

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

4.4 South Africa

Contrary to the first three case studies, not many European film initiatives are organised in South Africa. For this reason, the analysis of the roles played by film festivals, which is included below, focuses mostly on festivals taking place in Europe and their contribution to supporting the South Africa film ecosystem.

4.4.1 Film Festivals

Nonetheless, it is important to begin by mentioning the few relevant initiatives led by European stakeholders that take place in South Africa. The main reference in this context is the annual European Film Festival. In 2024, its eight edition, it held screenings in Johannesburg and Cape Town. The previous edition, taking place in 2023, was a partnership project of the Delegation of the European Union to South Africa, the participating European embassies of Belgium, Bulgaria, Czech Republic, Denmark, France, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland and Ukraine; and the cultural agencies of British Council, Camoes Institute of Portugal, Diplomatic Representation of Flanders, French Institute in South Africa, Goethe-Institut and Italian Cultural Institute (European Film Festival South Africa, 2023).

The EUFF combines screenings in Johannesburg and Cape Town, an online programme, and workshops and masterclasses. Its online dimension increases access to screenings in a difficult socioeconomic context and guarantees the visibility of films other than blockbusters. Moreover, the film festival makes visible African co-productions. Although this initiative is developed and implemented in the context of the EU's cultural diplomacy efforts, South African filmmakers use the EUFF's screenings and events as unofficial opportunities for professional development (Lähdesmäki et al, forthcoming).

The Italian Film Focus is a Festival organised "in collaboration with the Italian Embassy in Pretoria, the Italian Consulate in Cape Town, the Italian Cultural Institute of Pretoria, the Italian Ministry of Culture and Controluce Association" (Consolato Generale d'Italia, 2024). In the context, the Italian Embassy hosts meetings between filmmakers. The festival plays an important role in making Italian films and co-productions available in the South African context, where arthouse films face significant challenges in terms of distribution.

These events are fundamental to the visibility of European film in South Africa. Although their original and main goals are diplomatic, aiming to make visible Europe's cultural diversity and shared values, they are an important alternative for both audiences and film professionals in a domestic market that is dominated by Hollywood. However, both the scale of these initiatives and their reach are currently too small to allow them to establish significant cultural influence beyond a small niche of South Africans.

Regarding the most relevant South African festivals, audiovisual markets and international co-production forums, the South African Durban Film Festival (DIFF) must be mentioned. DIFF is the leading film festival in Africa, presenting screenings of features, documentaries and short films and multiple premieres, as well as premieres in townships without screens. It also offers

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

workshops, seminars and panel discussions and hosts a network of festival directors in South Africa (Durban International Film Festival, n.d).

The festival includes a film market – the Durban Film Market, led by the Durban FilmMart Institute (DFMI). The Market aims to "support local and international trade and investment in African film" (DurbanFilmMart, n.d). Today, the Durban FilmMart "is a pan-African finance and coproduction market […] named in UNESCO's 2021 Film Trends in Africa Report as the continent's best film market" (DurbanFilmMart, n.d.). Its goals are, namely, to enable funding for promising projects and accelerate the financing of the participating projects through transnational cooperation; stimulate development and production of African content (DurbanFilmMart, n.d). In the context of the DIFF, the French Institute in South Africa (IFAS) hosts the French Focus as one of the exhibitors (DurbanFilmMart, 2025).

Encounters – the South African International Documentary Festival – not only screens contemporary South African and international features and short documentaries; it also holds several industry events such as "in-depth sessions, including dynamic panel discussions, masterclasses, and in-conversations in Cape Town and Johannesburg" (Encounters, n.d.). This festival has been described as "as alternative spaces and document a history of changing cinema culture, narrative, political agendas, and audience demographics" (Binedell 2024, p.2). Still in South Africa, FAME Week Africa is a creative industries forum combining events focused on several creative industries (FAME Week Africa, n.d.).

Documentary Africa is a "Pan-African initiative that aims to cultivate and nourish a self-sustaining documentary film ecosystem in Africa" (Documentary Africa, n.d.) through multiple initiatives that support the value chain from across storytelling to distribution and audience-building. Among its funding partners are the German Agency for International Cooperation or (GIZ) and Deutsche Welle Akademie, the centre for international media development, journalism training, and knowledge transfer of Deutsche Welle, Germany's international public broadcaster. Other European institutions are also its partners: Cannes docs, the Dutch IDFA and the European Film Festival of Berlin's International Film Festival.

Finally, although the Cape Town World Cinema and the Sithengi Film and Television Market no longer take place, they were mentioned by several interviewees as important contributors to the establishment and development of the South African film industry, echoing the literature (Tuomi, 2006, pp.17-18).

According to film professionals in South Africa**, European film festivals in South Africa and in Europe play several social, cultural and industrial roles**. The following festivals were mentioned explicitly: Cannes, in which the South African film industry has had an official presence since 1997; Berlin; Venice; Series Mania in France; MIPS and MIPCOM in Cannes; Gothenburg Film Festival in Sweden; IDFA in Amsterdam; Rotterdam; Locarno; DocLisboa. Two festivals were also mentioned in the United Kingdom: Encounters Film Festival in Bristol and Sheffield Festival, England. South African filmmakers are supported by the Hubert Bals Fund of the Rotterdam Film Festival, the World Cinema Fund of the Berlinale, and Aide aux Cinémas du Monde or World Cinema Support – led by the French Film Institute.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Some of these festivals include African pavilions and markets but interviewees did not always agree regarding the success of these initiatives. One film professional stated the following: “There’s a massive African pavilion at Cannes, for example. Did I go in there once? Not one time did I go in there because it feels ghettoised […]. It's not in the main area. It's not where the Irish are and the British are and the Americans are” (SA Int4, DIR/PRO). Other interviewees were more optimistic about similar initiatives: “Berlin is also good because they […] have an African market within the Berlin Film Festival. (With the) support of the Department of Foreign Affairs and other partners in Germany, they created an Africa hub (SA Int16, FUNDER/POL).

Regarding their **social role,** meeting people face-to-face and building a network when establishing collaborations is crucial, something that is particularly difficult for South Africans due to the high entrance fees and other costs associated with such trips, combined with the weak domestic currency.

I've had a few producers telling me the value of attending film festivals in Europe. Often their next deal has come from that attendance.

SA Int16, FUNDER/POL

Regarding the **cultural role** of European festivals, several interviewees highlighted the importance of seeing films or documentaries that place artistic and cinematographic value above other considerations. The cultural dimension of festivals was also evident in several statements made by interviewees regarding the EUFF and those in attendance, who are often film students. European films are perceived as having high quality and being exposed to them is understood as keeping film professionals updated. As a film stakeholder stated regarding the EUFF:

In South Africa, if you're choosing the best films in the world, arthouse, you can't ignore European film.

SA Int2, FUNDER/POL

Regarding **their industrial role,** European Film Festivals function as **industrial models from which the South African film industry takes inspiration to support capacity building, market development and programming.** This is evident in the Durban FilmMart Institute, which “is taking the model of the Rotterdam cinema art. It's a developmental market to develop African content” (SA Int16, FUNDER/POL). Similarly, the MIPCON in Cannes influenced the creation of a MIP Africa. In particular, an interviewee highlighted the ateliers and workshops organised at European film festivals and their importance as skills development opportunities:

The Europeans have really good ateliers for writing and they're not stepping on the writers as much as they used to, they're not telling them to write, you know, the formula Hollywood thing. They're allowing them their fresh voices.

SA Int2, FUNDER/POL

More broadly, film festivals are opportunities to **develop networks**, **strengthen them and create new collaborations.** This is not only an individual approach; rather, it is enabled by

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

South African policy. To introduce South African producers to producers in Europe, the NFVF takes business delegations to festivals so that film professionals can access, namely, **fora and markets dedicated to the Global South**:

> ***In order to facilitate films from the Global South they have set up different divisions within so that they have […] the emerging filmmaker (markets) […]. Berlin has been one of the biggest ones […], the South African movie u-Carmen e-Khayelitsha, the Golden bear in Berlin, that was one of the films that was supported through all the different stages of development, production, etc. The NFVF was a big funder of that one, but the Berlin Film Festival itself [also].***
>
> **SA Int11, EXH**

It is also important to note that South African film professionals attend these festivals in multiple capacities, a characteristic that reflects the mode of functioning of the South African film industry. Therefore, their attendance often supports the same professionals in multiple ways across the supply chain.

On the negative side, festivals are seen as increasingly supporting non-arthouse films, which indirectly limits South African submissions, and although South African film professionals submit their work in European festivals this hasn't been reflected in an expansion of their international market share. Additionally, South African state institutions have limited budgets to provide support to filmmakers travelling to European film festivals and even less to support the marketing efforts of their projects.

Moreover, some interviewees stated that Europeans do not always act at festivals or regarding funding in ways that would reflect a serious commitment to South African films, and this is having an impact in the decreased interest from African film professionals in European circuits:

> ***Now with these [non-European] funds coming within the continent, quite a few of the other countries like Ghana will now have incentives for filmmaking. And not just structured incentives, there's other funds, even in the Middle East, like the Red Sea Fund that is also investing in African funds […]. I think that the evidence is always in people's choices. If they're choosing to rather avoid European funds, if they can, it tells us something […]. And I also think, you know, Europeans know they're doing this […]. When there's moments for engagement, the Europeans don't come to the party.***
>
> **SA Int10, DIST/SA**

It should be noted that film professionals in South Africa **rarely use European funding to access these festivals**. Although some festivals "invite people that they want to invite and they will pay for everything, including flights, accommodation [...], smaller festivals, they will only take care of your accommodation so that you participate in the market" (SA Int3, FUNDER/POL). Instead, South Africans are supported by the NFVF to attend film festivals in Cannes (where the NFVF also organises a South African pavillion), Berlin and Rotterdam, alongside "a special fund, which is called the Filmmaker Support" (SA Int9, O). The NFVF also has "a very good working relationship with the Berlinale Festival, but that's more also on the development side" (SA Int3,

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

FUNDER/POL). In some cases, professionals are directly selected by the NFVF. Under the Department of Sport, Arts, and Culture (DSAC), the aim of the NFVF is to support the growth of the film industry (NFVF, n.d.a.). The Department of Trade, Industry and Competition (DTIC) also provides funding under a project called Export Marketing and Investment Assistance (EMIA; DTIC, n.d.a.), which has supported travel of South Africans to European film makers – namely, emerging filmmakers to Cannes (Polity, 2015). The NFVF and the DTIC often join forces, for instance to support travel of film professionals to the International Documentary Festival in Amsterdam (Brand South Africa, 2012). Finally, local or regional actors in South Africa also contribute to funding such trips, as is exemplified by a marketing and distribution fund made available by the KZN [KwaZulu-Natal Film Commission]. The Cape Town Film Fund is another important stakeholder in this context. Despite this multiplicity of official stakeholders, existing support to attend European festivals continues to be insufficient vis-à-vis existing demand.

The biggest challenge is funding […]. We wanted to go to Cannes last year […]. It came up to 1.5 million rands […]. We ended up not even going because we couldn't get the funding. We went to DSEC [Department of Small Business Development in South Africa]. They sent us to NFVF. NFVF said that we were above their threshold to funding festivals.

SA Int12, DIR/PRO

4.4.2 Co-Production Markets

Currently, South Africa has multiple co-production agreements (NFVF, n.d.b.) with Canada (1997), Italy (2003), Germany (2004), the United Kingdom (2007), France (2010), Australia (2010), New Zealand (2011), Ireland (2012), The Netherlands (2015), Brazil (2019). Of these, the most active are Ireland, France, and the UK. The French agreement was updated in 2022, overcoming the original exclusive focus on "feature-length films with a first window of release in the cinema. The amended treaty accommodates features, short films and serialised content for all platforms, including television and digital" (DFA, n.d). Moreover, South Africa has joint film funds with specific countries – for instance, the Thuthuka fund, a partnership between the Dutch Film Fund and the South African NFVF (Filmfonds, n.d.) that supports four development projects a year (two in South Africa and two in the Netherlands).

At the multilateral level, South African film professionals can access finance to support co-productions through the ACPCultures+ and the ACP-EU programmes, although they highlight many difficulties in doing so.

European co-productions play a **cultural role** by supporting projects that foreground stories and shared links – historical, linguistic or even diasporic:

…there has been a long history with Norway and actually there could be quite an organic relationship there […]. And you know […], I've been looking into Germany and Namibia, particularly, and Germany and France […]. Holland has been a long relationship […]. We have done quite a lot of Pan-African work. We've done, but it's mostly been with English-speaking Africa […]. I don't think we've done any actual French work.

SA Int1, DIR/PRO

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Additionally, European co-productions play several **industrial roles**: they support the development of the South African domestic film industry by **establishing networks, reaching wider audiences, strengthening the profile of individual filmmakers, and creating further work and training opportunities for film professionals**:

I think it's all about the relations we can create with the EU-based producers and connections and also just be able to get it or get broadcasted in countries other than South Africa. And also just to be able to access an exchange of culture, I guess, as well as just an exchange of dynamics of storytelling [...]. And lastly, […] funding […]. It would set the bar very high for my status as a filmmaker having a co-production opportunity with the EU-based producer and getting even EU support […]. And also for the fact that if I host production companies to come and film in the Eastern Cape […] because then it creates opportunities for people to get work here […] and also the possibility of training.

SA Int17, DIR/PRO

On this topic, the interviews reveal the desire for South African film professionals to be treated as equal business partners. In particular, one professional highlighted the positive way how European film professionals perceive black women in the industry:

When it comes to co-production, I think it's most important in Africa that […] we can meet their technical strength […]. So for me, I enjoy co-productions and in South Africa, we are, as a black woman, really being undermined when it comes to film in the film industry. But European filmmakers, they don't undermine us. They respect the work that you do, they take you as an equal.

SA Int19, DIR/PRO

Interviewees also highlighted the **political role** played by **co-productions,** that is, their contribution to the maintenance of asymmetries between the Global North and the Global South, particularly regarding **intellectual property but also storytelling and the interrelated issue of access to South African archival material**.

You see the imbalances between Europe and Africa, and the way African filmmakers are taken advantage of, especially in the co-production setting [...]. IP is taken out of our continent [...], our film industry is not being resourced [...] but it's our story [...].And this is why filmmakers, African filmmakers, are just deciding to do things on their own.

SA Int10, DIST/SA

The issue of **storytelling** can also be highly political. One interviewee suggested that European actors have "no go zones" in this regard: "Belgium is one of the busiest, most active filmmaking countries, but I don't think any of them is thinking of making a movie about Leopold in the DRC, for example. So there are no go zones" (SA Int3, FUNDER/POL). Similarly, other film professionals shared that projects that assess the colonial past critically are less likely to receive European funding, and that the lack of interest given by some European film professionals involved in co-productions regarding South African storytelling is indissociable from the

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

positioning of its industry as a servicing one. **Access to archives** was also highlighted as a financially difficult and **contentious issue**:

> ***Co-productions, I have not done [with the] French because I'm fighting with the French [...]. One of the reasons I have a UK-based co-producer on one of my series is not because I need [...] the cash, it's the access to the archive [...]. And often that archive is about us.***
>
> **SA Int4, DIR/PRO**

Besides having to negotiate the political dimension of European co-productions, interviewees mentioned several **practical difficulties associated** with their participation therein. They include bureaucracy and complex expectations, namely regarding distribution partners in both territories, the legal complexities of managing multiple legal environments and limited freedom in terms of project management and workers' selection as well as the increasing gap between film professionals with high social media audiences and the expectations of public broadcasters. Moreover, several interviewees highlighted the financial expectations involved in European co-productions, which are not adapted to the South African film industry and its cash flow needs, both in the case of co-production requirements and in terms of domestic funding requirements associated with the tax incentives and rebates administered by the DTIC. Finally, co-productions are also made difficult by the complexity associated with the certification process of the NFVF and the recent instability of the Foreign Film and Television Production and Post-Production Incentive, which provides a 25% rebate on qualifying South African production expenditure (DTIC, n.d.b.). Because of these difficulties, film professionals often decide to skip co-productions and use private funding.

However, despite existing challenges, South African film professionals and stakeholders continue to perceive European film festivals and co-productions as central in their funding, development, co-production and distribution strategies.

4.5 South Korea

4.5.1 Film Festivals

Considering the limited exhibition landscape for art house cinema in South Korea, film festivals play a crucial role in introducing European films to local audiences and creating spaces for professional exchange between the two industries. As previously discussed, the highly concentrated exhibition sector poses significant barriers to the theatrical circulation of European films. In this context, festivals serve as one of the few platforms where European titles can be seen.

Although interviewees agreed that European films rarely succeed in the commercial circuit, a festival programmer noted that there is a dedicated audience for such films within the festival context. One participant explained, "But the festival is a bit different. There is always a kind of

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

cinephile audience that comes, even from Seoul and elsewhere. So during the first week of the festival, there are many, many spectators" (SK Int13 FF). This highlights how festivals act as temporary but vital alternative spaces where European cinema can find visibility and resonance with Korean audiences.

The Busan International Film Festival (BIFF) is the most prominent film event in South Korea and serves as a key site for the presence of the European film professionals in Asia. At BIFF, most EU countries are represented collectively under the European Film Promotion (EFP) umbrella, which facilitates both the visibility of European films and the participation of EU professionals. During participant observation in 2024, the EFP stand was positioned alongside Unifrance, while Italy stood out as the only European country with a separate national stand. This configuration underscores the prominence of France and Italy in advancing bilateral connections with South Korea, as highlighted in previous research (Yoon & Zamorano, 2023). Beyond film promotion, EFP also plays a networking role. As one interviewee explained, "usually their first experience of it is in Busan. So when they come to Busan but only meet people like themselves, it doesn't really help, you know. So we always try to make a programme that has Asian filmmakers and European filmmakers sit together and discuss" (SK Int5 FF).

Other festivals mentioned by interviewees included the Jeonju International Film Festival and the Bucheon International Fantastic Film Festival. Although these festivals are recognised as relevant platforms for international and independent cinema, several interviewees stressed the importance of expanding the presence of European film professionals who are mainly concentrated at BIFF. Increased participation in regional and thematic festivals could strengthen ties with local professionals and diversify the reach of European cinema. As one interviewee noted, "There is a valuable opportunity for the EFI to increase its involvement in other smaller international film festivals across South Korea" (SK Int2 DIR/PRO). This would not only help cultivate new audiences for European films but also foster more decentralised and sustained professional engagement.

In addition to film festivals, embassies and national cultural institutes play **a significant role in promoting European cinema in South Korea**. These initiatives are primarily led at the national level, with France and Italy being particularly active. Embassies and cultural centres organise thematic weeks and curated film cycles throughout the year, often focusing on the cinema of a single European country. Festival programmers and exhibitors also engage with these institutions to promote European films in South Korea, particularly by securing support to invite guests. This is seen as an important strategy to attract audiences and strengthen the visibility of European productions. As one interviewee noted, "We work with Unifrance, we work with EFP, with Cinética, the Irish Institute, Swiss Films… not for programming, but for help when we can't afford to invite someone—for example, to cover the plane ticket" (SK Int13 FF). In other cases, it is South Korean professionals who take the initiative to build audiences by contacting embassies, universities, or even national businesses. One explained, "When I introduce some Italian film, I contact the university, there are departments that study Italian. I call the professor and ask them to come with their students, then the Italian community, Italian restaurants… When we worked with Sweden, we contacted Volvo in Busan" (SK Int10 FF).

From a social perspective, film festivals are seen as **crucial spaces for networking, particularly in light of the weak professional ties between the European and South Korean**

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

film industries, as highlighted in section 3.5. As one interviewee observed, "European people in general need to know more about what Korean cinema is about, and I think we get to know each other through festivals" (SK Int12 DIR/PRO).

EU-based festivals thus play an important role in facilitating encounters between professionals, as one interviewee noted, “Communication and network are really important. That’s the reason why we are participating in the film market and the festival in Cannes… to expand our network. We think that we cannot do everything at the first step, we have to accumulate the relationship step by step” (SK Int15 DIST/SA). However, interviewees reported that South Korean participation in international festivals is largely limited to Cannes, Berlin, and Venice. One explained, “Only three festivals Korea cares about really. Even the filmmakers, even the company that worked for these producers and have worked in the industry for like over 30 years. One of them didn't even know the Sundance Film Festival, which is crazy… Rotterdam, they wouldn't know it either” (SK Int6 DIR/PRO). This pattern was confirmed in other interviews. While distributors and sales agents tend to focus on these high-profile events, filmmakers and producers appear more open to other festivals and markets.

In general, South Korean professionals attend these events with the support of KOFIC, not through EU-led initiatives. Even when present, significant language and cultural barriers were described as limiting effective engagement and longer-term cooperation with European stakeholders.

On the industrial side, film festivals also play a crucial role in **shaping the international distribution of European films in South Korea**. Given that European cinema is generally perceived as a commercial risk, distributors often rely on the visibility and legitimacy conferred by major festival selections to guide their acquisition decisions. As one interviewee stated, “If it is awarded, it does raise the interest” (SK Int5 FF). Another added, “If a film, like a feature film, gets into Cannes and wins the award, then they're gonna heavily promote in Korea and they'll be in a lot of theatres” (SK Int6 DIR/PRO). In this sense, international recognition at top-tier festivals can significantly improve a film's chances of theatrical release in South Korea. Interviewees also stressed the importance of promotional efforts, noting that the presence of the film’s crew and dedicated marketing strategies are essential to attracting audiences: “We need people to come from overseas, like European people can come, and then we need marketing” (SK Int1 DIR/PRO).

