EUMEPLAT
European Media Platforms: assessing positive and negative externalities for European culture

Deliverable 3.4

Catalogue of Best Practices and Main Obstacles to Europeanisation

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1 Rationale

Andrea Miconi

The specific goal of this report is to focus on the connection between video platformization and Europeanization, by working with both secondary analyses and first-hand data related to the ten countries represented in the EUMEPLAT consortium. Generally speaking, some topics will probably overlap with those of deliverables D3.1 and D3.2, dedicated to the aggregate evaluation of the main findings from the ten countries; and those of deliverable D3.4, which will provide a cluster analysis of data about movie circulation, collected in both WP1 and WP3. This was somehow inevitable, and we hope it is acceptable as well at this stage – while we will have to reach some reasonable decision for the purposes of scientific dissemination.

The first part of the report [sections 1 and 2] focuses on the big picture, by taking into account two major aspects of the problem: the geo-blocking of content releasing, for what concerns audiovisual *production*; and, when it gets to audiences and *consumption* modalities, the centrality of American and national products.

Section 4 offers a deepening of a specific matter: *piracy*, which is commonly considered a main negative externality of video platformization (and a consequence of digitization at large, at that). As we will see, the relation between VODs and piracy, in Europe, takes on a specific, and perhaps unexpected dimension.

In section 5, we will discuss the implementation of the European regulation of video-on-demand services, with a focus on the so-called Netflix Tax. Effectiveness and consistency of the rules established in different countries will be considered.

The final part [Section 6] looks for best-practices in the circulation and success of European movies and Tv-series – which, so far, are more the *exception* to the rule, than the rule. To what extent these cases can be considered as emblematic of a common European culture, and whether or not they reveal any pattern, will be discussed in this section.

In the table annexed to this introduction, we provide a synopsis of the best practices and main obstacles that we have detected, by means of both data aggregation and literature review. As it was inevitable, in some cases we could not come out with indications and recommendations, that we will try to provide in the final report [namely, in the White Book of Recommendations].

For the time being, we endorsed an empirical approach, by individuating the processes favoring cross-European circulation and exchange, and the obstacles to that. With this respect, we adopted a basic definition of Europeanization, drawing on two dimensions of the semantic map [see deliverable D1.6]: European media contents; and European audiences. In the first case, we took into account European joint-ventures in production and distribution [section 6]; in the second case, we somehow worked at the intersection between the “people-centric” and the “content-centric” aspect; between the “shared behavior of audiences in European national states” [section 2 and 3], and “their exposure to European media content” [section 6].

Synopsis. Best practices and Main Obstacles to Europeanization

Table a. Best practices in European VOD markets

Topic	**Field**	**Short description**	**See Section**
Public Service Media	Public policies	In the case of movie market, PSM seem to favor European contents, judging from their success. As an exceptional case, we can also recall the role of Norwegian PSM in the creation and launch of *SKAM*.	3, 6
Big Five Market	Movie circulation	Despite the dimensions of the market, and despite it being part of the Big Five, Germany shows a good rate of importations from the rest of Europe. Due to linguistic geo-blocking, this also provides Austrian cinema with some opportunities.	2
Portability	Media regulation	Portability of contents, by definition, has improved users' experience in the EU.	5
Legal and illegal consumption	Audience behavior	The diffusion of VOD contents is reducing the use of illegal contents in the EU, unlike in other areas, and with the exception of Lithuania and Latvia. Piracy is still diffused, for instance, in some countries located at the Eastern European borders or in Central Asia (Georgia, Ukraine, Belarus).	4
Small companies	Movie productions	Despite the role of global monopolists in digital market, small companies can find their way, and low-budget productions can thrive	3, 6
Transmedia	Movie production and distribution	Some features typical of digital media – virality, transmedia, spreadbility – are key to the realization of cross-European successes.	6
European contents	Content creation	Some cases of successful works – *SKAM* and *Money Heist*, though the latter has also got global resonance – reveal a	6

		possible interest for typical European contents, such as LGBTQ+ stories and (less significantly) economic crisis and austerity. This is the more relevant in the case of *SKAM*, whose production has been inspired by an in-depth research and consultation with European common people.	
Low-budget movies	Movie production and distribution	According to scientific literature, low-budget or "middle-brow" European movies are more likely to travel across borders. We have found evidence of a series or minor movies, realized in small producing countries, available in VODs in at least twenty national markets in Europe.	6

Table b. Main obstacles to Europeanization

Obstacle	**Field**	**Short description**	**See Section**
Regional and sub-regional co-productions	Video production	Bilateral and multilateral production agreements favor regional, rather than European collaborations.	2
Global or *glocal* co-productions	Video production	Major global companies, by drawing on the *runaway* method, more easily cooperate with single small countries.	2, 5
Geo-blocking	Video distribution	Releasing of VOD contents at the regional level, due to both copyright limitations and language barriers.	2
Geo-blocking	Video distribution	Geo-blocking is sometimes advocated by small countries, and by market operators, to counter-balance the power of major European producers.	2
European Big Five markets	Movie circulation	Cross-European circulation is not only threatened by the American hegemony, as the Big 5 – with the exception of Germany	2, 5

		– hardly import movies form the rest of Europe.	
Tax shelters	Regulation	National tax shelters attract the investments of global majors, and therefore favor the co-productions between US companies and single countries, rather than European co-productions.	5
Netflix Tax	Regulation	The implementation of the Netflix Tax, though foreseen at the EU level, is inconsistent, and based on different parameters in each country.	5
Portability and access	Regulation	The distinction between potability and access, in the EU regulation, allows for market fragmentation; or at least, does not prevent it.	5
Disparities in VOD catalogues	Movies and Tv-shows distribution	Huge disparities are in place among VOD national catalogues, in terms of number of available titles, dates of their releasing and their quality (based on IMBD ranking and festival prizes).	2,3
Availability of EU movies	Movie distribution	In VOD platforms, movies produced in EU countries are less available, on average, than those produced in the USA, in the Rest of the World and – more surprisingly so – than those produced in non-EU European countries.	2
American successes	Movie production, distribution and consumption	The American hegemony is still there in VOD market, as in the theatrical movie market.	2, 3, 5
Public Service Media	Public policies	In the case of TV-shows market, PSM seem to favor national rather than European contents, judging from their success.	3
Movie genre preferences	Movie distribution and consumption	The breakdown of movie preferences by genre, especially in the case of Netflix, reveal a constant pattern in different countries [i.e., the success of crime movies peaks everywhere in the same	3

		period]. This is possibly an indicator of the role of recommendation algorithm in determining what people actually watch.	
Social media preferences	Audience behavior	In the cases of YouTube and TikTok, people mostly follow national accounts. The category of banal nationalism can be called to action, here.	3
Movie festivals	Movie distribution	As to the role of international festivals, there are two differences between theatrical movie and VOD markets. Firstly, VOD availability is less dependent on festival screening than it is traditional distribution. Secondly, festivals often promote specific genres – especially documentaries – therefore supporting a traditional idea of what European cinema is.	6
European contents	Movie creation	If we look for typical features – what we have called *marked* Europeanization – European movies are often dedicated to real stories, as proved by the high recurrence of documentaries, and by the frequent use of real names in the very titles of the works. In this case too, a quite stereotypical representation of Europe is a possible consequence.	6

2 Geo-blocking and its effects on European Markets

Alessandro Galeazzi, Panos Kompatsiaris & Andrea Miconi

2.1 Geo-blocking in the European VOD Market: the big picture

Under the category of *geo-blocking* are included all strategies for the releasing of contents at the national or regional level, which prevent users from accessing a given set of movies or Tv-shows, based on their geographical position. With this respect, the two most common types of blocking are of economic and legal nature – respectively due to "contractual agreements between right holders and" VOD providers, and to the "territoriality of copyright" itself [Zahrádka & Schmücker 2022: 4]. Given the empirical purposes of this section, we will not provide an in-depth investigation on scientific literature related to geo-blocking[1], while accepting a basic framework. Based on Ramon Lobato's work, we can state the following definition:

> Most major video platforms use geoblocking to filter international audiences. Geoblocking allows these platforms to customise their offerings according to territory, language, and advertising markets, and provides an automated mechanism to enforce territorial licensing arrangements with rights-holders. In this sense it is a form of access control enacted at the level of content and platform regulation, rather than network infrastructure. But geoblocking has more subtle effects as well. Like search localisation and algorithmic recommendation, geoblocking is a 'soft' form of cultural regulation. Its widespread adoption is changing the nature of the open internet by locating users within national cyberspaces and customising content based on certain ideas about territorial markets [Lobato 2016: 10].

Even though geo-blocking is a widely reported phenomenon, what is more, VOD offer is impacted in a very particular way. According to available estimates, cross-border availability of European contents accounts for 80% of the catalogues in the case of music download and 93% in the case of e-books, while VOD libraries overlap each other only by 30-50% of their titles [Broocks, Duch Brown, Gomez-Herrera, & Martins 2020: 12]. That is why, in the run for the digital single market and in the framework of the DSM package [Hamuľák, Kiss, Gábriš, & Kocharyan 2021: 176], the European Union promoted the Regulation 2018/302 [European Parliament and the Council of European Union 2018], aiming at eliminating "unjustified geo-blocking and other forms of discrimination based, directly or indirectly, on the customers' nationality, place or residence or place of establishing" [Article 1]. By amending the 2006 European Council Regulation and the Directives 2017/2394 and 2009/22, the European Parliament and the Council of the EU therefore assert that

[1] For an assessment of scientific literature, see Broocks, Duch Brown, Gomez-Herrera, & Martins 2020.

> a trader shall not, through the use of technological measures or otherwise, block or limit a customer's access to the trader's online interface for reasons related to the customer's nationality, place of residence or place of establishment [Article 3].

To date, this notwithstanding, the effects of such intervention are far from satisfying. Even tough Netflix made the commitment of ending the geo-blocking, no appreciable changes could be observed across the years: as if the overcoming of geographical restrictions was more a discourse strategy than a real industrial policy, as it has been observed [Elkins 2021: 194-198]. As of February 2022, the European Parliament provided an assessment of the 2018 measures: though "the adoption and implementation of the Geo-blocking Regulation has been beneficial for consumers in facilitating cross-border purchases", in short, "certain obstacles persist, particularly in the provision of audiovisual service and content" [European Parliament 2022]. These recent improvements must not be overlooked, when one considers that in 2015 "cross-border availability of film titles" was still limited at 16.8% of the total catalogue [Alaveras, Gomez-Herrera, & Martens 2015]. More broadly speaking, though, despite such betterments as the simplification of the e-shopping transactions and the so-called portability, the VOD market is still affected by linguistic and territorial fragmentation. It has been argued, in this respect, that regulations fall short due to the lack of an agreed-upon legal definition of geo-blocking: so that we stuck to the common-sense understanding of it, meant to be the impossibility for users to access some contents, due to geo-localized copyright lock [Mazur 2019: 99-100].

A first obstacle to Europeanization, here, can be detected at the very institutional level of EU policies. In June 2017, the European Parliament and the Council of the European Union had released the regulation 1128, with the aim of favoring the "cross-border portability of online content services in the internal markets" [European Parliament and the Council of EU 2017]. For this purpose, "providers of online contents" are explicitly forbidden to "subject their subscribers to any additional charges for the provision of cross-border portability of online content services in accordance with this Regulation" [Article 19]. On the other hand, though, the directive clearly distinguishes between the *portability* of contents and the *access* to those contents:

> The concept of cross-border portability of online content services should be distinguished from that of cross-border access by consumers to online content services provided in a Member State other than their Member State of residence, which is not covered by this Regulation [Article 12].

While the portability has notably improved the user's experience, consequently, at the *upstream* level of the supply chain the geo-blocking is still used as a customization tool, likely to reinforce national and regional markets rather than favoring the rise of a common, pan-European culture. The data synthetized in table 1 is not surprising, in this perspective, as it shows how the Big Five account for 74% of the European movies made available in VOD platforms.

Table 1. European films released in European VOD platforms by country, May 2021

Country	Number of films	Share
France	3,629	22%
UK	1,967	12%
Germany	1,898	11%
Italy	1,627	10%
Spain	1,558	9%
Denmark	593	4%
Sweden	601	4%
Austria	421	3%
Czech Republic	507	3%
Netherlands	552	3%
Other 28 European countries	3,160	19%

[Source: Elaboration on Grece 2021a, 2021b]

A confirmation is provided by the following statistics, according to which the quota of imported non-national movies, on the total of European movies, drops down in the strongest production countries: 53.2% in France, 56.4% in the United Kingdom, 64.9% in Italy, 66.6% in Germany, and 77.9% in Spain. In all the other nations, the percentage ranges from 81.3 to 99.4% (with the only exception of the Dutch 78%), in a way that basically confirms, in the VOD market, the very same proportions of the theatrical movie market.

Table 2. Non-national European movies available on VOD platforms by country [May 2021]

Country	National movies	Non-national European movies	% of non-national on European movies
Austria	1,003	14,983	93.7
Belgium	547	9,470	94.5
Czech Republic	1,242	5,423	81.3
Denmark	1,357	7,343	84.4
Estonia	27	4,849	99.4
Finland	363	7,023	95
Germany	5,543	11,062	66.6
Hungary	112	4,414	97.5
Spain	2,155	7,609	77.9
France	6,995	7,976	53.2
Ireland	285	10,601	97.3
Italy	3,282	6,254	64.9
Lithuania	68	5,051	98.6
Latvia	45	4,903	99
Netherlands	715	5,809	78

Poland	442	5,790	92.9
Portugal	277	5,272	95
Romania	198	3,100	93.9
Sweden	1,112	7,216	86.6
Slovakia	62	2,472	97.5
UK	7,345	9,532	56.4
Average	1,570	6,958	81.5

[Source: Elaboration on Grece 2021a, 2021b]

A more direct indication of the role of geo-blocking can be inferred from the following two tables. On average, movies produced in the European Union are distributed in VOD platforms in 3.9 countries, compared to 5.4 countries for US movies, 4.9 for the rest of the world, and – more surprisingly – to 4.8 countries for non-EU European productions. In a similar vein, the VOD distribution of TV-shows produced in the European Union covers on average 2.7 countries, compared to 6.9 countries for those coming from the US and from the rest of the world, and 3.4 for other European releases. As to video platformization and its externalities, the only encouraging aspect for the European common market is that the data reveals a slight improvement, with respect to the Tv-on-demand market. As a matter of fact, though, movies and Tv-shows produced within the European Union have *the poorest distribution* in Europe, at least in the case of video-on-demand platforms.

Table 3. Circulation of movies by production country [number of countries covered on average]

	EU27	**Other European countries**	**USA**	**Other regions**
TVOD	2.7	5.2	7.3	4.9
SVOD	3.9	4.8	5.4	4.9

[Source: Grece & Jiménez Pumares 2021]

Table 4. Circulation of Tv-shows by production country [number of countries covered on average]

	EU27	**Other European countries**	**USA**	**Other regions**
TVOD	1.5	1.9	2.6	1.5
SVOD	2.7	3.4	6.9	6.9

[Source: Grece & Jiménez Pumares 2021]

An even clearer representation of how geo-blocking works is available in table 5, with respect to eleven VOD markets: nine belonging to the European Union (Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Netherlands, Sweden), the UK, and the US. The regional dimension of movie market is quite evident, here: with German movies widely distributed in Austria; the French and the Dutch in Belgium; the Swedish in Denmark and Finland; and to a lower degree, the Belgian in Netherlands, for instance, or the Austrian in Germany.

Table 5. Availability of movies on Netflix by country [June 2013-April 2015]

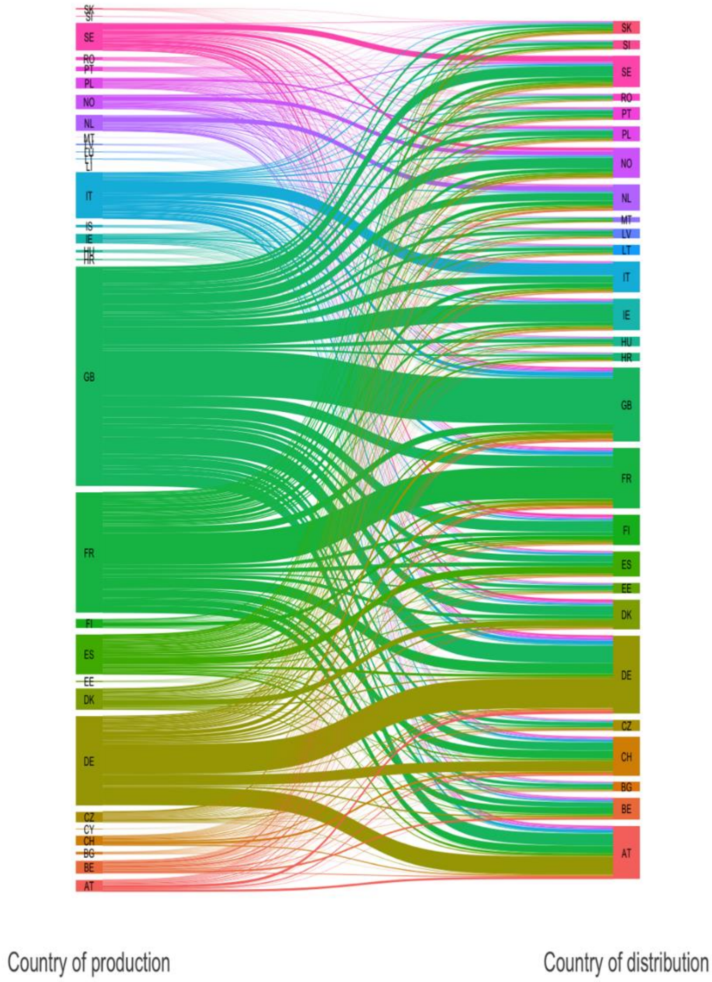
Origin/Destination	AT	BE	DE	DK	FI	FR	IE	NL	SE	UK	US
Austria	2	6	8	2	2	4	5	9	3	4	12
Belgium	3	35	3	3	3	7	4	9	3	4	19
Denmark	6	7	6	33	22	4	15	5	23	15	25
France	61	113	66	56	57	171	59	59	58	58	189
Germany	93	25	102	29	28	11	31	24	29	31	95
Italy	12	13	15	13	12	14	16	10	10	14	15
Japan	23	15	24	12	10	24	37	11	11	35	116
Netherlands	4	22	1	1	1	4	4	53	1	4	24
Portugal	0	1	0	0	0	0	0	0	2	3	6
Russia	0	3	0	1	1	3	0	1	2	3	6
Spain	14	16	13	15	15	9	14	13	15	15	49
Sweden	6	10	7	21	21	4	6	10	22	6	18
Turkey	1	0	2	1	1	1	1	0	1	0	4
USA	854	1,080	873	1,423	1,388	820	1,748	1,224	1,438	1,745	4,295

[Source: Elaboration on Batikas, Gomez-Herrera & Martens 2015]

We also have to notice how the figures reflect the huge disparities in terms of catalogue sizes, in the different countries. On a sample of 138 TVOD platforms, for instance, the size varies from 27 to 20,314 movies made available; in a sample of 420 SVOD catalogues, the size ranges from 12 to 27,262 titles, with distribution apparently following the power-law in both cases [see Grece & Jiménez Pumares 2021].

In order to better measure the impact of geo-blocking on the European media landscape, we repeated these analyses on a bigger sample, by working on the full archive of the Lumière Video-on-Demand database: more precisely, 90,510 movies, produced in 31 countries in the region. The considered countries are: Austria, Belgium, Bulgaria, Croatia, Czech Republic, Cyprus, Denmark, Estonia, France, Finland, Germany, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, and UK.

Chart 1. Distribution of European movies in VOD platforms, by nationality



The Sankey plot in Chart 1 provides a meaningful picture of the video-on-demand market. The main evidence is the role played by French and British cinema, with the two countries taking the center of the stage, controlling a huge part of the exports, and importing a relatively low number of titles from the rest of Europe. This is actually a familiar image, and similar to that already observed by Franco Moretti:

> As you can see, most European countries import from abroad a large portion of their novels (40, 50, 60, 80 percent, if not more), whereas France and Britain form a group to themselves, that imports very little from the rest of the European continent: a fact which has a very simple explanation: these two countries *produce* a lot of novels (and good novels, too), so they don't need to buy them abroad [Moretti 1997: 151].

Even though Moretti is talking about the golden age of the novel, in the XIX century, his words perfectly describe our chart, thus reminding us of the stability of the long duration geo-cultural patterns. The dissimilarity between the two hegemonic nations, Moretti argues, is in what would happen *after* the rise of the novel: with France increasing and even doubling its imports from other countries, and England remaining impermeable to literary transfers [Ivi: 151-152]. What is relevant, this is also a clear difference between the XIX century book market and contemporary movie market, as the United Kingdom *does* import many movies from Hollywood: and the reason behind the difference, as simple as that, is the ascent of the United States as the core of the Western world-system. What history tells us, though, is that the powerful part played the US is *in continuity* with the very rules of the modern world-system: so that the obstacle to cultural Europeanization is not only the hegemony of Hollywood – but also the *internal* hierarchization of European markets. This is the more relevant in light of Thomas Elsaesser's theory, according to which the very idea of European cinema has been traditionally built in opposition to Hollywood, "seen as the significant other" [2005: 41]. This way "of asserting its identity", Elsaesser argues, has eventually proved to be obsolete, as Europe is becoming itself a "continent of immigrants" and diversity, somehow "like the United States one century ago" [2019: 1-2]: and therefore, a new *positive* legitimation is needed, to state what European cinema is, beyond the internal divisions and the consequent economic weakness [Ivi: 84-85 and 164-167].

To a lower degree, German productions are quite influential, though they are mainly distributed in Switzerland and Austria, due to linguistic barrier and the following geo-blocking. One may notice that Germany is also a very vital market, with significant import flows from both France and the UK. With respect to the abundant literature dedicated to the so-called Big Five, inversely, Italy and Spain appear to have a marginal role, and this is perhaps the most surprising finding at all, as it would be inconsistent with some of the data we collected by means of secondary analysis [see table 1]. The limited presence of Italian works, on the other hand, would confirm the results of previous research, based on VOD catalogues of both movies [Barra & Perrotta 2020: 105] and Tv-shows [Baschiera & Re 2019: 12].

By definition, the world-system requires peripheral and semi-peripheral regions: and so does the world-system of cultural industries. The main indication of the chart, in fact, is that a vast majority of countries imports movies from the *core* of the audiovisual production. More technically, the data confirms the existence of an intermediate level of medium-sized producers – in particular Belgium, Poland, Sweden, and Denmark – as already observed by Szczepanik, Zahrádka and Macek [2020]. On the other hand, Central and Eastern European productions are increasingly marginalized, as proved by a study on the distribution of Romanian and Czech movies in European VODs. As a result, Central-Eastern Europe is put in fringe position, or *peripheralized*, in both quantitative and qualitative terms: due not only to the absolute amount of the available movies, but also to their proportion with the number of nationally produced titles, showing a "clear overrepresentation of French films in the catalogue and a clear underrepresentation of both Czech and Romanian" [Parvolesku & Hanzlík 2021: 11]. This disparity is also reflected in the composition of the catalogues, with the offer of French movies covering a variety of genres – including the most popular, the comedy – and Eastern and Central European offer striking for the "limited diversity of its output" [Ivi: 18-19]. In the end, we have three spaces in the video-on-demand market, and once again, core, periphery and semi-periphery: this would not be an original finding, after all. The fact is that the actors which "make noise" are not necessarily the most relevant, Braudel writes in *La Méditerranée*, as history is largely made of "silence" and repetition, and by the constraints of the structure [1949: 738].

As one can see, finally, international distribution of movies produced by small countries is still the exception to the rule, in the European market, in the age of video-on-demand and video sharing platforms. We will take into exam these exceptions in paragraph 3 of this section.

2.2 The American Successes

The US financial control over VOD services inevitably results in a wide availability of American contents [see Batikas, Gomez-Herrera & Martens 2015], which, by definition, poses a main threat to cultural Europeanization. According to the data collected by Grece & Jiménez Pumares [2021], American movies are the most diffused in Europe, though the proportion is higher in Tv-on-demand catalogues than it is in VOD services.

Table 6. Share of European movies in TVOD and SVOD services

	EU27	Other European countries	USA	Other regions
TVOD	156,006 [22%]	74,921 [10%]	415,095 [57%]	78,569 [11%]
SVOD	116,327 [24%]	53,061 [11%]	218,968 [44%]	105,060 [21%]
Total	264,299 [23%]	112,542 [10%]	614,377 [52%]	171,384 [15%]

[Source: Grece & Jiménez Pumares 2021]

Table 7. Availability index of VOD platforms movies

Number of countries in which the movie is available	All movies		EU movies		USA movies		Other countries	
	Total	%	%	%	Total	%	Total	%
1	11,351	51.9	6,319	60.3	3,096	40,5	1,936	51.7
2	5,289	24.2	2,345	22.4	1,936	25.3	1,008	26.9
3	2,316	10.6	870	8.3	1,040	13.6	406	10.8
4	1,366	6.2	477	4.6	678	8.9	211	5.6
5	750	3.4	251	2.4	398	5.2	101	2.7
6	473	2.2	129	1.2	291	3.8	53	1.4
7	245	1.1	61	0.6	163	2.1	21	0.6
8	64	0.3	20	0.2	35	0.5	9	0.2
9	18	0.1	6	0.1	9	0.1	3	0.1
10	2	0.0	2	0.0	0	0.0	0	0.0

[Source: Alaveras, Gomez-Herrera & Martens 2018]

Even though granular data always unravel a more nuanced pattern, table 7 substantially confirms the same tendency. European movies are more easily distributed in one country: 60% of the total, compared to the 40% of American titles. Conversely, American movies are more frequently distributed in two countries (25.3%, compared to 22.4%), and significantly more in three, four, five or six countries. It is rather interesting that a properly global distribution – in eight or more markets – is actually *occasional* for Hollywood movies, as it is for the European. Well beyond the much talked-about level of the blockbusters – which, by definition, are *rare* -

it seems that the break threshold is set at a different level: and what is decisive and crucial, in the majority of cases, is whether a movie is distributed in *one* country, or a in *a few* countries.