4.5.2 Co-Production Markets

Despite the existence of institutional frameworks aimed at encouraging collaboration, co-productions between the EU and South Korea remain limited. As noted in the introductory section, the EU–South Korea Protocol on Cultural Cooperation, signed in the context of the 2010 Free Trade Agreement, established the possibility for joint audiovisual productions to obtain European status and access EU funding. However, interviewees did not identify this protocol as an active or influential mechanism. It has had little visibility or operational relevance in the South Korean market.

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

At the national level, France is the only EU Member State to have signed a bilateral co-production treaty with South Korea, in 2006. Even so, results have been modest: according to Unifrance, only ten feature films have been produced under this agreement. As one interviewee clarified, these collaborations are often informal and centred on Korean filmmakers working in Europe, rather than being structured, bilateral co-productions: “I wouldn't really count it as a co-production… it’s more like a Korean director going to Europe and working with Europeans” (SK Int5 FF).

Several factors help explain the underdevelopment of co-production practices. First, the structure of the South Korean industry, as outlined in section 2.5, is largely based on private investment, allowing projects to be greenlit quickly when commercial conditions are met. In this context, co-productions are often perceived as slow and unnecessarily complex. As one producer explained, “ the European producer wanted more money from a big company in South Korea like CJ or Lotte, whatever. But when I go to say about the European producer to them, they say why we need them?” (SK Int3 DIR/PRO). This perspective reflects the consolidated and vertically integrated commercial production model that dominates the market.

However, independent filmmakers in South Korea express more interest in co-productions. Given their limited access to private funding and domestic support, international collaboration is seen as a potential solution, albeit one that is still culturally and logistically unfamiliar.

For independent filmmakers it is quite new because for a low budget film they don't have enough money to collaborate with the other country, even where the Japan or China, it was very hard to collaborate because we have to take airplanes and go outside. So, it was not, I can say, it was not a culture, Korean culture, in film industry, in film making. But they said more and more we needed to collaborate over the other countries if we want to produce our film. (SK Int4 FUNDER/POL)

Multiple barriers inhibit co-production engagement. These include the lack of industry networks between the two regions, legal and bureaucratic complexity, and differences in production timelines and financial structures, “Because the system is different. Because the processes are different, the timelines are different, and the budget is different as well—so it’s not easy either.” (SK Int13 FF).

Korean system is not like a step by step. For example, in Europe we can go from a preproduction fund and then after that post production fund, after that post production fund and then distribution fund, something like that. You can try and you can get it from there from here. But here in South Korea, we can't do that. When you sign your contract with your private investment, and normally it's close your contract, it means you can't put another investor in your Film because your first investor don't want it. So they close the contract. So you can do nothing, so we can't go step by step. (SK Int3 DIR/PRO).

However, as discussed previously, the South Korean film industry is currently facing a series of **structural challenges**, including the aftermath of COVID-19, a shift in audience behaviour, and a political turn that has led to a decrease in public investment. In this context, some professionals have begun to see co-production as a potential solution to address funding shortages and sustain production activity. As one interviewee observed, “what I'm saying is

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

economy is getting worse [...] you have to find other resources, so that's why a lot of people are getting more interested in international production"(SK Int1 DIR/PRO).

> ***I think we need to do coproduction because the ecosystem we have is very good for commercial films, but for independent film there are more and more problems and maybe the only solution is to collaborate with the other countries. In my opinion, collaboration, coproduction with European countries could be more interesting in terms of independent film today (SK Int17 DIST/SA).***

In sum, while institutional mechanisms for co-production between the EFI and South Korea exist, they have yet to result in meaningful collaboration. The structure of the South Korean film market—characterised by fast-paced commercial production and readily available private funding—limits the perceived need for international partnerships, particularly in the commercial sector. Co-productions with the EFI are often viewed as bureaucratic and slow, making them less attractive for mainstream producers. Conversely, while such collaborations may offer valuable opportunities for independent filmmakers, these professionals frequently lack the resources and institutional support within South Korea to initiate or sustain co-production efforts. Linguistic, cultural, logistical barriers and lack of professional networking further constrain the practical implementation of such partnerships.

Regarding participation in co-production markets, the primary platform in South Korea is the Asian Contents & Film Market (ACFM), held annually during the BIFF. One interviewee described their participation in the Rotterdam Producers Lab as a particularly positive experience.

While no interviewees concretely mentioned it, it is important to highlight the *Ties That Bind* initiative as a relevant example. This training programme for European-Asian co-production, co-organised by the European Audiovisual Entrepreneurs (EAVE), the Udine Far East Film Festival, and the Southeast Asian Audio-Visual Association, is designed to foster co-production links between Europe and Asia by bringing together emerging producers from both regions for training and networking. However, it is not only focused in South Korea, and the participation of South Korean professionals are limited.

Despite these initiatives, **cultural and language barriers were repeatedly mentioned across the value chain as key challenges**. These obstacles limit deeper engagement and contribute to a perception that participating in co-production markets and film festivals settings can be "intimidating" (SK Int1 DIR/PRO). Interviewees stressed that more targeted mechanisms are needed—especially in terms of co-financing opportunities and professional networking. As one explained, "Although there is an existing co-production treaty with the EU, enhancing co-financing schemes and creating more networking opportunities are vital for fully leveraging this agreement" (SK Int2 DIR/PRO). Another highlighted the need for a broader and more inclusive bottom-up approach: "Instead of simply talking to producers in South Korea, involving everyone in the conversation might be a better way to sort of map the complex demands and also complex possibilities as well" (SK Int8 O).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

4.6 Türkiye

4.6.1 Film Festivals

According to film professionals in Türkiye, film festivals and particularly their market sections are amongst the most important platforms that provide filmmakers with **social networks** that are necessary to get their films funded. Many of the interviewees express **positive views and high esteem when they speak about film festivals and their cultural, social and industrial roles, which are quite intertwined**. Talking about finding funding in some A-List film festivals in Europe, which refers to international film festivals accredited by the Fédération Internationale des Associations de Producteurs de Films (FIAPF) as "competitive feature film festivals" (FIAPF 2025), such as Berlin, Rotterdam and Sarajevo, a funder, for instance, expresses that they "found co-producers and even funding. These platforms are incredibly valuable" (T Int11, FUNDER/POL). In fact, "valuable" is a repetitive term found in the interviewees's answers. Speaking of opportunities of partnership, another policy maker (T Int6, FUNDER/POL) says that they "collaborate with many festivals, but all our partnerships are with the industry sections, because that's where projects are developed... It's thanks to these parts that successful films emerge years later. That's why we find them very valuable". These statements span different roles: producers, funders, curators, and critics, reinforcing the overall positive sentiment toward the supportive role of festivals — especially in project development, visibility, and international access.

Regarding the **cultural role** of the festivals, film professionals from Türkiye highlight the audience culture attached to them, as well as the possibilities they offer for curation and discovery. One film critic/ festival programmer (T Int5, O) described festivals as "sacred spaces" having a specific "festival spirit", especially in Türkiye where theatrical releases are saturated with mainstream films. Therefore, festivals become cultural platforms for arthouse cinema to be seen and discussed by relevant viewers including cinephiles, filmmakers, critics and industrial stakeholders. One producer (T Int2, EXH) refers to the collective cultural experience of the festivals and likens it to a ritual. While producers and directors emphasise the importance of having the opportunity to showcase their films and meet interested parties, distributors, festival programmers and critics highlight the variety of hidden gems of European cinema. Another producer (T Int12, DIR/PRO) explains how festivals often give awards with Eurimages representatives in attendance in The Antalya Film Forum co-production market. They argue that these connections lead to international support and visibility. A festival programmer (T Int5, O) notes that festivals are where you "dig up films". In fact, festivals in Türkiye are some of the few channels to get to know a diversity of productions and, as noted by a director/producer (T Int3, DIR/PRO), "the screenings [at the festivals] are sold out". However, they also raise an interesting point when noting that "when the same films go to theatrical release a week later, no one goes." This information is crucial in understanding the social role of the festivals as well. Even though ticket sales for arthouse filmmaking in Türkiye remain very low compared to mainstream prices, the social aspect of festival going enables arthouse films to be sold out on these platforms.

Most film professionals highlight **high levels of audience engagement in film festivals and they recognise the value of these organisations in terms of community building and**

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

networking. A film critic and programmer shares their observation "that the festival screenings are almost always full even when they are showing shorts" (T Int5, O) However, some also refer to festivals in Türkiye as politicised and polarised institutions (T Int4, DIST/SA; T Int7, FF) and they talk about self-censorship in filmmaking as they emphasise their worries about freedom of expression. One festival programmer exemplifies how festival speeches by awarded filmmakers caused a stir in some festivals (T Int7, FF). Similarly, they talk about the reluctance of filmmakers to submit their films to certain organisations. Nonetheless, both the festivals in Europe and those organised in Türkiye, especially if they have a side event such as a co-production forum or market, or a film development workshop, remain the most significant vessels for filmmakers in Türkiye with which to realise their films.

In terms of their **industrial role**, the strongest point raised by professionals in the interviews is a **perception of festivals with film markets as vital industry ecosystems. They argue that in order for arthouse, independent films to be made, they need to find co-production opportunities from Europe**. However, some producers point to the decrease in the involvement of the European Film Industry in the festivals organised in Türkiye in the last decade (T Int11, FUNDER/POL; T Int10, DIR/PRO). Therefore, festivals in Europe are significant for both international discovery and recognition of films from Türkiye and for building long-lasting industrial networks and partnerships. One film programmer draws attention to the fact that "filmmakers gain visibility in festivals like Cannes, Berlin and Venice even before the production starts" (T Int1, EXH). In this sense, arthouse filmmakers need to participate in such organisations in order to initiate their filmmaking financially. One interviewee talks about how success in these festivals usually lead to long-term relationships, once the bond is built, it carries over to other projects (T Int12, DIR/PRO). Almost all respondents refer to the lack of film funding opportunities in Türkiye and the fact that getting co-production funds from Europe is dependent on securing financial support in Türkiye. Therefore, festivals are the hubs in which arthouse film professionals from Türkiye bond with European industry stakeholders in order to pitch, develop, co-produce and finally exhibit their films.

Finally, **the interviews reveal that Europeanness and the European film industry are associated with arthouse and funding structures in festivals.** Films that are co-produced in Europe enter slow and meticulous production processes that are narrated in detail in many interviews. There is a belief that in order to make an auteur film, one must engage with the European ecosystem. At the same time, filmmakers differentiate between film funds and co-production opportunities from different European countries, rather than seeing Europe as a whole. Although they agree on the prestige and the value of European co-productions, they also believe the changing political atmosphere in Europe, especially the rise of right-wing governments, has affected cultural policies. Hence, European presence in festivals in Türkiye and co-production funding budgets for Turkish films have decreased in the last decade.

4.6.2 Co-Production Markets

Türkiye has a special relationship with the European film industry, particularly evident in co-production practices. Türkiye became a member of Eurimages in 1990. "Eurimages is the cultural support fund of the Council of Europe. Established in 1989, it currently numbers 39 of the 46 member states of the Strasbourg-based Organisation, plus Canada" [(Eurimages 2025)](). From 1990 to 2025, Eurimages supported 106 Turkish films.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Türkiye is also a signatory to the Council of Europe Convention on Cinematographic Co-Production (CETS No. 220) (Council of Europe 2025). Rather than establishing bilateral agreements, this convention creates a multilateral framework for film co-productions among the member states of the Council of Europe. Through it, Türkiye is connected to over 40 European countries that are also parties to the convention, enabling cross-border collaboration in film production.

In addition, there is a recorded bilateral co-production agreement between France and Türkiye (European Audiovisual Observatory). This agreement was signed on 18 October 1993 and entered into force on 1 April 1996. It covers both feature-length and short films, allows third-country producers to participate if their country also has a co-production agreement with France or Türkiye, and stipulates that the financial contribution of each co-producer must be at least 20%.

Türkiye is also a party to the EFTA–Türkiye Free Trade Agreement. The European Free Trade Association (EFTA) is a regional trade organisation and free trade area established in 1960 by countries that were not part of the European Economic Community (now the European Union). Its current members are Iceland, Liechtenstein, Norway, and Switzerland. EFTA's primary purpose is to promote free trade and economic integration between its member states and with external partners through a network of free trade agreements. Under Annex XV – Co-Productions (EFTA 2021), EFTA member states and Türkiye agreed on a framework for co-producing films and television programmes. This framework grants co-productions the status of national films in each participating country, making them eligible for local benefits and subsidies. The annex sets conditions on the minimum and maximum financial contributions from each co-producer (generally 20–80%, with possible adjustments to 10–90% in special cases) and establishes competent authorities—such as Türkiye's Ministry of Culture and Tourism, General Directorate of Cinema—to approve projects.

As previously discussed, **co-production opportunities with Europe are regarded by many Turkish arthouse and independent filmmakers as essential for initiating and sustaining their projects**. Due to the scarcity and the politicisation of national film funding in Türkiye, which has been highlighted by some professionals, access to European funds and networks is often a prerequisite for securing a viable production strategy. In this context, co-production markets play a critical industrial role – not only as financial instruments but also as relational spaces where creative partnerships are established, visibility is gained, and long-term collaborations are formed. **Notably, almost every professional in Türkiye interviewed for this research referred to the existence of co-production markets when asked about the European Film Industry's presence in Türkiye, underlining their centrality as key contact points between the two industries**.

There are currently two co-production markets held by two international film festivals in Türkiye. The most long-standing is *Meetings on the Bridge* (Köprüde Buluşmalar), organised annually within the scope of the Istanbul Film Festival since 2006. It offers support to fiction and documentary projects in development or post-production through both monetary awards and curated meetings with international industry representatives. *Meetings on the Bridge* also collaborates with international funding initiatives – most notably the Türkiye-Germany Co-Production Development Fund, which was launched in 2011 through a partnership between

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Hamburg Schleswig-Holstein and Medienboard Berlin-Brandenburg. The fund aims to support projects in the development stage that are co-produced by German and Turkish partners and has been offering annual grants to selected projects. Up until 2023, this fund contributed to the production of 67 films (İKSV, 2023). These films premiered in prestigious European film festivals, including Berlinale Main Competition, Cannes Critics' Week and Berlinale Forum and Karlovy Vary Film Festival's main competition.

Similarly, the *Antalya Film Forum*—an industry segment of the Antalya Golden Orange Film Festival—serves as a key co-production market and project development platform where Turkish and regional projects are pitched to an international audience of producers, funders, and festival programmers. However, the Forum's institutional fragility became especially evident in recent years: in 2023, the entire Antalya Film Festival was cancelled due to government-backed censorship controversies, which in turn led to the cancellation of that year's Antalya Film Forum. This incident illustrates how film institutions in Türkiye, particularly those tied to public or municipal funding, remain vulnerable to political pressures. As one interviewee critically noted:

…since these festivals in Antalya (Antalya Golden Orange Film Festival) and Adana (Adana Golden Boll Film Festival) are festivals that can only be organised if the municipality gives money, when the municipalities change, the festival structures, administrations, etc. are constantly changing, so they can never settle down. Just when you think that this festival has improved, it is working well, there is an election, the mayor changes, something happens. They should not be so financially dependent on the state, the government or politics, local administrations or the country's administration, the ministry of culture. As long as they are, unfortunately, problems are always bound to arise there.

(T Int4, DIST)

Antalya Film Forum continues its activities as a co-production market again in 2024.

In recent years, another co-production platform has been organised by TRT, Türkiye's national public broadcaster: TRT 12 Punto Script Days, a script development and co-production platform. The platform is organised around several award categories for feature-length projects: TRT Co-Production Award, TRT Pre-Buy, TRT Project Development Award. In addition, international co-productions are also supported under the TRT International Co-Production Awards scheme. The jury and master-classes are also organised with the participation of professionals from the European film industry. A senior executive from TRT 12 Punto states:

In TRT 12 Punto, we invited more than 40 cinema professionals from all over the world to meet with the finalists last year. Among them are festival managers, fund managers. For example, the CEO of Euroimages, which I just mentioned, was on our jury two years ago. The president of the European Film Academy came. We bring this network to Türkiye, we have the opportunity to have one-on-one meetings with the finalist projects in TRT 12 Punto. With these people, they somehow start to seek support for their projects and they gain recognition.

(T Int6, FUNDER/POL)

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Besides organizing the coproduction platform TRT 12 Punto has taken on the role of minority co-producer in several high-profile European films in recent years. Among its co-productions are *Triangle of Sadness* (Ruben Östlund, 2022), *Klondike* (Maryna Er Gorbach, 2022), *It Must Be Heaven* (Elia Suleiman, 2019), and *Quo Vadis, Aida?* (Jasmila Žbanić, 2020). In addition to these minority co-productions, TRT is also working to establish its presence in the Eastern European film landscape by offering multiple support awards at festivals such as the Sarajevo Film Festival and the Karlovy Vary Film Festival. An executive from TRT's 12 Punto noted that the platform aims to increase its involvement in co-productions with European and other international partners, both to promote Türkiye and to expand opportunities for Turkish films to enter international co-production frameworks:

> ***What we are trying to do with TRT 12 Punto... We now give awards at some film festivals, such as the Sarajevo Film Festival, the Karlovy Vary Film Festival, the project development section in Trieste, as well as in Durban in Africa.why do we give these awards? It is really to increase the co-operation you have just asked. When we give awards there, the visibility and awareness of TRT and Turkish cinema increases, and we start to be involved in the projects that come there, and the projects there start to get to know Türkiye. Obviously, we open an opportunity for the next project to be shot in Türkiye and to be shot with producers from Türkiye. And since we give awards there, projects from Türkiye are being looked at more positively in that region.***
>
> **(T Int6,FUNDER/POL)**

Another recent initiative is Başka Sinema Market, launched in 2023 as part of the aforementioned Başka Sinema. The platform's first edition adopted a curated, invitation-only selection process, presenting projects across three strands: Fictions in Development, Fictions WIP, and Documentaries WIP. These were showcased to industry professionals via Festival Scope, with juries awarding standout titles in each category. From 2024 onwards, Başka Market transitioned into a physical event, opening submissions to a broader range of filmmakers and regions (Başka Sinema 2024).

Whether festival-based or institutionally driven, these platforms demonstrate how **European co-productions are vital for Turkish arthouse filmmakers, particularly securing budgets and international visibility.** However, their continued effectiveness depends heavily on political stability, institutional continuity, and sustained engagement from European industry stakeholders.

4.7 Common analysis

In common, the data analysed in this section reveal that the EFI (associated by most survey respondents with co-productions, *cinéma d'auteur*, art cinema and state support, as Section 3. EFI in International Markets makes clear) is understood by non-EU film professionals as crucial to help them diversify funding sources, co-production opportunities and distribution circuits, and

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

to strengthen, therefore, the presence of art house and/or independent films in their domestic markets as well as the international circulation of such productions. Reflecting their tendency to associate the EFI with abstract values and policy frameworks above particular institutional remits, when speaking about co-production arrangements non-European film professionals occasionally refer interchangeably to EU and non-EU initiatives (such as the Council of Europe's Eurimages, which supports co-productions – something that emerges in particular in the Turkish case study). This echoes the literature that suggests that Europeanness is a flexible signifier (Mary Harrod et al., 2015) whose boundaries are increasingly dissolved by transnational forms of collaboration (Lobato and Lotz, 2023). In other words, the EFI is perceived as an important ally – supporting cultural diversity with substantive financial backing and strong policy structures.

However, other stakeholders are beginning to emerge and to challenge the EFI's position as the preferred international partner of non-EU film professionals in their co-production and distribution strategies. To give two examples, in South Korea there is a clear preference to engage with Asian and US players (Section 4.5), Mexico's geographical proximity and longstanding ties to the United States foster stronger engagement with US partners (even though co-productions with European countries remain highly valued; Section 4.3), and the BRIC are increasingly present in the South African film ecosystem (Section 4.4).

Moreover, in light of increased market concentration in distribution and exhibition, unstable public funding, soaring film budgets, the growing power of American streamers, and the increasing weight of economic considerations (that is, above creative experimentation) in film funding, the six case studies confirm that, according to non-European film professionals, the cultural, social and industrial relevance of European film festivals and co-production markets remains unabated.

Although the six markets examined are markedly different, the data gathered highlight several commonalities in terms of the **industrial, cultural and social roles** that are played by **European film festivals**. These roles are presented separately for analytical reasons. They are also supported by an illustrative set of examples.

- Regarding their **industrial** role, European film festivals are seen as important opportunities for film professionals to gain visibility, showcase their work, and establish connections. To give some examples, interviewees in Argentina highlight that the inclusion of a feature film in a renowned film festival makes its distribution in Europe more likely and that, conversely, European titles awarded prizes in such festivals are also more likely to circulate in Latin America (Section 4.1). Similarly, EU films that are awarded in major film festivals are easily distributed in South Korea (Section 4.5). Festivals with film markets are also considered vital industry ecosystems by Turkish professionals – who view them as fundamental to find co-production opportunities supporting arthouse and independent films (Section 4.6). More broadly, European Film Festivals also function as industrial models from which the South African film industry takes inspiration when its stakeholders design domestic initiatives to support capacity building, market development and programming (Section 4.4).