In order to cope with this problem, let us focus on the movies produced or co-produced in the United States, and first released in European video platforms during the year 2021. Needless to say, the impression in that geo-blocking rules *do not* apply to the most powerful country, as schematized in table 8.

Table 8. American movies available in European VOD services, 2021

	Title	Producing countries	Countries of service [number]	Notes
1.	14 Peaks: Nothing is Impossible	GB, USA	31	--
2.	512 Hours	GB, USA, IT	2	Available in GB and IE
3.	9/11: Inside the President's War Room	USA, GB	25	--
4.	A Castle for Christmas	GB, USA	31	--
5.	A Feature Film About Life	LT, USA	1	Only available in GB
6.	A Fine Pavement	USA, SI	1	Only available in GB
7.	Aleph	USA, HR, QA	1	Only available in PL
8.	Alien: Battlefield Earth	GB, USA	5	--
9.	A Little Italian Vacation	USA, IT, HN	23	--
10.	Armageddon Tales	USA, DE	6	--
11.	Army of Thieves	DE, USA	31	--
12.	Ave Marie	USA, FR, KZ, BY	3	Available in GB, IE, NL
13.	Being James Bond	GB, USA	3	--
14.	Benediction	GB, USA	4	Available in GB, IE, NL, ES
15.	Blonde. Purple	USA, GB	6	--
16.	Blood Red Sky	DE, USA	31	--
17.	Blush	USA, ES	25	--
18.	Breaking News in Yuba County	GB, USA	19	--
19.	Breathe	USA, GB	1	Only available in ES
20.	Caged	USA, GB	10	--
21.	Camping at the End of the World	SE, USA	1	Only available in SE
22.	Chaos Walking	USA, CA, HK, LU	23	--
23.	Charli CXC: Alone Together	USA, GB	9	--

24.	Cinderella	USA, GB	31	--
25.	Coda	USA, FR, CA	25	--
26.	Conductor	FI, USA	5	Available in GB, IE, DK, NO, SE
27.	Convergence: Courage in a Crisis	GB, USA	31	--
28.	Creation Stories	GB, USA	17	--
29.	Cyrano	GB, CA, USA	28	--
30.	Dashcam	GB, USA	3	Available in GB, IE, NL
31.	Dawid i Elfy	PL, USA	31	--
32.	Death to 2021	USA, GB	31	--
33.	Distamcia de rescate	PE, CL, ES, US, AR	31	--
34.	Eat Your Catfish	TR, USA, ES	1	Only available in TR
35.	Edge of the World	USA, GB, CN, MY	10	--
36.	Eggs	PL, USA	11	--
37.	Eight for Silver	GB, FR, USA	1	Only available in NL
38.	El Planeta	USA, ES	12	--
39.	Encounter	GB, USA	31	--
40.	End of the Line: The Women of Standing Rock	USA, FI	1	Only available in FI
41.	Escaping Eritrea	FR, GB, USA	1	Only available in SE
42.	É stata la mano di Dio	ITA, USA	31	--
43.	Evan Wood	USA, GB, ES	9	--
44.	Everybody’s Talking About Jamie	GB, USA	30	--
45.	Farrucas	USA, ES	1	Only available in ES
46.	Father of Flies	GB, USA	3	Available in GB, IE, NL
47.	Finch	GB, USA	25	--
48.	Flag Day	USA, GB, CA	24	--
49.	Flugt	DK, SE, NO, FR, USA, ES, IT, GB	13	--
50.	Freakscene: The Story of Dinosaur Jr.	DE, USA	11	--
51.	Friends: The Reunion	USA, GB	20	--
52.	Giddy Stratospheres	GB, USA	6	--

53.	Great White	AU, USA, GB	19	--
54.	Gunpowder Milkshake	FR, DE, USA	26	--
55.	Hilda and the Mountain King	GB, USA, CA	30	--
56.	Hillsong Church: God Goes Viral	GB, USA, AU	18	--
57.	Hitman's Wife's Bodyguard	USA, GB	25	--
58.	Holy Emy	GB, FR, USA	26	--
59.	House of Gucci	USA, CA, GB	29	--
60.	Impact	US, BE	18	--
61.	Journey to Royal: A WWII Rescue Mission	USA, GB	16	--
62.	Joy Womack: The White Swan	RU, GB, USA	2	--
63.	Just Noise	MT, CA, USA	4	--
64.	King Otto	GR, USA, GB	14	--
65.	La casa del caracol	USA, ES, MX, PE	9	--
66.	La colline où rugissent les lionnes	FR, XK, USA	6	--
67.	Lady Boss: The Jackie Collins Story	GB, USA	7	--
68.	Lady Sapiens, à la recherche des femmes de la Préhistoire	BE, CA, FR, JP, USA	2	--
69.	Last Film Show	IN, FRA, USA	5	--
70.	Left Behind	RU, UA, USA	4	--
71.	Locked Down	GB, USA	15	--
72.	Ma Belle, My Beauty	USA, FR	7	--
73.	Mau	AT, USA	2	--
74.	Miraculous World: Shanghai, la légende de Ladydragon	FR, USA	28	--
75.	Mix Up in the Mediterranean	USA, CA, MT	2	--
76.	Munich: Edge of War	GB, USA	31	--

77.	Murina	HR, BR, USA, SI	9	--
78.	My Little Pony: A New Generation	USA, IE, CA	31	--
79.	Never Back Down: Revolt	USA, GB	30	--
80.	Nightride	GB, FR, USA	9	--
81.	Night Teeth	GB, USA	31	--
82.	Noche de fuego	MX, DE, BR, AR, CH, USA	26	--
83.	No Time to Die	GB, USA	28	--
84.	One Shot	GB, USA	18	--
85.	Operation Mincemeat	GB, USA	21	--
86.	Our Ark	NL, USA	1	Only available in TR
87.	Outside the Wire	HU, USA	31	--
88.	Oxygène	FR, USA	31	--
89.	Passing	USA, GB, CA	31	--
90.	Persona	USA, GB	17	--
91.	Peter Rabbit 2: The Runaway	AU, USA, IN, GB, CA	28	--
92.	Pig	USA, GB	16	--
93.	President	US, DK, NO	5	--
94.	Pure Grit	IE, US	2	Available in GB, IE
95.	Robin Robin	GB, USA	31	--
96.	Ron's Gone Wrong	USA, GB	29	--
97.	Secret Magic Control Agency	RU, USA	31	--
98.	Səpələnmiş Ölümlər Arasında	MX, USA, AZ	26	--
99.	Son	IE, USA, GB	15	--
100.	The Gardener	GB, USA	7	--
101.	The Green Knight	USA, CA, IE	21	--
102.	The King's Man	USA, GB	31	--
103.	The Kissing Booth 3	GB, USA	31	--
104.	The Last Duel	GB, USA	31	--
105.	The Last Letter from Your Lover	GB, FR, USA	31	--
106.	The Lost Daughter	GR, GB, IT, USA	26	--
107.	The Loud House	US, GB, ES, MX	31	--

108.	The Male Gaze: Celluloid Dreams	US, BR, GB, GR, FR	3	Available in AT, DE, GB
109.	The Mauritanian	GB, USA	22	--
110.	The Poltergeist Diaries	HU, USA, GB, NO	3	Available in AT, DE, GB
111.	The Protégé	USA, GB	24	--
112.	The Rescue	USA, GB	31	--
113.	The Sea Ahead	LB, BE, FR, USA, QA	3	--
114.	The Smartest Kids in the World	USA, BE, FI, NL, KR, CH	1	Only available in TR
115.	The Sparks Brothers	GB, USA	26	--
116.	The Survivor	CA, HU, USA	14	--
117.	The Unforgivable	GB, DE, USA	31	--
118.	The War Below	GB, USA	12	--
119	The Wimbledon Kidnapping	USA, GB	2	Available in GB, IE
120.	The Wonderful: Stories from the Space Station	USA, GB	26	--
121	The Yellow Wallpaper	USA, IE	4	--
122.	Tom & Jerry	USA, GB, FR, DE	28	--
123.	To Olivia	GB, USA	5	--
124.	Twist	GB, USA	17	--
125.	Upon Her Lips: Heartbeats	GB, FR, USA, IL, SE	1	Only available in GB
126.	Voyagers	USA, CZ, RO, GB	21	--
127.	We Are Living Things	IT, CN, USA	1	Only available in GB
128.	When We Were Bullies	DE, USA	8	--
129.	While We Sleep	USA, UA	5	--
130.	Why?	GB, USA	1	Only available in GB
131.	With This Breath I Fly	USA, GB	26	--
132.	Women	USA, IS, GB	5	--
133.	Wrath of Man	USA, GB	23	--
134.	Wrong Turn	USA, DE	19	--
135.	Zack Snyder's Justice League	USA, GB	24	--

136.	Zeroes and Ones	DE, USA, GB, IT	15	--
137.	Zone 414	USA, GB	23	--

[Source: Lumière VOD Database]

In terms of geo-cultural strategies, the American hegemony apparently reveals a three-level pattern: the *global*; the *regional*; and, less significantly, the *local*.

The global level is that of the main productions, somehow expected to hit the box-office: in particular, 28 movies are made simultaneously available in no less than 30 countries. Other 14 movies are present in 20 or more countries, and eight of them in 15-20 European markets, with a total of 50 properly cross-European titles. The most common formula, here, is the USA-UK cooperation, which accounts for 52 out of the 137 movies overall; and for 15 of the 28 above-cited, large-scale releases. Once again, we can observe here the ambivalent status of British cinema, which on the one hand participates in the hegemonic role of English-based productions; while, in the other way, revealing its subordination to the power of Hollywood companies [Wayne 2006].

The regional pattern is premised, as is often the case, on the linguistic fragmentation of the continent, and it brings us the closest to the classical geo-blocking strategies. In this cluster, we can group the movies only available in the United Kingdom (*We Are Living Things*; *Why?*; *Upon Her Lips: Heartbeats*; *A Feature Film About Life*; *A Fine Pavement*); or in UK and Ireland, as in the case of *Pure Grit*; *The Wimbledon Kidnapping*; and *512 Hours*. In some cases, movies are also distributed in other countries, at the condition that English is largely spoken: for instance, *Conductor* (available in UK, Ireland, Denmark, Norway, and Sweden); or *Dashcam* and *Father of Flies* (both present in UK, Ireland, and Netherlands).

At the local level, what is at stake is probably the exploitation of national markets by means of *super*-national arrangements: as it was originally established with the runaway productions, the method invented by the Hollywood majors to put under control the other cultural industries, by taking advantage of the geographical setting and, at the same time, pre-selling the final product to on-site distribution companies [Rosenbaum 2000: 41; Scott 2005: 49; Elmer & Gasher 2015: 15]. In this perspective we can interpret the launch of *Farrucas*, which is an American-Spanish co-production only available in Spain; *End of the Line: The Women of Standing*, a Finnish-American venture released in Finland; *Camping at the End of the World*, a Swedish-American one, only present in Sweden; whilst *Eat Your Catfish*, only distributed in Turkey, results from an industrial cooperation among Turkey, USA, and Spain[2].

All in all, the American role in European video markets seems to be unquestionable, at least if we analyze the catalogues of available movies. The same indication can be inferred, for instance, in a comparative analysis of Netflix libraries in eleven countries, whose results are

[2] For the co-productions as a “glocal” strategy and as a response to the quota system, see Section 5 of this deliverable.

synthetized in the table below [Batikas, Gomez-Herrera, & Martens 2021: 15]. With no relevant differences among nations, the quota of American movies varies from 60 to 69% of the overall catalogue – with France standing out, once more, as the *less colonized* county, arguably due to its traditional protectionist policies.

Table 9. American movies available in VOD services in eleven countries

Country	US movies	Total movies*	Percentage of US movies
Austria	854	1391	61.39
Belgium	1080	1652	65.37
Denmark	1423	2067	68.84
France	820	1353	60.60
Finland	1388	2015	68.83
Germany	873	1447	60.33
Ireland	1748	2728	64.07
Luxembourg	981	1451	67.60
Netherlands	1224	1793	68.26
Sweden	1438	2071	69.43
UK	1745	2620	66.60
USA	4295	6636	64.72

(*) Movies "of uncertain origin" are not included

[Source: Batikas, Gomez-Herrera, & Martens 2021]

Whether or not the mere availability of contents is a sufficient condition, though, is still to be understood; and in the last years, it has become a common interrogative among scholars and policy-makers interested in cross-European exchanges[3]. One may wonder, in this respect, if the same can be told about American products – is their mere availability *enough*, or is their success due to some additional or alternative reasons?

In this case too, we opted for an empirical approach, by investigating the success of the most widely released movies in European VOD services. The table below lists the movies available in at least 30 European or border countries, and first released in 2021, for a total of 28 titles; and their success based on the top-watched ranking in the period from November 1, 2021, to February 28, 2022, according to the EUMEPLAT WP3 national reports.

[3] Think, for instance, at the European Audiovisual Observatory conference, *Circulation of European films: Is availability enough ?*, which took place in Cannes in May 2022.

Table 10. Success of the movies first released in 2021 in 30+ countries

Title	BE	BG	CZ	DE	ES	GR	IT	PT	SE	TR
14 Peaks: Nothing is Impossible	--	x	x	x	--	--	--	--	--	--
A Castle for Christmas	--	x	x	x	x	--	--	x	--	x
Army of Thieves	--	x	x	x	x	--	--	x	--	x
Blood Red Sky	--	--	--	--	--	--	--	--	--	--
Cinderella	--	--	x	--	--	--	--	--	--	--
Dawid i Elfy [David and the Elves]	--	--	--	--	--	--	--	--	--	--
Death to 2021	--	x	--	--	--	--	--	--	--	--
Distancia de rescate [Fever Dream]	--	--	--	--	--	--	--	--	--	--
Encounter	--	--	--	--	--	--	--	--	--	--
É stata la mano di Dio [It Was the Hand of God]	--	--	--	--	--	x	--	x	--	--
Everybody's Talking About Jamie	--	--	--	--	--	--	--	--	--	--
Hilda and the Mountain King	--	--	--	--	--	--	--	--	--	--
The King's Man	--	--	--	--	x	--	--	x	--	--
The Kissing Booth 3	--	--	--	--	--	--	--	--	--	--
The Last Duel	x	--	--	--	x	x	--	x	--	--
The Last Letter from Your Lover	--	--	--	--	--	--	--	--	--	--
The Loud House	--	--	--	--	--	--	--	--	--	--
Munich: Edge of War	x	--	--	x	x	x	--	x	--	x
My Little Pony: A New Generation	--	--	--	--	--	--	--	--	--	--
Never Back Down: Revolt	--	--	--	--	--	--	--	--	--	--
Night Teeth	--	--	--	--	x	--	--	x	--	--
Outside the Wire	--	--	--	--	--	--	--	--	--	--
Oxygène	--	--	--	--	--	--	--	--	--	--
Passing	--	--	--	--	--	--	--	--	--	--
The Rescue	--	--	--	--	--	--	--	--	--	--
Robin Robin	--	--	--	--	--	--	--	--	--	--
Secret Magic Control Agency	--	--	--	--	--	--	--	--	--	--
The Unforgivable	x	--	x	--	--	x	--	--	--	x

[Source: EUMEPLAT elaboration on FlixPatrol data]

As limited as this observation may be, it appears that availability *is not enough*, and not even for American productions and co-productions. Seventeen movies out of twenty-eight are not included in any top-watched statistics, and only a bunch of them can be properly considered trans-national successes: *A Castle for Christmas* and *Army of Thieves*, in both cases in Bulgaria, Germany, Czech Republic, Spain, and Portugal; *The Last Duel* in Belgium, Spain, Portugal, and Greece; and *Munich: Edge of War*, in Belgium, Germany, Spain, Portugal, Greece, and Turkey.

Table 11. Success of the movies first released in 2020 in 30+ countries

Title	BE	BG	CZ	DE	ES	GR	IT	PT	SE	TR
Ammonite	--	x	x	--	--	--	--	--	--	--
Angela's Christmas Wish	--	--	--	--	--	--	--	--	--	--
Archive 81	--	x	--	--	x	--	--	x	--	x
Black Beauty	--	--	--	--	--	--	--	--	--	--
Borat Subsequent Movie Film*	--	--	x	--	--	--	--	--	--	NA
Bruised	x	--	x	--	--	x	--	--	--	x
Chico Bon Bon and the Very Berry Holiday	--	--	--	--	--	--	--	--	--	--
Coded Bias	--	--	--	--	--	--	--	--	--	--
Concrete Cowboy	--	--	--	--	--	--	--	--	--	--
Dolittle	--	x	--	--	--	x	--	--	--	--
The Empty Man	--	--	--	--	--	--	--	--	--	--
Enola Homes	--	--	--	--	--	--	--	--	--	--
The High Note	--	--	--	--	--	--	--	--	--	--
The Kissing Booth 2	--	--	--	--	--	--	--	--	--	--
Miraculous World	--	--	--	--	--	--	--	--	--	--
The Night House	--	--	--	--	x	--	--	--	--	--
Never Rarely Sometimes Always	--	--	--	--	--	--	--	--	--	--
Pieces of a Woman	--	--	--	--	--	--	--	--	--	--
Rebecca	--	--	--	--	--	--	--	--	--	--
The Trial of the Chicago Seven	--	--	--	--	--	--	--	--	--	--
Tripping with Nils Frahm	--	--	--	--	--	--	--	--	--	--
Uncovered	--	--	--	--	--	--	--	--	--	--

(*) Not available in Turkey

[Source: EUMEPLAT elaboration on FlixPatrol data]

Looking for a partial confirmation, we made the same exercise on the most widely distributed movies in 2020: to be precise, twenty-two movies available everywhere, with the partial exception of *Borat*, which has not been screened in Turkey, arguably due to well-known political polemics. As a matter of fact, sixteen of these films are not included in the top-watched list of *any* country, and only two are popular in four countries: *Archive 8*1, in Bulgaria, Spain, Turkey, and Portugal; and *Bruised* in Belgium, Czech Republic, Turkey, and Greece.

Once again, we have to recall that systematic data collections are hardly available, especially on the consumption side, and therefore no generalizations are allowed, based on our analysis. With this premise in mind, our statement - that availability is not enough - would lead to three possible observations.

Firstly, the winner-takes-all dimension of the movie market must be recalled, due to the astonishing success of a handful of high-budget titles: for instance, the episodes of the *Harry Potter* franchise – produced between 2001 and 2011 - are among the top-watched titles in all countries where they are available (Italy, Czech Republic, Turkey, Belgium, and Bulgaria). Here we dealt with the movies released in the biennium 2020-2021: which does not tell anything about the richness and deepness of the VOD libraries, not to mention the impact of the tiles that have already passed the test of theatrical screening. For an overall assessment of the international success of *all* titles, not limited to the 2020 and 2021 releases, please refer to deliverables 3.1 and 3.2.

While the consumption of VOD contents will be analyzed in detail in section 3 of this deliverable, this tendency may suggest – if anything - the hypothesis of global video culture as a *stratified* space, with a second tier of movies, and a more complex and nuanced pattern still to be discovered, below the visible level of the blockbusters. Instead of accepting the simplified juxtaposition between local and global, Shaun Moores argues [2012: 86-87], we shall consider the space of flows as a hierarchized pattern: and what is true for the material flows, may prove to be true for cultural flows as well.

Secondly, to which extent the availability can guarantee for the success of a movie is hard to tell, until we will know something more about its actual *findability*. Among the thousands of titles included in the VOD catalogues, in fact, relevant differences are in place in terms of visibility, budget, and marketing strategies: which are the more difficult to detect, as those strategies are embedded in the recommendation algorithms. As the opacity of the algorithm is a well-known, and probably unsolvable problem in the Internet Studies, we will rather move to a final consideration.

Thirdly, and with this in mind, that distribution strategies do not totally explain why people watch what they watch – that “the catalog is not audience”, in Lobato’s words [2018: 251] – might bring positive consequences. It is not our intention to contest the importance of “distribution studies”: which have recently reached their full legitimacy, also claiming the specificities of their scientific field. Distribution is not simply an intermediate point between production and consumption [see Braun 2021: 17-30], the idea goes, and we endorse it: for the very same reason, though, audiences’ choices should not be reduced to the effects of marketing strategies, no matter how advanced and customized they are. Whilst media studies are hegemonized by automated quantitative analyses, this would shift the attention to a very *qualitative* aspect: the close interpretation of cultural forms, and of the possible reasons of their notoriety or failure. In this respect, section 6 of this deliverable will be devoted to the investigation of some particular cases of cross-European successes.

2.3 Focus on small producing countries

The focus on minor productors, besides the general purposes of our research, is due to two additional reasons. To start with, some major attention to small countries has been requested by the evaluators after the first year of the EUMEPLAT activities, and more generally speaking, it has been repeatedly advocated by a few scholars in recent years [see Trappel 2014; Ibrus & Rohn 2019]. And secondly, the analysis of VOD markets is a good occasion for doing that, as small-sized nations fall in a very specific position, due to their dependence on the importations from Hollywood, but also from the European Big Five: "with a handful of exceptions", in fact, "the production budgets for films led by and made in these countries were equivalent to a low budget film in one of the big five nations" [Higson 2021: 215].

We have noticed that from the standpoint of the European Union, and understandably so, geo-blocking restrictions are seen as a main threat to economic and cultural unification: addressed as a political priority already back in the 2014-2015 biennium [Trimble 2016: 61], and even referred to as "potential barriers erected by companies to cross-border online trade in goods and services" [European Commission 2015]. On the very contrary, geographical restrictions are often advocated by video producers and distributors, as they would allow for the valorization of cultural diversities, rather than favoring the homologation of taste and movie consumption [Zahrádka & Schmücker 2022: 14]. There is little doubt that the major platforms are making this argument to surreptitiously defend their commercial interests, in response to a classical critique – which on the contrary was, against the backdrop of cultural imperialism, that of making the world too global and uniform, as in Farhad Manjoo's [2019] well-known definition of Netflix as "the most intoxicating portal". This being said, such argument would deserve an honest and unbiased consideration. We have already observed how the very definition of Europeanization varies from region to region, taking on specific nuances in the core and in the periphery of the system; or in Eastern, Central-Western, and Southern Europe [see deliverable D1.6- *Europeanization: Operational Definition*]. In a similar vein, the outlook of each country or region on the common market may reflect the well-known differences, and the huge imbalances between the Big Five and the minor producers. This is why, according to some scholars, the elimination of geo-blocking – if not mitigated by a range of interventions – would risk to be detrimental to small countries, in favoring monopolization and exposing them to the competition with strong producers [Dabrovolskas 2017: 17 and 32 in particular]. As noticed by Ibrus [2016: 17] about the Estonian case, "the peripheral country" is attracted by definition by globalization forces, but at the same time "it worries about media concentration in the single market and about the evolving market dominance of global players that could have a detrimental effect on the existence of its own national media system".

This premise is necessary, in order to properly frame the discourse, and to give justice to the plurality of interests that are affected by the possible convergence towards a common digital market. The data we collected, concretely, are related to the movies first released in video platforms in 2021, and produced or co-produced in nine countries: Austria, Croatia, Cyprus, Estonia, Ireland, Latvia, Lithuania, Malta, and Slovakia. We selected these countries not only based on their dimensions, but also due to the state of the audiovisual industry: in their respective Netflix catalogues, for instance, there are traditionally a few national productions, and in some years in "there were no local films available at all" [Lobato 2018: 247].

Table 12. Austrian movies available on European VODs, 2021

	Title	Producing countries	Countries of service [number]	Notes
1.	255.01	AT	3	Available in AT, DE, GB
2.	Anna Gasser: The Spark Within	AT	2	Available in DE, PL
3.	Beatrix	AT	27	--
4.	Credo in un solo padre	IT, AT	2	Available in GB, IT
5.	Das Flammenmädchen	AT	3	Available in AT, CH, DE
6.	Das Virus in uns	AT	2	Available in AT, DE
7.	Dear Future Children	DE, GB, AT	3	Available in AT, CH, DE
8.	Die Lederhosenaffäre	AT	2	Available in AT, CH, DE
9.	Die Schuke der magischen Tiere	DE, AT	3	Available in AT, CH, DE
10.	Ein Clown, Ein Leben	AT	1	Only available in AT
11.	Endphase	AT	3	Available in AT, GB, DE
12.	Erde essen	AT	1	Only available in AT
13.	Eva-Maria	AT	1	Only available in AT
14.	Fiction for Future	DE, AT, CH	1	Only available in DE
15.	Grosse Freiheit	AT, DE	14	--
16.	Hinterland	AT, LU	5	--
17.	I Am the Tigress	AT, USA, DE	1	Only available in AT
18.	In den Fängen der Wikinger	AT	7	--
19.	Klammer	AT	3	Available in AT, CH, DE
20.	Klammer – Chasinf the Line	AT	2	Available in AT, CH
21.	Krai	AT	8	--
22.	Luzifer	AT	20	--
23	Man kann nicht alles haben	AT	3	Available in AT, CH, DE
24.	Masking Threshold	AT	2	Available in GB, IE
25.	Mau	AT, USA	2	--
26.	Me, We	AT	1	Only available in AT
27.	Moneyboys	AT, FR, BE	23	--
28.	Monte Verità	CH, AT, DE	3	Available in AT, CH, DE
29.	Moonbound	DE, AT	12	--
30.	Neujahrskonzert der Wiener Philarmoniker 2021	AT	1	Only available in DE
31.	Nicht die Regel	AT	1	Only available in AT
32.	One Extraordinary Year	AT	27	--

33.	Outside Noise	DE, KR, AT	27	--
34.	Parov Stelar: Voodoo Sonic the Documentary	AT	22	--
35.	Room Without a View	DE, AT	1	Only available in AT
36.	Rosamunde Pilcher: Stadt, Land, Kuss	DE, AT	3	Available in AT, CH, DE
37.	Rotzbub	AT, DE	4	Available in AT, CH, DE, ES
38.	Sargnagel – Der Film	AT	3	Available in AT, CH, DE
39.	Side Effects & Risks	AT	4	Available in AT, CH, DE, FR
40.	Soldat Ahment	AT	1	Only available in AT
41.	Stories from the Sea	AT	1	Only available in AT
42.	The Bubble	CH, AT	1	Only available in AT
43.	Three Peaks & in Between	CH, AT, FR, IT	3	Available in AT, DE, GB
44.	Train Again	AT	31	--
45.	Tutti per Uma	IT, AT	1	Only available in IT
46.	Wildes Inssbrusck	AT	1	Only available in AT

[Source: Lumière VOD Database]

By and large, what video platforms are generating is a new "sense of media regionalism", Steinberg and Li opine [2017: 173]: and the Austrian case perfectly fits the definition, with 26 movies – out of 46 – only being available in German-speaking areas. In regard of differences, the Croatian production is rather oriented towards the internal market, with six movies only released in the homeland, out of a total of twelve.

Table 13. Croatian movies available on European VODs, 2021

	Title	**Producing countries**	**Countries of service [number]**	**Notes**
1.	Aleph	USA, HR, QA	1	Only available in PL
2.	Barbadeala cu blucuc sau porno baòamuc	RO, LU, CZ, HR, CH, GB	23	--
3.	Boys Feels: Desire in the Dark	CH, SE, XK, HR, NL	1	Only available in GB
4.	Hakeri Rata	HR	1	Only available in HR
5.	Korado 1201	HR	1	Only available in HR
6.	Labinska Republika	HR	1	Only available in HR
7.	Love around the world	HR, DE	1	Available in CH, HR

8.	Murina	HR, BR, USA, SI	9	--
9.	Nebesa	RS, DE, MK, I, HR, ME, BA	12	--
10.	Resinger	HR	1	Only available in HR
11.	Rijecki orao	HR	1	Only available in HR
12.	Samo je nebo iznad nas	HR	1	Only available in HR

[Source: Lumière VOD Database]

Table 14. Slovakian movies available on European VODs, 2021

	Title	Producing countries	Countries of service [number]	Notes
1.	Atlas ptáku	CZ, SI, SK	1	Only available in CZ
2.	Cenzorka	SK, CZ, UA	3	Available in BE, CH, NL
3.	Chyby	CZ, SK	2	Available in CZ, SK
4.	Ciary	SK	27	--
5.	Happy New Year 2	SK, CZ	1	Only available in CZ
6.	I mysi patrí do nebe	CZ, FR, PL, SK	18	--
7.	Kazdá minuta zivota	CZ, SK	1	Only available in SK
8.	Láska pod kapotou	SK, CZ	1	Only available in SK
9.	Love, Dad	CZ, SK	2	Available in DE, FR
10.	Martin a tajomstvo lesa	SK, CZ	1	Only available in CZ
11.	Mazel a tajemství lesa	CZ, SK, DE	3	Available in CZ, PL, SK
12.	My Sunny Maad	CZ, FR, SK	5	--
13.	Rekonstrukce okupace	CZ, SK	27	--
14.	The Auschwitz Report	SK, CZ, PL, DE	6	--
15.	The Male Gaze: Hide and Seek	SK, GB, BR, IT, DE	3	--
16.	The Sailor	SK	27	--
17.	Ubal a zmiz	CZ, SK	2	Available in CZ, SK
18.	Unseen	SK	1	Only available in SK
19.	Wild Roots	HU, SK	8	--
20.	Známi neznámi	SK, CZ	1	Only available in CZ
21.	Zpráva o záchrane mrtvého	CZ, SK, FR	2	Available in CZ, SK

[Source: Lumière VOD Database]

The regional or sub-regional dimension is relevant in the Slovakian case too, with half of the titles – ten out of twenty-one – only available in the former Czechoslovakia. Once again, this limitation is probably due to the linguistic barrier and to the use of local languages: especially when one considers that in Czech Republic and Slovakia – despite the small dimensions of both markets - the movies have been traditionally dubbed, with the subtitling only recently introduced [Demjanová 2016: 10]. What is rather surprising, is the limited number of collaborations with main producing countries, only six: whereas, if we look at recent history, it is a fact that the Slovakian studios "heavily rely on runaway productions to maintain their operation" [Iordanova 2003: 26].

The Slovenian case is different: though the small numbers prevent any conclusion about the state of the VOD movie market, the national industry seems to have little impact, both in terms of productions and distribution. This is probably caused by the lack of infrastructure and local entrepreneurship that, as noted by Meta Mazaj [2011: 195-196], makes the Slovenian audiovisual sector dependent on the State contributions, through the Slovenian Film Fund.

Table 15. Slovenian movies available on European VODs, 2021

	Title	Producing countries	Countries of service [number]	Notes
1.	A Fine Pavement	USA, SI	1	Only available in GB
2.	Atlas ptáku	CZ, SI, SK	1	Only available in CZ
3.	Granny's Sexual Life	FR, SI	2	Available in DE, FR
4.	Murina	HR, BR, US, SI	9	--
5.	Nebesa	RS, DE, MK, I, HR, ME, BA	12	--
6.	Piccolo corpo	IT, FR, SI	7	--

[Source: Lumière VOD Database]

Table 16. Estonian movies available on European VODs, 2021

	Title	Producing countries	Countries of service [number]	Notes
1.	Dainos Lapei	LT, EE, LV	4	--
2.	Firebird	EE, GB	22	--
3.	Hytti nro 6	FI, RU, EE, DE	15	--
4.	Naised rindejoonel	EE, FI	1	Only available in FI
5.	The Body Fights Back	EE	2	Available in GB, IE
6.	Zhizn Ivanny	RU, NO, FI, EE	1	Only available in SE

[Source: Lumière VOD Database]

Table 17. Lithuanian movies available on European VODs, 2021

	Title	**Producing countries**	**Countries of service [number]**	**Notes**
1.	A Feature Film About Life	LT, USA	1	Only available in GB
2.	Begike	LT, CZ	4	--
3.	Boys Feels: I Love Trouble	LT, FR, NL	3	--
4.	Dainos Lapei	LT, EE, LV	4	--
5.	Gads pirms kara	CZ, LT, LV	27	--
6.	I'll Stand by You	CH, LT, IT	1	Only available in LT
7.	Naktine zvejyba	LT	2	Available in LT, LV
8.	People We Know Are Confused	LT	3	Available in GB, LT, PL
9.	Piligrimai	LT	8	--
10.	Techno, Mama	LT	31	--
11.	Tres	ES, LT, FR	1	Only available in ES
12.	Vyras uz pinigus	LT	2	Available in LT, LV

[Source: Lumière VOD Database]

Table 18. Latvian movies available on European VODs, 2021

	Title	**Producing countries**	**Countries of service [number]**	**Notes**
1.	Dainos Lapei	LT, EE, LV	4	--
2.	Gads pirms kara	CZ, LT, LV	27	--
3.	Imad's Childhoos	IQ, SE, LV	16	--
4.	Miracol	RO, CZ, LV	9	--
5.	Samuel's Travels	LV, BE	1	Only available in PL
6.	Természetes fény	HU, LV, FR	18	--
7.	The Land of Blue Lakes	LV	1	Only available in GB
8.	Wasele	PL, LV	1	Only available in PL

[Source: Lumière VOD Database]

The regional stance of Baltic video industries is clearly shown by the data, with local collaborations accounting for almost 50% of the total co-productions released. In particular Estonia, Latvia and Lithuania, also due to their small dimensions, have traditionally constituted an integrated market [see Mancini 2015; Kõuts-Klemm, Rožukalne & Jastramskis

2022: 545-546][4]. Such integration has led to the institution of the cooperation platform known as Baltic Films, active between 2005 and 2009, and it has been eventually ratified at the highest level with the 2015 agreement among the National Film Centre of Latvia, the Estonian Film Institute and the Lithuanian Film Centre. The purpose of the accord is to provide a framework, "establish co-production fund for films and Tv-productions between Baltic States", and to promote the "distribution of Latvian, Lithuanian and Estonian films" in the three countries[5].

The public funding of local works is particularly relevant in the Baltic case, due to a serious "concern for smaller markets is the availability of resources to support domestic content", Balčytiene and Harro-Loit write, "as opposed to less expensive but imported content" [2009: 518]. With this respect, the penetration of global platforms in the Baltics may threaten the consolidated strength of the local production systems, as it questions "how much of the actual user spend reaches the local industries, especially in smaller countries" [Ibrus & Rohn 2019: 55].

Table 19. Irish movies available on European VODs, 2021

	Title	**Producing countries**	**Countries of service [number]**	**Notes**
1.	Andie the Great	IE, CA	12	--
2.	Black Medicine	IE	2	Available in GB, IE
3.	Breaking Out	IE	1	Only available in IE
4.	Breaking Out: The Remarkable Life of Fregus O' Farrell	IE	2	Available in GB, IE
5.	Christmas at Castle Hart	IE, CA	1	Only available in GB
6.	Deadly Cuts	IE	3	Available in ES, GB, IE
7.	Die Druiden: Mächtige Priester der Kelten	DE, FR, IE	24	--
8.	Don't Sell Me a Dog	IE	5	DE, ES, FR, GB, IT
9.	Fischia il vento	IE, IT, GB	19	--
10.	Gateway	IE		Only available in NL

4 For the analysis of Baltic media in the framework of comparative media studies, see Castro Herrero & others 2017; Dobek-Ostrowska 2015 and 2019; Jakubowicz & Sükösd 2008.

5 *Cooperation agreement between National Film Centre of Latvia, Estonian Film Institute and Lithuanian Film Centre*, 2015, retrieved at: https://www.lkc.lt/docs/Collaboration-Agreement-between-the-Baltic-Film-Institutions.pdf.

			1	
11.	Imbolc	IE	11	--
12.	Invisible Borders	GB, IE	1	Only available in GB
13.	Let the Wrong One In	IE	13	--
14.	Love Yourself Today	IE	2	Available in GB, IE
15.	My Little Pony: A New Generation	USA, IE, CA	31	--
16.	Pure Grit	IE, USA	2	Available in GB, IE
17.	Riverdance: The Animated Adventure	GB, IE	30	--
18.	Roy	GB, IE	1	Only available in PL
19.	Son	IE, USA, GB	15	--
20.	The Crafty Irish	IE	5	Available in DE, ES, FR, GB, IT
21.	The Father of the Cyborgs	IE	2	Available in GB, IE
22.	The Green Knight	USA, CA, IE	21	--
23.	The Green Sea	IE	2	Available in GB, IE
24.	The Letters	IE	5	Available in DE, ES, FR, GB, IT
25.	The Wall	IE	1	Only available in FR
26.	The Yellow Wallpaper	USA, IE	4	--
27.	Winifred Meeks	IE	4	--
28.	Wolf	IE, GB, PL	25	
29.	You Are Not My Mother	IE	3	Available in GB, IE, NL
30.	Young Plato	IE, BE, FR	2	--

[Source: Lumière VOD Database]

The state of the Irish production sector is very health, judging from the above numbers. In particular, the role of Netflix in favoring the circulation of Irish contents has been already remarked upon [Flinn & Tracy 2019-2020: 303]. As it was the case of Baltic markets, though, it remains unclear to what extent the platformization process is beneficial to the local industry, as major players are likely collecting most of the revenues. More technically speaking, this probably comes as a consequence of national regulation, as the 2015 New Section 481 established the requirement for film companies to have an "Irish-based producer, co-producer or executive producer", whilst it is clearly stated that the rule does not apply to "Internet based VOD companies such as Netflix" [Murphy & O' Brien 2015: 225].

Table 20. Maltese movies available on European VODs, 2021

	Title	Producing countries	Countries of service [number]	Notes
1.	Just Npise	MT, CA, USA	4	--
2.	Luzzu	MT	19	--
3.	Mikha'El	MT	1	Only available in GB
4.	Mix Up in the Mediterranean	US, CA, MT	2	Available in LT, LV

[Source: Lumière VOD Database]

Table 21. Cypriot movies available on European VODs, 2021

	Title	Producing countries	Countries of service [number]	Notes
1.	.dog	CY, GR	8	--
2.	Gulliver Returns	UA, CY	9	--
3.	The Man with the Answers	CY, GR, IT	6	--

[Source: Lumière VOD Database]

In the case of Cyprus and Malta, finally, figures are too low to allow any statement or consideration – besides the weakness of local audiovisual industries, and beyond the notable exception of *Luzzu*. What is rather possible, is to make a couple of considerations about the general state of small European markets. Firstly, national movies are included in the catalogues of each country, which makes a concrete difference with the previous situation, when this was not always the case [see Lobato 2018: 247]. As it has been observed, it is probably in 2019 that the VOD providers adapted their distribution strategies:

> For example, Netflix territorial catalogs in Central and Eastern Europe, until 2019, included virtually no local titles (this changed in the second half of 2019, especially in Poland and the Czech Republic), while already in 2017 they offered between 3 and 4% of local content in the Netherlands, Denmark
> and Austria [Szczepanik, Zahrádka, & Macek 2020: 9].

Secondly, we may notice some exceptions to the rule that prevents small countries from being competitive at the international level. Among the productions and co-productions which neither include Hollywood and the European Big Five, in fact, the following movies were widely distributed:

- *Beatrix*, an Austrian production available in 27 countries;
- *One Extraordinary Year*, an Austrian production available in 27 countries;
- *Parov Stelar: Voodoo Sonic*, an Austrian production available in 22 countries;

- *Train Again*, an Austrian available in 31 countries;
- *Luzifer*, an Austrian available in 20 countries;
- *Ciary*, a Slovakian production available in 27 countries;
- *The Sailor*, a Slovakian production available in 27 countries;
- *Rekonstrukce okupace*, a co-production between Czechia and Slovakia, available in 27 countries;
- *Gads pirms kara*, a co-production among Czechia, Lithuania and Latvia, available in 27 countries;
- *Piligrimai*, a Lithuanian production available in 8 countries;
- *Techno, Mama*, a Lithuanian production available in 31 countries;
- *Imbolc*, an Irish production available in 11 countries;
- *Let the Wrong One In*, an Irish production available in 13 countries;
- *The Crafty Irish*, an Irish production available in all the Big Five markets (Germany, Spain, Italy, France, and UK);
- *Luzzu*, a Maltese production available in 19 countries.

Whether these cases are occasional and exceptional, or revealing of some pattern, will be discussed in section 6, while dealing with best practices in cross-European contents circulation.

3 The main obstacles to Europeanization: between American Successes and Banal Nationalism

Ioanna Archontaki, Panos Kompatsiaris & Andrea Miconi

3.1 What people watch on VODs

All in all, the data we have collected show the usual polarization: the American hegemony in VOD consumption, and the national dimension of influencers, particularly in the cases of TikTok and YouTube – what we might frame in terms of banal nationalism, as contents are mostly about daily life and funny videos.

Before going into details, two limitations must be kept in mind:

(1) This is about the top-watched movies and Tv-series, and therefore it has nothing to do with the European quotas, which are discussed in other sections of WP3 deliverables;
(2) This is about the most-watched contents, and it does not tell anything about the long-tail and the niche markets.

A way to start is to ask, is there any threshold effect, so to speak? What happens to the European movies, when and where the American titles are most watched? And what happens to the European titles, when and where national titles are most watched?

In regard to content consumption in Europe, the data confirms that European titles do better when American movies drop under 50% of the total available content; and on the other hand, there is apparently no correlation between the consumption of national and EU_27 content (see table below).

Table 22. Top watched movies by nationality

Country	Platform	National	Other EU_27	USA	Total
Belgium	Netflix	1	28	76	160
Belgium	Disney+	0	1	43	53
Belgium	iTunes	6	18	44	98
Bulgaria	Netflix	0	26	64	138
Bulgaria	HBO	1	11	54	112
Bulgaria	iTunes	0	5	55	92
Italy	Netflix	14	26	70	157
Italy	Google Play	0	4	32	59
Italy	Amazon Prime	26	12	41	111

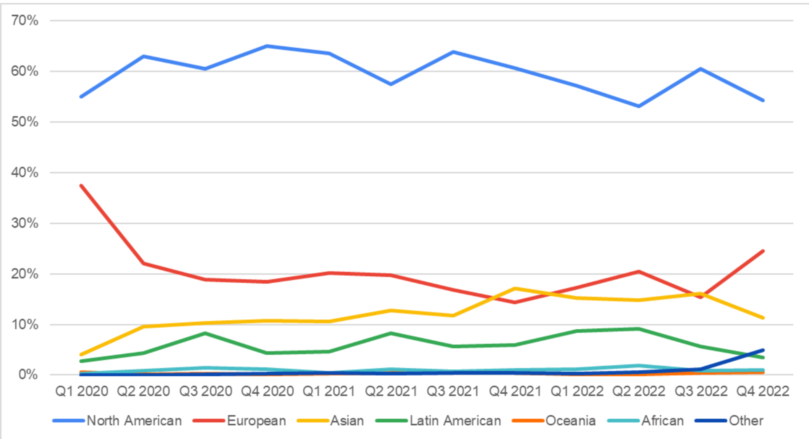
Czech Republic	Netflix	15	29	45	123
Czech Republic	HBO	1	6	52	104
Czech Republic	Amazon Prime	0	8	29	50
Spain	Netflix	11	23	58	130
Spain	HBO	0	4	34	52
Spain	Disney+	0	3	49	68
Greece	Netflix	0	20	68	125
Greece	Google Tv	0	1	36	45
Greece	iTunes	0	1	32	42

[Source: elaboration on FlixPatrol data]

3.1.1 Breakdown of global consumption by geographical area

When analysing global content consumption of the six most popular VoD platforms in the period from 2020 to 2022, we can detect some common patterns. As seen in chart 2, the consumption of north - American content is predominant (from 55% in 2020 to 64% in 2021) throughout the period for the Netflix case. On the other hand, the consumption of European content was 37.4% during the first quarter of 2020, then dropped to its lowest point during the third quarter of 2021 (16.9%), only to rise again up to 24.5% during the last quarter of 2022. In the case of Netflix, we can say that the consumption of American content isn't corelated to the consumption of the European one. To the contrary, we see that when the consumption of European content drops, the consumption of Asian content and to a lesser degree Latin American content replaces it. Therefore, when it comes to global consumption on Netflix, we can say that the predominance of north – American content cannot be challenged by smaller regional markets. It is rather that the smaller markets of Europe, Asia and Latin America that compete with each other for the second place in the global content consumption.

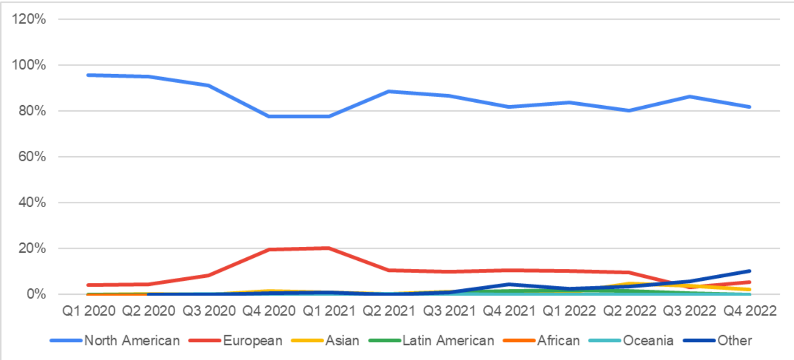
Chart 2. Content preference by region of origin on Netflix



[Source: elaboration on FlixPatrol data]

The situation is different regarding content consumption on HBO (chart 3). On this platform the consumption of north – American content and European content demonstrate a complementary relationship. In graph 2 it is clearly visible that when the consumption of north- American content drops (from Q2 2020 to Q4 2020) the consumption of European content increases equally. Similarly, when the consumption of north – American content increases (from Q1 2021 to Q2 2021) the consumption of European content equally decreases.

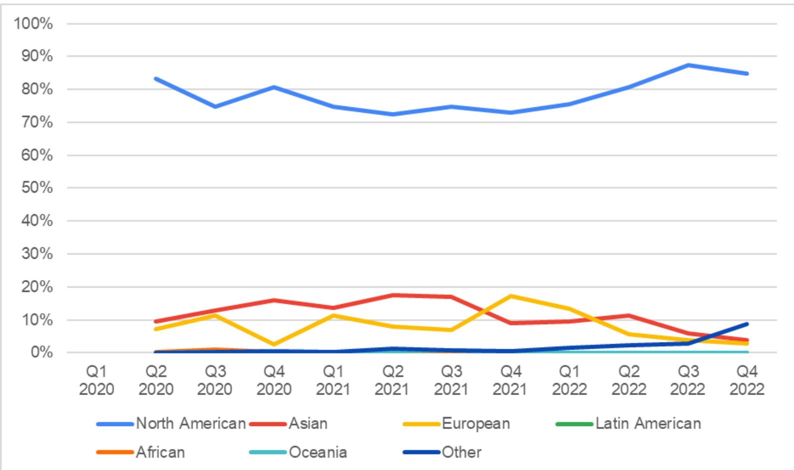
Chart 3. Content preferences by region of origin on HBO



[Source: elaboration on FlixPatrol data]

Similarly to the Netflix case, consumption of north – American content on Amazon prime is challenged by the two smaller markets of Asia and Europe. However, the consumption of Asian content outperforms the European one from 2020 to 2021 and it is only for a short period of time (from Q4 2021 to Q1 2022) that the European content performs better than the Asian one (chart 4).

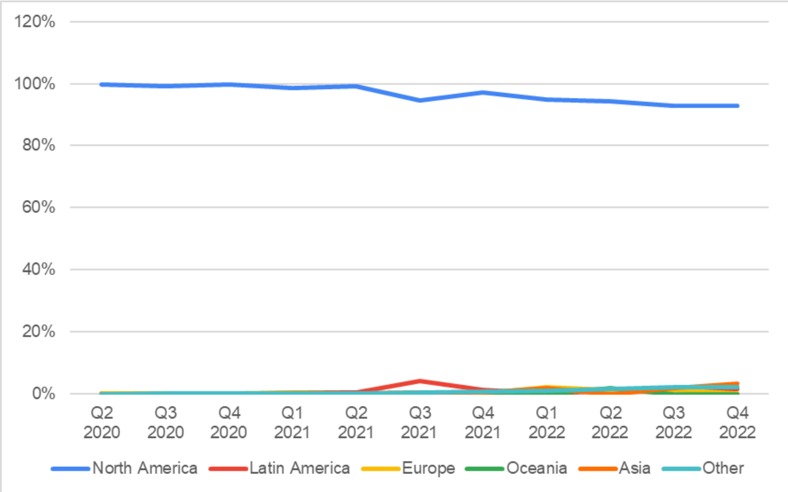
Chart 4. Content preferences by region of origin on Amazon Prime



[Source: elaboration on FlixPatrol data]

On Disney+, the dominance of north – American content is total throughout the period. A small drop in the consumption during the third quarter of 2021 is accompanied by a small increase of consumption of Latin American content. Content coming from other regions of the world is almost non – existent on this platform (chart 5).

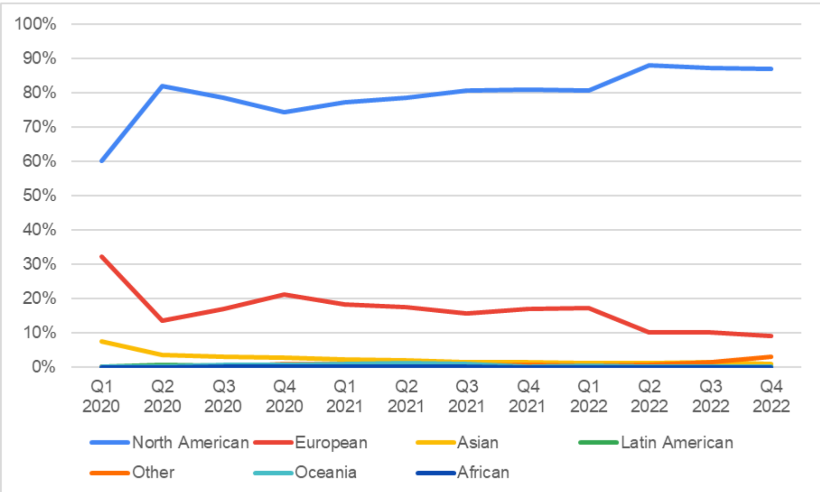
Chart 5. Content preferences by region of origin on Disney+



[Source: elaboration on FlixPatrol data]

Content consumption on iTunes resembles the HBO case. Here again, the north – American content and the European one have a complementary relationship. In chart 6 we can clearly see that when north – American content increases during the second quarter of 2020 and the first quarter of 2022 the consumption of the European one decreases equally.