- Regarding their **cultural role**, European film festivals and thematic weeks provide a platform for European films to reach domestic audiences and foster cultural exchange

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

and dialogue between European and local filmmakers – as is evident in Argentina (Section 4.1) and South Korea (Section 4.5), to give two examples. Moreover, in the South African case (Section 4.4), even though the scale of such initiatives remains too small, their focus on artistic and cinematographic value provides an important cultural alternative for both audiences and film professionals in a market that is dominated by Hollywood.

- Finally, regarding their **social** role, European film festivals – particularly, their market sections – are crucial opportunities to allow film professionals to develop social networks and subsequently funding, as is revealed by the Turkish example (Section 4.6). In South Korea, the presence of EU film professionals in local festivals is perceived as essential to establish social ties between professionals in both industries (Section 4.5). The social role of festivals also goes beyond film professionals. As the Brazilian (Section 4.2) and South Korean (Section 4.5) examples attest, film festivals support audience development by exposing viewers to content that isn't easily available in commercial circuits.

That is, the views of non-European film professionals confirm the importance of film festivals and their markets as alternative circuits (Peranson, 2008) that facilitate links across multiple forms of value (e.g. cultural and economic) and the emergence of transnational networks (Iordanova, 2016; Marijke de Valck, 2007).

Likewise, European **co-productions** play multiple industrial and cultural roles across the six markets.

- In terms of their **industrial role**, and to give some examples, in Argentina, international co-productions are of increasing importance in diversifying funding sources and accessing new distribution channels. Likewise, European co-productions markets are seen by Brazilian film professionals as avenues for securing international co-production agreements, distribution deals, and expanding their presence in the international film industry (Section 4.2). This is also echoed by Turkish independent and arthouse filmmakers, who consider co-production opportunities with Europe as essential for bringing their projects to life (Section 4.6).

- Regarding their **cultural role**, among other points made, Argentinian professionals actively engage with international co-production markets to, among other aims, bridge Latin American and European cinema (Section 4.1) – a position echoed by Mexican interviewees, who highlight the importance of audiovisual markets and international co-production forums as major hubs for fostering collaborations (Section 4.3). In South Africa, co-production markets also emerge as creating opportunities to establish links with international professionals with whom South African share historical or cultural ties, leading potentially to joint story-led productions (Section 4.4). In South Korea, where co-production with the EU is underdeveloped, co-production markets are essential for networking between both industries (Section 4.5).

These findings are aligned with scholarship discussing co-productions as frameworks with multiple forms of value and impact (Mitric, 2025).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

This being said, non-EU film professionals also call for the partial renewal of these frameworks and initiatives. Several policy recommendations are included in Section 5.2 Policy implications.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

5. Discussion

5.1 Challenges and trends

Before the common challenges are identified, it is helpful to summarise those that are faced by the six case studies.

Argentina's audiovisual sector stands at a critical crossroads. While the country continues to demonstrate strong production capacity and international collaboration, the decline in domestic market share, coupled with sweeping policy changes, has destabilised the industry's foundations. The weakening of public institutions, reduction of funding, and growing participation of global streaming services in the local market are shifting the focus away from artistic innovation toward commercially driven content. Although international co-production, especially with European partners, offers strategic opportunities, current frameworks often fall short of addressing the specific needs of the Argentine context. A sustainable future for the sector will require renewed public support, targeted policy reform, strengthened distribution channels, expanded access to diverse exhibition windows, and robust mechanisms to safeguard cultural diversity and artistic autonomy.

Despite signs of renewed dynamism in 2024, **Brazil's** film industry continues to face significant structural challenges that limit its growth and international positioning. The persistent dominance of Hollywood productions, driven by a distribution system heavily influenced by US-based companies, together with a small exhibition network, insufficient to meet the needs of a country the size of Brazil, restricts the visibility and commercial viability of national and independent films. Although domestic film production has increased in 2024, structural limitations in distribution and the lack of adequate exhibition space remain key obstacles to the broader circulation of Brazilian and European content. International co-productions offer valuable opportunities for funding and international exposure. However, these partnerships remain heavily reliant on public funding, which is subject to fluctuation and vulnerability. Moreover, access to international film festivals and markets, widely seen as crucial for career development and film circulation, is increasingly constrained by rising costs and heavily dependent on state support, limiting participation for many professionals. Addressing these challenges requires not only sustained public investment in production but also targeted policy measures to strengthen national distribution networks, diversify exhibition opportunities, and reduce barriers to international productions.

While European partnerships are culturally and professionally valued in **Mexico**, deeper reforms in distribution, exhibition, and public support are essential to ensure a more balanced and sustainable audiovisual ecosystem. Greater support for independent circuits and training is also key to fostering long-term industry growth. From the perspective of film professionals and industry stakeholders, international co-production partners serve not only as financial and creative collaboration spaces but also facilitate the exchange of experiences, knowledge, and storytelling frameworks. Industrially, they offer mechanisms for strengthening production capacities and market access. Nonetheless, these same markets are perceived as perpetuating power asymmetries between the Global North and South, where European norms are treated as the default. Additionally, professionals identified numerous obstacles, both institutional and

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

operational, including restricted access to co-production markets, limited visibility and clarity of co-production agreements, and bureaucratic complexities that complicate their implementation.

South Africa's film industry is growing – as are its interdependencies with other industries and stakeholders in Africa and the BRICS, reflecting the country's and, more broadly, the African continent's shifting geopolitical position. Despite this and the recent intensification of public policies to attract investment, the country's audiovisual ecosystem remains fragile and dependent on international productions. Moreover, South African and European films face significant challenges in reaching South African audiences due to the high concentration of exhibition and distribution circuits. To guarantee the sustainable development of the industry, greater support tailored to small and independent players is needed. In this context, the European film industry and European partnerships are recognised as relevant. In particular, European festivals serve an important artistic function and are an important industrial model for South African professionals and stakeholders. Interviews hold similarly positive views regarding European co-productions. However, persistent difficulties in accessing both festivals and co-production markets, such as bureaucracy, the closedness of networks and limited information, and insufficient or inadequate forms of support, hinder further collaborations, as does the perceived lack of serious commitment from European actors towards the South African film industry. This is exemplified by persistent difficulties regarding accessing European archives and limited creative freedom in films examining South African's colonial past. In conclusion, while existing relationships with the European Film Industry tend to be evaluated positively, a certain distrust towards European stakeholders remains. This could be addressed with a more serious commitment to supporting the South African film sector and to ensuring mutuality in the design of such relationships.

In **South Korea,** the film industry has long been recognised for its strong production capacity and high market share, largely driven by vertically integrated conglomerates. However, the market remains heavily skewed toward commercially oriented blockbuster productions, leaving limited space for independent and arthouse cinema to flourish. The sector is currently undergoing a period of significant tension and transition. The decline in cinema attendance following the COVID-19 pandemic, shifting audience habits, and the reduction of public funding have all exacerbated pre-existing challenges, particularly for independent producers struggling to secure financing and distribution. While there is growing interest in international collaboration as a response to these financial pressures, the existing co-production framework with the EFI remains largely underutilised due to linguistic, cultural, and logistical barriers. Strengthening these links will require targeted policy support, more inclusive funding mechanisms, and sustained efforts to foster mutual understanding and professional exchange between both industries.

In **Türkiye,** the film industry lost the momentum it had gained between the early 2000s and mid-2010s. Most notably, domestic box office figures — once the strongest indicator of the vitality of Turkish cinema — have not recovered following the COVID-19 pandemic. The industry remains sharply divided between commercially successful mainstream films and underfunded arthouse productions. While mainstream films continue to attract audiences, arthouse films suffer from a lack of viewers and cannot generate sustainable box office revenue. As a result, these productions largely depend on public funding and co-productions. However, the Turkish Ministry of Culture's support fund – the only public source for independent cinema – is widely

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

criticised for being insufficient and increasingly politicised in recent years. Against this backdrop, co-productions have become vital for sustaining independent filmmaking in Türkiye. The leading international co-production partners are the EU countries. Since joining Eurimages in 1990, Turkish arthouse filmmakers have benefited from this European support mechanism and continue to apply to regional film funds across Europe. Importantly, these collaborations are not merely transactional; they also foster artistic exchange, which is enabled by forming production teams with international partners.

Despite this longstanding shared experience, financial and structural barriers persist. The sharp depreciation of the Turkish lira and rising production costs have made it increasingly difficult for Turkish producers to retain majority positions in co-productions. Additionally, certain European regional funds impose spending requirements – such as the need to spend over 100% of the awarded budget within the funding country – which can limit the possibility of such partnerships. European festivals, especially A-list events, continue to play a vital role in providing visibility and prestige for Turkish arthouse cinema. Turkish films regularly appear in major European festivals, receiving critical acclaim and networking opportunities. However, due to the currency crisis and the lack of in-kind or travel support, attendance at these festivals and events has decreased. This financial barrier is a significant obstacle to sustaining international exposure and building long-term connections. In conclusion, while European partnerships remain central to the survival and evolution of Turkish independent cinema, current conditions highlight the need for more equitable structures, better financial access, and stronger support mechanisms to maintain artistic exchange and ensure the long-term sustainability of these collaborations.

The six case studies highlight several common challenges:

- Weak domestic market shares (with the exception of South Korea);
- Limited exhibition space for independent and arthouse cinema;
- Heavily concentrated distribution channels;
- Insufficient public support tailored to independent productions, players and circuits;
- Inadequate mechanisms to safeguard artistic innovation, cultural diversity and artistic freedom;
- Outdated and bureaucratic co-production frameworks;
- Inadequate forms of support to international film festivals and markets;
- Insufficient professional training and opportunities for professional exchange;
- Inequitable policy and institutional frameworks.

This analysis is confirmed by the data that emerges from the international survey. Although the data are complex, their visual representation makes it possible to identify both the main options selected as the first, second, and third priorities by respondents, and general trends.

When asked what specific areas the EU should prioritise to enhance institutional support to their local film industry and therefore contribute to addressing its needs, respondents highlighted in first place (and significantly above the other options) the development of co-production markets (37.9%). The second and third choices were distributed mostly evenly with the exception of access to international markets and distribution channels (the top second choice with 13.4%) and the encouragement of international collaboration and networking opportunities (12.7%), respectively [Figure 69].

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Moreover, looking at the broad trends that emerge from the responses to this question, co-production initiatives, tax incentives, access to international markets, and international collaboration are also key priorities.

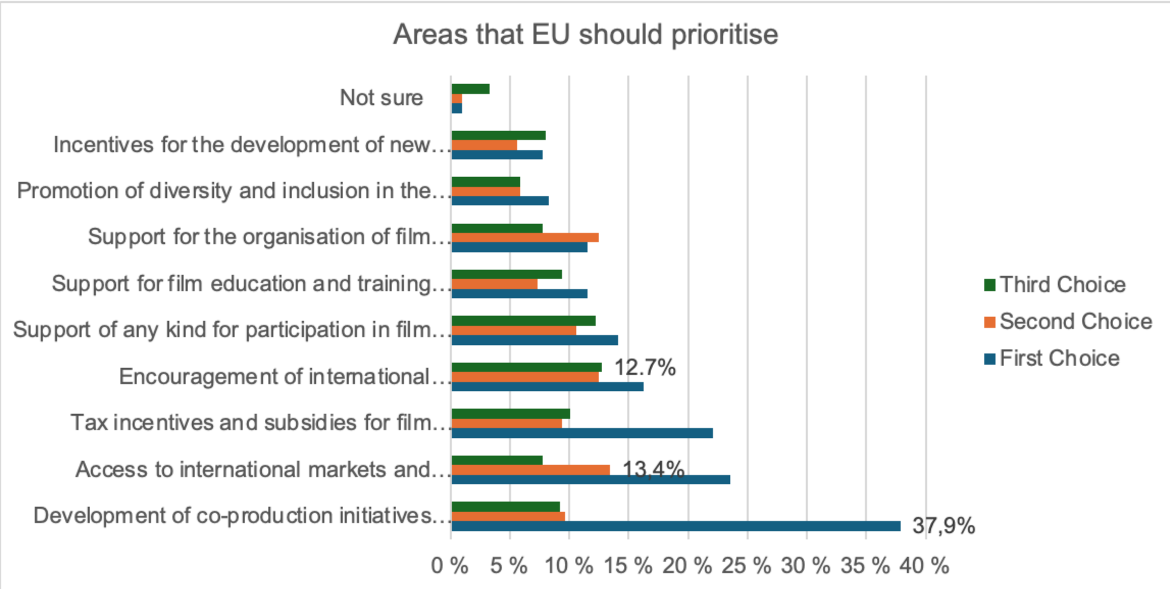


Figure 69 - Ranking of areas for EU to prioritise

When Turkish respondents are removed [Figure 70], although there are some slight changes, the broad distribution is confirmed. As their first choice, respondents select the development of co-production initiatives (43.7%), followed by access to international markets as the second choice (16.1%). The difference mainly lies in the top third choice: incentives for the development of new technologies and digital platforms for film distribution (14.5%).

However, as before, looking at the broad trends that emerge from the responses to this question, co-production initiatives, tax incentives, access to international markets, and international collaboration are the key priorities.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

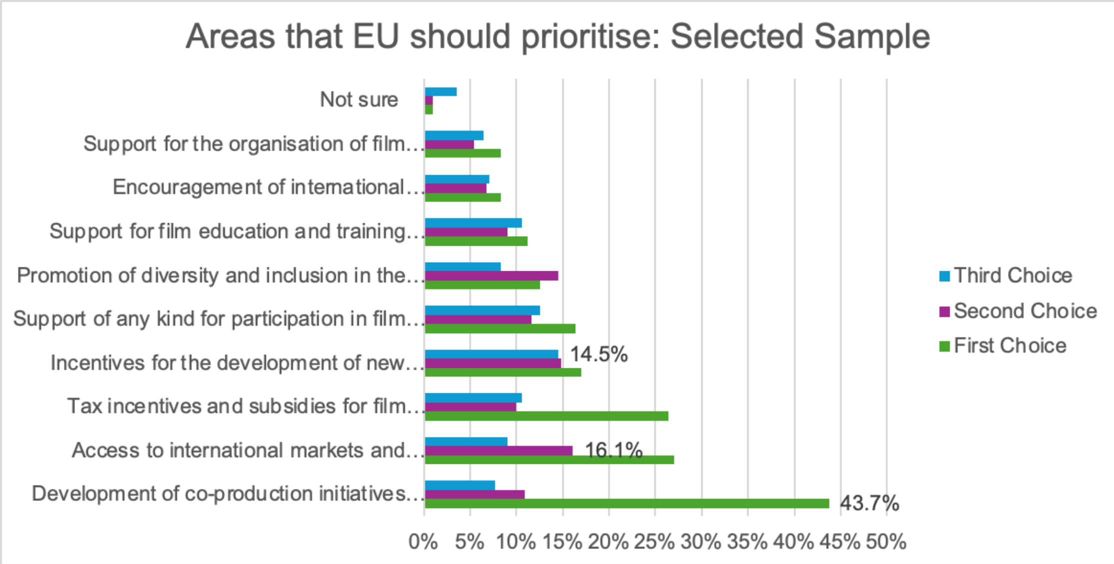


Figure 70 - Ranking of areas for EU to prioritise – Selected sample

An analysis of the data split per case study adds nuance to these findings. In Argentina, most respondents selected as their first choice the development of co-production initiatives with other countries (53.6%), as second choice access to international markets and distribution channels (17.1%) and in the third choice the encouragement of international collaboration and networking opportunities (24.3%) [Figure 71].

More broadly, looking at the general trends, professionals largely agree on the need to develop co-production initiatives with other countries, provide tax incentives and subsidies for film production, encourage international collaboration and networking opportunities, and ensure access to international markets and distribution channels.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

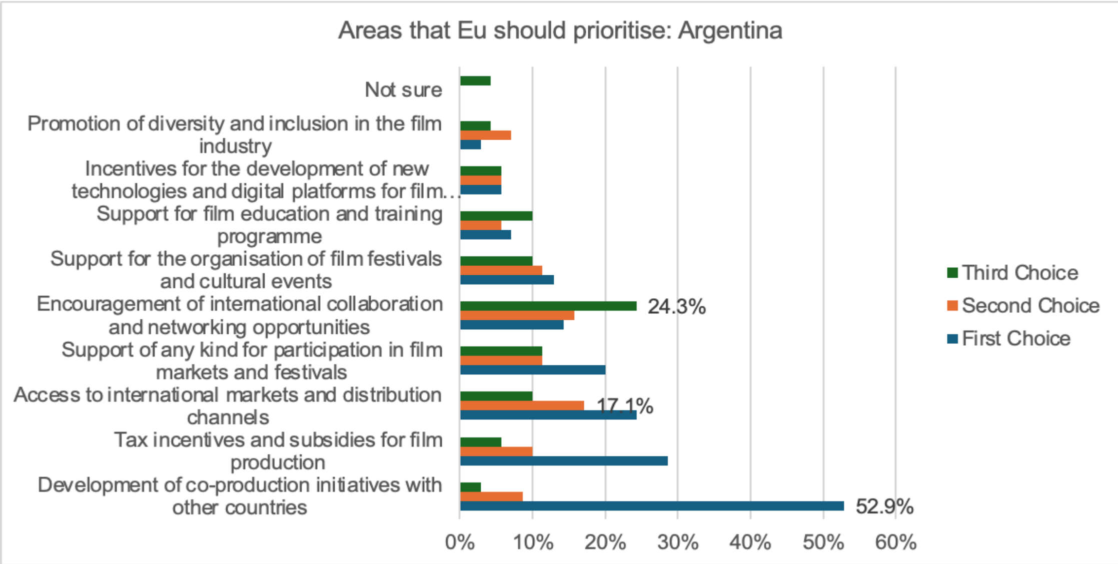


Figure 71 - Ranking of areas for EU to prioritise – Argentina

As in Argentina, professionals in Brazil selected the development of co-production initiatives with other countries as the top first choice (38.9%), access to international markets and distribution channels as their top second choice (20.8%) and tax incentives and subsidies for film production as their top third choice (15.3%) [Figure 72].

More broadly, answers were also concentrated around the following options: the encouragement of international collaboration and networking opportunities, tax subsidies, and support of any kind for participation in film markets and festivals.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

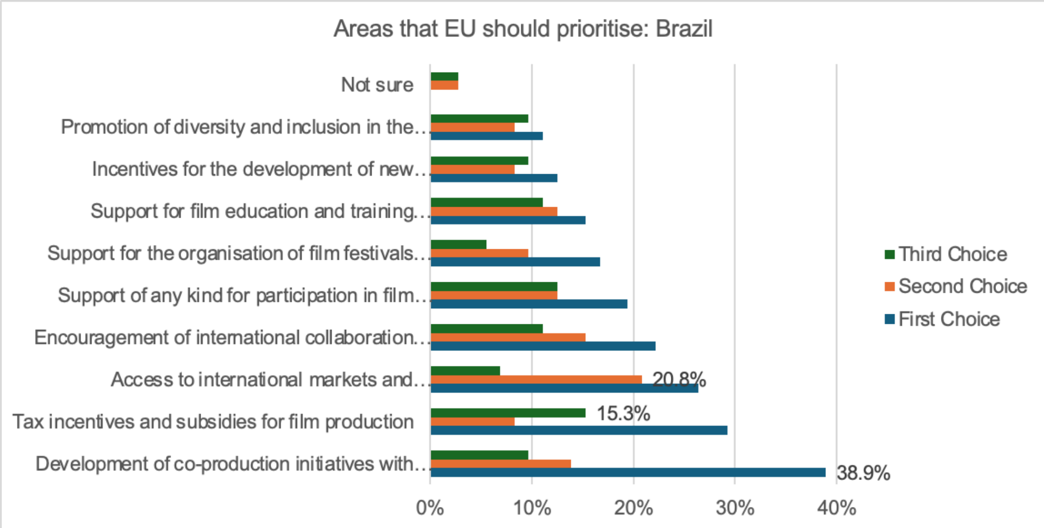


Figure 72 - Ranking of areas for EU to prioritise – Brazil

Professionals in the Mexican film industry selected as their top first choice the development of co-production initiatives with other countries (53.6%), as their top second choice support for the organisation of film festivals (18.2%). As their top third choice support of any kind for participation in film markets and festivals (14.5%) [Figure 73].