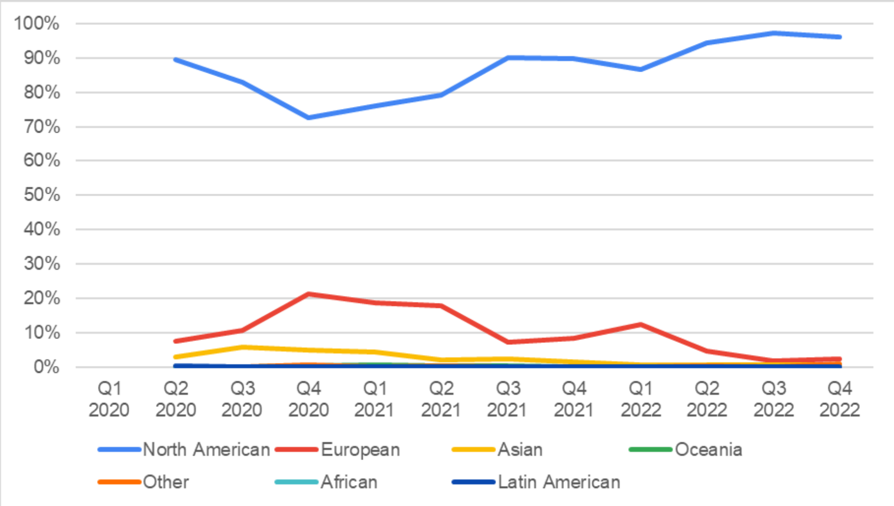
Chart 6. Content preferences by region of origin on iTunes



[Source: elaboration on FlixPatrol data]

Consumption patterns on Google TV follow the trend of iTunes and HBO. The dominance of north – American content is only meekly challenged by the European one. When the consumption of European content increases the consumption of north – American one decreases and the opposite. The small rise of Asian content consumption from the Q2 2020 to Q2 2021 is insufficient to compete with the other two markets (chart 7).

Chart 7. Content preferences by region of origin on Google TV



[Source: elaboration on FlixPatrol data]

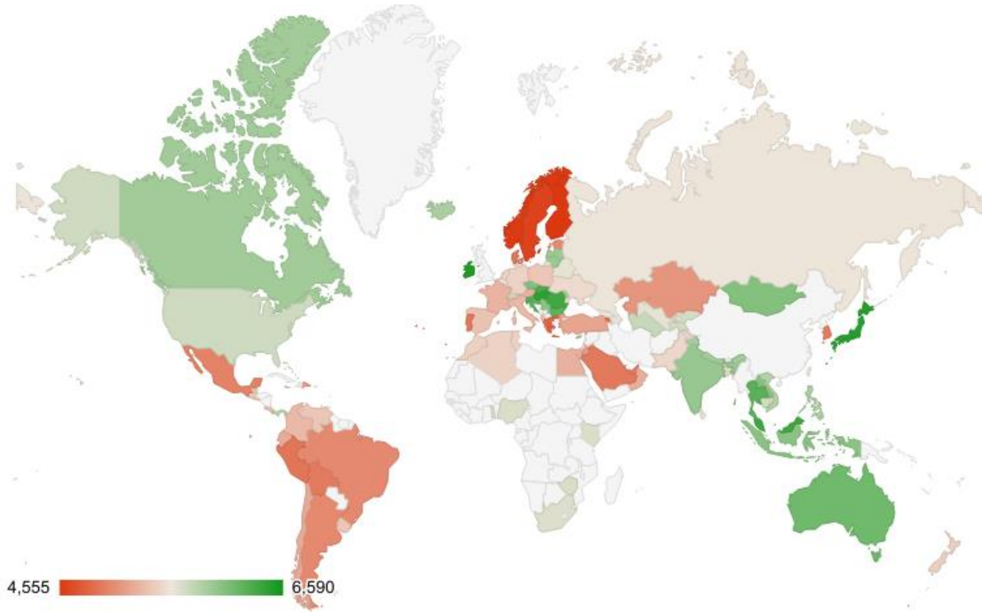
3.1.2 National catalogues and content availability

As we already saw, north – American content consumption is predominant throughout all VoD platforms. However, the consumption of European content varies significantly through time and from one platform to another. The main factor that drives content consumption on these platforms is the availability of content. As demonstrated in section 2, despite EU regulation, geo-blocking is still applied for the countries of the EU, pushing further the fragmentation of the European market. We also saw in section 5 that VoD libraries tend to overlap in only 30% - 50% of their titles. However, when examining the European catalogues in comparison to non – EU countries we see some common characteristics.

Taking under examination the catalogues of Netflix, where European content is the most prominent in terms of consumption, we can note the following. First and foremost, Ireland, Baltic countries and Eastern European countries have more titles in their libraries compared to other EU regions (chart 8). Moreover, European catalogues include older movies than other parts of the world. In chart 9 we see that the European catalogues, along with the Japanese and the Icelandic one, include more titles from 1920s to 1979 in comparison the rest of the world. On the contrary, Asian catalogues include more titles from the 80s (chart 10) and the 90s (chart 11).

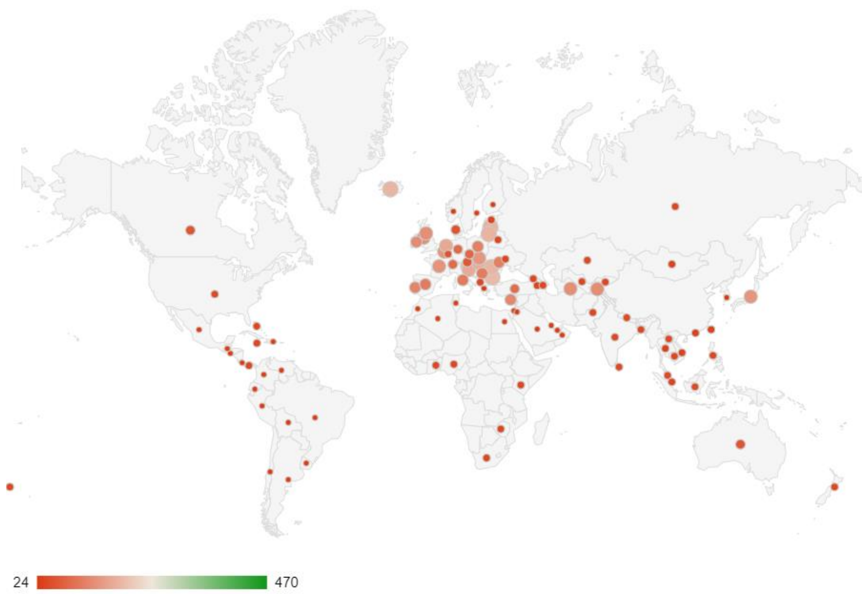
Moreover, countries of Central and Eastern Europe include more quality titles in terms to IMDB ratings compared to the rest of Europe. More specifically in chart 12 we see that Ireland has the catalogue with the most quality movies in Europe (778 titles), followed by Serbia (751), Bulgaria (742), Hungary (741), Romania (747), Slovenia (745), Slovakia (738), Czech Republic (736), Croatia (740), Ukraine (727), Russia (725), Lithuania (721) and Latvia (710). The same countries seem to have richer libraries regarding medium quality titles according to IMDB ratings (from 6 to 7.9), as shown in chart 13. Regarding content genres, these countries have more drama, comedy, crime and documentary titles in their Netflix libraries (charts 14, 15, 16, 17, 18, 19).

Chart 8. Number of titles in Netflix national catalogues in 2021.



[Source: elaboration from Flixwatch.co data]

Chart 9. National catalogues on Netflix including titles from 1920 – 1979



[Source: elaboration from Flixwatch.co data]

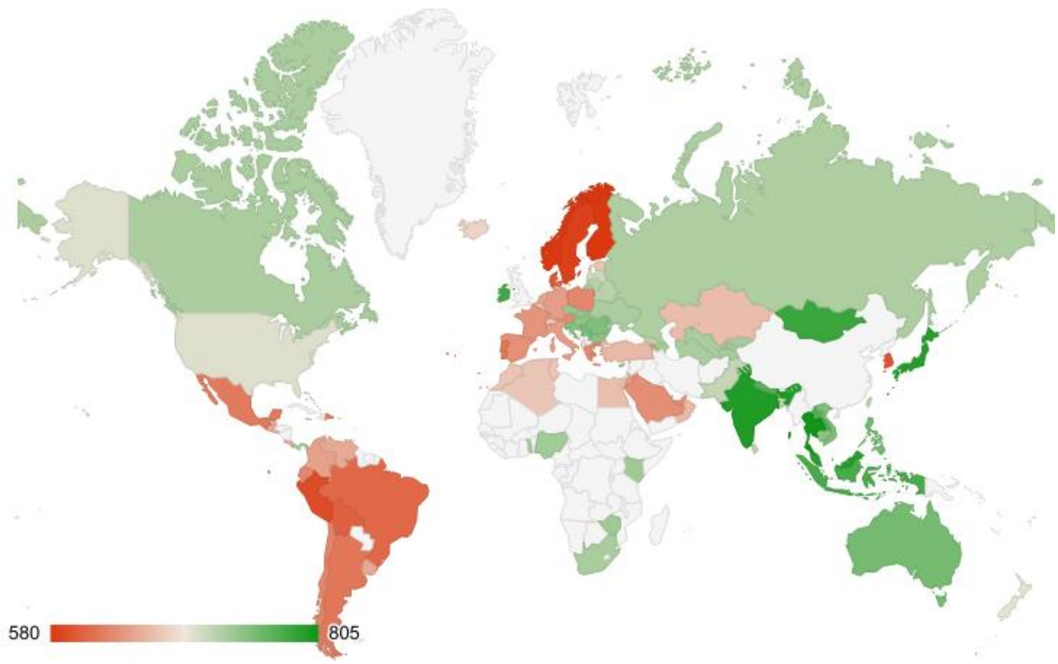
Chart 10. National Catalogues on Netflix including titles from 1980– 1989

[Source: elaboration from Flixwatch.co data]

Chart 11. National Catalogues on Netflix including titles from 1990 – 1999.

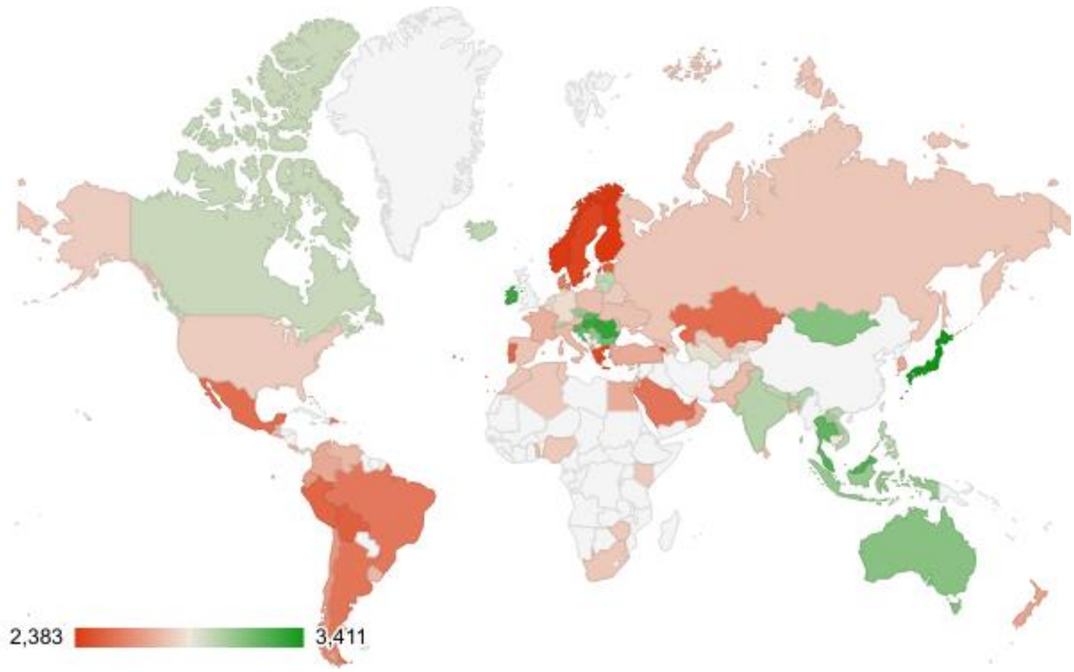
[Source: elaboration from Flixwatch.co data]

Chart 12. National Catalogues on Netflix including titles with high IMDB ratings (above 8)



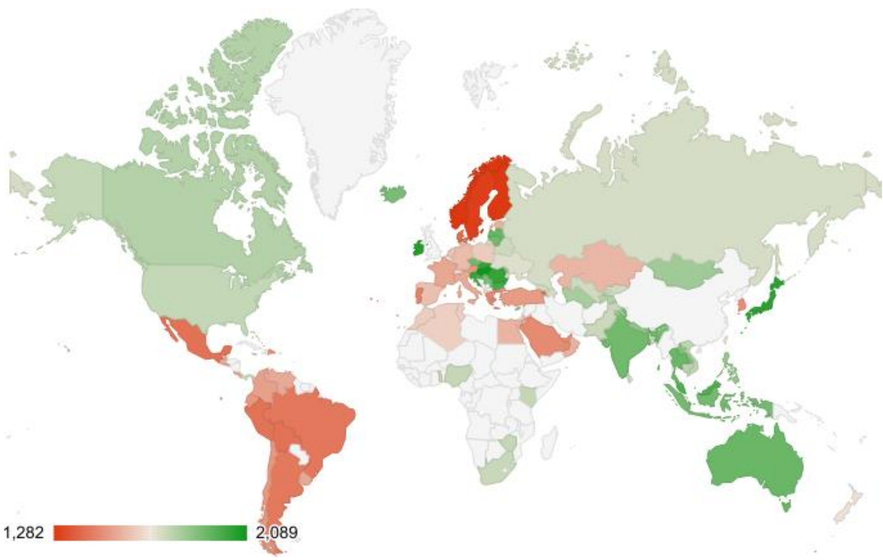
[Source: elaboration from Flixwatch.co data]

Chart 13. National Catalogues on Netflix including titles with medium IMBD ratings (6.0 – 7.9)



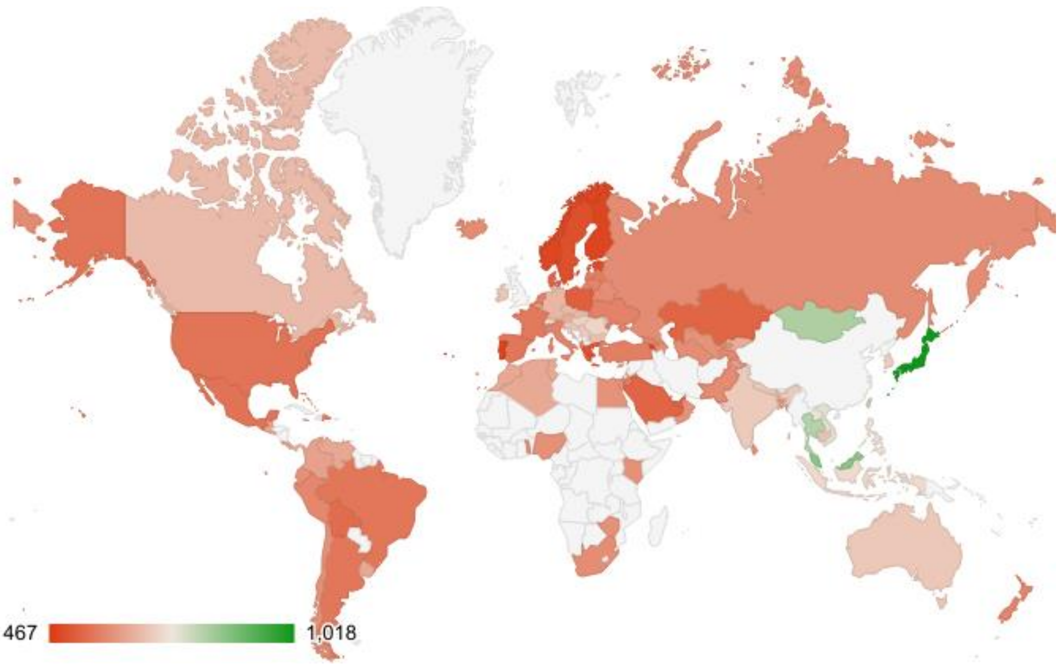
[Source: elaboration from Flixwatch.co data]

Chart 14. Drama titles in National Catalogues on Netflix



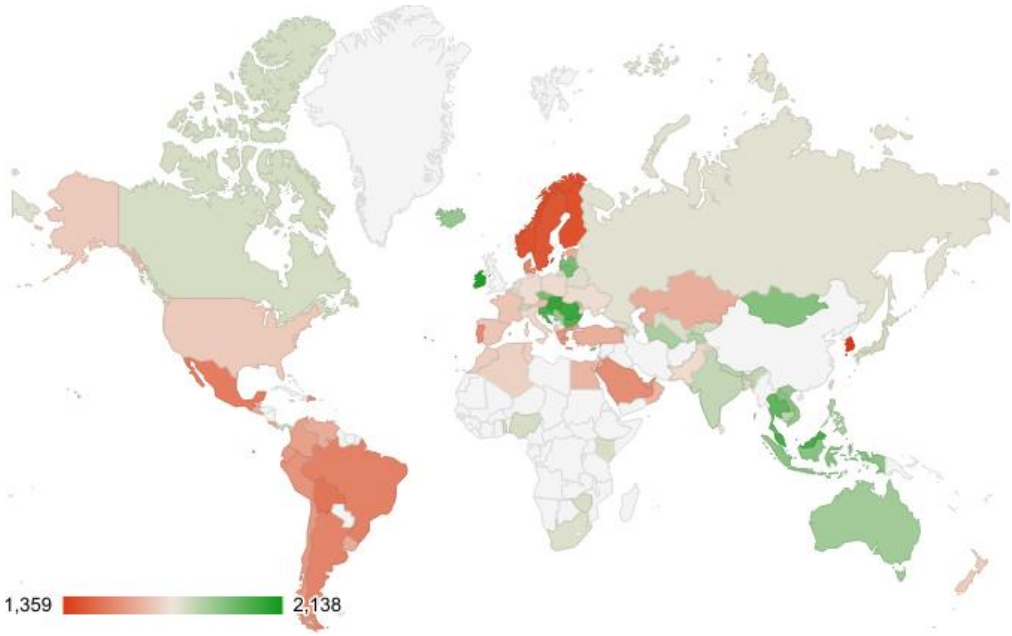
[Source: elaboration from Flixwatch.co data]

Chart 15. Action titles in National Catalogues on Netflix



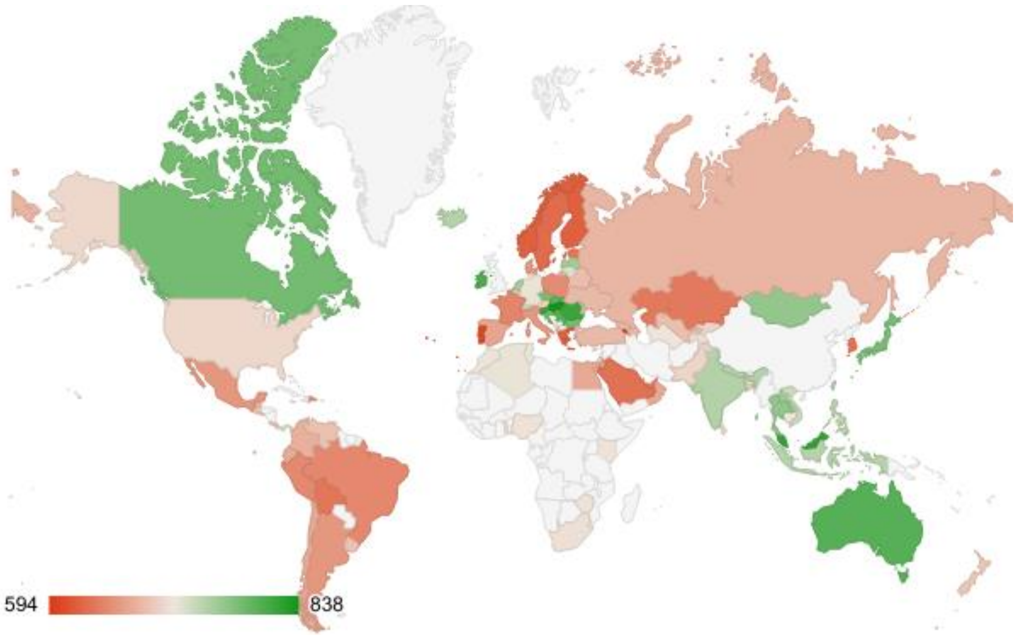
[Source: elaboration from Flixwatch.co data]

Chart 16. Comedy titles in National Catalogues on Netflix



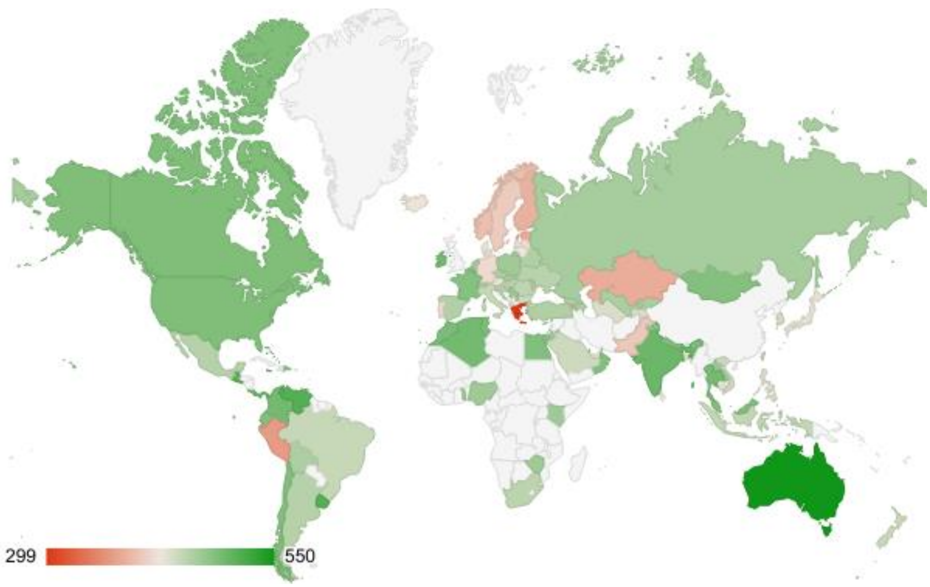
[Source: elaboration from Flixwatch.co data]

Chart 17. Crime titles in National Catalogues on Netflix



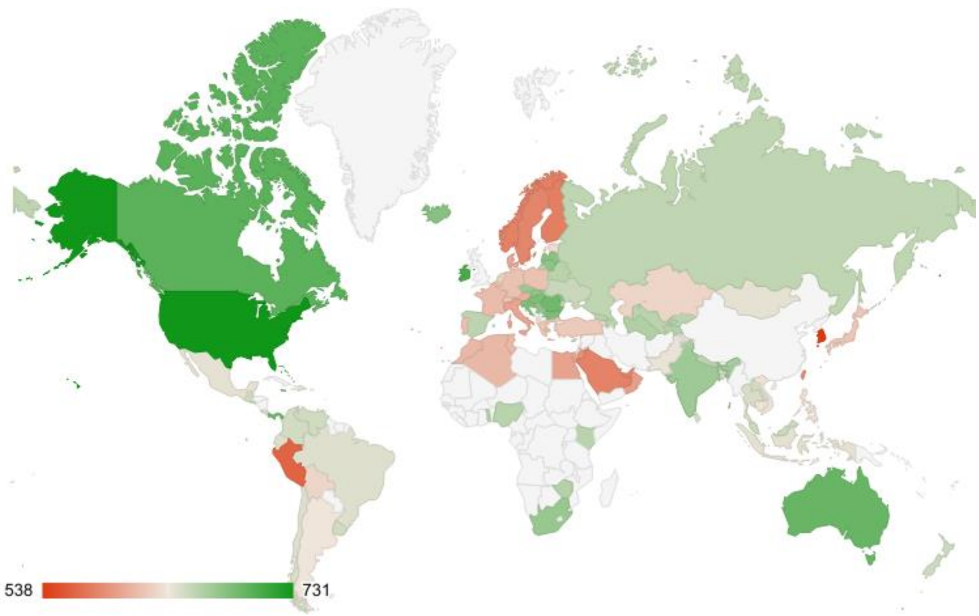
[Source: elaboration from Flixwatch.co data]

Chart 18. Animation titles in National Catalogues on Netflix



[Source: elaboration from Flixwatch.co data]