Looking at the broad trends that emerge from the responses to this question, Mexican professionals tend to highlight the following priorities: the development of co-production initiatives, access to international markets and distribution channels, and tax incentives and subsidies for film production.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

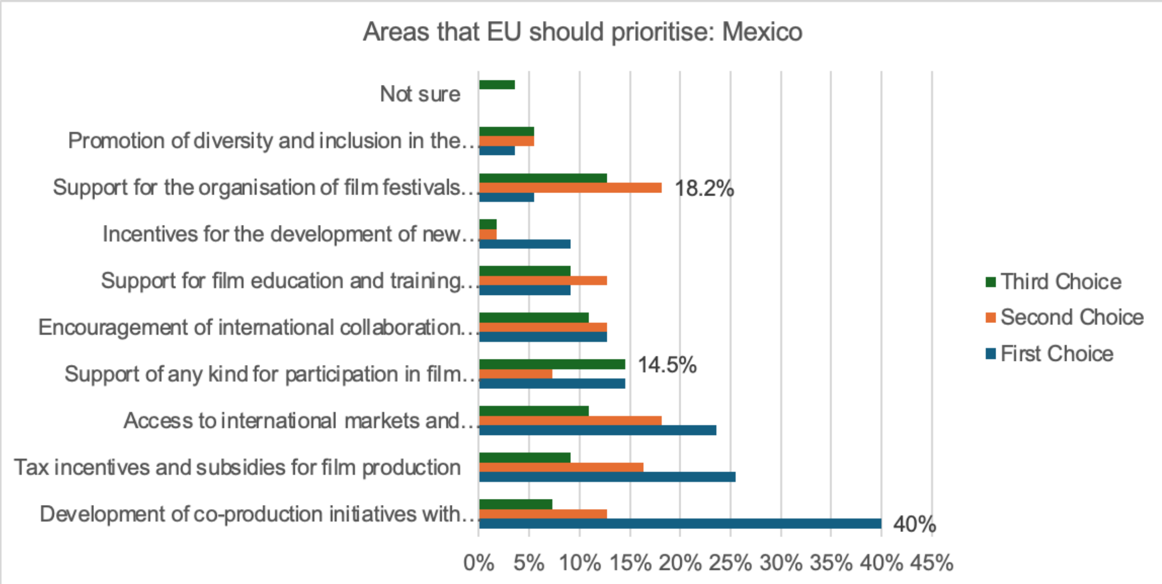


Figure 73 - Ranking of areas for EU to prioritise – Mexico

In South Africa, professionals selected as their top first choice the development of co-production initiatives with other countries (53.6%), as their top second choice support for film education and training programmes (17.9%), and as their top third choice incentives for the development of new technologies and digital platforms for film distribution (21.4%) [Figure 74].

More broadly, besides being significantly in agreement regarding the need for the development of co-production initiatives with other countries, they are mostly split regarding the other options – with the exception of support for the organisation of film festivals and cultural events, which was selected by few respondents.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

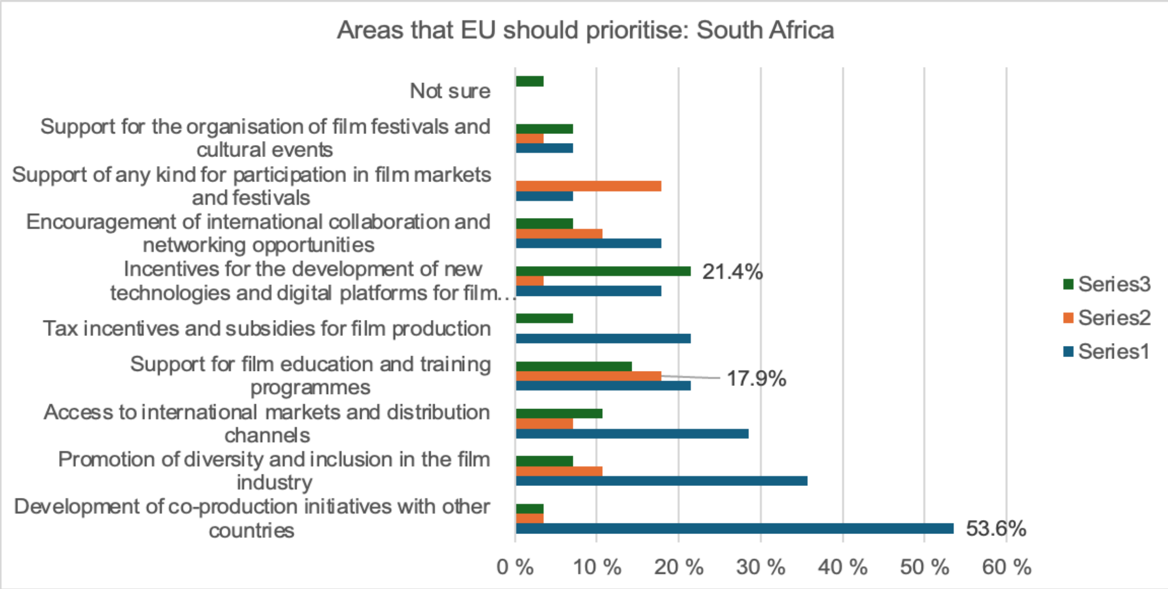


Figure 74 - Ranking of areas for EU to prioritise – South Africa

In Türkiye the answers are less clearly concentrated in a small number of choices. Respondents selected as their top first choice the encouragement of international collaboration and networking opportunities, as well as access to international markets and distribution channels (ex-aequo with 23%), as their top second choice access to international markets and distribution channels (22%), and as their top third choice support for the organisation of film festivals and cultural events, incentives for the development of new technologies and digital platforms for film distribution, and tax incentives and subsidies for film production (ex-aequo with 13%) [Figure 75].

Looking at the data more broadly, film professionals highlighted all options as priorities – suggesting that the Turkish film ecosystem would gain from multiple forms of EU support.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

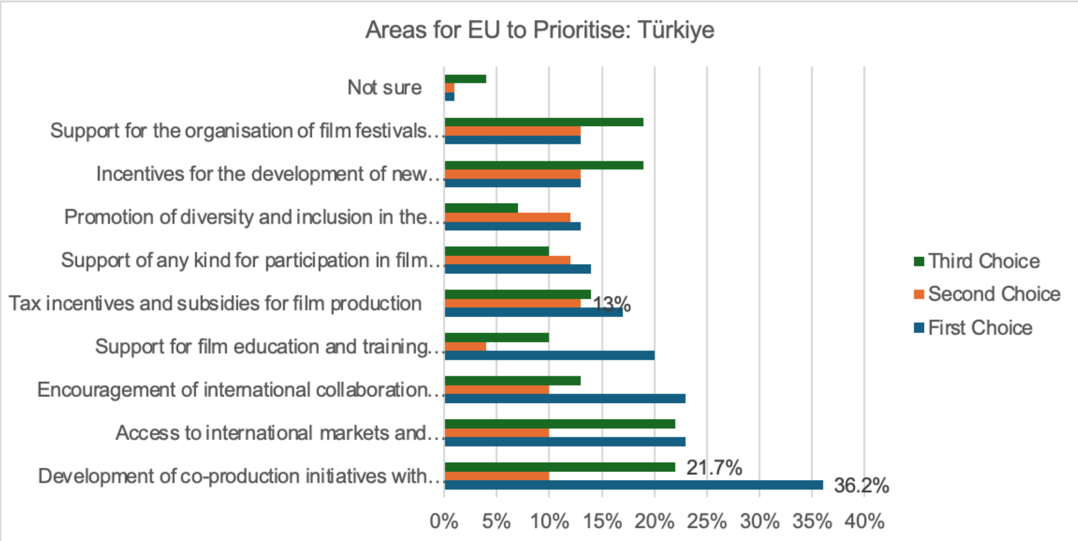


Figure 75 - Ranking of areas for EU to prioritise: Türkiye

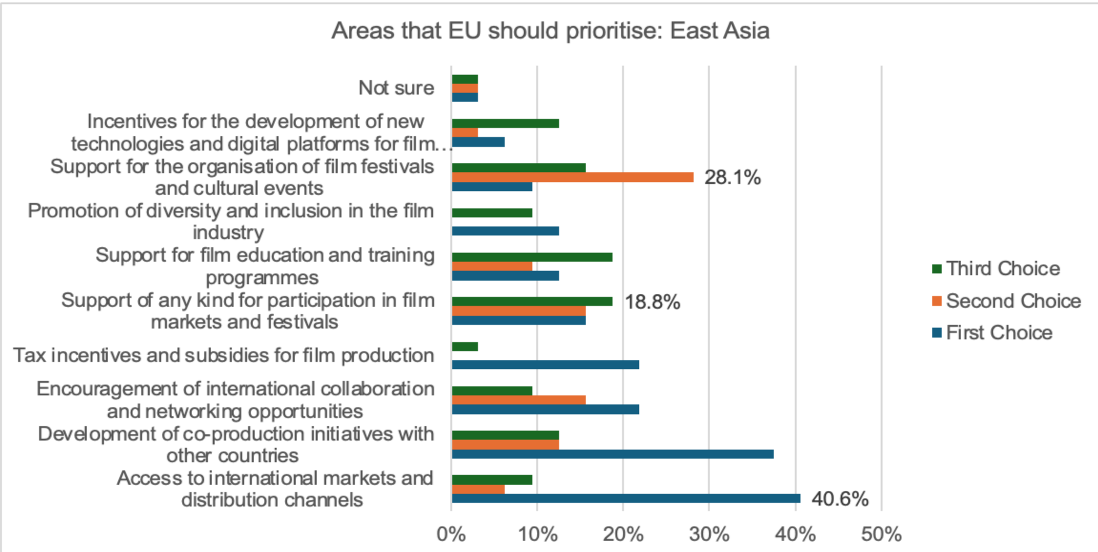


Figure 76 - Ranking of areas for EU to prioritise – East Asia

Finally, East Asian respondents selected as their top first choice access to international markets and distribution channels (40.6%), as their top second choice support for the organisation of film

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

festivals and cultural events (28.1%) and as their top third choice support of any kind for participation in film markets and festivals (18.8%) [Figure 76].

Looking at the data more broadly, East Asian respondents highlighted access to international markets and distribution channels, the development of co-production initiatives with other countries, and support for the organisation of film festivals and cultural events.

In conclusion, although each sample provides a different answer regarding the policy areas that the EU should prioritise in each case study or region, there's generalised agreement regarding the need to develop co-production initiatives with other countries and to provide tax incentives and subsidies for film production. This is consistent both with the findings of the common international sample and with the insights that emerge from the qualitative analysis regarding the challenges requiring concerted policy action, in particular: limited exhibition space for independent and arthouse cinema, insufficient public support tailored to independent productions, players and circuits, and outdated and bureaucratic co-production frameworks.

This finding makes a contribution to the literature. Although scholarship has confirmed that cooperation agreements such as co-productions allow EU actors to encourage the adoption of regulatory models aligned with its standards (Loisen and De Ville, 2011; Vlassis, 2016; Fernandes, 2025), the existence of a desire for such frameworks from non-EU film professionals hadn't yet been confirmed.

5.2 Policy implications

Based on the data gathered and the needs and challenges uncovered, the following policy recommendations could strengthen the global circulation of the European Film Industry, relations between European and non-European film professionals and stakeholders, and contribute to simultaneously addressing the needs of European and non-European film industries. These policy recommendations will be extended in dedicated policy briefs.

International co-productions

- **Update international co-production agreements:** Most interviewees highlighted the importance of co-production agreements for the internationalisation of films and knowledge exchange between different countries. However, many of them are outdated vis-à-vis contemporary industry practices, systemic market changes, and ongoing technological developments such as streaming services.

- **Consolidate and make information accessible in a dedicated website:** Details about international co-production agreements with European countries and existing support schemes are fragmented across multiple websites, institutions, languages and countries. This makes it difficult for foreign film professionals – particularly, to those at the start of their careers and/or working independently – to understand the complex legal, financial and technical requirements associated with these agreements. The EU could provide a dedicated and easily accessible website compiling such details.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- **Lower thresholds of co-production financing requirements:** Film professionals in Global South countries repeatedly complain of the high financing thresholds involved in co-productions with European countries, which are not compatible with national budgets. Lowering such thresholds would make more co-productions with countries from the Global South possible.

- **Reinforce existing funding available to support international co-productions:** Existing funding for international co-productions should be strengthened to address challenges in film promotion and distribution across all participating countries, ensuring that co-producing states gain visibility and access to each other's markets.

- **Lower bureaucratic burdens**: To address the bureaucratic challenges of international co-production agreements, regulations should be simplified, documentation standardised, and clear procedures established to facilitate cross-border film collaboration. Additionally, it could be valuable to implement a system to assess co-producing countries based not only on financial contributions but also on their technical and artistic input, promoting more balanced and meaningful collaborations. Moreover, introducing greater flexibility in EU policies and official practices towards film professionals from countries experiencing political instability would ensure that they can more easily access co-production opportunities and support mechanisms.

Film festivals

- **Reinforce and widen existing funding towards the participation of non-European film professionals**: Several interviewees described how existing funding is either limited to a small number of participants or does not cover all costs. The EU could provide dedicated funding targeting a selection of international markets to guarantee that a wider number of non-European film professionals can attend selected film festivals and markets.

- **Strengthen dedicated workshops and events in co-production forums and markets**: Several interviewees argued that film festivals, and in particular their co-productions and markets, are crucial for non-European film professionals to grow their networks and subsequently acquire funding. Festival organisers, supported by EU funding, could reinforce the number of existing workshops and events dedicated to European-non-European co-productions and widen invitations to European and non-European financiers.

- **Revise the positioning of non-European pavilions in European film festivals**: While interviewees from South Africa recognise the importance of having an African pavilion in European film festivals, its positioning in a marginal place is seen as symptomatic of what they perceive as the inequality of treatment between European and non-European professionals. To strengthen trust, European film festival organisers could reconsider their placement.

- **Establish funding mechanisms to cover or subsidise screening fees for selected European films, enabling their participation in international film festivals beyond**

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Europe: This would enable festival organisers in South America to showcase EU films according to their quality and potential audience appeal, rather than budgetary constraints – something currently made difficult by the increasingly prohibitive prices charged by sales agents.

- **Support the participation of EU film professionals in non-EU festivals and market events.** This would facilitate the development of networks with professionals in non-EU film industries and establish or reinforce links with local audiences.

Exhibition and distribution

- **Develop new partnerships among publicly managed windows of exhibition:** The circulation of European films could be increased by strengthening cooperation between entities with publicly managed windows of exhibition across the case studies.

- **Develop new partnerships among publicly managed streaming services:** Likewise, the EU could support cooperation between non-European publicly managed streaming services such as CineAr Play (Argentina), Nuestro Cine MX (Mexico) and Tela Brasil[20] (Brasil) and similar European service. This would foster the exchange of European and non-European titles and create a new window of exhibition for both parties.

- **Provide greater support to European distributors and local exhibitors of arthouse independent European film**. This could include supporting exchanges between parties to strengthen local exhibition rights of European films, accompanied by similar exchanges in the European continent to support the exhibition of non-European films, and increased MEDIA funding to support dubbing and subtitling.

- **Invest in long-term audience building:** Although the case studies differ in this context, there is nonetheless shared potential for an increase in viewers of European films across the six markets surveyed. This requires not only supporting their global circulation but also creating audiences that search for and watch such films. The EU could support cultural programmes directed at non-European children and young people to support cinema clubs and events showcasing European and non-European films.

European programmes

- **Review and simplify current support schemes for the distribution and the promotion of European films.** Non-European stakeholders complain about the complexity of funding schemes, which limits the participation of independent and small distributors. The simplification of these programmes could be combined with clearer user-friendly guidelines, regularity in payments and a streamlined application procedure that would improve access to these programmes.

---

[20] Although announced by the Brazilian MinC, this streaming service has not been released as of July 2025.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- **Revive programmes dedicated to distribution**: Considering the challenges to distributing and exhibiting European films, the EU could revive the programme Europa Cinema Mundus, which used to offer support for theatrical programming based on circulation and exchange between MEDIA countries and non-MEDIA member states, or the MEDIA Mundus programme, which included funding lines focused on distribution, promotion and co-production with countries outside of Europe.

Modes of working

- **Include non-Europeans in film funding evaluation committees**: Some interviewees describe how European funding decisions focused on the Global South initiatives and co-productions are made exclusively by individuals who do not know their local knowledge. Including non-European film professionals in such evaluation committees would enable better informed decisions regarding European funds and build trust.

- **Facilitate access to film archives by non-European stakeholders:** Several interviewees complained of the difficulty of accessing European archives due to unaffordable fees. The EU could suggest that national archives create pricing schemes and that access costs are lowered to film professionals and entities from lower to middle income countries.

- **Improve two-way exchanges:** Reinforce the screening of local non-EU films in European Film Festivals. This would create new exhibition channels for independent domestic films, strengthen cultural exchange, and build trust.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

6. References

Abdenur, A.E. (2018). Brazil-Africa Relations: From Boom to Bust?. In Nagar, D., Mutasa, C. (Eds.) *Africa and the World*. Palgrave Macmillan, Cham. https://doi.org/10.1007/978-3-319-62590-4_9

Agência Gov. (2024). *Minc e ANCINE ampliam recursos para a internacionalização do cinema brasileiro* [Ministry of Culture and ANCINE expand resources for the internationalization of Brazilian cinema]. https://agenciagov.ebc.com.br/noticias/202406/minc-e-ancine-ampliam-recursos-para-a-internacionalizacao-do-cinema-brasileiro

Akdede, S. H. (2025). Is there a role for art for cultural imperialism if it exists? Theoretical explanations with Turkish example. In A. Yalçıntaş & Heisem Arne (Eds.), *Decolonial Narratives in Economics: Alternative and Underrepresented Voices*. Edward Elgard Publishing Limited.

Akinola, A. and Tella, O. (2022). COVID-19 and South Africa–China Asymmetric Relations. *World Affairs*, 185(3), 587–614. https://doi.org/10.1177/00438200221102405.

Albornoz, L. A. and Gallo, P. (2024). Global SVOD services in Spain: The availability and prominence of Spanish films and other audiovisual works. In C. Meir and R. Smits (Eds.). *European Cinema in the Streaming Era: Policy, Platforms and Production* (pp. 109–130). Palgrave Macmillan. https://doi.org/10.1007/978-3-031-42182-2_6.

Albornoz, L. A. and Krakowiak, F. (2023). Netflix's first decade of presence in Latin America. In P. Bouquillion, C. Ithurbide and T. Mattelart (Eds.), *Digital platforms and the global south: Reconfiguring power relations in the cultural industries* (pp. 128–146). Routledge. http://dx.doi.org/10.4324/9781003391746-7.

Albornoz, L. A.; Segovia, A. I. and Almiron, N. (2020). *Grupo Prisa: Media Power in Contemporary Spain*. Routledge.

Alvaray, L. (2023). Of how streaming platforms are changing the audiovisual space in Latin America. *Transnational Screens*, 14(1), 1–19. https://doi.org/10.1080/25785273.2023.2170762

Ampere Analysis (2025). *ViX will be the fastest-growing major streamer in the Americas in 2025*. https://www.ampereanalysis.com/press/release/dl/vix-will-be-the-fastest-growing-major-streamer-in-the-americas-in-2025

Amusan, L. (2018). Seeking relevance in the age of globalisation: Russia in Africa through South Africa. *Journal of African Union Studies*, 7(1). https://journals.co.za/doi/abs/10.10520/EJC-ef8e66e40

ANATEL (Agência Nacional de Telecomunicações). (n.d.). *Painel de dados – Acessos históricos* [*Data dashboard – Historical access*]. https://informacoes.anatel.gov.br/paineis/acessos/historico

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

ANCINE (Agência Nacional do Cinema, Brasil) (2025a). *Informe mercado cinematográfico 2024* [Film market report 2024]. https://www.gov.br/ancine/pt-br/oca/publicacoes/arquivos.pdf/informe-mercado-cinematografico-2024.pdf

ANCINE (2025b). *Publicada a terceira edição do edital de coprodução com Portugal* [Third edition of the co-production call with Portugal published]. https://www.gov.br/ancine/pt-br/assuntos/noticias/publicada-a-terceira-edicao-do-edital-de-coproducao-com-portugal

ANCINE (Agência Nacional do Cinema, Brasil) (2023). *ANCINE: Cenário 2023 Investimentos no setor audiovisual* [ANCINE: Scenario 2023: Investments in the Audiovisual Sector]. ANCINE https://www.gov.br/ancine/pt-br/oca/publicacoes/arquivos.pdf/informe-mercado-cinematografico-2023.pdf

Ani, Kalechi. J. (2025). The Changing Dynamics of Saudi Arabia–African Security Relations. *Journal of African Foreign Affairs*, 12(1). https://journals.co.za/doi/abs/10.31920/2056-5658/2025/v12n1a3

Mostra Internacional de Cinema (2024). *Informações gerais* [*General information*]. Retrieved July 16, 2025, from https://48.mostra.org/informacoes-gerais

Bahia, L. (2023). *Políticas públicas para el cine y el audiovisual en tres actos: Los movimientos del cine y audiovisual en Brasil en los años 2000* [*Public policies for cinema and audiovisual in three acts: The movements of cinema and audiovisual in Brazil in the 2000s*]. *Revista Espirales*, 7(2), 27-42. https://revistas.unila.edu.br/espirales/article/view/4410

Barnard, H. and Tuomi, K. (2008). How Demand Sophistication (De‐)limits Economic Upgrading: Comparing the Film Industries of South Africa and Nigeria (Nollywood). *Industry and Innovation*, 15 (6), 647-668.

Batlle, D. (2024). *El cine europeo se ve cada vez menos en Argentina* [*European cinema is increasingly less seen in Argentina*]. *La Capital*. https://www.lacapital.com.ar/zoom/el-cine-europeo-se-ve-cada-vez-menos-argentina-n10112546.html

Bizberge, A. (2020). Convergencia digital y políticas de comunicación en Argentina, Brasil y México (2000-2017) [Digital Convergence and Communication Policies in Argentina, Brazil, and Mexico (2000–2017]. Buenos Aires: El Colectivo, Instituto de Estudios de América Latina y el Caribe-IEALC.

Binedell, J. P. (2024). Curating a Counter-Archive: A Historical Examination of South African Film Festivals. Masters degree. University of Pretoria. https://www.proquest.com/docview/3143985379?pq-origsite=gscholar&fromopenview=true&sourcetype=Dissertations%20&%20Theses

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Bondebjerg, I.B. (2018). Foreword. In *European film and television co-production: Policy and practice* (pp. i–x). Palgrave Macmillan. https://doi.org/10.1007/978-3-319-97157-5

Botha, M. P. (2003). Current film policy in South Africa: the establishment of the National Film and Video Foundation of South Africa and its role in the development of a post-apartheid film industry. *Communication*, 29(1-2), 182-198. https://doi.org/10.1080/02500160308538026

Box Office Mojo (2024). *Box Office Mojo Türkiye film verileri [Box Office Mojo Türkiye movie data]*. https://www.boxofficemojo.com/year/?area=TR

Box Office Türkiye (2023). *Türkiye sinema zincirleri ve salon verileri*. [*Türkiye's cinema chains and screens data*] https://boxofficeturkiye.com/haber/box-office-turkiye-en-fazla-koltuk-ve-salon-sayisina-sahip-sinemalar--5570

Bradley, A. (2016). China and South Africa: Emerging Powers in an Uncomfortable Embrace. *Journal of Contemporary China*, *25*(102), 881-892. https://doi.org/10.1080/10670564.2016.1184900

Brand South Africa (2012). Local presence at global film events. https://brandsouthafrica.com/93871/film/local-presence-at-global-event/

BRICS (2009). Joint Statement of the BRIC Countries' Leaders. http://www.brics.utoronto.ca/docs/090616-leaders.html

BRICS (2011). Sanya Declaration. http://www.brics.utoronto.ca/docs/110414-leaders.html

Brown, D. B. (2021). Theatrical cinema in South Africa: The Parasite within, South Korea as a model for survival. *Journal of African Cinemas*, 13(1), 43-62. https://doi.org/10.1386/jac_00043_1

Cariforum Region (2009). Best Practices re Regulatory Regimes and Incentives to Develop the Audiovisual Sector in the Caribbean Draft Report on World Best Practices in Legislation, Regulatory Regimes and Incentives. https://caricom.org/documents/10217-final_audio_visual_sector_report_-_september_2009.pdf

CANACINE (Cámara Nacional de la Industria Cinematográfica, México) (2025). *Resultados definitivos – Resultados de industria 2024* [Final results – 2024 industry results]. https://canacine.org.mx/wp-content/uploads/2025/01/Resultados-de-industria-2024-.pdf

CCEBA (Centro Cultural de España en Buenos Aires) (2024). *Espanoramas 2024: Muestra de cine español* [*Espanoramas 2024: Spanish Film Showcase*].https://www.cceba.org.ar/cine/espanoramas-2024

CEPAL (Comisión Económica para América Latina y el Caribe). (n.d.). *Buenos Aires*. Urban and Cities Platform. https://plataformaurbana.cepal.org/en/countries/argentina/buenos-aires

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Chalaby, J. K. (2023). *Television in the streaming era: The global shift.* Cambridge University Press. http://dx.doi.org/10.1017/9781009199285

Chalaby, J. K. (2025). Streaming giants and the global shift: Building value chains and remapping trade flows. *Journal of Communication*, 75(2), 112–124. https://doi.org/10.1093/joc/jqae040

CineUE Argentina. (n.d.). *Encuentro de Cine Europeo en Argentina*. https://cineueargentina.com/

Clifford, C. and Gruzd, S. (2022). Russian and African Media: Exercising Soft Power. Policy Insights 125. South African Institute of International Affairs. https://www.jstor.org/stable/pdf/resrep40121.pdf?acceptTC=true

Comissão Europeia (2013). *Media Mundus 2013*. https://www.europacreativamedia.cat/wp-content/uploads/media-mundus-web-01.pdf

Consolato Generale d'Italia (2024). Italian Film Focus. https://consjohannesburg.esteri.it/en/news/dal_consolato/2024/11/italian-film-focus/

Consulado-Geral da Alemanha em São Paulo (2025). *Filmes dirigidos por cineastas alemãs ganham mostra especial no Sesc durante o mês da Mulher* [*Films directed by German women filmmakers featured in special showcase at SESC during Women's Month*]. Ministério Federal das Relações Exteriores da Alemanha. https://brasil.diplo.de/br-pt/noticias/2704146-2704146

Council of Europe (2025). *Council of Europe Convention on Cinematographic Co-Production (CETS No. 220)*. https://www.coe.int/en/web/conventions/full-list?module=signatures-by-treaty&treatynum=220

Crenshaw, K. (1989) Demarginalizing the Intersection of Race and Sex: A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory and Antiracist Politics, *University of Chicago Legal Forum*, 1989. https://chicagounbound.uchicago.edu/cgi/viewcontent.cgi?article=1052&context=uclf

Cuelenaere, E. (2024). How "original" are Netflix Original films? Mapping and understanding the recycling of content in the age of streaming cinema. *Media, Culture & Society*, 46(5), 991-1009. https://doi.org/10.1177/01634437231224081

Dâmaso, M. (2025). *The European Union as a Global Cultural Power* (M. Dâmaso, Ed.). De Gruyter. https://doi.org/doi:10.1515/9783111026558

Dâmaso, Mafalda, Albornoz, L. Mª Trinidad García Leiva, Isabela Vargas Miranda, Antonios Vlassis, Marina Rossato Fernandes, Lucile Coenen, Elif Akçalı, Melis Behlil and Ruken Doğu Erdede (forthcoming). In Sarikakis, K., Dâmaso, M., Lähdesmäki, T., Ramos Arenas, F., Vlassis, A. (Eds). *The Governance of Competitiveness in the European Film Industry: A Reader* . Chapter 11: Mapping the European Film Industry in the Argentinian, Brazilian, Mexican, South African, South Korean and Turkish Markets: Roles, Trends and Gaps. Palgrave Macmillan.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Delegation of the European Union in Argentina (n.d.). *Encuentro de Cine Europeo en Argentina* [*European Film Meeting in Argentina*]. https://cineueargentina.com/

Delegation of the European Union to the Republic of South Africa (2025). *South Africa and the EU strengthen partnership and boost trade and investments*. EEAS. https://www.eeas.europa.eu/delegations/south-africa/south-africa-and-eu-strengthen-partnership-and-boost-trade-and-investments_en?s=120

Delegation of the European Union to the Republic of South Africa (n.d.). *European Union and South Africa*. EEAS. https://www.eeas.europa.eu/south-africa/european-union-and-south-africa_en?s=120

De Marchi, L. and Diamante, A. A. (2023). Cultural policies for the SVoD market in Brazil: From an attempt at regulation to total deregulation. In *Digital platforms and the Global South* (pp. 147-164). Routledge. https://library.oapen.org/handle/20.500.12657/77623

De Valck, M. (2007). *Film Festivals: From European Geopolitics to Global Cinephilia*. Amsterdam University Press.

DFA (n.d.). South Africa France Updated Audio-visual Treaty. https://docfilmsa.com/news/south-africa-france-updated-audio-visual-treaty/

Díaz, O. A. (2024). Informe especial: Evolución del actual ecosistema mediático: La evolución de la oferta de contenidos y plataformas [Special report: Evolution of the current media ecosystem: The evolution of content and platform offerings].

Diéguez Coba, A. (2022). *ICEX: El cine español en Argentina* [*ICEX: Spanish Cinema in Argentina*]. ICEX España Exportación e Inversiones, E.P.E.

Directorate-General for International Partnerships (2025). *South Africa*. https://international-partnerships.ec.europa.eu/countries/south-africa_en

Documentary Africa (n.d.). Documentary Africa. https://documentaryafrica.org/

Doyle, G. (2016). Digitization and changing windowing strategies in the television industry: Negotiating new windows on the world. *Television & New Media,* 17(7), 629-645. https://doi.org/10.1177/ 1527476416641194

Doyle, G., Paterson, R. and Barr, K. (2021). *Television production in transition: Independence, scale, sustainability and the digital challenge*. Palgrave Macmillan. https://doi.org/10.1007/978-3-030-63215-1

DTIC (n.d.a.) Export Marketing and Investment Assistance (EMIA). https://www.thedtic.gov.za/financial-and-non-financial-support/incentives/export-marketing-and-investment-assistance/

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

DTIC (n.d.b.). Foreign Film and Television Production and Post-Production Incentive (Foreign Film). https://www.thedtic.gov.za/financial-and-non-financial-support/incentives/film-incentive/foreign-film-and-television-production-and-post-production-incentive-foreign-film/

Durban International Film Festival (n.d.). About the Durban International Film Festival. https://ccadiff.ukzn.ac.za/about-us/

DurbanFilmMart (2025). DFM 2025 Partners and Funders. https://durbanfilmmart.co.za/dfm-2025-partners-and-funders/

DurbanFilmMart (n.d.). No title. https://durbanfilmmart.co.za/home-page/

DurbanFilmMart (n.d.). Who is DFMI? https://durbanfilmmart.co.za/about-dfmi/

EAO (European Audiovisual Observatory) (2014). *The Turkish film industry. Key developments 2004 to 2013*. Strasbourg: European Audiovisual Observatory. https://rm.coe.int/168078354a

EAO (European Audiovisual Observatory) (n.d.). *Co-production agreements: France-Türkiye*. https://merlin.obs.coe.int/article/3271?utm_source=chatgpt.com

EAO (European Audiovisual Observatory) (2025). Focus 2025 - World Film Market Trends. Strasbourg: European Audiovisual Observatory. https://book.coe.int/en/european-audiovisual-observatory/12197-pdf-focus-2025-world-film-market-trends.html

EGEDA (2024). *Panorama Audiovisual Iberoamericano 2024*. Egeda. https://www.egeda.com/documentos/PanoramaAudiovisualIberoamericano2024/PanoramaIberoamericano2024.pdf

Eurimages (2025). *About Eurimages*. Council of Europe. https://www.coe.int/en/web/eurimages/about

European Commission (2014). *Commission to the European Parliament and the Council — Annual Report on the Implementation of the EU-Korea Free Trade Agreement* (COM/2014/0109 final). Official Journal of the European Union. https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX%3A52014DC0109&utm

EU Delegation in Mexico (2025). *El Festival de Cine Europeo vuelve a la Cineteca Nacional México para celebrar la diversidad cultural de la Unión Europea* [*The European Film Festival returns to Mexico's Cineteca Nacional to celebrate the cultural diversity of the European Union*]. https://www.eeas.europa.eu/delegations/m%C3%A9xico/el-festival-de-cine-europeo-vuelve-la-cineteca-nacional-m%C3%A9xico-para-celebrar-la-diversidad-cultural_es

European Free Trade Association (EFTA) (2021). *Annex XV – Co-Productions: EFTA–Turkey Free Trade Agreement*. https://www.efta.int/sites/default/files/documents/legal-texts/free-trade-relations/turkey/other%20

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Services%20Annexes/EFTA-Turkey%20-%20Annex%20XV%20-%20Co-Production.pdf?utm_source=chatgpt.com

Elsaesser, T. (2005). *European cinema. Face to face with Hollywood*. Amsterdam University Press.

Encounters (n.d.). About the festival. https://encounters.co.za/welcome/about-the-festival/

Encounters (n.d.). Industry events. https://encounters.co.za/industry-events/

European Film Festival South Africa (2023). European Film Festival 2023. https://www.eurofilmfest.co.za/2023-home/

Fagbile, Y. A. (2023). Towards decolonizing film distribution and exhibition practices in 21st-century Nigeria. *Advanced Journal of Theatre and Film Studies*, 1(2).

Falicov, T. L. (2019). *Latin American Film Industries*. Bloomsbury Publishing. https://doi.org/10.5040/9781911239376

FAME Week Africa (n.d.). No title. https://www.fameweekafrica.com/

Fédération Internationale des Associations de Producteurs de Films (FIAPF). (2025). *List of competitive feature film festivals. https://fiapf.org/festivals/accredited-festivals/competitive-feature-film-festivals/*

Fernandes, M. R. (2025). The influence of the European Union on Latin American supranational media policy. In Dâmaso, M. (Ed.) T*he European Union as a Global Cultural Power.* De Gruyter. https://www.degruyterbrill.com/document/doi/10.1515/9783111026558-007/html

Fernandes, M. R. (2022). The end of an era? The decrease of the EU influence in Ibero-American digital media policy discourses. *International Journal of Cultural Policy*, *29*(7), 876–893. https://doi.org/10.1080/10286632.2022.2147517

Fernandes, M. R. and Albornoz, L. A. (2023). Netflix as a policy actor: Shaping policy debate in Latin America. *Journal of Digital Media & Policy*, 14(2), 249-268. https://doi.org/10.1386/jdmp_00124_1

Fernandes, M. R., Loisen, J. and Donders, K. (2021). Mercosur caught between lofty ambitions and modest achievements: a critical analysis of 16 years of audiovisual policy-making. *International Journal of Cultural Policy*, 27(4), 544-558. https://doi.org/10.1080/10286632.2020.1786544

Fernandes, M.R. Vlassis, A., Bissot, P., Solenn, H. (2025). The Framings and Strategies of Cinema Professionals. Report on "International Market" in the European Film Industry, funded by the European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Festival de Cine Alemán (2024). *Festival de Cine Alemán 2024* [*German Film Festival 2024*]. https://cinealeman.com.ar/

Festival de Cinema Italiano (2024). *O evento* [*The event*]. https://festivalcinemaitaliano.com/o-evento/

SSIFF (San Sebastián Film Festival) (2024). *Rules & Regulations. Europe-Latin America Co-Production Forum*. Retrieved July 7, 2025, from https://www.sansebastianfestival.com/2024/film_registration/rules_and_regulations/1/21439/in

Festival Varilux de Cinema Francês (2024). *Palavra do curador* [*Curator's note*]. https://variluxcinefrances.com/2024/o-festival/palavra-do-curador/

Figueiró, B. (2025). *Co-producing with Brazil*. Cinema do Brasil. https://www.cinemadobrasil.org.br/_files/ugd/cbc683_045354c712d34db48bdb864427919ab9.pdf

Filmfonds (n.d.). Thuthuka. https://www.filmfonds.nl/en/funding/fund/thuthuka

Fioramonti, L. and Kotsopoulos, J. (2015). The evolution of EU–South Africa relations: What influence on Africa? *South African Journal of International Affairs*, *22*(4), 463-478. https://doi.org/10.1080/10220461.2015.1111166

Fleischmann, I. (2023). Guerra do streaming: Globoplay desafia Netflix pela liderança do mercado [*Streaming War: Globoplay Challenges Netflix for Market Leadership*]. *Bloomberg Línea*. https://www.bloomberglinea.com.br/2023/02/23/guerra-do-streaming-globoplay-desafia-netflix-pela-lideranca-do-mercado/

FocusEconomics (n.d.). *Argentina Economy Overview: Forecast & Reports*. FocusEconomics. https://www.focus-economics.com/countries/argentina/

Gagné, G. (2016). The trade and culture debate: Evidence from US trade agreements. Lexington Books.

García Leiva, M. T., Bizberge, A. and Mastrini, G. (2025). SVoD in Europe and the Americas: A comparative approach to regulatory regimes. *International Journal of Communication*, 19, 94-114. https://ijoc.org/index.php/ijoc/article/view/22129

Geldenhuys, D. (2015). The comprehensive strategic partnership between South Africa and Russia. *Strategic Review for Southern Africa*, 37(2). https://www.up.ac.za/media/shared/85/Strategic%20Review/Vol%2037%20(2)/geldenhuys-pp118-145.zp74595.pdf

Goethe-Institut Brasília (2025). Semana da Europa 2025 [Europe Week 2025]. https://goethebrasilia.org.br/cultura/semana-da-europa-2025/

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Goethe-Institut Mexiko. (2024). *23. Festival de Cine Alemán: Metamorfosis – El cine nos transforma* [*German Film Festival: Metamorphosis – Cinema Transforms Us*]. https://www.goethe.de/ins/mx/es/kul/fil/023.html

González, L. (2021). *Sobre la proyección de un mapa alternativo para el cine de diversidad cultural: cine argentino en Francia [On the projection of an alternative map for cultural diversity cinema: Argentine cinema in France]*. Imagofagia: Revista de la Asociación Argentina de Estudios de Cine y Audiovisual, (24), 44–73.

Grupo Salinas (2025, July 16). *TV Azteca se consolida como líder informativo gracias a su nueva alianza con dos plataformas referentes en el ecosistema digital: AS.com y El País [TV Azteca consolidates as information leader thanks to its new alliance with two leading digital ecosystem platforms: AS.com and El País]*. https://www.gruposalinas.com/es/Noticias/22680

Ibermedia. (2025). *Nuestras convocatorias*. https://www.programaibermedia.com/nuestras-convocatorias/

IBGE (Instituto Brasileiro de Geografia e Estatística) (2024). *IBGE releases annual update of Brazil's territorial structures* [Press release]. IBGE News Agency.https://agenciadenoticias.ibge.gov.br/agencia-noticias/2012-agencia-de-noticias/noticias/42251-ibge-divulga-atualizacao-anual-das-estruturas-territoriais-do-pais

IFT (Instituto Federal de Telecomunicaciones, México) (2024a). *Oferta: SIMRA 2024 – Plataformas OTT en México* [OTT Platforms in Mexico, First Half of 2024]. Unidad de Medios y Contenidos Audiovisuales. https://umca.ift.org.mx/uploads/contenido_tema/413/OFERTA%20-%20SIMRA%202024.pdf

IFT (Instituto Federal de Telecomunicaciones, México) (2024b). *Informe demanda de plataformas OTT en México: Primer semestre (Ola) 2024 [Report on demand for OTT platforms in Mexico: First semester (Wave) 2024]*. https://somosaudiencias.ift.org.mx/archivos/2_Demanda1S2024.pdf

INCAA (Instituto Nacional de Cine y Artes Audiovisuales, Argentina) (2022). *Estudio de impacto económico y tributario del sector audiovisual argentino* [*Economic and tax impact study of the Argentine audiovisual sector*]. Buenos Aires: INCAA.

INCAA (Instituto Nacional de Cine y Artes Audiovisuales, Argentina) (n.d.). *Asuntos Internacionales / International Affairs* [*International Affairs*]. https://www.incaa.gob.ar/institucional/normativas/asuntos-internacionales/

INDEC (Instituto Nacional de Estadística y Censos, Argentina) (n.d.a.) *Datos geográficos* [*Geographic data*]. https://www.indec.gob.ar/indec/web/Nivel4-Tema-1-15-25

INDEC (Instituto Nacional de Estadística y Censos, Argentina) (n.d.b.). *Economic and Financial Data for Argentina. https://sdds.indec.gob.ar/nsdp.htm*

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Innocenti, V. and Pescatore, G. (2023). *Converging trends: The industrial and content dynamics of contemporary television*. *Cinergie – Il Cinema e le altre Arti,* 12(24), 117-133. https://doi.org/10.6092/issn.2280-9481/18447

IMCINE (Instituto Mexicano de Cinematografía) (2024). *Anuario estadístico de cine mexicano 2024 [Statistical yearbook of Mexican cinema 2024].* https://anuariocinemx.imcine.gob.mx/Assets/anuarios/2024..pdf

IMCINE (Instituto Mexicano de Cinematografía). (n.d.a). *Convocatoria ECAMC 2025: Estímulo a la creación audiovisual en México y Centroamérica para comunidades indígenas y afrodescendientes*. Secretaría de Cultura. https://www.imcine.gob.mx/Pagina/Convocatoria?uid=bfe0fc0a-660b-4063-ba2f-81c327ed5655

IMCINE (Instituto Mexicano de Cinematografía) (n.d.b). *Centro de Apoyo a la Postproducción (CAPP)*. Secretaría de Cultura. https://www.imcine.gob.mx/Pagina/Contenido?uid=ee193ffd-092b-46f1-b552-76499d28e69d

IMF (International Monetary Fund) (2020). Six charts explain South Africa's persistent and multi-faceted inequality. https://www.imf.org/en/News/Articles/2020/01/29/na012820six-charts-on-south-africas-persistent-and-multi-faceted-inequality

INEGI (Instituto Nacional de Estadística y Geografía, México) (n.d.). *Frontera exterior de México* [Mexico's external border]. https://geoweb2.inegi.org.mx/geografia/espanol/datosgeogra/extterri/frontera.cfm

Institut français d'Argentine (2025). *Festival de Cine Francés 2025 en Buenos Aires* [*French Film Festival 2025 in Buenos Aires*]. https://ifargentine.com.ar/fr/planning/cinefrances25\

Iordanova, D. (2002). Feature Filmmaking within the New Europe: Moving Funds and Images across the East-West Divide. *Media, Culture & Society*, 24, 517-536.

Iordanova, D. (2016). The film festival and film culture's transnational essence. In M. de Valck, B. Kredell and S. Loist (Eds.) *Film festivals, history, theory, method, practice* (pp.11-17). Routledge.

Jezierski, A. (2010). *Television everywhere: How Hollywood can take back the Internet and turn digital dimes into dollars*. iUniverse.

Jinsoo, A. (2018). *Parameters of Disavowal*. University of California Press.

Joffe, A. and Magkou, M. (2025). The Payer, the Piper and the Fairness Tune: on EU–Africa Cultural Cooperation. In Dâmaso, M. (2025). (Ed). *The European Union as a Global Cultural Power* (pp.31-52). De Gruyter Brill. https://doi.org/10.1515/9783111026558-002

Kang, J. M. (2024). Not just Netflix: Interventions of Korea's domestic streamers. International *Journal of Cultural Studies*, 27(1), 28-46. https://doi.org/10.1177/13678779231197695

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Karam, B. (2023). ‘An-Other’-centred film curricula Decolonising film studies in Africa. In S. L. Mudavanhu, S. Mpofu and K. Batisai (Eds.), *Decolonising Media and Communication Studies Education in Sub-Saharan Africa*. Routledge.