Chart 19. Documentary titles in National Catalogues on Netflix

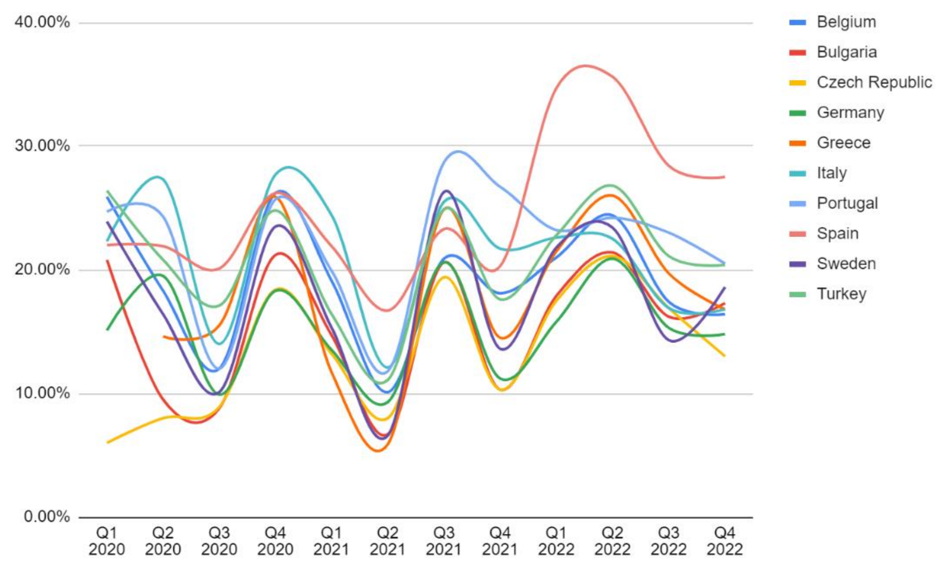


[Source: elaboration from Flixwatch.co data]

3.1.3 Content preferences by Genre – The Netflix case

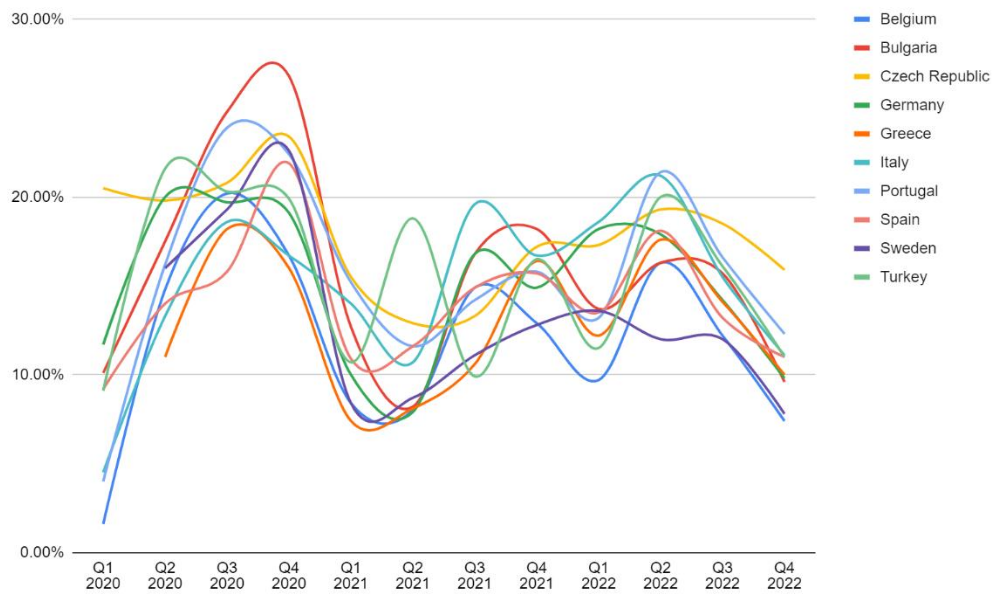
As demonstrated above, different countries have various titles in their libraries that can be categorised according to their year of release, quality based on IMDB ratings and genres. In this section we examine the consumption of various genres from 2020 to 2022. For our examination we included six out of the most popular genres as recorded on flixpatrol.com in the Q1 of 2022, namely drama (24%), comedy (14.1%), action (8.7%), crime (8.3%), thriller (5.8%) and adventure (5.3%) along with two genres aimed at niche audiences, documentary (5%) and animation (4%). As shown in the graphs below (from chart 20 to 27) the consumption for all genres in all countries follow the same trends throughout different periods of time, with the exceptions of comedy and animation. One explanation for the recorded patterns is that audiences' consumption is mainly driven by the promotion of certain titles by the recommendation algorithms on Netflix platform and mush less on users' individual search.

Chart 20. Genre preference on Netflix by Country: Drama



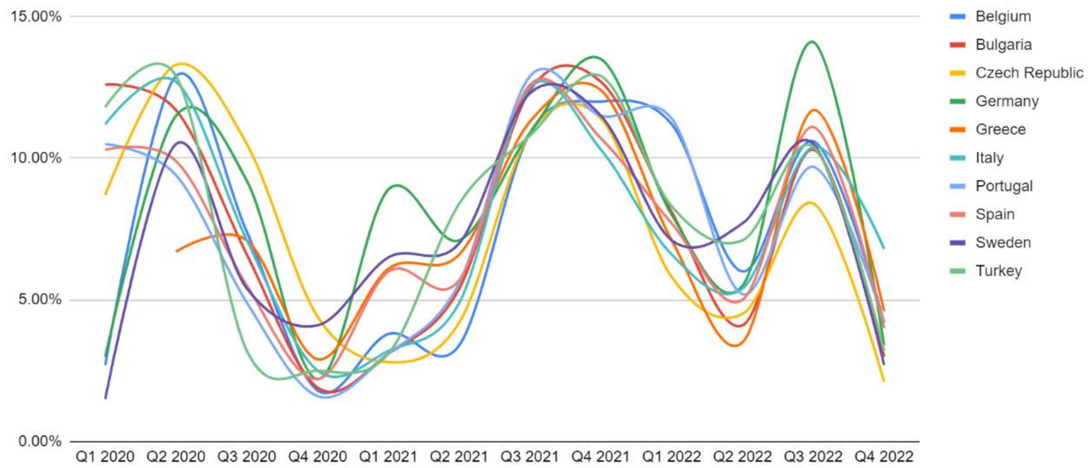
[Source: elaboration on FlixPatrol data]

Chart 21. Genre Preferences on Netflix by Country: Comedy



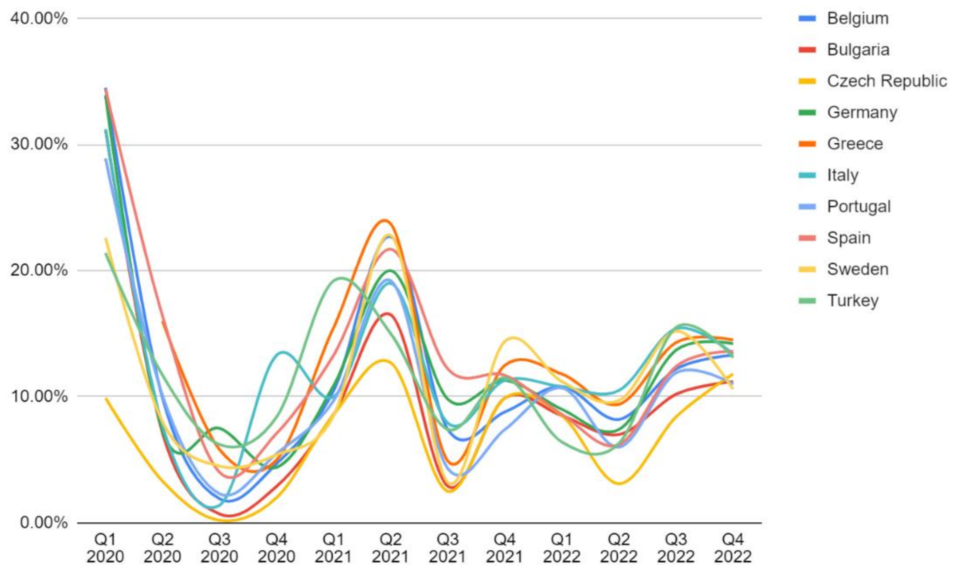
[Source: elaboration on FlixPatrol data]

Chart 22. Genre Preferences on Netflix by Country: Action



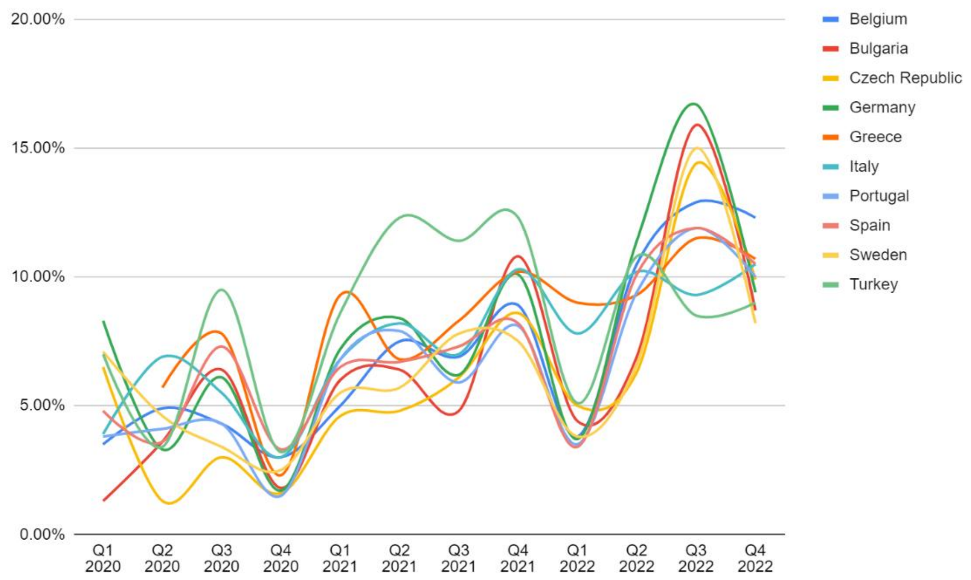
[Source: elaboration on FlixPatrol data]

Chart 23. Genre Preferences on Netflix by Country: Crime



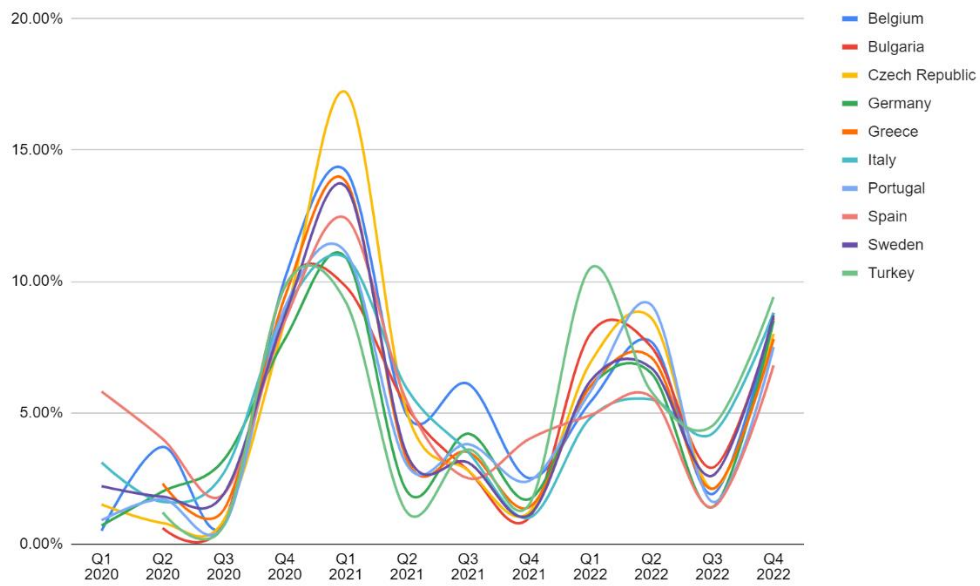
[Source: elaboration on FlixPatrol data]

Chart 24. Genre Preferences on Netflix by Country: Thriller



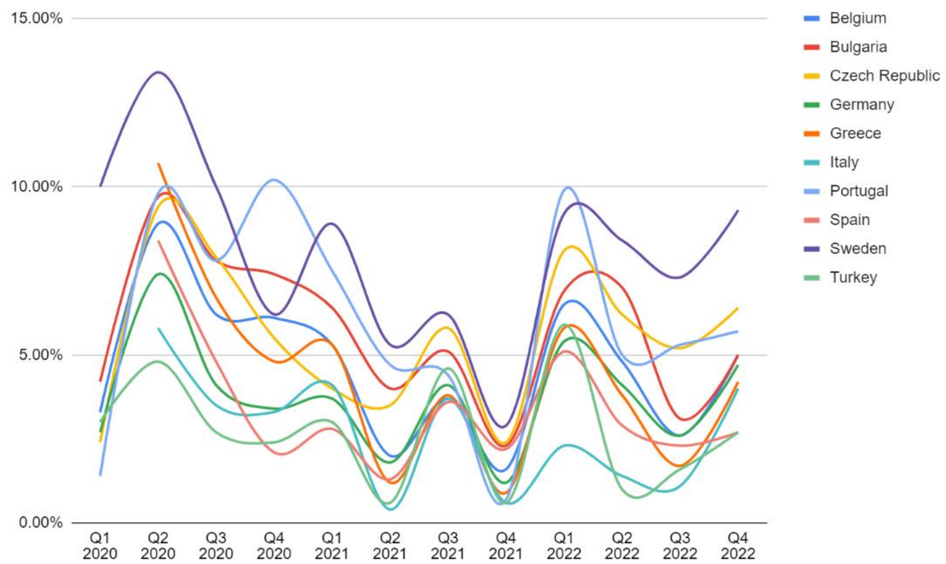
[Source: elaboration on FlixPatrol data]

Chart 25. Genre Preferences on Netflix by Country: Adventure



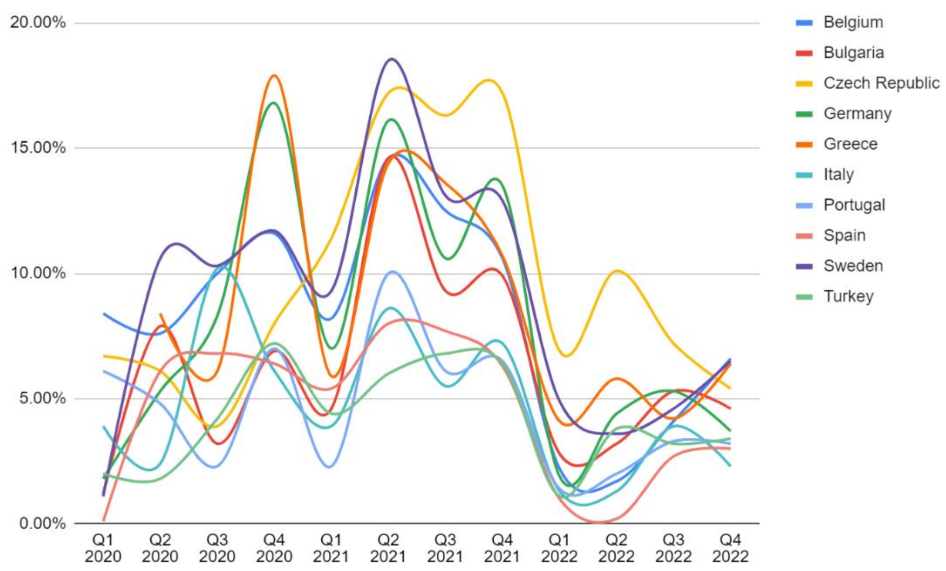
[Source: elaboration on FlixPatrol data]

Chart 26. Genre Preferences on Netflix by Country: Documentary



[Source: elaboration on FlixPatrol data]

Chart 27. Genre Preferences on Netflix by Country: Animated

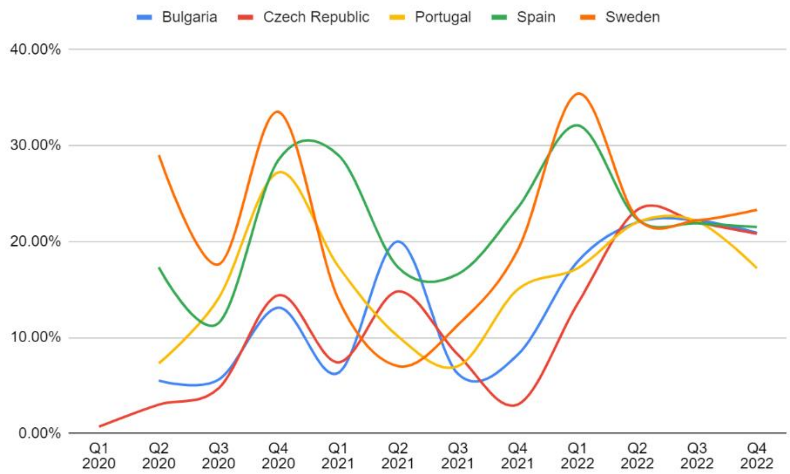


[Source: elaboration on FlixPatrol data]

3.1.4 Content preferences by Genre on HBO

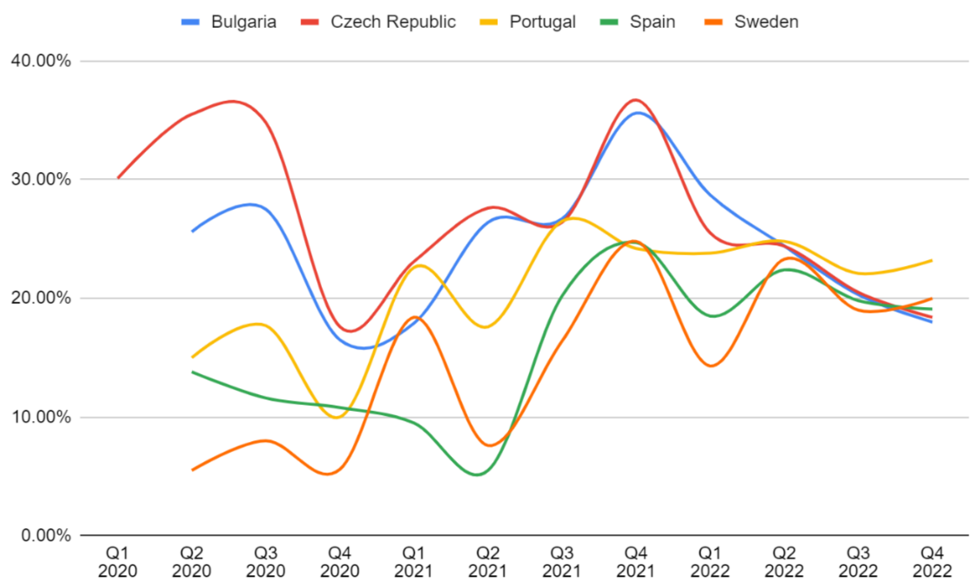
Whereas Netflix is relying on its algorithms' recommendations and advanced machine learning for keeping viewers engaged while browsing its huge catalogues, the newly launched HBO Max platform is focusing more and more on human curated recommendations, while still using algorithms. By using human-curated recommendations, which are more sophisticated, HBO aims in users' greater engagement and longer retention. Another benefit of this tactic is that HBO platform is not as vulnerable to feedback loops and filter bubbles that may end up pushing their users away. For the reasons above, we decided to look more into the HBO case regarding genres consumption and compare the results with Netflix. For the analysis we considered again the most popular genres as recorded by Flixpatrol for the Q1 of 2022. The most popular genres for this period were drama (22%), comedy (18%), sci-fi (11.9%), superhero (8.3%), fantasy (7.7%) and crime (4.4%). For comparability reasons we also took under consideration two genres considered niche, documentary (3.7%) and animation (8.1%). In the graphs below (chart 28 to 35) we see that consumption in Bulgaria and Czech Republic follow in most of the cases the same patterns, while consumption in Portugal is mostly aligned to that of Sweden and to lesser degree to Spain. One other interesting finding is that since Q2 of 2022 consumption is almost identical in all countries under investigation.

Chart 28. Genre preferences on HBO: Drama



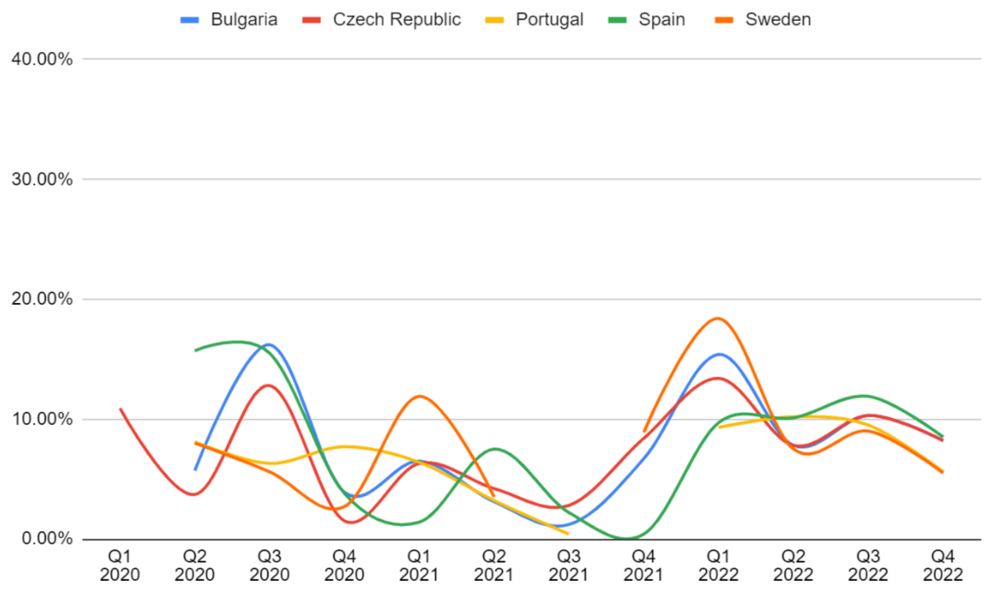
[Source: elaboration on FlixPatrol data]

Chart 29. Genre preferences on HBO: Comedy



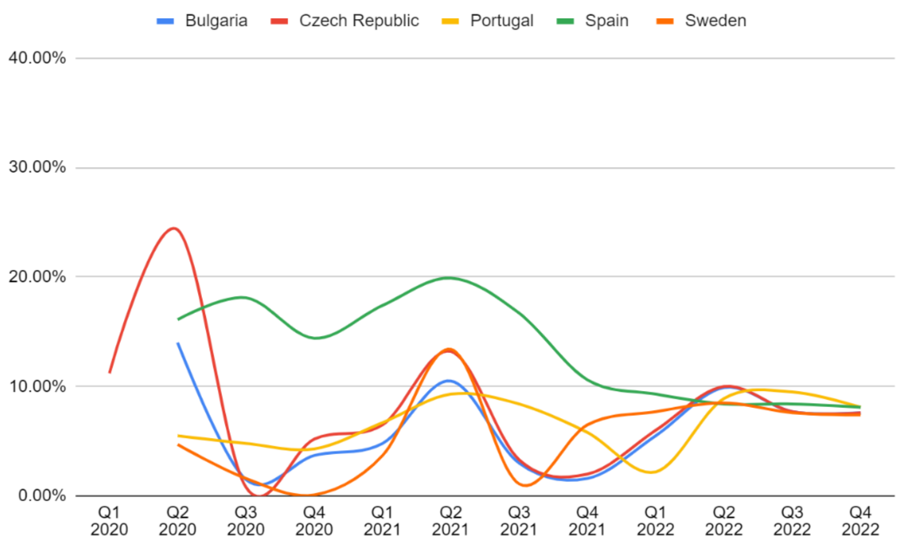
[Source: elaboration on FlixPatrol data]

Chart 30. Genre preferences on HBO: Science Fiction



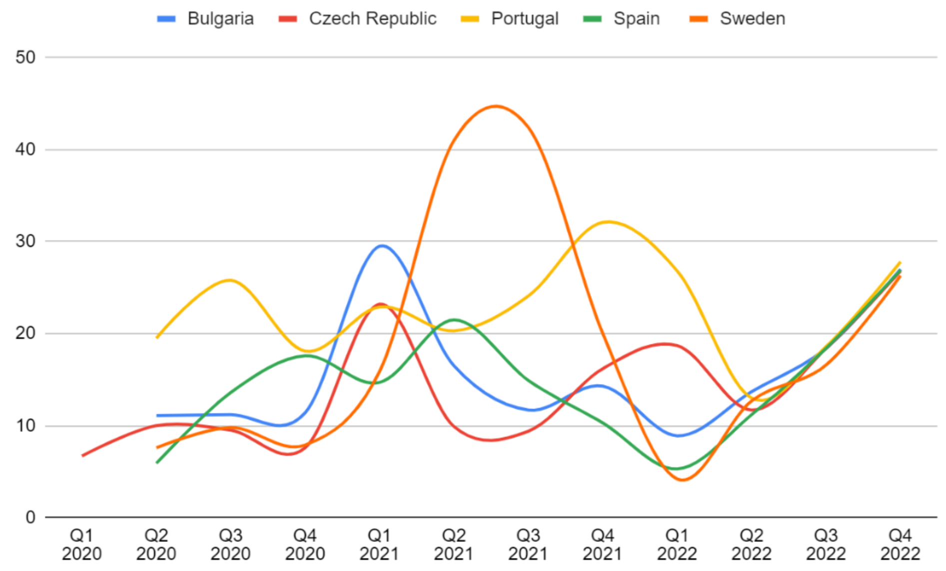
[Source: elaboration on FlixPatrol data]