Keet, A. (2014). Epistemic “othering” and the decolonisation of knowledge. *Africa Insight*, *44*(1).

Keukeleire, S. and Lecocq, S. (2018). Operationalising the decentring agenda: Analysing European foreign policy in a non-European and post-western world. *Cooperation and Conflict*, 53(2), 277-295. https://doi.org/10.1177/0010836718766394

Kim, T. (2022). Cultural politics of Netflix in local contexts: A case of the Korean media industries. *Media, Culture & Society*, 44(8), 1508-1522. https://doi.org/10.1177/01634437221111917

Lähdesmäki, T., Hiltunen, K., Dâmaso, M., Behlil, M., Akçalı, E. and Doğu Erdede, R. (forthcoming). Report on the Lux Audience Award & European Film Festivals. Developed by the Horizon Europe project REBOOT (Reviving, Boosting, Optimising and Transforming European Film Competitiveness – REBOOT), funded by the European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Latin America News (2023, February 23). *Streaming war in Brazil: Globoplay challenges Netflix for market leadership*. The Rio Times. https://www.riotimesonline.com/brazil-news/brazil/streaming-war-in-brazil-globoplay-challenges-netflix-for-market-leadership/

Lee, H. K. (2022). Supporting the cultural industries using venture capital : A policy experiment from South Korea. *Cultural Trends*, 31(1), 47-67. https://doi.org/10.1080/09548963.2021.1926931

Lisimba, A. (2020) Theoretical Understanding/Literature Review Dependency Theory. In Lisimba, A. *Impact on Development, Employment Generation & Transfer of Technology: China’s Trade and Investment in Africa*. 21-47. https://link.springer.com/chapter/10.1007/978-981-15-9573-8_2

Lobato, R. and Scarlata, A. (2022). Regulating Discoverability in Subscription Video-on-Demand Services. In T. Flew and F.R. Martin (Eds.). *In Digital Platform Regulation: Global Perspectives on Internet Governance* (pp. 209–228). Palgrave Macmillan.

Loisen, J., and De Ville, F. (2011). The EU-Korea protocol on cultural cooperation: towards cultural diversity or cultural deficit? *International Journal of Communication,* 5, 254-271. http://hdl.handle.net/1854/LU-1113592

Más Cultura. (2025, January 19). *My French Film Festival llega a México*. https://mascultura.mx/my-french-film-festival-llega-a-mexico/

REBOOT (www.thereboot-project.eu) has received funding from European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Mastrini, G., Repetto, C. B. and Espada, A. (2023, May). *Argentina: Technology, public sphere and journalism* (English adaptation by N. Solomon). Media and Journalism Research Center. https://journalismresearch.org/wp-content/uploads/2024/04/Argentina-Tech-EN.pdf

Meir, C. and Mitrić, P. (2025). *Intellectual Property and the Contemporary European Audiovisual Industries* [Report]. European Audiovisual Production Association (CEPI). https://doi.org/10.13140/RG.2.2.20600.97282

Meir, C. and Smits, R. (Eds.). (2024). *European cinema in the streaming era: Policy, platforms, and production*. Palgrave Macmillan. https://doi.org/10.1007/978-3-031-42182-2

MinC - Ministério da Cultura (Brazilian Ministry of Culture) (2025). *Brazilian Audiovisual Industry Guide*. https://www.marchedufilm.com/wp-content/uploads/2025/03/brazilian-audiovisual-industry-guide-ministry-of-culture.pdf

MinC - Ministério da Cultura (Brazilian Ministry of Culture) (2024). Na América Latina, o Brasil lidera o consumo de streaming, mas enfrenta desafios de representatividade de conteúdo nacional [In Latin America, Brazil leads streaming consumption but faces challenges in national content representation]. https://www.gov.br/cultura/pt-br/assuntos/noticias/na-america-latina-o-brasil-lidera-o-consumo-de-streaming-mas-enfrenta-desafios-de-representatividade-de-conteudo-nacional

Ministry of External Affairs (2024). India – South Africa Bilateral Relations. https://www.mea.gov.in/Portal/ForeignRelation/Bilateral-brief_SA-for-XPD-June-2024.pdf

Mitrić, P. (2025). European co-production—Because together is better than one. In *The co-production landscape in Europe*. Palgrave Macmillan. https://doi.org/10.1007/978-3-031-92341-8_1

Mongin, O. (2007). The Decentering of the World. *Esprit*, 54-61.

Monzon, L. (2025, May 19). *South Africa's top streaming sites, with one surprising winner*. from https://htxt.co.za/2025/05/south-africas-top-streaming-sites-with-one-surprising-winner/

Morais, K., Stefanini Canesso, N., Bezerra, C., Jambeiro, O., Mendonça Domingues da Silva, J. and Melo, U. (2025). The Bolsonaro effect on audiovisual promotion policy in Brazil. *International Journal of Cultural Policy*. http://dx.doi.org/10.1080/10286632.2025.2470819

MPA (Motion Pictures Association of America) (2020). 2020 Theme Report. MPAA.

Mzekandaba, S. (2024). *SA's saturated streaming market too hot for BritBox to handle*. https://www.itweb.co.za/article/sas-saturated-streaming-market-too-hot-for-britbox-to-handle/rxP3jqBERbdMA2ye

Narang, H. (2024). India-South Africa Strategic Partnership. *Diplomacy & Beyond.* https://diplomacybeyond.com/india-south-africa-strategic-partnership/

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Netflix (2023). Netflix's socio-economic impact. South Africa, Nigeria & Kenya (2016-2022). https://africapractice.com/wp-content/uploads/2023/04/NetflixReport-11April-DIGITALfile-1.pdf

NFVF (National Film and Video Foundation, South Africa) (2024). *South Africa's (preliminary) Box Office Report*. https://www.nfvf.co.za/research-reports/

NFVF (National Film and Video Foundation, South Africa) (n.d.a.). About us Overview. https://www.nfvf.co.za/about-us-overview/

NFVF (National Film and Video Foundation, South Africa) (n.d.b.) Co-Productions. https://www.nfvf.co.za/co-productions/

NFVF (National Film and Video Foundation, South Africa) (n.d.c.). *FAQs about the South African film industry*. https://www.nfvf.co.za/faqs-about-the-south-african-film-industry/

Nkuka, V. N. and Shai, K. B. (2020). What drives Russia's involvement in Africa? [An Afrocentric review of Russia–South Africa relations, 2000–2018]. *Journal of Public Affairs – an international journal*. https://onlinelibrary.wiley.com/doi/abs/10.1002/pa.2176?casa_token=SzI1YWUOz2AAAAAA:prvXEqIBCTtG1FLLS0nx7_wy8ar45DdvuB7DtKqQIRFW6PlUKz4DSIW-jswVXZgjOXkMGWAfb-UL4o0

OBITEL (Observatorio Iberoamericano de Ficción Televisiva) (n.d.). *Anuario OBITEL 2024 - Ibero-American television fiction yearbook*. https://www.obitel.net/?page_id=1871&lang=es

OECD (Organisation for Economic Co-operation and Development) (2025). *Income inequality (indicator)*.https://www.oecd.org/content/dam/oecd/en/publications/reports/2025/04/oecd-economic-surveys-turkiye-2025_fa62886d/d01c660f-en.pdf

Olavarría, D.; Luzardo, A. and Mateo-Berganza Díaz, M. M. (2021). *Behind the Camera: Creativity and Investment for Latin America and the Caribbean: Learnings from Conversations with Key Players in the Audiovisual Sector*. Inter-American Development Bank. https://doi.org/10.18235/0003589

Olsberg - SPI. (2024). *Economic impact study for a new federal audiovisual production incentive in Brazil*. Olsberg - SPI. https://www.o-spi.com/projects/brazil-incentive-economic-impact-study

Onar, Nora Fisher and Nicolaïdis, Kalypso. (2013). The Decentring Agenda: Europe as a post-colonial power. *Cooperation and Conflict*, 48(2), 283–303. https://doi.org/10.1177/0010836713485384

Ozdurak, C. (2020). Birleşme ve Devralmalar Sonrasında Türkiye Sinema Sektöründeki Oligopolistik Yapı [*The Oligopolistic Structure in the Turkish Cinema Industry Following Mergers and Acquisitions*]. *Nişantaşı Üniversitesi Sosyal Bilimler Dergisi* [*Nişantaşı University Journal of Social Sciences*], 8(1), 1-17.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Parc, J. (2017). The effects of protection in cultural industries: the case of the Korean film policies, *International Journal of Cultural Policy*, 23 (5), 618-633. https://doi.org/10.1080/10286632.2015.1116526

Parc, J., Umana-Dajud, C. and Messerlin, P. (2022). The Impact of Subsidies on Film Quality : Empirical Evidence from France, Korea, the United Kingdom, and United States. *The Journal of Arts Management, Law, and Society*, 52(6), 419-434. https://doi.org/10.1080/10632921.2022.2120141

Park, S. (2020). Decolonizing the future Postcolonial themes in South Korean science fiction. In Y. S. Yang (Ed.), *Routledge Handbook of Modern Korean Literature*. Routledge.

Pauwels, C. and Loisen, J. (2016). Leading by Example? European Union Implementation of Cultural Diversity in Internal and External Audiovisual Policies. *Javnost – The Public*, 23(2), 153-169. https://doi.org/10.1080/13183222.2016.1162980

Pellino, A. (2023). Decentering Nations: The Role of National Institutes for Culture in the Promotion and Circulation of European Cinema. *Cinéma & Cie. Film and Media Studies Journal,* 23(41), 95-114.

Peñoñori, M. (2023). “Baratos, pero complicados”: Por qué las producciones argentinas... [“Cheap but complicated”: Why Argentine productions...] *Yahoo Vida y Estilo*. https://es-us.vida-estilo.yahoo.com/producciones-fuga-actores-directores-tramas-025032007.html

Peranson, M. (2008). First you get the power, then you get the money: Two models of film festivals. *Cineaste*, 33(3), 37.

Piedras, E. (2025). TV de paga: preferencia a la baja en la era del streaming [Pay TV: declining preference in the streaming era]. *El Economista*. https://www.eleconomista.com.mx/opinion/tv-paga-preferencia-baja-streaming-20250327-752255.html

Policy (2015). DTI: Young South African filmmakers empower themselves in Cannes. https://www.polity.org.za/article/dti-young-south-african-filmmakers-empower-themselves-in-cannes-2015-05-19

Portolés, J. B. (2019). Boosting EU-LAC cultural cooperation: Lessons learned from EU programmes. In L. Bonet and H. Schargorodsky (Eds.), *The challenges of cultural relations between the European Union and Latin America and the Caribbean* (pp. 51–83). Quaderns Gescènic.

Prefeitura de São Paulo (2025). Spcine completa 10 anos e divulga balanço de ações [Spcine turns 10 years old and releases action report] [News]. https://prefeitura.sp.gov.br/web/cultura/w/spcine-completa-10-anos-e-divulga-balan%C3%A7o-de-a%C3%A7%C3%B5es

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Prêmios Quirino (2025). *Fórum de Co-Produção e Negócios* [*Co-Production and Business Forum*]. https://premiosquirino.org/pt-pt/forum/

PwC (2025). *Film and Entertainment Industry in South Africa, 2024-2028*. https://www.pwc.co.za/en/publications/entertainment-and-media-outlook.html

Respighi, E. (2025). *Así es cómo Uruguay logró convertirse en un polo audiovisual regional [This is how Uruguay became a regional audiovisual hub]*. https://www.pagina12.com.ar/836485-asi-es-como-uruguay-logro-convertirse-en-un-polo-audiovisual

Representações da República Federal da Alemanha no Brasil (2025). *Filmes dirigidos por cineastas alemãs ganham mostra especial no Sesc durante o mês da Mulher [Films directed by german women filmmakers feature in a special Sesc showcase during women's month]*. Embaixada da Alemanha no Brasil. https://brasil.diplo.de/br-pt/noticias/2704146-2704146

RioFilme (n.d.). *Cash Rebate: Incentive to the attraction of audiovisual productions to the city of Rio de Janeiro*. https://www.riofilmcommission.com/en/cash-rebate/

RioMarket (2024). *Quem somos* [*About us*]. https://www.riomarket.com.br/br/riomarket/quem-somos

Rivenburgh, N. and Manusov, V. (2010). Decentering as a research design strategy for international and intercultural research. *The Journal of International Communication*, 16(1), 23-40. https://doi.org/10.1080/13216597.2010.9674757

Rodríguez, C. (2025). *Balance 2024: la taquilla general descendió un 19 % en un año con varios récords históricos* [*2024 overview: overall box office dropped 19% in a year with several historic records*]. *Ultracine*. https://web.ultracine.com/2025/01/03/balance-2024-la-taquilla-general-descendio-un-19-en-un-ano-con-varios-records-historicos/

Ryoo, W. (2008). The political economy of the global mediascape: The case of the South Korean film industry. *Media, Culture & Society*, *30*(6), 873-889. https://doi.org/10.1177/0163443708096098

Robins, K. (1996). Interrupting Identities: Turkey/Europe. In Hall, S. and du Gay, Paul (Eds.) *Questions of Cultural Identity* (pp. 65-86). Sage Publications.

Rud, L. (2018). *Transnationalism in Korean-Argentine cinema: International co-productions and cinematic representation* [Conference presentation]. 9th World Congress of Korean Studies, Seoul, South Korea. Academy of Korean Studies.

Schroeder Rodríguez, P. A. (2020). Una historia comparada del cine latinoamericano [*A Comparative History of Latin American Cinema*]. Iberoamericana / Vervuert. https://doi.org/10.15517/rfl.v47i1.44334

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

SEYAP (Sinema Eseri Yapımcıları Meslek Birliği (2022). Türkiye sinema sektör raporu [Türkiye cinema industry report]. https://www.se-yap.org.tr/wp-content/uploads/2022/09/seyapboxofficeikinciceyrekraporuveistatiskleri-1.pdf

Şaul, M. (2020). The opening of South Africa and the future of African film. *Black Camera: An International Film Journal*, 12(1), 315-319.

Secretaría de Cultura del Gobierno de México (2025). El EFICINE anuncia los proyectos autorizados en el primer periodo de 2025 *[EFICINE Announces the Projects Approved in the First Period of 2025].* [Press release]. https://www.gob.mx/cultura/prensa/el-eficine-anuncia-los-proyectos-autorizados-en-el-primer-periodo-de-2025?state=published

Secretaría de Cultura del Gobierno de México (2023). *Canal 22 cierra el 2023 como un medio público confiable con tres décadas de historia [Canal 22 closes 2023 as a reliable public media with three decades of history]* [Press release]. https://www.gob.mx/cultura/prensa/canal-22-cierra-el-2023-como-un-medio-publico-confiable-con-tres-decadas-de-historia

Secretaría de Cultura del Gobierno de México (2024). *2024, año de fortalecimiento del cine mexicano [2024, Year of Strengthening Mexican Cinema].* https://www.gob.mx/cultura/prensa/2024-ano-de-fortalecimiento-del-cine-mexicano

Secretaría de Hacienda y Crédito Público. (n.d.). *EFICINE – Estímulo Fiscal a Proyectos de Inversión en la Producción y Distribución Cinematográfica Nacional [EFICINE – Tax Incentive for Investment Projects in National Film Production and Distribution]*. Gobierno de México. https://www.estimulosfiscales.hacienda.gob.mx/es/efiscales/eficine

Seguí, I., Tedesco, M. C., Barrenha, N. C. and Shaw, D. (2023). Decolonising and depatriarchalising research cultures: a conversation with RAMA, the transnational Latin American women's audiovisual research network. *Transnational Screens*, *14*(1), 37-46. https://doi.org/10.1080/25785273.2023.2180201

Sendra, E. (2023). Embracing collaborations between festivals and higher education: A case study of the 'Decolonising film festivals and curating African cinemas' networking event at King's College London. *Industry and Higher Education*, 38(1), 97-103. https://doi.org/10.1177/09504222231222257

SICA APMA (Sindicato de la Industria Cinematográfica Argentina. (2024). *DEISICA nº 34: Datos 2024 sobre la industria cinematográfica argentina* [*DEISICA no. 34: 2024 data on the Argentine film industry*] (G. Valerga et al., Eds.). Equipo DEISICA. https://www.sicacine.org.ar/docs/Deisica%2034_a%C3%B1o%202025_Datos%202024.pdf

Smit, A. (2023). Original Local Productions, Streaming Services and the Future of Subscription TV in South Africa. In Ogola, G. (Ed.) *The Future of Television in the Global South*. Palgrave Macmillan. https://doi.org/10.1007/978-3-031-18833-6_2

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Smits, R. (2024). Theatrical Distribution or Online Streaming? Release Strategies in Europe in Times of Disruption and Change. In Meir, C. and Smits, R. (Eds.) *European Cinema in the Streaming Era.* Palgrave Macmillan, Cham. https://doi.org/10.1007/978-3-031-42182-2_5

Smits, R. (2022). Circulation Patterns, Abundance and Scarcity: Film Availability in the Online Era. *Media Industries*, 9(2), 41-58. https://doi.org/10.3998/mij.1875

Smits, R. (2025). *Circulating films online: Insights from independent distributors in Europe*. https://doi.org/10.13140/RG.2.2.24573.27367

South African Cultural Observatory (2017). South Africa's trade in cultural goods and services with a focus on cultural trade with BRICS partners. https://www.southafricanculturalobservatory.org.za/download/1034

South African Embassy to the Kingdom of the Netherlands (n.d.). *Key sectors*. https://zuidafrika.nl/trade-investment/key-sectors/

Spcine. (2024). *Spcine marca presença no Festival de Cinema de Cannes 2024 com ações especiais* [*Spcine Takes Part in the 2024 Cannes Film Festival with Special Initiatives*]. https://spcine.com.br/spcine-marca-presenca-no-festival-de-cinema-de-cannes-2024-com-acoes-especiais/

Statista (2024). *GDP of African countries by country*. https://www.statista.com/statistics/1120999/gdp-of-african-countries-by-country/

Statista (2023). *Largest cities in South Africa*. https://www.statista.com/statistics/1127496/largest-cities-in-south-africa/

Statista. (2023). *Servicios de streaming con más suscriptores en América Latina* [*Streaming Services with the Most Subscribers in Latin America*]. https://es.statista.com/grafico/29404/servicios-de-streaming-con-mas-suscriptores-en-america-latina/

Statista (2022). *Most in-demand streaming services in South Africa (share)*. https://www.statista.com/statistics/1035668/most-in-demand-streaming-services-south-africa-share/

Statista (n.d.a). *Employment in Argentina*. Statista. https://www.statista.com/topics/10562/employment-in-argentina/#topicOverview

Statista (n.d.b). *Servicios de streaming con más suscriptores en América Latina* [*Streaming services with the most subscribers in Latin America*]. https://es.statista.com/grafico/29404/servicios-de-streaming-con-mas-suscriptores-en-america-latina/

Statistics South Africa (2024). *Mid-year population estimates, 2024* (Report No. P0302). https://www.statssa.gov.za/publications/P0302/P03022024.pdf

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Tengeh, R. K. and Udoakpan, N. (2021). Over-the-Top Television Services and Changes in Consumer Viewing Patterns in South Africa. *Management Dynamics in the Knowledge Economy,* 9(2), 257–277. https://doi.org/10.2478/mdke-2021-0018

The Department of Trade, Industry and Competition (The DTIC). (n.d.). *Film incentive*. https://www.thedtic.gov.za/financial-and-non-financial-support/incentives/film-incentive/

Trading Economics (n.d.). South Africa Exports to Asia. https://tradingeconomics.com/south-africa/exports-to-asia

Tuomi, K. (2006). The South African Feature Film Industry: A Comparative Analysis. Working Paper. https://humanities.uct.ac.za/sites/default/files/content_migration/humanities_uct_ac_za/1380/files/prism_film_industry.pdf

Türkiye İstatistik Kurumu (TÜİK) (2023). *Sinema ve tiyatro istatistikleri* [*Cinema and theater statistics*]*, 2022*. https://data.tuik.gov.tr/Bulten/Index?p=Sinema-ve-Tiyatro-Istatistikleri-2022-45537

Türkiye İstatistik Kurumu (TÜİK) (2024). *Sinema ve tiyatro istatistikleri* [*Cinema and theater statistics*]*, 2023*. https://data.tuik.gov.tr/Bulten/Index?p=Sinema-ve-Tiyatro-Istatistikleri-2023-47105

Türkiye İstatistik Kurumu (TÜİK) (2025). *Sinema ve tiyatro istatistikleri* [*Cinema and theater statistics*]*, 2024*. https://data.tuik.gov.tr/Bulten/Index?p=Sinema-ve-Tiyatro-Istatistikleri-2024-48891

Tüzün, S. (2013). Multipleks Sinema Salonları ve Türkiye Örneğinde Sinema Sektöründe Değişen Güç Dengeleri [*Multiplex Cinemas and Shifting Power Balances in the Cinema Industry: The Case of Turkey*]. *Sinecine: Sinema Araştırmaları Dergisi*, 4(1), 85-115.