Chart 31. Genre preferences on HBO: Superhero



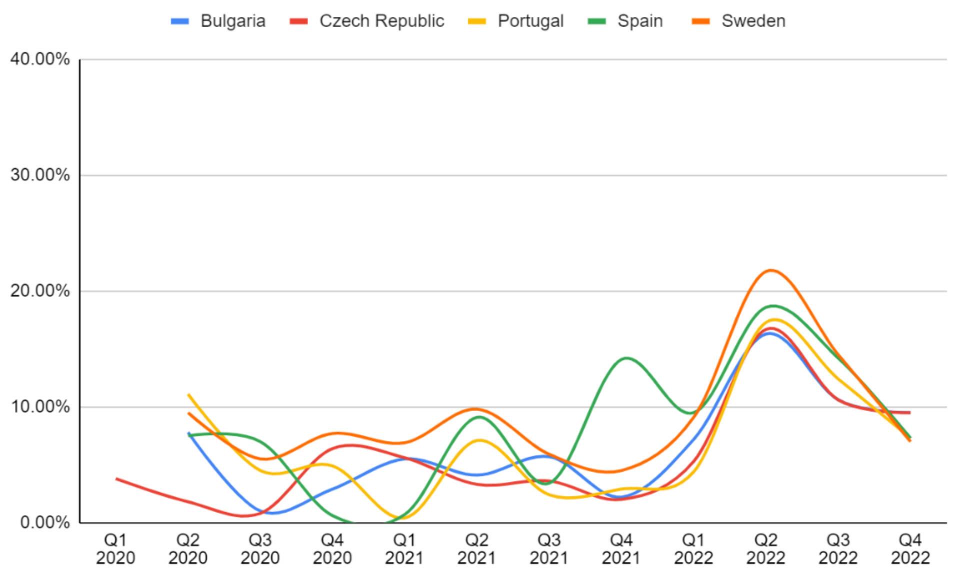
[Source: elaboration on FlixPatrol data]

Chart 32. Genre preferences on HBO: Fantasy



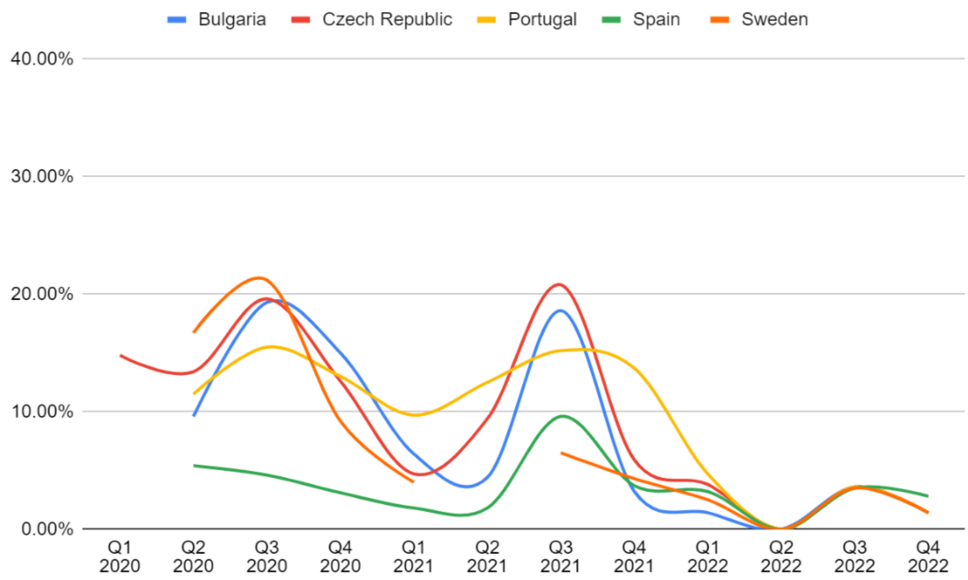
[Source: elaboration on FlixPatrol data]

Chart 33. Genre preferences on HBO: Crime



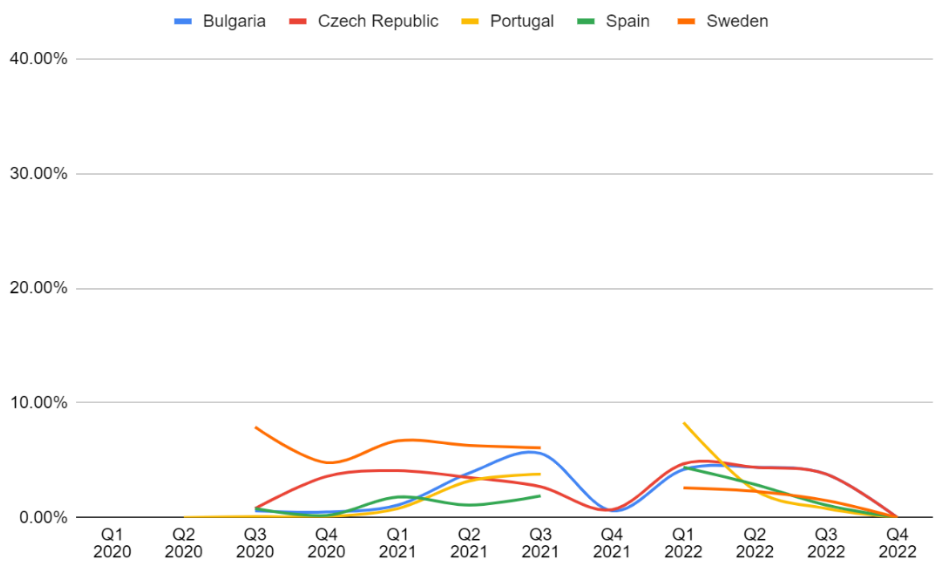
[Source: elaboration on FlixPatrol data]

Chart 34. Genre preferences on HBO: Animated



[Source: elaboration on FlixPatrol data]

Chart 35. Genre preferences on HBO: Documentary



[Source: elaboration on FlixPatrol data]

3.1.5 Public Service Media

A few considerations about the role of Public Service Media, which has been more widely addressed in the Work-Package 1 reports. As one can see in the table below, national movies account for more than 50& of the most watched titles in Italy, with the percentage dropping down to 31% in Belgium, and 8% in Greece. The main finding, here, has rather to do with the success of European movies, which account for 40% of the total in Greece, 34% in Italy, and 38% in Belgium. Even though the data are limited the three countries, and do not allow for any generalization, it seems that public media policies are providing a good service to Europeanization, in this case.

Table 23. Top watched movies by nationality in PSM video platforms

Country	National	Other EU_27	USA	Total
Greece	5	24	17	60
Italy	50	78	56	228
Belgium	9	29	19	76

[Source: Elaboration on FlixPatrol data]

When we consider the top-watched Tv-shows, on the other hand, results are very different. The incidence of European titles is actually limited in PSM platforms, as it is in commercial VODs. In Belgium we can find only three European titles in PSM, and none in Disney+ and Netflix; in Italy and Greece the percentage of European successes is even lower than in the American platforms. In the movie market, PSM seem to make space for the circulation of European products; whilst in the Tv programs market, they rather favor *national* contents – respectively 50% of the top-watched in Greece, 86% in Italy, and 60% in Belgium.

Table 24. Top-watched Tv-shows by nationality

Country	Platform	National	Other EU_27	USA	Total
Belgium	Disney+	0	0	22	24
Belgium	Netflix	0	0	35	60
Italy	Disney+	0	0	31	34
Italy	Netflix	5	7	39	64
Belgium	Disney+	0	0	22	24
Italy	Amazon Prime	8	4	20	40
Czech Republic	Netflix	0	8	35	55
Czech Republic	Amazon Prime	0	1	18	26
Czech Republic	HBO	0	2	17	24
Spain	Netflix	9	8	33	59
Spain	HBO	1	0	23	26
Spain	Disney+	0	0	30	32

Greece	Netflix	0	8	33	59
Bulgaria	Netflix	0	8	48	62
Bulgaria	HBO	0	3	21	31

[Source: Elaboration on FlixPatrol data]

Table 25. Top watched Tv-shows in PSM video platforms, by nationality

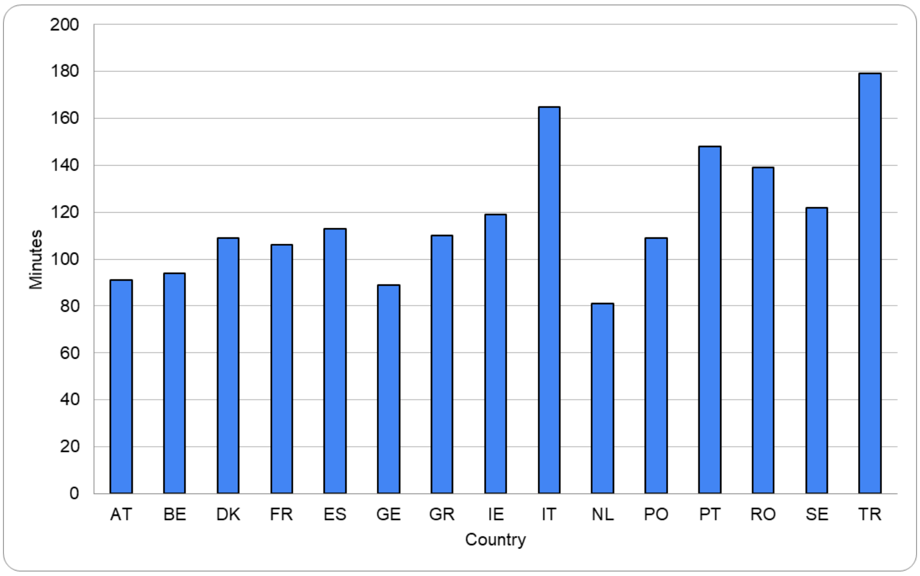
Country	National	Other EU_27	USA	Total
Greece	14	5	1	28
Italy	32	1	1	37
Belgium	15	3	3	25

[Source: Elaboration on FlixPatrol data]

3.2 What people follow on Social Media

Social media usage has definitely increased during the last decade, making these platforms the second most popular medium after TV. Chart 36 shows the daily time spent on these platforms in various European countries. Residents in Turkey spend almost 180 min. daily, followed by Italians with 165 min. and Portuguese with 148 min. The most reluctant people in social media usage are located in the Netherlands (81 min.) and Germany (89 min.).

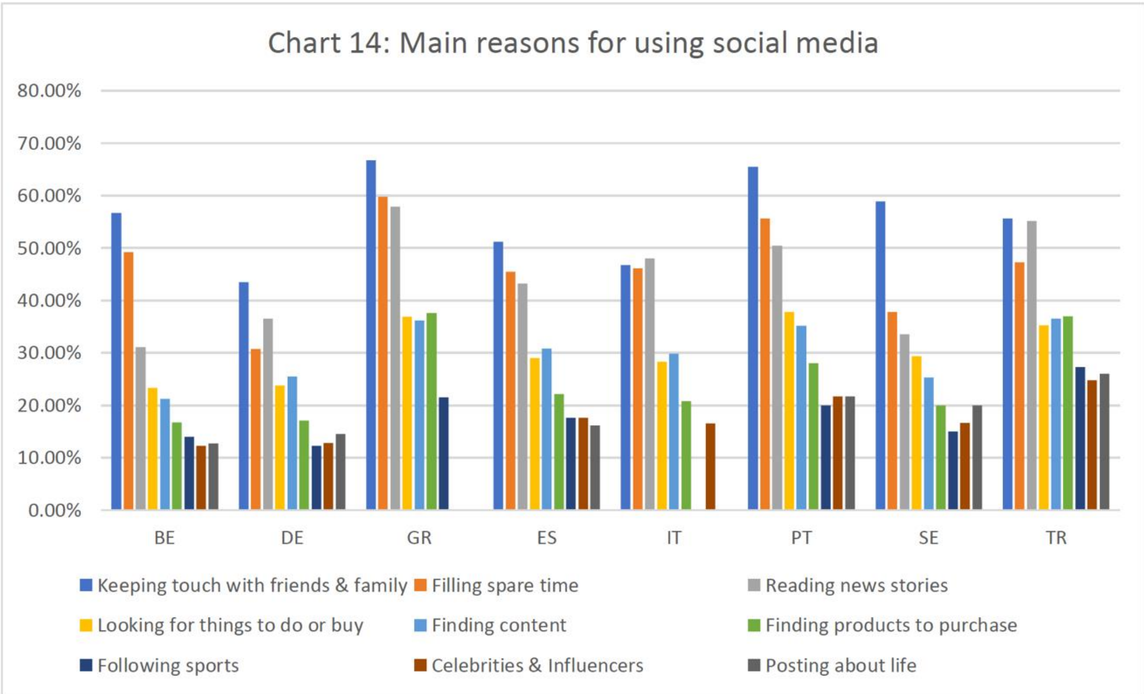
Chart 36. Daily time spent using social media, 2022



[Source: Data elaboration from Hootsuite Digital Report, 2022 https://datareportal.com/library]

For more context, in chart 37 we look into the main reasons people spent their time on social media (including messaging platforms). In all countries under investigation the main reason reported is "keeping in touch with friends and family", most notably in Greece (66.8%), Portugal (65.5%) and Sweden (58.9%). The only exception to the rule is Italy, where respondents noted as "reading news stories" as the main reason for using social media (48%), but "keeping in touch with friends and family" followed with a small percentage difference (46.8%). Filling up spare time is the second most reported reason of usage in almost all countries (from 30.7% in Germany to 59.8% in Greece), followed by "reading news stories" (from 31% in Belgium to 57.9% in Greece). It appears that following sports, celebrities and influencers is an occupation reported by fewer respondents in each country (from 12.5 to 25%). People also seem less interested in most cases in posting things about their own life (12.7% in Belgium, 14.5% in Germany, 16.2% in Spain, 20% in Sweden, 21.7% in Portugal, 26% in Turkey).

Chart 37. Main reasons for using social media

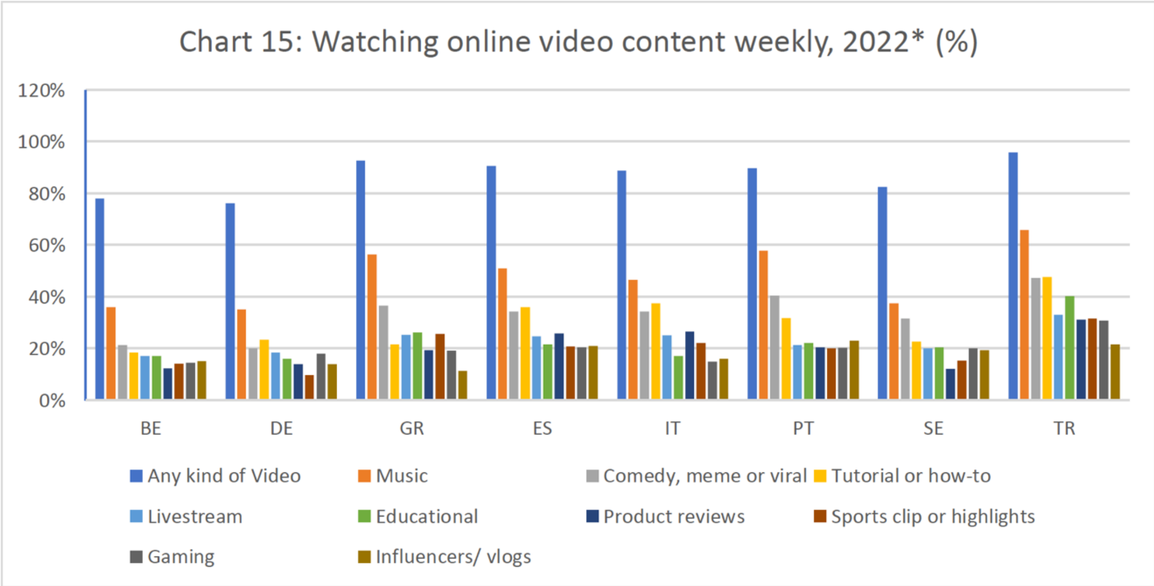


Source: Data elaboration from Hootsuite Digital Report, 2022 https://datareportal.com/library

[Source: Data elaboration from Hootsuite Digital Report, 2022 https://datareportal.com/library]

Before examining content consumption in various video platforms, we can look into the video consumption on the Internet. In chart 38 we see that in all countries under investigation music is the most popular genre (lowest score 35% in Belgium, highest score 65% in Turkey), followed by comedy and memes (from 20% in Germany to 47.2% in Turkey) and online tutorials (from 18.3% in Belgium to 33% in Turkey). Other content like educational videos, product reviews, sport highlights, gaming and vlogs by various influencers score lower than 20% in most of the cases, as shown in chart 38.

Chart 38. Watching online video content weekly, 2022



*Percentage of internet users aged 16 to 64, who watch each kind of video via Internet each week.

[Source: Data elaboration from Hootsuite Digital Report, 2022 https://datareportal.com/library]

Based on our research in ten countries, we see common patterns regarding the consumption on social media platforms. We took under examination two video – based social networking platforms namely Tik Tok and Instagram and analysed the Top100 accounts in each country. As shown in table 26, more than 96% of Tik Tok content comes from accounts based in the respective country. On Instagram on the other hand, there are much more popular accounts coming from abroad. Namely, in the case of Italy 17% of the most popular accounts come from the USA and 15.2% from other EU countries. In Czech Republic 17% come from other EU countries (mostly Slovakia) and 8% from countries outside EU. In Spain 19% of top accounts come from USA and 16% from EU countries. In Germany, local accounts score the lowest (19%), while of popular accounts 51% come from the USA and only 3% from other EU countries.

Table 26. Top channels by nationality on TikTok and Instagram

Country	Platform	National	Other EU_27	USA	Other	Total	National (%)
Belgium	TikTok	97	0	0	0	97	100
Belgium	Instagram	87	1	0	0	89	97.7
Bulgaria	TikTok	94	0	0	0	94	100
Bulgaria	Instagram	75	4	1	11	89	84
Czech Republic	TikTok	100	0	0	0	100	100

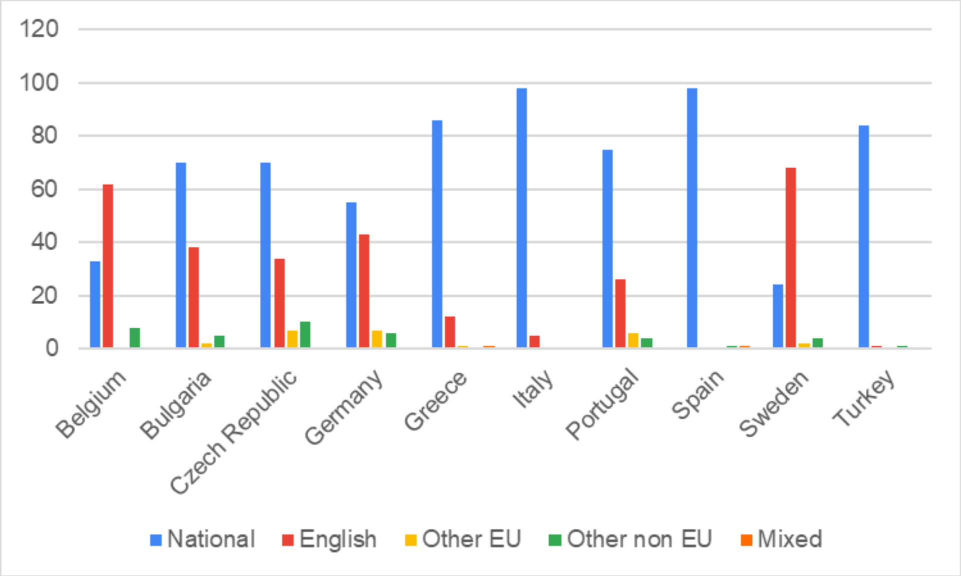
Czech Republic	Instagram	65	17	0	1	100	65
Germany	TikTok	100	0	0	0	100	100
Germany	Instagram	19	3	51	0	100	19
Greece	TikTok	98	0	0	0	100	98
Greece	Instagram	93	3	0	0	100	93
Italy	TikTok	349	0	0	0	349	100
Italy	Instagram	207	68	76	0	445	46.5
Portugal	TikTok	98	0	0	1	100	98
Portugal	Instagram	91	2	0	0	99	92
Spain	TikTok	98	0	1	1	100	98
Spain	Instagram	20	16	19	0	100	20
Sweden	TikTok	96	0	1	3	100	96
Sweden	Instagram	94	0	2	4	100	94
Turkey	TikTok	66	0	0	0	66	100
Turkey	Instagram	58	13	10	15	96	60

[Source: Elaboration on HypeAuditor data]

By reading the news and getting informed on social media, watching music videos, tutorials and sharing memes, European citizens interact daily with content coming both from their country and abroad. The comparison between TikTok and Instagram most followed accounts may indicate that a platform addressed to older users with higher income, based on commercialised visual content (photos and short video clips) such as Instagram could be more fertile ground for international content than a niche platform addressed to the younger users of TikTok.

However, is language the main barrier that maintains EU fragmentation when it comes to social media content? By analysing the languages spoken by the followers of top100 accounts in each country, we can see different patterns on the three platforms. YouTube is a platform used by people searching for content mostly in their native language, however in Belgium and Sweden top 100 accounts have more than 60% of followers with English as their primary language (**chart 39**).

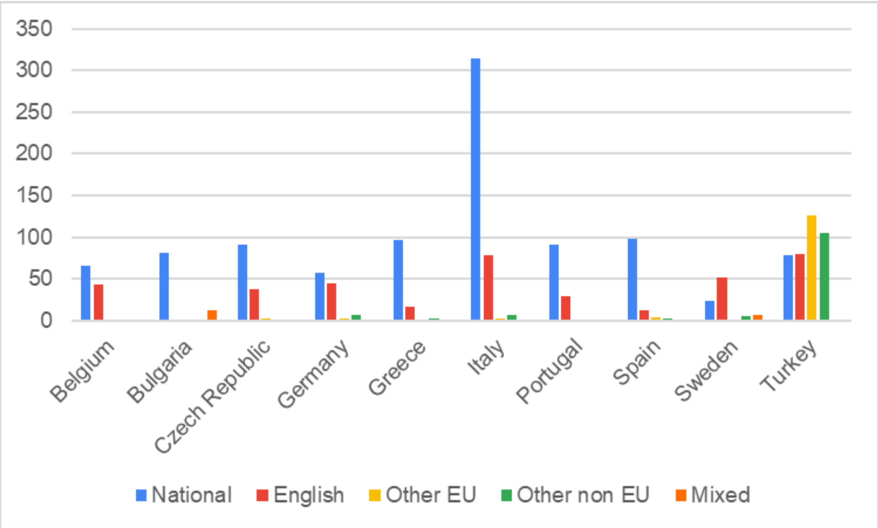
Chart 39. YouTube users' languages



[Source: Elaboration on HypeAuditor data]

On TikTok young people prefer content in their native language. Two notable exceptions here are Sweden, where English is more prevalent than national language and Turkey that has the biggest variety among users' languages (chart 40).

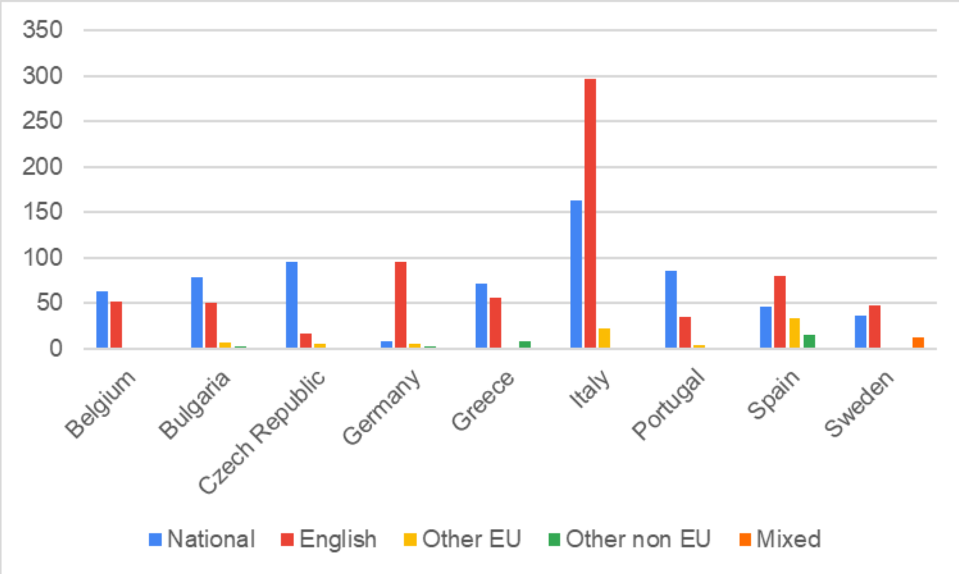
Chart 40. TikTok users' languages



[Source: Elaboration on HypeAuditor data]

English is used as the primary language by Instagram users following the top100 accounts in Italy, Germany, Spain and Sweden. In Belgium and Greece users of national languages are more but English users are following closely. With the exception of Spain, there isn't any noteworthy use of other European or non - European languages (chart 41).