TV Azteca (n.d.). Acerca de nosotros *[About us].* https://www.irtvazteca.com/es/acerca-de-nosotros

TV Azteca (2024). Cuatro canales de TV Azteca estarán disponibles en Pluto TV *[Four TV Azteca channels available on Pluto TV].* https://www.tvazteca.com/internacional/noticias-1/canales-tv-azteca-pluto-tv

Twentify (2018). *Türkiye'de dijital izleme alışkanlıkları araştırması* [*Research on digital viewing habits in Turkey*]. https://www.twentify.com/tr/blog/turkiye-ottye-isindi-medya-dagitim-servisleri-pazarinda-teknolojik-donusum-hizlaniyor

Ulin, J. C. (2019). *The Business of Media Distribution: Monetizing film, TV, and video content in an online world*. Routledge. https://doi.org/10.4324/9781351136624

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Unifrance (2024). *28e Tour de Cine Français, the world's most important traveling French film festival*. https://en.unifrance.org/news/16986/28e-tour-de-cine-frances-the-world-s-most-important-traveling-french-film-festival

van Noort, C. (2017). Strategic Narratives of the BRICS: A Visual Analysis. *E-International Relations.* https://www.e-ir.info/2017/11/09/strategic-narratives-of-the-brics-a-visual-analysis/

Vargas, E. (2025). *Netflix e Amazon Prime dominam o mercado de streaming no Brasil* [Netflix and Amazon Prime dominate the streaming market in Brazil]. *IstoÉ Dinheiro*. https://istoedinheiro.com.br/netflix-amazon-prime-streaming-brasil

Ventana Sur (n.d.). *Ventana Sur: Mercado y Festival Internacional de Cine* [*Ventana Sur International Film Market and Festival*]. https://www.ventana-sur.com/

Vinuela, A. (2019). Exporting the French co-production model: *Aide aux Cinemas du Monde* and *Produire au Sud*. In J. Hammett-Jamart, P. Mitrić, & E. N. Redvall (Eds.), *European film and television co-production: Policy and practice* (pp. 165–180). Palgrave Macmillan. https://doi.org/10.1007/978-3-319-97157-5_13

Visser, G. (2014). *The film industry and South African urban change*. *Urban Forum,* 25(1), 13-34. https://doi.org/10.1007/s12132-013-9203-3

Vlassis, A. (2016). Soft power, global governance of cultural industries and rising powers: the case of China. *International Journal of Cultural Policy*, 22(4), 481-496. https://doi.org/10.1080/10286632.2014.1002487

Vlassis, A. (2020). European Union and online platforms in global audiovisual politics and economy: Once Upon a Time in America? *International Communication Gazette*, 83(6), 593–615. https://doi.org/10.1177/1748048520918496

World Bank (n.d.a). *Argentina*. https://www.worldbank.org/en/country/argentina

World Bank (n.d.b). *Brazil*. https://data.worldbank.org/country/brazil

World Bank (n.d.c). *Mexico*. https://www.worldbank.org/en/country/mexico

World Bank (2023). *Poverty & equity brief: South Africa*. https://databankfiles.worldbank.org/public/ddpext_download/poverty/987B9C90-CB9F-4D93-AE8C-750588BF00QA/current/Global_POVEQ_ZAF.pdf

World Bank (2024). *World development indicators: GDP per capita (current US$) – Türkiye*. https://data.worldbank.org/indicator/NY.GDP.PCAP.KD.ZG?locations=TR

World Bank (2024). *Korea, Rep.* https://data.worldbank.org/country/korea-rep?utm_source=chatgpt.com

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Yoon, S. W. and Zamorano, M. M. (2023). EU–South Korea international cultural relations in the twenty-first century: An overview. *Asia Europe Journal, 21*, 565-585. https://doi.org/10.1007/s10308-023-00682-w

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

7. Annex 1: Methodological Details

7.1 Survey script

Understanding the Presence of the European Film Industry in non-EU markets
Dear Film Professional,

We are a group of researchers from Erasmus University Rotterdam, Université de Liège, Universidad Carlos III de Madrid, and Kadir Has Üniversitesi. We are conducting research on the presence of the European Film Industry in non-EU markets to develop policy recommendations to strengthen its promotion and distribution.

What is the research about?

REBOOT (Reviving, Boosting, Optimising, Transforming European Film Industry) is a Horizon Europe project funded by the European Commission. It project aims to explore the long-standing strengths and pervasive gaps in European Film Competitiveness. We therefore process your data based on public interest. We are conducting this research independently: the financial contribution has no influence on the outcomes of this study.

Why are we asking you to participate?

Because you have knowledge of the presence of the European Film Industry in non-EU (European Union) markets.

What can you expect?

You will be asked to fill in a short survey with multiple choice questions. This will take around 10 minutes. Feel free to stop anytime without need of explanation.

What data will we ask you to provide?

We ask you to provide sociodemographic information (gender, age, racial or ethnic origin, nationality, countries of professional activity, years of combined experience, current role in the industry) as well as your opinion about the European Film Industry broadly and in relation to your main country of professional activity.

Who can see your data?

Access to your personal data is restricted to the research team.

How long will your personal data be stored?

Ten (10) years.

What happens with the results of the study?

The results will be published on https://thereboot-project.eu/ as academic outputs or reports. They may also contribute to internal reports for the European Commission. Data in anonymised form will be made accessible for verification purposes and/or further re-use to comply with funder requirements on FAIR data (findability, accessibility, interoperability, and reusability).

Do you have questions about the study?

Please contact Dr Mafalda Dâmaso at damaso@eshcc.eur.nl. If you wish to know more about the project, please visit the project's webpage: https://thereboot-project.eu/.

Do you have a complaint or concerns about your privacy?

Please email the Data Protection Officer (fg@eur.nl) or visit www.autoriteitpersoonsgegevens.nl.

Ethics approval
This research has been reviewed and approved by an internal review committee of Erasmus University Rotterdam (approval number: ETH2425-0151).

I have read the information above. I understand what the study is about and what data will be collected from me. By ticking the boxes below:

- I confirm that I am at least 18 years old.
- I consent to participate in this study.
- I consent to the processing of sensitive data (racial or ethnic origin; opinion about the European Film Industry both broadly and in relation to your main country of professional activity).

What is your gender?

Male

Female

Non-binary/third gender

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Prefer not to say

Other (please specify)

What is your age?

18-24 years old

25-34 years old

35-44 years old

45-54 years old

55 years old or above

What is your racial or ethnic origin? Choose one option that best describes your ethnic group or background.

White

Mixed/Multiple Ethnic Groups

Asian

Black / African / Caribbean

Prefer not to say

Other. Please describe:

What is (or are) your nationality (or nationalities)?

First nationality (please specify):

Second nationality (please specify):

What is your main country of professional activity? Please select it from the drop-down menu.
NB: List not included for increased readability.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Do you have other countries of regular professional activity? If so, please write them here (in no order): _______

How many years of combined experience do you have in the film industry?"

1-5 years

6-10 years

11-15 years

More than 15 years

How would you describe your main roles in the film industry now?

Director

Producer

Screenwriter

Cinematographer

Distributor

Exhibitor

Festival programmer

Policymaker

Sales agent

Film critic

Platform manager

Other (please specify)

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Please select from the words below the best options that define the European Film Industry for you:

Cinéma d'auteur

Experimental

Blockbusters

Regional integration

High culture

Cultural diversity

Non-commercial

International co-productions

Freedom of expression

Other (please specify):

State support

Multilingualism

Competitive

Regional integration

Art cinema

Uncompetitive

Successful

Slow cinema

Very hard to define

What are the main strengths of the European Film industry, if any?

Cultural diversity

IP arrangements

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Reaches multiple audiences

Skillful film professionals

Arthouse cinema

Distribution

Artistic freedom

International co-productions

Awarded film directors and actors/actresses

Film festivals in Europe and beyond

Public support (state support, policies, EU programmes...)

Worldwide circulation

Arthouse cinema

Other (please specify):

In which outlets do you believe European cinema circulates the most in your main country of professional activity? Rank the top 3 options, where 1 is the most likely.

Commercial circuit: Art house cinemas

Commercial circuit: Multiplex cinemas

Commercial circuit: Free-to-air TV

Commercial circuit: Streaming services

Commercial circuit: Pay-TV

Non-commercial circuit: Film Festivals

Non-commercial circuit: Thematic weeks

Non-commercial circuit: Non-commercial venues (cultural centres and museums)

Streaming/VOD: Netflix

Streaming/VOD: Prime Video

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Streaming/VOD: Disney+

Streaming/VOD: HBO Max

Streaming/VOD: MUBI

Streaming/VOD: Apple iTunes

Streaming/VOD: Google Play Movies & TV

Streaming/VOD: Microsoft Store

Streaming/VOD: YouTube Movies

Streaming/VOD: Amazon Instant Video

Other: (please specify)

What are the main obstacles to the international distribution of European films in theatres and other channels (streaming services, free-to-air TV, Pay-TV) in your main country of professional activity? Please rank the 3 main options, where 1 is the most relevant.

Language barriers

Limited availability of subtitled or dubbed versions

Cultural differences and preferences

Competition from Hollywood films

Competition from domestic films

Limited marketing budgets

Lack of awareness about European films internationally

Complex distribution agreements

High distribution costs

Trade barriers and policies that limit the circulation of European films

Other: (please specify)

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

What are the main obstacles to the international distribution of European films in theatres and other channels (streaming services, free-to-air TV, Pay-TV) in your main country of professional activity? Please rank the 3 main options, where 1 is the most relevant.

Language barriers

Limited availability of subtitled or dubbed versions

Cultural differences and preferences

Competition from Hollywood films

Competition from domestic films

Limited marketing budgets

Lack of awareness about European films internationally

Complex distribution agreements

High distribution costs

Trade barriers and policies that limit the circulation of European films

Other: (please specify)

In your opinion, what are the main needs of the film ecosystem in your main country of professional activity?Please rank the 3 main options, where 1 is the most relevant.

Talent development

Increased funding access

Increased diversity of stories

Increased representation of different groups in the industry

Improved distribution networks

Improved exhibitor sector

Advanced post-production facilities

Access to international film circuit

Audience engagement initiatives

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Other: (please specify)

Are you aware of any programmes or incentives provided by the EU to support the film ecosystem in your main country of professional activity?

Very aware

Somewhat aware

Not very aware

Not aware at all

If so, how effective are the programmes and incentives offered by the EU to support the film ecosystem in your main country of professional activity?

Very effective

Somewhat effective

Not very effective

Not effective at all

What specific areas should the EU prioritise to enhance institutional support and promote improvements in your main country of professional activity?Please rank the 3 main options, where 1 is the most relevant.

Development of co-production initiatives with other countries

Access to international markets and distribution channels

Support for the organisation of film festivals and cultural events

Support for film education and training programmes

Encouragement of international collaboration and networking opportunities

Tax incentives and subsidies for film production

Promotion of diversity and inclusion in the film industry

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Incentives for the development of new technologies and digital platforms for film distribution

Support of any kind for participation in film markets and festivals

Not sure

Other: (please specify)

Do you have non-European international partners?

Yes

No

Who are your main non-European international partners?

Hollywood majors (including VOD platforms such as Netflix)

Other American players (e.g. Sundance Institute, independent producers, etc)

Chinese players

Other Asian players

Indian players

Latin American players

Middle Eastern players

African players

Other: (please specify)

How do you compare these experiences against your collaboration with European actors?

Main international partners

Much worse

Worse

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Similar

Better

Much better

Do you have any final comments that you'd like to share with us?

7.2. Interview script

Role and Experience

How would you describe your main roles in the film industry now?

European Film

To begin, if I say "European film", what words or images come to mind?

And what if I say "European film industry"? What words or images come to mind?

EFI in local market

In your opinion, what are the main strengths and needs of the [development/production/adapt according to stakeholder's area of expertise] subsector in your national film ecosystem?

How can [depending on previous answer: strengthened] cooperation between the EFI and your local film ecosystem help address those needs?

EFI co-production

I now want to focus on co-production. Have you had any experiences with European film co-production funding or other forms of support? Were they helpful and, if so, why and how exactly? If not, why was that? I am also interested in hearing about your experiences with similar programmes from European countries.

EFI distribution

What are the main obstacles faced in the distribution of films produced in European countries in theatres and in other channels (VOD, television)?

Film festivals with EFI support

I now want to focus on film festivals and markets.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

[Q to ask to film professionals interviewed during EU festivals or who attend them often]: When you go to film festivals in Europe, do you receive any form of funding or non-financial support (e.g. travel and accommodation, accreditation, participation in workshops, etc)? If yes, can you describe your experience in film festivals [clarification if needed: how competitive was the process, was the person invited, which film festival or market are they talking about]?

[Q to ask to film professionals interviewed outside of the EU or in EU festivals]: Is the EFI present in film festivals in your region? If so, how?

Geopolitics: EFI vs US vs China vs India

Have you ever collaborated with Hollywood majors (including VOD platforms such as Netflix) or other American players (e.g. Sundance Institute, independent producers, etc)? If so, how do you compare these experiences against your collaboration with European actors?

Are you aware of any Chinese or Indian programmes or forms of support for your local film industry? If so, can you describe them? And how do you evaluate them?

Extra question

Do you have any suggestions of people that I/we should interview?

7.3 Interviewees: Categories

- DIR/PRO. Directors/producers
- DIST/SA. Distributors/sales agents
- EXH. Exhibitors
- FF. Film festivals
- FUNDER/POL. Public funder/policymaker/regulator/national institute/association
- O. OTHER

If individuals hold or have held multiple roles, they are categorised according to their most recent or most relevant role. Moreover, broadcasters are included either under EXH or FUNDER/POL depending on the specific role of the interviewee (i.e. whether they are programmers or hold a policy-oriented role).

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

7.4 Interviewees: List

Argentina - AR

- AR Int1, FUNDER/POL, current researcher and former representative of an audiovisual public agency
- AR Int2, FUNDER/POL, president of an audiovisual public agency
- AR Int3, FUNDER/POL, representative of an advisory body on audiovisual matters
- AR Int4, FF, film festival organiser
- AR Int5, DIR/PRO, producer
- AR Int6, DIST/SA, distributor
- AR Int7, FF, film festival organiser
- AR Int8, FF, Film festival director
- AR Int9, FUNDER/POL, president of an industry association
- AR Int10, DIR/PRO, producer
- AR Int11, O. OTHER, festival and film publicist
- AR Int12, O. OTHER, audiovisual representative
- AR Int13, DIR/PRO, producer and vice president of an industry association
- AR Int14, DIR/PRO, producer
- AR Int15, DIST/SA, distributor
- AR Int16, FF, Film festival director
- AR Int17, DIR/PRO, producer

Brazil - BR

- BR Int1, DIR/PRO, producer
- BR Int2, DIR/PRO, producer and director
- BR Int3, DIR/PRO, producer and programmer of a niche SVOD service

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- BR Int4, DIST/SA, EXH, distributor, exhibitor and president of a cinematographic organisation
- BR Int5, DIR/PRO, producer
- BR Int6, OTHER, publicist and consultant for an audiovisual support agency, former exhibitor
- BR Int7, DIR/PRO, producer
- BR Int8, DIR/PRO, producer
- BR Int9, FF, film festival director
- BR Int10, DIST/SA, distributor
- BR Int11, DIST/SA, distributor and producer
- BR Int12, FUNDER/POL, current researcher and former senior film policymaker
- BR Int13, DIST/SA, distributor and producer
- BR Int14, FUNDER/POL, current researcher and former film policymaker
- BR Int15, DIR/PRO, producer
- BR Int16, OTHER, cultural editor at a publication and forum coordinator at a film festival

Mexico - MX

- MX Int1, FUNDER/POL, representative of a national film agency
- MX Int2, DIR/PRO, producer
- MX Int3, DIST/SA, distributor
- MX Int4, DIR/PRO, producer
- MX Int5, DIST/SA and FF, distributor and festival organiser
- MX Int6, DIR/PRO, producer and director of an industry association
- MX Int7, FF, Film festival organiser
- MX Int8, EXH. Exhibitors, public broadcaster representative

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- MX Int9, FUNDER/POL, film commission representative
- MX Int10, FUNDER/POL, film institution representative
- MX Int11, EXH. Exhibitor, exhibitor
- MX Int12, EXH. Exhibitor and distributor
- MX Int13, FF, Film Festival organiser
- MX Int14, DIR/PRO, producer and former film festival organiser

South Africa - SA

- SA Int1, DIR/PRO, producer
- SA Int2, FUNDER/POL, official agency policymaker
- SA Int3, FUNDER/POL, former senior film policymaker
- SA Int4, DIR/PRO, currently producer, formerly broadcaster
- SA Int5, DIR/PRO, producer and director
- Sa Int6, DIR/PRO, producer
- SA Int7, DIR/PRO, producer
- SA Int8, DIR/PRO, producer
- SA Int9, O, film commissioner
- SA Int10, DIST/SA, distributor and film programmer
- SA Int11, EXH, broadcaster
- SA Int12, DIR/PRO, director and producer
- SA Int13, DIR/PRO, director and actress
- SA Int14, DIR/PRO, director
- SA Int15, DIR/PRO, producer
- SA Int16, FUNDER/POL, film commissioner

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- SA Int17, DIR/PRO, filmmaker
- SA Int18, DIR/PRO, currently filmmaker, formerly government official
- SA Int19, DIR/PRO, filmmaker

South Korea - SK

- SK Int1, DIR/PRO, producer, with previous experience in exhibition
- SK Int2, DIR/PRO, producer
- SK Int3, DIR/PRO, filmmaker
- SK Int4, FUNDER/POL, representative from KOFIC
- SK Int5, FF, representative of Busan International Film Festival
- SK Int6, DIR/PRO, filmmaker
- SK Int7, EXH, representative from Korean Broadcasting System
- SK Int8, O, Researcher
- SK, Int9, O, Researcher
- SK, Int10, FF, representative from Busan International Short Film Festival
- SK Int11, DIST/SA, acquisition manager
- SK Int12, DIR/PRO, filmmaker
- SK Int13, FF, representative from Busan Film Festival and producer, with previsous experience in exhibition
- SK Int14, DIR/PRO, producer
- SK Int15, DIST/SA, distributor
- SK Int16, DIST/SA, distributor
- SK, Int17, DIST/SA, distributor of Korean independent animations

Türkiye - T

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

- T Int1, EXH, film programmer working at Mubi Türkiye
- T Int2, EXH, arthouse film producer and distributor
- T Int3, DIR/PRO, scriptwriter and director
- T Int4, DIST/SA, arthouse film distributor, producer and also a cinema owner
- T Int5, FF, festival director and film critic
- T Int6, FUNDER/, public funder working at National TV
- T Int7, FF, festival coordinator
- T Int8, DIR/PRO, producer
- T Int9, DIR/PRO, producer
- T Int10, DIR/PRO, producer
- T Int11, FUNDER/POL, association member and producer
- T Int12, DIR/PRO, producer and videocaster
- T Int13, DIR/PRO, scriptwriter and director
- T Int14, EXH, exhibitor and documentary director
- T Int15, EXH, film curator and film critic
- T Int16, POL., policy maker working at the cinema directorate in the Ministry of Culture of Türkiye

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

8. Annex 2: Data

This section provides information that, despite not being crucial to the analysis, can nonetheless provide a better understanding of the sample.

8.1 Extra Data

This section includes graphs and data that are not considered crucial for the analysis. They were included in this section to make the body of the report easier to read.