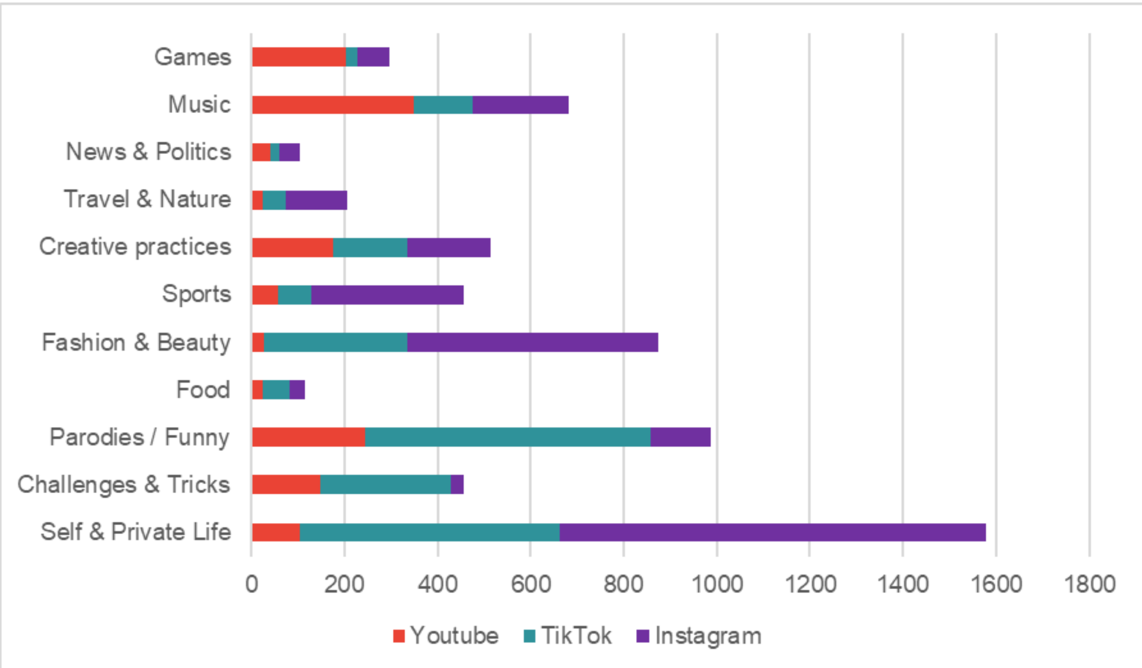
Chart 41. Instagram users' languages



[Source: Elaboration on HypeAuditor data]

But even if it is the case that popular content comes mainly from accounts located within the country, we cannot ignore media grammar and its impact on users of each platform regarding the production and consumption of content. In chart 42 we see that three social media platforms based on video host different kinds of content. YouTube for instance, is a platform popular for its music content, gaming and the comedy channels. Instagram is a friendlier platform for posting personal content, fashion and beauty or even sports' related content. Tik Tok hosts creators that produce personal and funny content, experiments, challenges and tricks.

Chart 42. Type of content in top100 social media accounts



[Source: Elaboration on HypeAuditor data]

3.3 Is banal nationalism still here?

From our analysis on Tik Tok and Instagram, we discovered that in most EU countries under investigation people prefer to watch content from national accounts using primarily their national language. In addition, English indeed is the *lingua franca* of the EU and depending on the country, social media users are more or less prone on using it as their primary language.

As a matter of fact, there is evidence of European audiences being attracted by national issues, with the attention towards EU-related aspects commonly peaking when the latter intersect or involve local interests: for instance, debt crises, negotiations between the Union and the Member States, and the like [Barisione & Ceron 2017: 92-99]. The relevance of national contents in social media discourse, in its turn, would show how the traditional/digital media distinction *does not* properly overlap with the national/global transition. As a matter of fact, the national pattern is sustained by both the old and the new media – ranging from movie comedies to Tv broadcasting, to the most popular YouTubers and TikTokers – and the same can be told for the global and the European. This counter-intuitive finding, therefore, can give justice to the complexity, the asynchronies and the continuities that shape contemporary European mediascape, showing how history is made of stability, sameness, and of the persistence of the structure, to put it in Fernand Braudel's [1949] words. As we know, national identities on the web are mostly considered in terms of *reactive* forms of identity: this is the case of Manuel Castells' interpretation of the space of places, intended as the resistance of subaltern classes to the spread of global flows [see his classical trilogy: Castells 1996, 1998, 1999]. In most relevant cases, the analysis of on-line nationalism is actually imbued with judgmental statements, as in Christian Fuchs' work on the connections between the very idea of nation, and authoritarianism, patriarchy, militarism, and invention of the public enemy [2020: 2-7 in particular]. Here we would take a different stand, arguing that the importance of local social media accounts has to do with the *cultural* needs of the audiences: something close to Benedict Anderson's idea of imagined community [1983], with not accidentally referred to the media – novel and newspapers – as main drivers of identification; or to what, after Michael Billig, we define *banal* nationalism:

> Why do "we", in established, democratic nations, not forget "our" national identity? The short answer is that "we" are constantly reminded that "we" live in national: our identity is continually being flagged [1995: 92].

However, when it gets to our data, this doesn't necessarily mean that the content produced and consumed via social media is *exclusively* native content. As research has already shown, various account owners copy foreign popular accounts on topics, formats, production techniques on montage, special effects and general discourse (Himma-Kadakas et al., 2018). Despite that, the ingredient for success for online content producers is the element of authenticity (Clazie-Thomson, 2022). This is alluded by producing technically advanced but at the same time "amateur" videos with informal style and language, simple and superficial humor (in some cases even provocative), while revealing aspects of a marketable personal life (Abidin, 2017; Pereira et al. 2018; Scolari & Fraticelli, 2019). The algorithms of the platforms, once launched as alternative media for communication, are now fully commercialized and promote certain types of content effectively guiding creators on what to produce. This feedback loop leads to mere local variations of a largely typified content based on a globally tested recipe for success, leaving in reality small margins for originality.

As our data indicate, people use the internet to get information, ideas, inspiration, and new skills during their free time. However, today's use of the internet is being promoted as a new type of "hustle culture" outside the workplace (Ticona, 2022). Worse, the commercialization of social media revealed another depressing development: making marketable previously unmonetized aspects of human life such as leisure time, personal life, relationships, and hobbies (Carter, 2016).

Although European citizens still seem reluctant to post personal content and worry about privacy online, at the same time they consume a great deal of "personal" content in certain platforms, perhaps more they care to report. The main reason behind this fascination for personal content could be a desperate attempt to regain some financial independence and stability in an increasingly precarious market situation by monetizing aspects of the human experience (Thieme, 2018; Cottom, 2020). It is no accident that previous activities that were by large free have crept their way into commercialization: "dumpster diving", thrifting, couch surfing, and myriad other activities are now part of the so - called gig economy and have entire YouTube series where "professionals" give advice on how to best monetize them. Even parenting has been commercialized by exploiting childhood for views (Abidin, 2017).

In this inhospitable landscape, working to build a European identity could be a lost cause. The reason for this uneven battle is obvious: American libertarian culture, where the individual is the sole responsible for the outcome of their lives, is leading the race; it could even be argued that it has already won. It would be definitely better for the EU to return its attention on securing a better work - life balance for its citizens to ensure that Europeans do not follow Americans in this trend.

4 (Un)expected externalities: Digital Piracy and VODs

Panos Kompatsiaris

4.1 Introduction: digital piracy, cultural trends and Europe

In the context of the cultural and media industries, piracy concerns the unauthorized use, copying or distribution of digital content that is protected by copyright laws, including music, movies, books, and software. The term was popularized in this context in the 1980s with the unauthorized selling of music and VHS tapes and later in the 1990s it was moved to the unauthorized copying of CDs that are digital conduits of informational and cultural content in the form of music, film and software. As personal computers and the internet became more prevalent in households, increasing global connectivity, unauthorized distribution of digital content increased online, and digital piracy entered the everyday vocabulary of cyberspace. The first website popularizing online piracy was the peer-to-peer sharing (P2P) Napster in 1999 that allowed the distribution of music files (.MP3s) between users, bypassing the industry protocols and regulations. Following that, the P2P BitTorrent communication protocol enabled a more sophisticated and faster method of file sharing via BitTorrent clients, such as Torrent and Transmission, which can be installed on the user's computer and run torrent files. In that way, the user downloads the torrent file from a 'tracker' (that is a platform that contains a catalogue of digital content) and via BitTorrent clients employs the so called 'seeds', that is other users who own the file in their computers and share it via their own client. As a result, the user can download from multiple users at the same time, and as internet speeds increased, downloading became significantly faster than it was on Napster. The Pirate Bay is an iconic BitTorrent tracker including all types of digital content and there are also many more specialized trackers (usually invite-only) for music, books or audiovisual content. As the practice of streaming became more popular than downloading in terms of digital consumption, the traffic of torrent file sharing decreased.[6] The latest most widely popularized practice of unauthorized consumption of digital content, then, is online streaming, according to which the user enters websites containing mostly audiovisual content (including TV serials) and watches them in real time. These websites do not charge a fee (as they have no licenses to do so) and mostly make their revenue from advertising.

There is no consent around the discursive and material implications of piracy, as a variety of social agents would interpret it differently according to their social and economic positionalities. While most internet users who engage in some form of piracy may see

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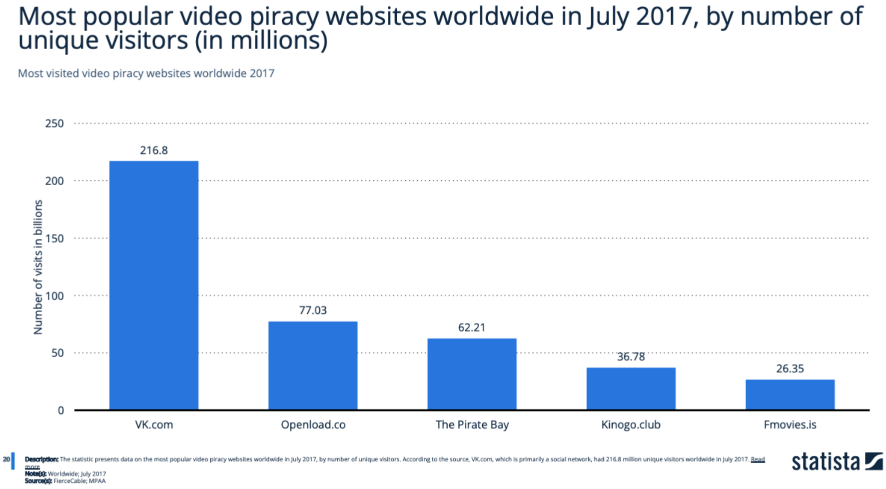
[6] Here are some statistics pointing to the gradual replacement of torrents by streaming, for Poland and Hungary: https://www-statista-com.iulm.clas.cineca.it/statistics/1033212/poland-torrent-versus-streaming-long-video-content/; https://www-statista-com.iulm.clas.cineca.it/statistics/1130158/hungary-torrent-and-online-movie-streaming-usage/.

downloading, streaming, and sharing as normal, everyday activities (Burkart, 2014), digital piracy is unmistakably a threat to the digital content industries, particularly those that make their money through copyright (Belleflamme & Peitz, 2010). As the internet throughout the 2000s increasingly became a marketplace of commodity and profit-driven, industrial cultural production, digital piracy rose to a global challenge for the copyright industries, as their losses amount to several billion dollars per year as a result of this unlicensed consumption of content. On the other end of the spectrum, activist social actors, including the pirate political parties that popped up in Europe after the 2010s with more iconic one in Sweden, Germany and Czech Republic, see online piracy as part of the liberal institution of 'freedom of expression', that is, the freedom to share and communicate cultural activities with others.

The difficulty to controlling piracy emerges from the nature of cultural contents and commodities. Cultural commodities generally tend towards becoming public goods as they concern the educational and cultivating side of societies, and the more they are consumed by the public, the more reputational and symbolic capital they will bring to their creators (which they can use for future projects, as we shall later discuss). In political-economic terms, they are nonrival goods, which means that their consumption by one person does not prevent or foreclose their consumption by another; for example, if a person streams a film or reads a book, this does not diminish the value of these cultural products because they can be watched or read again by other people without a loss in quality (or, in some cases, with very little loss of quality, as in books). They are also nonexcludable, which is to say the buyer cannot often exclude another person from its consumption (Garnham, 2005; Belleflamme & Peitz, 2010). Cultural goods can be more easily copied, shared and possibly sold in unauthorized ways (in contrast to industrial goods, for instance) via the technologies available to the public in each period of time, as the regulating frameworks usually lag behind the development of these technologies. Given these challenges, the primary function of copyright laws vis-à-vis cultural production is to create, as much as possible, conditions of artificial scarcity for cultural products so that knowledge, creativity, information and ideas are converted into capital. In this regard, piracy is one of the key terrains for a struggle over new legislative initiatives on behalf of the main entertainment and content-producing industries (Matos, Ferreira & Smith, 2021). This is a struggle for imposing a common prohibitive framework, including harsher punitive measures and litigation, and is by definition global, as pirate websites can always move around geographically to countries with looser regulatory frameworks (for instance according to chart 43 the most popular website for pirated activates in 2017 was by far the Russian VK).

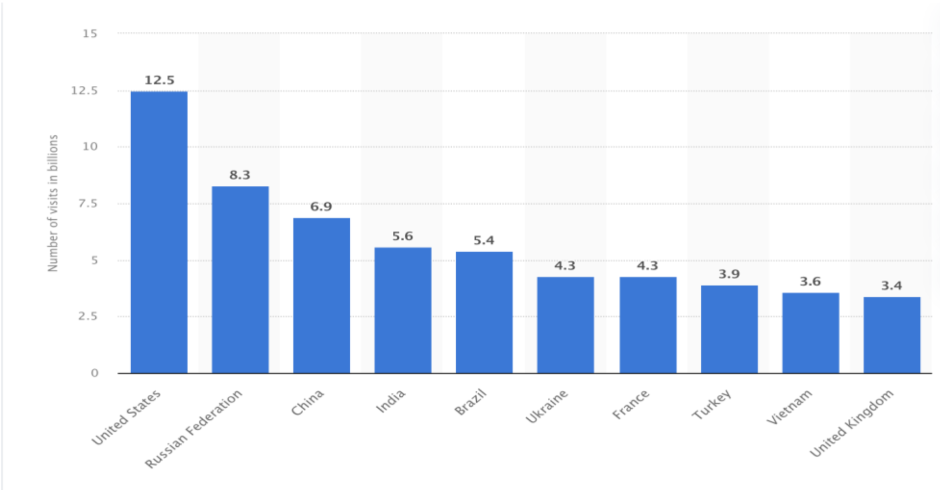
Chart 43. Most popular video piracy websites worldwide in July 2017



[Source: Statista]

In terms of raw numbers, Europe is not among the top consumers of pirated content in the world; Chart 44 shows that, based on the number of worldwide visits to piracy sites in 2020, the only EU country in the top ten is France (in seventh place).

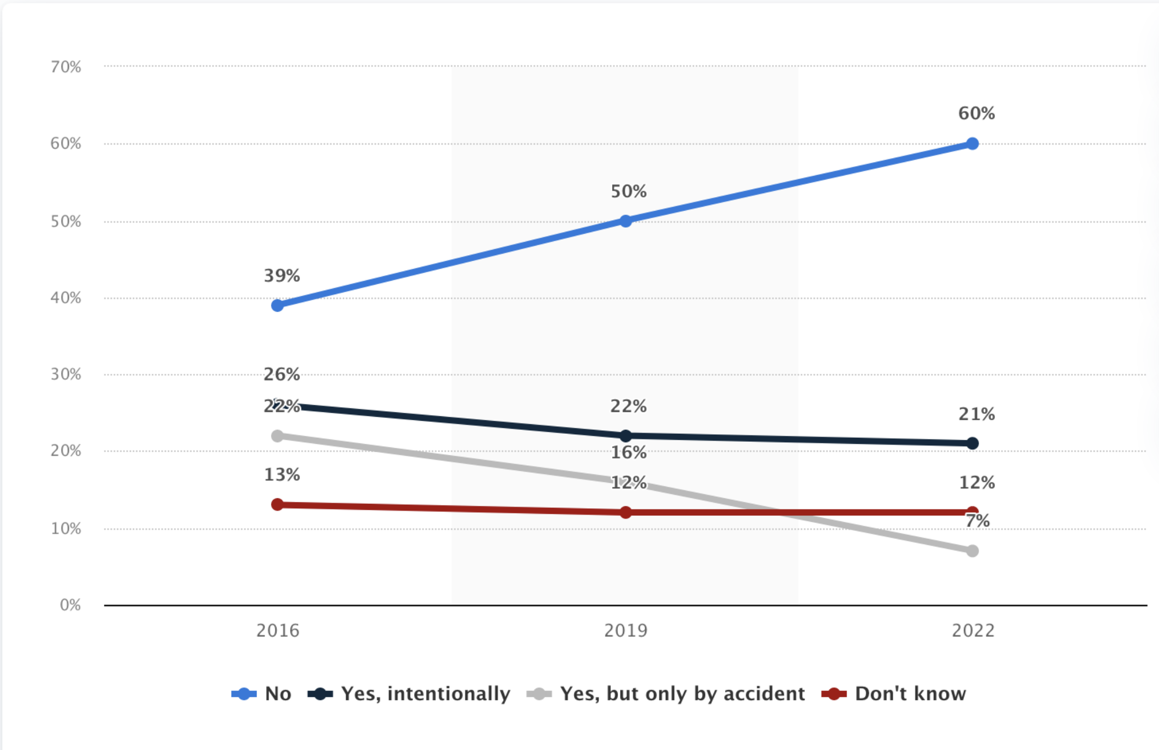
Chart 44. Numbers of visits to media piracy sites in 2020 by country [in billions]



[Source: Statista]

Furthermore, there are indications that the younger generation, at least in Europe, is less likely to consume pirated content. In Europe, the proportion of young internet users who have not accessed ‘illegal’ media digital content increased from 39% in 2016 to 60% in 2022, nearly doubling the number of users who do not consume pirated content (Chart 45).

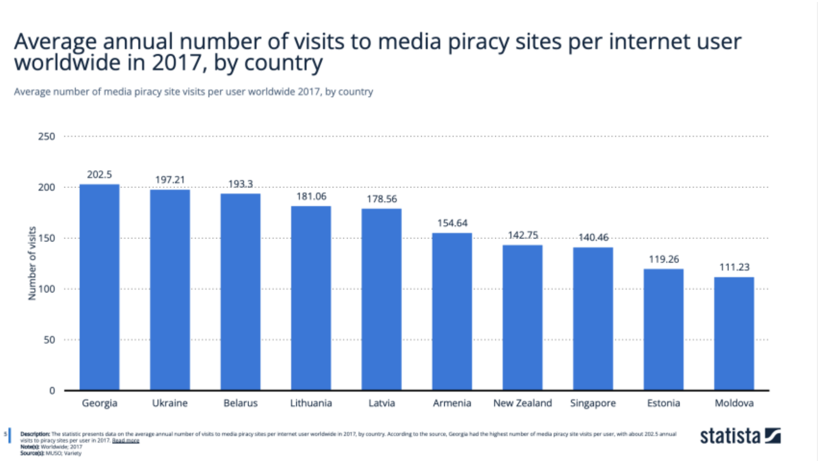
Chart 45. Share of young internet users who have accessed illegal media digital content in Europe, 2016-2022



[Source: Statista]

From 2017 to 2020, access to pirate sites dropped from almost 13 percent to 6,5 percent, or in half, and the total annual growth rates in access to pirated content during this period were negative. Having said that, some of the highest annual numbers of users based on the average annual number of visits to media piracy sites per internet user share are common in Eastern European countries, including Georgia, Ukraine, Belarus, Lithuania and Latvia, which are in the top 5 places worldwide; this shows that there is a pattern around consumption of pirated content in this part of Europe worth investigating further from an anthropological and largely socio-historical perspective (Chart 46).

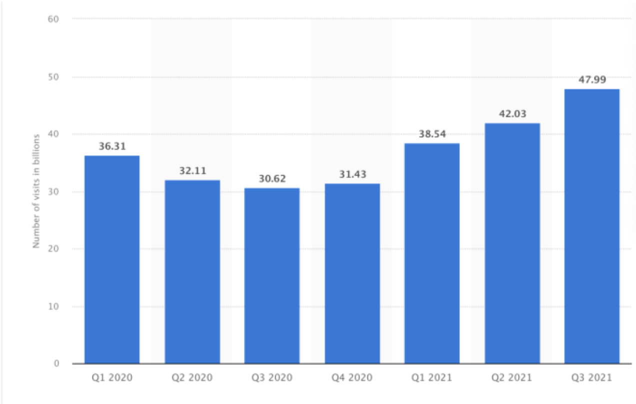
Chart 46. Average annual number of visits to media piracy sites per internet users, 2017



[Source: Statista]

With the COVID-19 pandemic beginning in 2020, worldwide visits to piracy sites increased significantly in the second and third quarters of 2021, as lockdowns forced people to stay at home (this coincided with an increase in digital content consumption during lockdowns in general).

Chart 47. Total number of visits to piracy sites worldwide from 1st quarter 2020 to 3rd quarter 2021.

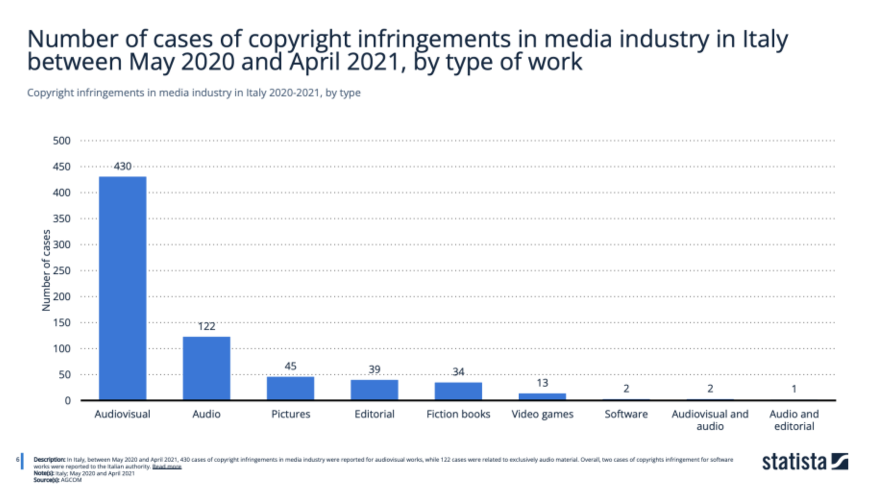


[Source: Statista]

4.2 VODs and Piracy

Napster was the early online piracy incubator, popularizing an ethos of sharing music files, which in turn formed the main bulk of pirated content on the internet; yet, as referred to above, the massive increase in internet speeds and bandwidth since the 2000s combined with the sheer availability and often virality of audiovisual content as well as the rise of YouTube and later music streaming services had as an effect a transition, according to which the main target of piracy became the audiovisual sector instead of the music sector (Smith, Telang & Zhang, 2019). This transition has been incremental and significant. To give an example, pirated consumption of audiovisual works in Italy in 2021 amounted to more than 70% of total copyright infringements in audio, pictures and books combined (Chart 48).

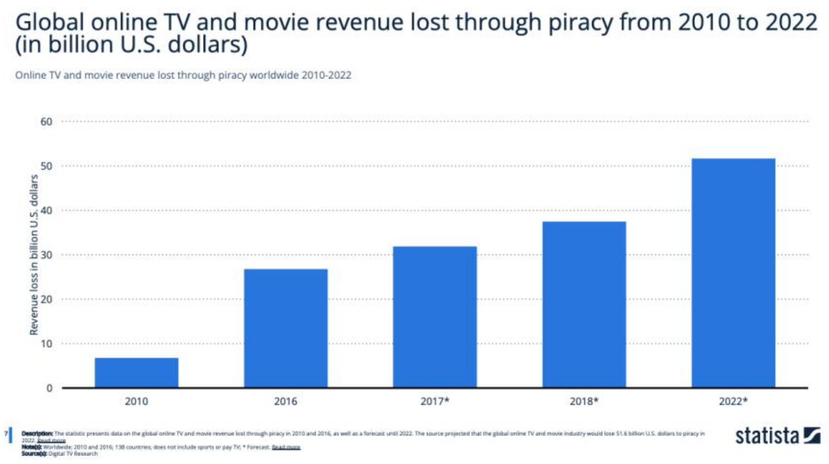
Chart 48. Number of cases of copyright infringements in media industry in Italy, May 2020- April 2021, by type of work



[Source: Statista]

An important factor in this transition has been the rise of (mainly) US-based video-on-demand (VOD) services and their spread throughout the world during the 2010s, which created a new enormous and global market for audiovisual content. In Europe alone, VOD services rose from 12.1 million EUR in 2010 to 11.6 billion EUR in 2020, which means VOD market grew more than 100 times (Grece, 2021a). In this regard, the sharp increase of loss in revenue as a result of the unauthorized audiovisual content consumption that we see in chart 49 corresponds with the sharp market increase for the audiovisual industry (in this sense we can notice a link between the two). The main VOD business models are transactional video on demand (TVOD), like Apple iTunes and Google Play, where the user pays per view of individual pieces of content, and subscription video on demand (SVOD), like Netflix, HBO Max, Amazon Prime and Mubi, where the user buys a monthly or yearly subscription in exchange for access to wide range of streaming content on the platform. The VOD services offered an organized and algorithmically curated model of online consumption that proved not only easy to use and affordable, at least for consumers in countries with higher GDP per capita, but additionally created a global public sphere around particular audiovisual content (e.g., *Game of Thrones*, *Casa de Papel*, *The Squid Game*) and buzz around streaming services (mainly Netflix). In turn, this new globalizing public sphere, fostering a liberal-cosmopolitan attitude, enabled online fandom practices that crossed national borders. This in effect made certain audiovisual content 'necessary' to consume as a form of cultural capital and a precondition for participating in cultural debates.