Second Nationality	Frequency
Italian	30
Spanish	17
Portuguese	7
Mexican	5
South African	5
Argentine	4
French	4
Canadian	3
Chilean	3
USA	3
Brazilian	2
British	2
Bangladesh	1
Bulgarian	1
Egyptian	1
German	1
Hong Kong	1
Hungarian	1
Iranian	1
Namibian	1
Polynesia	1
Thai	1
Turkish	1
Uruguayan	1

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Table 17 - Respondents by second nationality

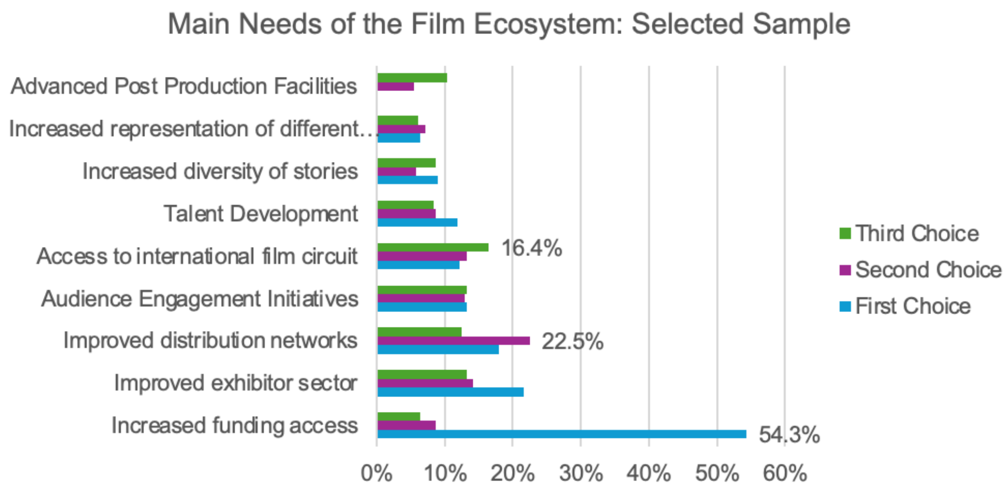


Figure 77 - Main Needs EFI – Selected sample

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Word that describes the EFI	Count	Percentage
International co-productions	218	70.1%
Cinéma d'auteur	217	69.8%
State support	189	60.8%
Art cinema	188	60.5%
Cultural diversity	143	46%
Multilingualism	102	32.8%
High culture	98	31.5%
Freedom of expression	96	30.9%
Regional integration	86	27.7%
Experimental	60	19.3%
Non-commercial	60	19.3%
Successful	59	19%
Competitive	51	16.4%
Slow cinema	45	14.5%
Very hard to define	15	4.8%
Uncompetitive	14	4.5%
Blockbusters	7	2.3%

Table 18 - Best defining word EFI – Selected sample

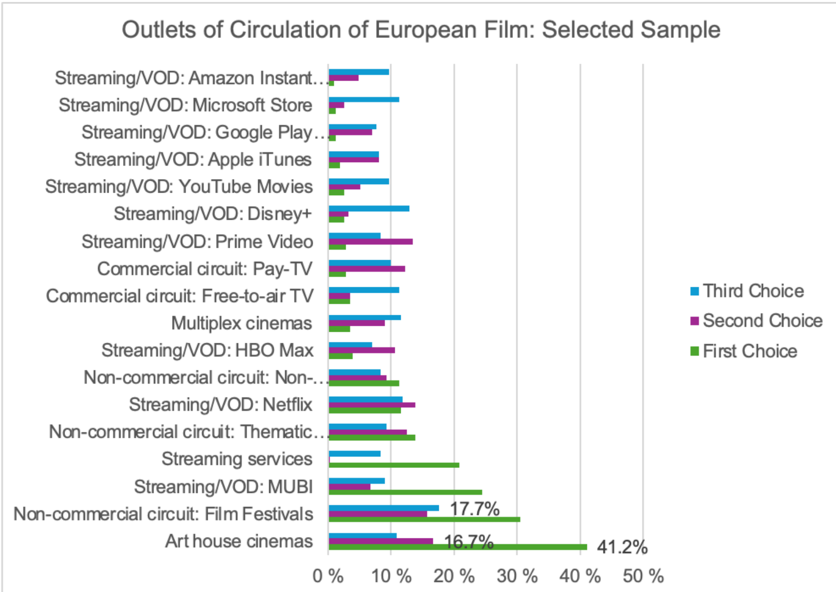


Figure 78 - Outlets of circulation of European film – Selected sample

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

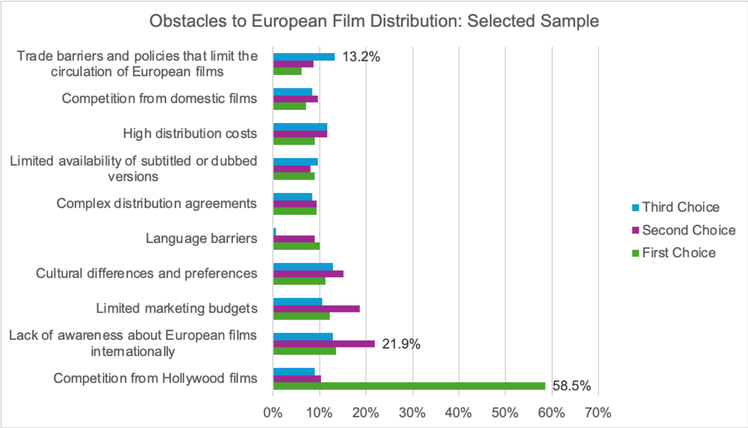


Figure 79 - Main obstacles to European Film Distribution – Selected sample

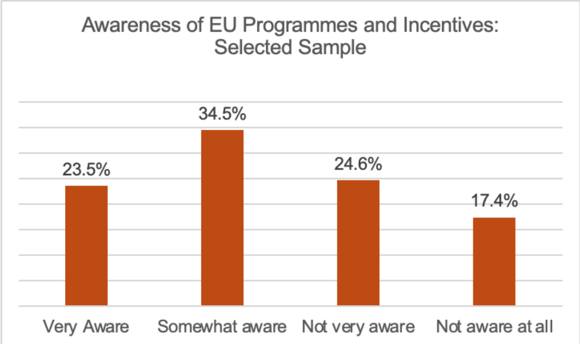


Figure 80 - Awareness of programmes or incentives provided by the EU – Selected sample

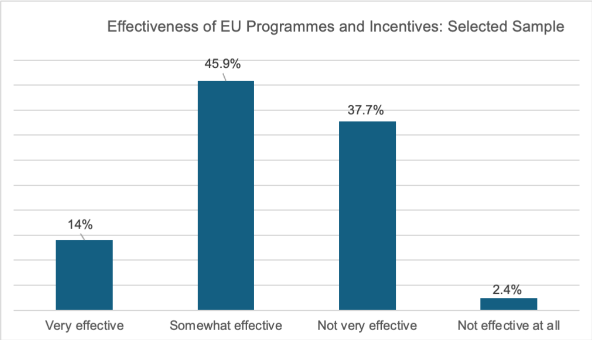


Figure 81 - Effectiveness of programmes and incentives provided by the EU - Selected sample

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Figure 82- Respondents with non-European international partners

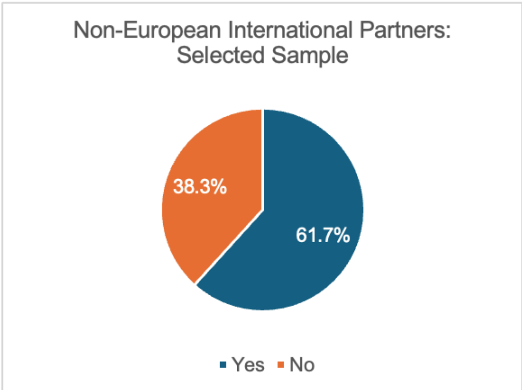


Figure 83 - Respondents with non-European international partners – Selected sample

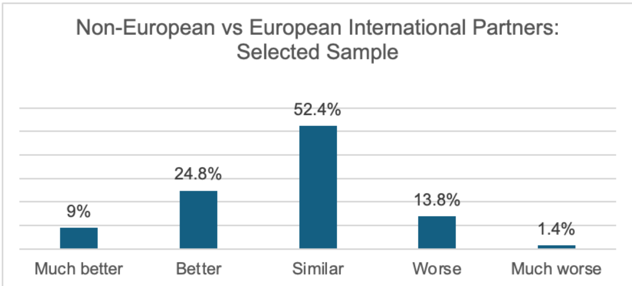


Figure 84 - Comparison of experiences with non-EU partners – Selected sample

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

8.2 Intersectional Analysis

This section provides data to assess to what extent the variables gender, ethnicity and age as well as their intersectionality (Crenshaw, 1989) provide further insights regarding the data. As the tables and figures indicate, with only some exceptions, results are not strong enough to suggest that either the variables under consideration or their intersection influence the findings significantly. It should also be noted that this section only includes tables and graphs from which relevant insights emerge; several other analyses were run but they were deemed irrelevant.

Effects of gender on choosing the word that describes the European Film Industry

Can we predict how respondents define the EFI based on gender? The goal of this analysis was to understand the impact of gender on the likelihood of choosing a specific word to define the EFI. Respondents had to choose a word that defines the EFI among 18 different options: *cinéma d'auteur*, experimental, blockbusters, regional integration, high culture, cultural diversity, non-commercial, international co-productions, freedom of expression, state support, multilingualism, competitive, regional integration, art cinema, uncompetitive, successful, slow cinema, very hard to define, and other.

Binary logistic regression analyses revealed three significant results [Table 19]. Looking at the table it can be observed that female respondents are more likely than male respondents to select the words cinéma d'auteur and competitive to describe the EFI, respectively by 56.6% and 82.5%. However, gender explains just a small part of these variations, that is, the model explains 1.5% of the variance for *cinéma d'auteur*, and 1.9% for competitive. Therefore, this suggests that other factors other than gender are likely to play a larger role in this selection. Nonetheless, the effect of gender on choosing one of these three options is statistically significant. It should also be noted that non-binary respondents were not included in the analysis as they made up only 1.6% of the total sample, making findings related to this group not generalisable.

Word that describes EFI	**Significant Contrast**	***B***	***p-value***	**Exp(B)**	**Significant**
Cinéma d'auteur	Female vs Male	0.488	0.033	1.566	**Yes**
Competitive	Female vs Male	0.602	0.030	1.825	**Yes**

Table 19: Logistic regression results predicting word choice by gender

Note: *B* = unstandardised regression coefficient, Exp(B) = odds ratio. p-value < 0.05 (*).

Effects of gender x ethnicity on choosing the word that describes the European Film Industry

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

If we take an intersectional approach and look at the extent to which the intersection of gender and ethnicity play a role in choosing which word best defines the EFI [Figure 85], we can observe interesting findings. The option international co-production, which is also the most picked one (63% of the entire sample), shows evenly distributed percentages among different groups (male-white 61.2%, female-white 64.6%, male-mixed/multiple 56.4%, female-mixed/multiple 69%, male-asian 58.8%, female-asian 93.3%, male-black/african/caribbean 75%, and female-black/african/carribbean 66.7%) suggesting there is broadly shared agreement in the importance of international co-productions among respondents despite their gender and ethnicity. In the case of the second most picked word, *cinéma d'auteur*, we can observe a stronger presence of female respondents, suggesting this word might resonate more among the female group. In fact, the female-white group has a 64.5% rate, female-mixed/multiple group 76.2%, and female - black/african/caribbean 53.3%, while male respondents have rates between 17.6% and 57.1%. Moreover, the word art cinema scored strong among Asian groups (male-asian 76.5%, and female-asian 80%).

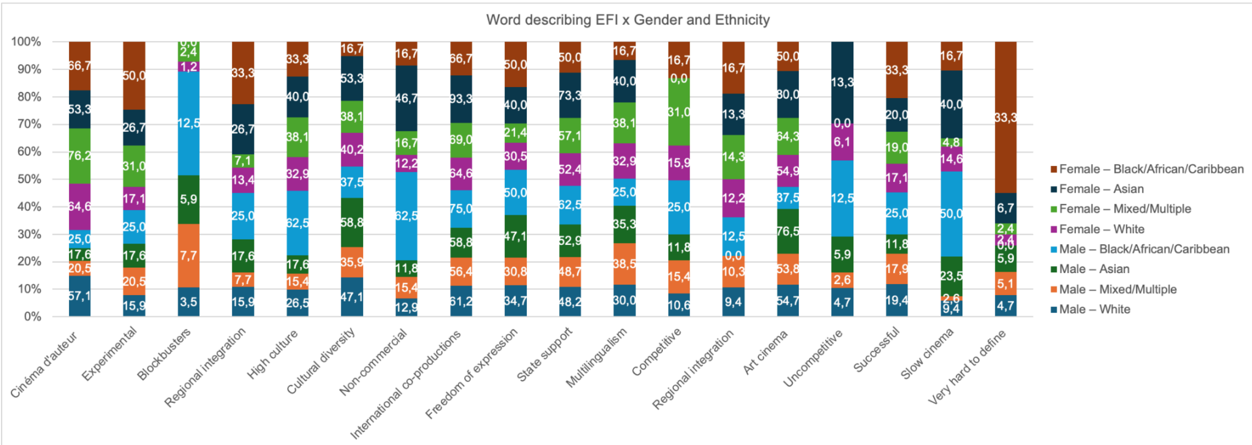


Figure 85 - Best defining word EFI x gender & ethnicity[21]

Effects of gender on choosing EFI main strength

The aim of this analysis was to predict the effects of gender on the likelihood of choosing the strengths of the EFI according to non-European film professionals. Respondents had to choose among several options: cultural diversity, IP arrangements, reaches multiple audiences, skillful film professionals, arthouse cinema, distribution, artistic freedom, international co-productions, awarded film directors and actors/actresses, film festivals in Europe and beyond, public support (state support, policies, EU programmes…), worldwide circulation, and other.

The analysis revealed two significant results for IP arrangements and film festivals in Europe

[21] Non-binary respondents were not included in the graph as they made-up only 1.6% of the total sample and thus findings related to this group are not statistically relevant.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

and beyond [Table 20]. Female respondents are more likely to select IP arrangements than male respondents by 97.8% and to select film festivals in Europe and beyond by 82.8%.

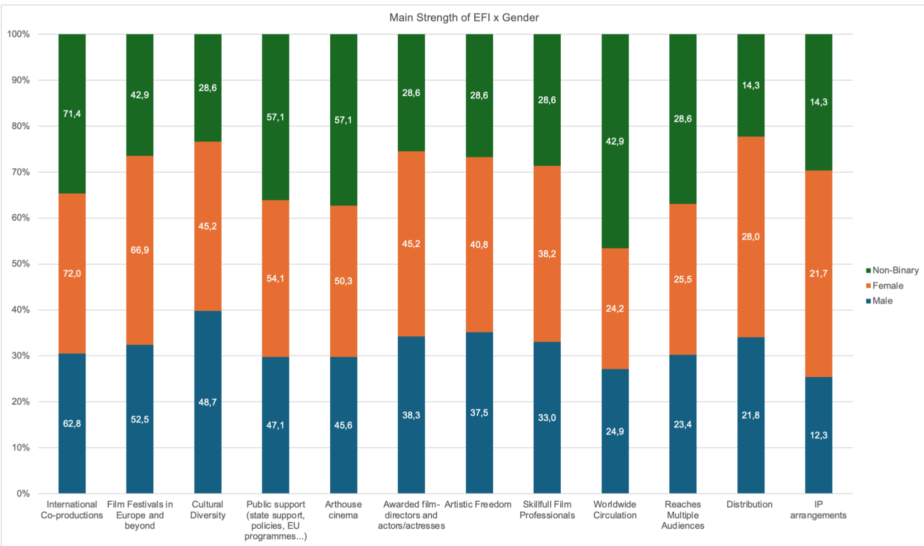
However, as in the case of the best word describing the EFI, the model only explains a small portion of the variance: 2.5% for IP arrangement and 2.8% for film festivals in Europe and beyond. This suggests that other factors besides gender are likely to play a role in choosing these options.

EFI Strength	**Significant Contrast**	***B***	***p-value***	**Exp(B)**	**Significant**
IP arrangements	Female vs Male	0.682	0.012	1.978	**Yes**
Film festivals in Europe and beyond	Female vs Male	0.603	0.004	1.828	**Yes**

Table 20: Logistic regression results predicting EFI strength by gender

Note: *B* = unstandardised regression coefficient, Exp(B) = odds ratio. p-value < 0.05 (*).

When looking at the percentages [Figure 86: we can observe an evenly distributed pattern for the three genders (male, female, and non-binary) evenly represented for each option. However, it is important to note that non-binary respondents only represented 1.6% of the total sample. Therefore, the results related to this group are not generalisable.



REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

Figure 86 - Main strength of EFI by gender

Effects of gender x ethnicity on choosing EFI main strength

If we take an intersectional approach, we can observe that gender and ethnicity seem relevant for the case of international co-productions, festivals in Europe and beyond, public support, and arthouse cinema [Figure 87]. These options also represent the most picked options overall [Figure 60]; see Section 3.7. International co-productions is widely selected across gender/ethnic groups (male-white 60.6%, male-mixed 64.1%, male-Asian 58.1%, male-Black/African/Caribbean 87.5%, female-white 67.1%, female-mixed 78.6%, female-Asian 80%, and female-Black/African/Caribbean 83.3%), suggesting that international co-productions are deemed as an EFI strength by almost every group. Similarly, the options film festivals in Europe and beyond, public support, and arthouse cinema show consistent and high selection rates across these groups. Other options such as reaches multiple audiences, skillful film professionals, distribution, and worldwide circulation seem to be selected more often by respondents from the Black/African/Caribbean group.

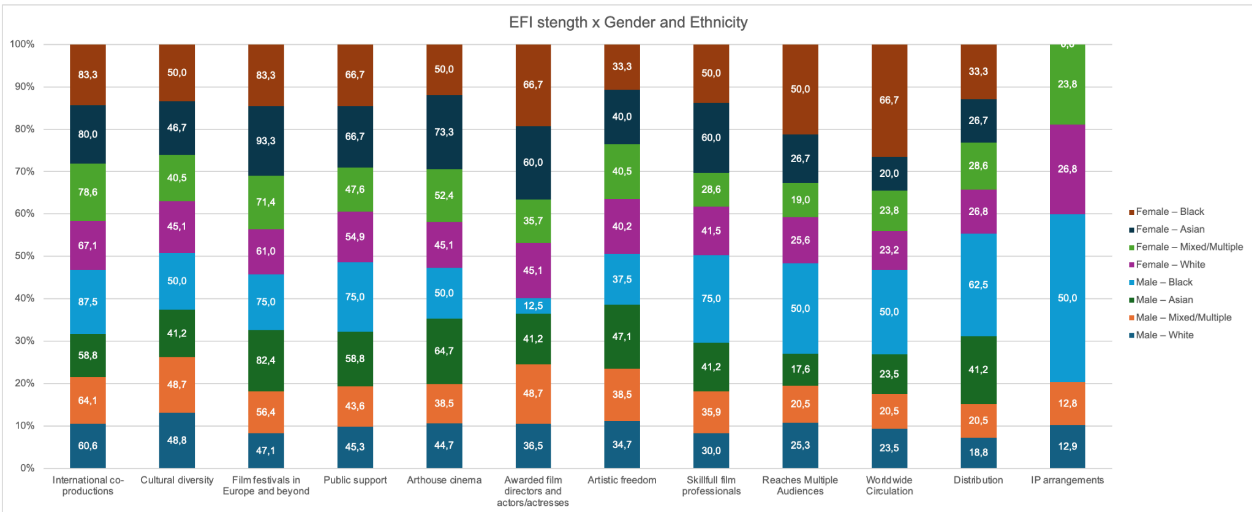


Figure 87 - Strength of EFI by gender and ethnicity

Effects of gender x ethnicity on awareness level of EU programmes and incentives

If we take an intersectional approach to observe the awareness levels of EU programmes and incentives of different groups [Figure 88], it becomes clear that among Black/African/Caribbean respondents, those stating that they are very aware of said programmes are all men (62.5%). Male-Asian respondents tend to state they are somewhat aware (47.1%) of said programmes and only 5.1% state that they are very aware, while groups like male-White, female-Asian, and female-white seem to have a relatively balanced distribution.

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.

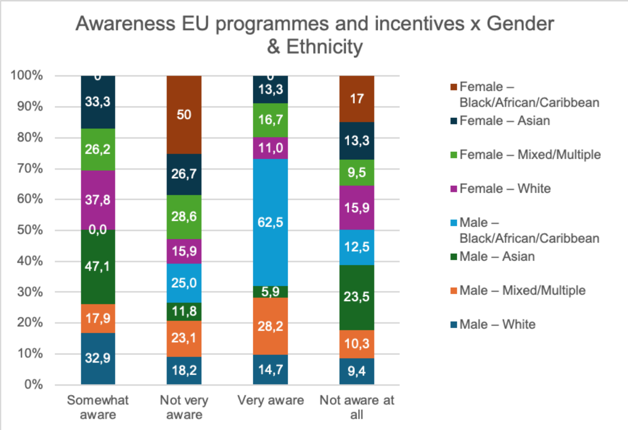


Figure 88 - Awareness of programmes and incentives provided by the EU by gender & ethnicity

Conclusion

Altogether, the logistic regressions and intersectional analysis included in the previous pages present limited findings. The aim of the two logistic regressions was to assess whether one can predict if respondents would choose one option over another based on their gender, both in the case of the best defining word for the EFI and the EFI's strengths. While the analyses revealed statistically significant results – female respondents seem to be more likely than male respondents to choose the word competitive, *cinéma d'auteur*, and the strengths IP arrangements and film festival in Europe and beyond – the relationship between the predictor (gender) and the outcome was weak in both circumstances. Additional research, such as qualitative interviews with the respondents aimed at exploring their understanding of these concepts could provide insightful data to further interpret these results.

Regarding the intersectional analyses, their aim was to understand whether the interaction between the social categories gender and ethnicity could reveal diverse results in respondents' views of the EFI strengths and in their level of awareness of EU programmes and incentives. Among the options provided, there seems to be consensus among different groups on what the main strengths of the EFI are. Moreover, a limited number of options such as reaches multiple audiences, skillful film professionals, distribution, and worldwide circulation seems to be favoured by the Black/African/Caribbean group. However, it should be highlighted that these results may be distorted by the low representation of these groups in the sample, which constitutes only 3.3% of total respondents. The results relating to respondents' level of awareness of EU programmes and initiatives also reveal no striking data, with the exception of the presence of the male-Black/African/Caribbean group in the 'very aware' category. Understanding this finding which would require further investigation.

These results highlight the importance of future research using qualitative methods to better understand the respondents' perception of the EFI and their familiarity with EU programmes.

Citation

Please cite this report as follows: Dâmaso, M., Niutta, A., Vargas Miranda, I., Albornoz, L., García Leiva, Mª Trinidad, Rossato Fernandes, M., Vlassis, A., Behlil, M., Doğu Erdede, R., Akçalı, E. (2025). The Framings and Strategies of Cinema Professionals. Report on International Understandings of the European Film Industry. Developed by the Horizon Europe project REBOOT (Reviving, Boosting, Optimising and Transforming European Film Competitiveness – REBOOT), funded by the European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769. https://doi.org/10.5281/zenodo.16744614

Contact

Website: www.thereboot-project.eu

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

REBOOT Contributors

REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.