Chart 49. Global online Tv and movie revenues lost through piracy from 2010 to 2022 [in billion U.S. dollars]



[Source: Statista]

Overall, in audiovisual piracy, the main ways of consuming unauthorized content are four: a) through unauthorised streaming sites, where, as previously stated, users can watch live online a specific audiovisual content; b) through downloading torrents, where users can download and store the digital content on their hard drives c) via direct download sites (DDL), where users click on hyperlinks that lead to the immediate download of content; and d) via stream ripping (or recording), where users record content streaming services (e.g., YouTube) and save it to their computers using specific applications. The first way, that of streaming films from unauthorized sites, is by far the most popular although direct downloading and torrent trackers are also popular.[7] These forms of online piracy presumably affect the revenues of VOD platforms, as, in simple terms, if users can find pirated copies of movies and TV shows online, they may be less likely to pay per view for TVOD or to subscribe to an SVOD service (de Matos, Ferreira, Smith, 2021).

The centrality of audiovisual piracy that emerged with VODS is further related to this transition in pirated consumption from torrents to unauthorized streaming as mentioned above. This has to do with the affordances that VOD services provide for copying and

[7] For instance, the share of online piracy practices in 2020 is: Streaming sites: 57%, Direct download portals: 27%, Torrent sites: 12%, Stream rippers: 4%
https://www.go-globe.com/online-piracy/
In other accounts streaming relates to the consumption of 80% of the overall online piracy https://www.techinasia.com/most-viewers-watch-pirated-content

distributing content. As Michael D. Smith, Rahul Telang and Yi Zhang explain in relation to both TVOD and SVOD:

> For example, after movies were introduced to the iTunes store, pirated copies sourced from iTunes downloads became more prevalent on piracy Web sites. Similarly, with the increasing popularity of streaming platforms such as Hulu and Netflix, the associated WEBRip and WEBCap files also started to become readily available on the Internet. With the fast growth of the streaming platforms, it is not surprising that streaming piracy has overtaken peer-to-peer piracy as the most popular means to pirate content (2019: 200).

In this regard, the tremendous growth of the VOD sector during the 2010s and especially after the internationalization of Netflix and TVOD services like Google Play, YouTube and iTunes, was key for the advance of streaming piracy into the main form of piracy.

4.3 Literature, Theory and Perspectives on VOD and Piracy

The scholarly material around piracy can be divided in two broad perspectives that correspond to the overall politics of the authors. The first comes from critical theory or activist scholars who would either decriminalize piracy, see it as a beneficial for society or even understand it as a potentially emancipatory practice (e.g., Hall, 2012; 2016; Burkart, 2014). If we apply this thinking to audiovisual piracy, the latter can, for example, be considered as a means to publicize an audiovisual product, make it potentially viral and bring symbolic benefits to the creative producers which can be traded later and lead to financial gains. For instance, as the consumption of pirated content offers reputational gains to cultural producers, including social media visibility or the circulation of articles and reviews about their work, an actor may be able to sign easier future contracts or a musician can attract more audience in their gigs.

At a broader level, this ‘friendly’ approach to piracy is further part of new grassroots legislative initiatives around the authorship-copying-distribution complex that both draw and depart from the essentially liberal-capitalist framework of ‘copyrights’ in favour of a more communitarian politics. We can mention, for instance, the copyleft licensing system developed in the 1980s by the open software pioneer Richard Stallman, that is described as “any method that utilizes the copyright system” in order to “pursue the policy goal of fostering and encouraging the equal and inalienable right to copy, share, modify and improve creative works of authorship”.[8] The GNU General Public License, designed for software works and developed by Stallman himself, is one example, as is the Creative Commons license, which applies to all creative works developed by Lawrence Lessig, Hal Abelson, and Eric Eldred. Apart from promoting the public character of creative works by keeping the access free, something that benefits society horizontally and especially those from poorer backgrounds, the copyleft is grounded on ideals of participation, cooperation and mutuality instead of policing and enclosure. The copyleft licensed works are ‘free’ to be distributed, developed and remixed by

[8] https://copyleft.org/.

anyone without the need to pay a fee and, in this sense, they are more immediately subject to human creativity or can be improved to more effectively address human needs. While this approach applies more directly in the case of software, because software has a functional use that can be improved if it is unrestrictedly open to social creativity, we can also envisage how the free use of audiovisual content can lead to more horizontally cultivated human societies. Another benefit would be that it could assist cultural producers in their creative work by letting them incorporate the creative works of others without paying for license fees. According to the copyleft strategy, by sharing their albums online for free, for instance, musicians would be able to make money from selling hard copies, gigs and other merchandise.

Yet, if this approach is already somewhat more precarious financially wise for musicians, the problem is that especially for audiovisual producers the possibilities for financial compensation from creative labour are less for the original creators, given the fact that the production costs in film are much higher than music and that most directors, actors and camerapersons cannot employ the returns strategy of musicians that includes playing gigs and selling merchandise. Participants in a hypothetical copyleft audiovisual work could, for example, benefit from audience exposure through advertising and promotion or teaching at seminars, schools, and master classes (another booming sector in the platform economy), but investors would have less incentive to invest in audiovisual works that would yield no financial benefit. In any case, more research is needed in order to think of a sustainable copyleft strategy for audiovisual works.

The second perspective is what we can call the 'copyright perspective', as it echoes the interests of the commercial industry and argues that piracy is a 'crime' that has to be dealt with through policy initiatives. The copyright perspective looks at the VOD industry in more detail in contrast to the piracy-as-empowerment perspective, which is in principle broader and grapples with the political-philosophical dimensions of piracy. This literature regards piracy as an unreserved threat to revenues that is not limited to the audiovisual and cultural industries in general but has a significant impact on the economy as a whole (for example, de Matos, Ferreira, and Smith [2021] argue that piracy losses in the US alone were nearly 12 billion dollars). Contrary to the copyleft strategy, then, here all creative works should be copyrighted in order to secure financial gains for their participants and motivate future investment. Although it may seem like an everyday practice, the violation of copyright, according to this perspective, threatens the health and future development of the audiovisual industry.

VOD piracy here is part of a larger trend of illegally consuming unauthorized content, which is framed as immoral and delinquent. The anti-piracy literature then often attempts to understand the motivations of users engaging in this delinquent act so that the companies or the state can adopt policies for changing the users' 'harmful' habit. The goal is to eventually persuade them to pay for a legal way to consume a work, either through offering a better service or through punitive measures. As such, there is a large bulk of literature that deals with the personal, behavioural and even psychological substratum of individuals, analyzing the reasons that they engage in piracy (e.g., de Matos, Ferreira, and Smith, 2021; Riekkinen, 2018; Barros, 2022; Smith, Telang and Zhang, 2019) as the unauthorized consumption of content can even be framed as the outcome of bad 'national habits' (Nistoreanu, Dincă and Șchiopu, 2017). In reference to piracy in Romania, for example, Nistoreanu et al. (2017) write that "the film consumer in contemporary societies is increasingly selfish, not caring about the losses of film studios due to piracy, because the desire to watch movies as quickly, cheaply, and comfortably as possible constantly exceeds the desire of a cinematic experience” (:407). In this regard, the personal motivation to consume pirated content becomes synonymous with harm, social injustice and recklessly spent leisure time.

While there is not enough space here to account for all the research and aspects touching on VOD and piracy, we can indicatively discuss works that explore this ‘bad habit’ not only from a personal but from a larger technical, social and economic perspective. On the technical front, for instance, a potentially weak feature of VOD services, in contrast to music streaming services like Spotify or Apple Music, is their incomplete catalogues. On the one hand, SVOD catalogues are far from complete, in the sense that they only contain a limited number of films or series, and on the other hand, the TVOD model does not cover all titles. In this regard, even if the user is subscribed in one or more SVOD services or is willing to pay for TVODs, they may not be able to find the films or series they want to watch. The incomplete cataloguing of VODs is then another reason that makes audiovisual piracy more alluring compared to music piracy. This is related to the different production and distribution models between audiovisual and music; that is to say, the audiovisual content is generally much more expensive to produce and requires more consumption time than music, so it is extremely difficult (if not impossible) to have a SVOD service, for instance, that could buy a complete film catalogue (all the films that exist). Thus, a pirated streaming site can contain a much bigger catalogue and possibly a lot more content than say Netflix, Hulu and HBO combined. What legal SVOD services can offer compared to illegal streaming services, according to Jane Riekkinen, is content quality (that is exclusive programming), system quality (video quality, subtitles in multiple languages and so on) as well as security (I would also add customized and algorithmically curated services as the main advantage of SVODs).

To account for the psychological mechanisms according to which a ‘pirate’ would justify to themselves and others the unauthorized use of copyrighted content, Riekkinen employs social psychology theories, such as the “neutralization theory” and the theory of “cognitive dissonance” (2018). The idea here is that the pirates rationally understand that what they do is harmful and employ different mechanisms to suppress their guilt, including “denial of responsibility, denial of injury, denial of the victim, condemnation of condemners and appeal to higher loyalties, metaphor of the ledger, defense of necessity, and justification by comparison” (2018: 3559). These are mechanisms that make pirates continue engaging with piracy by giving them the necessary moral ground and justifications. Based on the model of individual patterns of rationalizing, Riekkinen makes the hypothesis that, insofar as SVOD services *do offer* superior content quality, system quality and security compared to pirate websites, once they have tried it the users will develop a likewise psychological mechanism that devalues piracy and supports their subscription choice. As soon as individuals may try a Netflix subscription, for instance, and are satisfied with it, they will according to this hypothesis “will decrease their valuation of the illegal piracy option in comparison to legal SVOD option” (2018). Yet Riekkinen discovered that this hypothesis was not supported by findings after conducting survey research with people who had previously engaged in piracy after purchasing a SVOD subscription; satisfaction with SVOD services does not necessarily imply a negative effect towards piracy, which means that while users may be satisfied with a Netflix subscription, they will continue to justify piracy practices and possibly engage in piracy *at the same time* they are subscribed. The most obvious reason for that is that, as mentioned above, the catalogue of VOD services is limited and users who have a propensity to consume and more broadly look for free content will do so irrespectively of the satisfaction they may derive from the use of VOD. What we can conclude from this research is that a) incomplete VOD cataloguing is a reason for looking for content elsewhere, thus motivating piracy b) there is no either/or when it comes to the authorized/ unauthorized consumption of content, as someone may value both subscription-based and pirated consumption at the same time. In other words, as Smith at al put it, "once consumers have learned how to pirate, it may be difficult to attract them back to legal channels" (2019: 202).

A similar thesis is supported by the research of de Matos, Ferreira, and Smith (2021), who collaborated with a multinational telecommunications provider to set up an experiment with households that had previously used BitTorrent. According to the experiment, they provided these households with a free 45-day TV bundle that included access to movies that could be streamed via SVOD. However, while TV consumption increased during these days as an effect of the new content, this did not change the habit of using BitTorrent and thus downloading content from unauthorized sources. They find that "giving pirates access to these channels increased their consumption of TV by 4.6%, decreased their consumption of Internet, both download and upload traffic by 4.2% and 4.5%, respectively, but did not change their likelihood of using BitTorrent during the experiment" (2021: 3). These results again confirm that it is hard to curtail piracy via making content available in VOD services and that, furthermore, curtailing piracy would require increasing the marginal costs for consuming pirated content for the users (via increasing the costs for searching for titles online, litigation or making it inconvenient to consume content). This would require a larger policy co-ordination effort instead of simply attempting to improve SVOs themselves.

Another key factor of this discussion is the mere availability of content, which relates to the adoption of certain technological models by VODs and the ways that new technologies of distribution boost or reduce piracy. Focusing on movies (instead of TV content), for instance, Michael D. Smith, Rahul Telang and Yi Zhang pose a key policy question for the film industry: "should content owners more aggressively adopt new distribution channels to address the challenge of piracy?", to which they answer:

> Adopting new channels (e.g., digital downloads and streaming service) might help producers attract more consumers to the market, especially those who are currently pirating due to a lack of access to the new legal format. At the same time, adopting new channels might only shift consumers (and revenue) from existing legal channels to the new channel, or new digital channels might make content easier to pirate, worsening the overall piracy problem.

The answer they give is that the adoption of new legal channels, such as for example the release of the movie in iTunes, which is the platform that the authors investigate, reduces the levels of online piracy for the film. In this sense, we can argue with the authors that if used in a proper way, technological advances such as that of VODs, can, if not alter the consumer's relation with piracy then at least boost sales for the particular audiovisual product.

We can also finally argue that sharing activity *in general* can become a 'problem' for the VOD sector insofar as a) it is noticed and b) there are sufficient resources to be dealing with it. The line between piracy and sharing is sometimes too fragile. We can here mention the password sharing in VOD's, which in the last years starts being presented as another 'threat' for the industry. For instance, a 2019 review lumps together piracy and password sharing as being responsible for industry losses; Felix Richter states that "the U.S. pay-TV industry is set to lose $6.6 billion to account sharing and piracy this year, a figure that could rise to $9 billion by 2024" (Richter, 2019).[9] As Richter states further on however, Netflix in individual users has been quite lenient with "CEO Reed Hastings saying it is something 'you have to learn to live with', because the line between legitimate and illegitimate account sharing is fine" (Richter, 2019). Yet as the competition in the sector grows with more major players coming in, Netflix has decided to prohibit the practice of password sharing in 2023 after a rebound in subscriber numbers in Q3 2022 that boosted the platform's confidence. In other words, the material (market competition, increase in subscriber numbers) and the discursive (labelling a practice of sharing as 'threat') are intertwined in piracy labelling (Carpentier, 2021); certain activities can be named harmful for the industry, criminalized or prohibited one way or another as soon as the material conditions allow it.

4.4 Final remarks

It is important to remember that when it comes to research on piracy there are always important limitations concerning first of all the geographical focus that corresponds not only to different cultural habits but crucially to consumer power. It is very different, for instance, to conduct research in a country where the average wage may be 100 euros per month than conducting research in a country where the average wage maybe 2000 euros per month. In this sense, at least from a policy framework, research on piracy cannot be easily generalized and 'globalized'. In the case of Europe, that at least in a global context the average wage is higher data shows that there is a correlation between the development of VODs and the reduction in unauthorized consumption of audiovisual content. Apart from the geographical limitations, there are also limitations in the ways that each research is framed, the methodology it uses and the sample it examines. For instance, a research such as that of Matos, Ferreira and Smith (2021) that uses a randomized sample can be questioned as it is unclear whether the results would be the same if a different sample was going to be used. Furthermore, as piracy is in principle an illegal activity, it is very possible that some of the users may not even admit in questionnaires and surveys that they do it and, in this sense, they may distort the data.

When it comes to piracy and the audiovisual sector, at least with the available data and literature, we can preliminarily conclude with the following (and expect more research): a) the growth of the audiovisual sector and VODs triggered a new wave of piracy activities, mostly centered around unauthorized streaming websites (overtaking torrents) b) the incomplete

[9] https://www-statista-com.iulm.clas.cineca.it/chart/19914/estimated-revenue-loss-for-the-us-pay-tv-industry-from-piracy-and-account-sharing/.

catalogues of VODs is an important factor for users engaging in piracy activity even though they may be subscribed already in legal streaming services c) the piracy levels in Europe are reduced with the development of VODs and this is mostly related to the purchasing power of Europeans; in this sense, the development of VODs and the reduction of piracy can be more effective in wealthy countries d) from the industry perspective the fight against piracy can only make sense if it is global as new websites and mirror websites can always appear indefinitely all around the world and geo-blocking strategies can only work until users discover the new sources e) lastly, we can argue that the copyleft model can definitely increase exposure, visibility and overall social development but requires a different thinking about art-making and creativity in general, including the possibility of valuing low budget productions, which should be combined with a different social and economic paradigm, i.e., state policies for compensating cultural producers instead of relying on market-based compensation.

5 Is the “Netflix Tax” a possible European solution?

Andrea Miconi

5.1 The Audiovisual Media Services Directive, Article 13(1)

Among other things, two industrial aspects of the VODs sector are regulated by the AVMSD: the so-called quotas of European works, to which large attention has been devoted; and the imposition of a fiscal levy on video platform companies, regardless of their country of formal registration.

> Member States shall ensure that on-demand audiovisual media services provided by media service providers under their jurisdiction promote, where practicable and by appropriate means, the production of and access to European works. Such promotion could relate, inter alia, to the financial contribution made by such services to the production and rights acquisition of European works or to the share and/or prominence of European works in the catalogue of programmes offered by the on-demand audiovisual media service [European Parliament and Council of Europe, 2010].

The AVMSD also states that, “where Member States require media service providers under their jurisdiction to contribute financially to the production of European works”, in direct or indirect form, “they may also require media service providers targeting audiences in their territories, but established in other Member States to make such financial contributions, which shall be proportionate and non-discriminatory” [European Parliament and Council of Europe, 2018b]. As it has been repeatedly noticed, Article 13(1) is a general framework unlikely to provide detailed operational indications, as it leaves much space to the single States for the transposition of the guidelines and the establishing of an ad-hoc tax, not to mention its rate and modalities [Mezdorf, 2022]. What is more, the right to collect taxes from a company, independently from its geographical location, has been disputed, and the dilemma has been cleared only in 2018, after the EU court rejected the appeal presented by Netflix [General Court, 2018].

As showed by André Lange, the taxation is actually in line with that imposed at the level of State regulations – starting between 1950s and 1970s in France, Germany, England and Portugal – for funding the realization of national theatrical movies [Lange, 2020]. What is rather new is the alternative allowed to the VOD providers, between an ad-hoc tax and the investment in local co-productions [Ibidem]. And it is a fact that, well beyond the legal ramifications, the main companies proactively embraced the quota system, for turning it into a powerful marketing tool. This has resulted in an increase in the number of European originals: which, in the case of Netflix, grow from 23 in 2016 to 40 in 2018 and 47 in 2019, while dropping down to 42 in 2020, probably caused by the delay of some productions for Covid-related problems [Iordache, Raats & Afilipoaie, 2022]. Evidence from several countries sketch the same picture, showing how VOD platforms put in motion a *glocalization* strategy for optimizing the penetration in different markets In France, the making of the 2016 TV-show *Marseille* – even without being successful per se - opened up a new season of investments and co-productions [Taillibert & Cailler, 2021]. In Turkey, the launch of Netflix itself was accompanied by an intense advertising campaign about local culture eventually fighting back, and Turkish works becoming available worldwide [Ildir & Celik Rappas, 2022]. An analogous tendency has been detected in Spain, where Netflix steadfastly claimed to support local creators through the international circulation of some series – think at *La casa de papel* – while actually displaying an almost all-American catalogue [Albornoz & García Leiva, 2022]. The Czech Netflix localization has a more peculiar history, as it was originally available only in Czech Republic, and lately released in Slovakia after the protests of local film-makers and stakeholders, which teamed up to sign an ad-hoc petition [Szczepanik, 2020]. The main player in the Eastern European scene is rather HBO, which back in 2014 – way before Netflix – started applying the idea of local programming as the backbone of its own commercial strategy [Szczepanik, 2021]. As Baschiera and Re noticed about the Italian case, the nationality of movies and Tv series is used as a criterium for organizing contents, not dissimilarly from narrative genres: hence the breakdown of the category into a wide series of single thematic signals, ranging from "Italian Comedies" to "Discovering Italy", "Audio in Italian", or "Award-Winning Italian Movies" [2022, p. 75]. As already stated, the marketing operations of VODs are inspired by the classical glocalization paradigm: upon which, if we go back to Roland Robertson's original definition, the local itself is "constructed on a trans- or super-local basis", and "much of the promotion of the locality is in fact done from above or outside" [Robertson, 1995, p. 26].

In the meantime, Germany was the first country to introduce the so-called "Netflix tax" [García Leiva & Albornoz, 2021], which from 2014 onwards apply to all VOD services with a yearly turnover above 0.5 million €. France would follow in 2017, with a 2% tax on international VOD platforms, also in this case calculated on the previous year's turnover. Quotas and funding obligations were early adopted also in Italy, as similar mechanisms were already in place in the Italian legal system, with the so-called "Franceschini method" being modeled after the French protectionist paradigm, and named after the powerful two-time Minister of Culture, Dario Franceschini [Dagnino, 2021]. In the first place, Italy would oblige VOD providers to choose between a 20% quota of European works in their catalogue and a 5% of the revenue investment in European productions; though lately, after mid-2019, both measures would become mandatory. The recent decree 208/2021 has eventually set a very high standard, with a 20% direct investment of VODs' net revenues, from 2024, for funding both European and national works [Kostovska et al., 2022].

As a matter of fact, the transposition of AVMSD in many national regulations required long political negotiations. It has been observed how small countries, and those which recently joined the EU, were also the most reluctant: this is the case of Bulgaria, Cyprus, Denmark, Estonia, Finland, Hungary, Lithuania, Latvia, Luxembourg, Malta, and Sweden; whereas only two small-sized nations admitted in 2004 or later – Croatia and Slovenia – rigorously embraced the taxation method [Apa & Gangemi, 2019; Komorowski et al., 2021]. Other countries would implement the measures with a notable delay, between 2020 and 2021, in some cases after the Covid-19 crisis gave new centrality to VOD services – more explicitly so, in the case of Poland [Jupowicz-Ginslaka & Wróblewska, 2021].

From a legal standpoint, it can not be excluded that the countries more eager to adopt the AVMSD-related measures are those with a long tradition in State intervention, media regulation, and public service media – Italy, France, and Germany. As the AVMSD is premised in a 2010 EU regulatory act, which called for a commitment to promote European contents [García Leiva & Albornoz, 2021]. In Italy a similar rule had already been introduced with the law 220/2016. Such law set a minimum quota of 30% of European contents and 15% of national contents, in terms of total hours of videos delivered, which would be confirmed by the measures laid out in the decree 204/2017, also giving proxy to AgCom, the regulatory Italian Communication Authority, for supervising the respect of the guidelines [Baschiera & Re, 2019]. To provide some context, it has also to be noticed that in Italy regulations are in place since 2013, which impose "investment sub-quotas" for national works – not dissimilarly from France, as already observed - therefore shaping a sort of two-level protectionist scheme [D'Arma & Gangemi, 2021].

In the broader perspective of media and cultural studies, we can rather observe this tendency in light of the opposition between major and minor producing nations. As a matter of fact, even the 30% standard for the quotas resulted – as is often the case - from a political compromise, with strong countries pushing for a 40% threshold, and smaller nations – among which Finland, Denmark, Luxembourg, and Czech Republic - contesting the principle of national quotas as such [Vlassis, 2021a, 2021b]. At the same time, the main European markets also reveal how the quota system is far from being perfect, and its concrete implementation is not easy to assess. As to the Italian case, Baschiera and Re [2022] observed an incomplete fulfilling of the task, with American products getting the lion's share, and national contents accounting for no more than 4.4% of the 3,065 works available on Netflix – more precisely, 108 movies and 28 Tv-series. At the continental level, according to Christian Grece's reports for the Audiovisual Observatory, European works reach the 19% of the titles included in VOD libraries, whereas national productions only account for 5% [Grece, 2018, 2019]. This certainly results from the hegemony of American works over national video productions, firstly bore out by Miller and Rudniski [2012] in their early analysis of VOD contents in Canada, then observed by Lobato and Scarlata [2017] in the case of Australian VODs, and largely confirmed in European countries as well [Fontaine & Grece, 2016; Iordache, 2021]. A major problem stands, in the latter case, which has to do with the vague definition of "European content", that may apply to the location of production – *Emily in Paris*, for instance – or to the nationality of the producing company, not to mention the funding and fiscal system upon which the whole enterprise depends [Parc & LaFever, 2021]. The adaptation of the AVMSD in the Portuguese legal system, to provide a concrete example, only includes references to national language, without saying anything about Portuguese film locations or professional crews to be hired [Costa, Lameiras & Lameiras, 2022]. The strictest definition has been introduced in France, back in 1990, and it may well be considered as a good practice to be imported: for instance, article 6 of the Decree 1990/66 exclude from European contents those that are produced by local subsidiaries or branches of non-EU companies [Premier ministre de France, 1990].

More broadly speaking, such vague definition of European contents - on which the mentioned glocal strategies are premised – possibly makes the quota system ineffective (if not *backfire*), also due to the unprecedented dimensions of VOD catalogues. Idiz et al. [2021] aptly noticed, while studying the Dutch market, that the non-linear nature of platform delivering makes it possible the avoidance of European rules, so that the legal parameters can be formally respected without their cultural and political goals being secured. With this respect, algorithmic recommendations do play a fundamental part, as they can make the public more or less aware of the very existence of European contents. The quota system is not guarantee of a real *cultural* Europeanization, in other words, given that - as Ramon Lobato put it - "the catalog is not the audience" [Lobato, 2018, p. 251]. In this respect, the fiscal levy may well be considered as a complimentary measure, expected to raise significant funds for European productions. It is no surprise, therefore, that VOD operators largely prefer the adoption of the quota system to the fiscal imposition, as proved by their huge investments - in productions, marketing, and locations – in those countries where no "Netflix tax" is in place [Agina & Hediger, 2021].

5.2 The implementation of the "Netflix Tax" in Europe

The table below provides an overview on the transposition of Article 13(1) in the legislative systems of European countries – including some non-EU countries. The elaboration is based on a first review of legal documents, reports and scientific literature, which is far from being complete, and yet brings some methodological complications.

Firstly, as is often case, data are actually patchy, and in some cases inconsistent. In particular, finding reliable information for some countries – distinctly when it gets to small countries, Eastern Europe and the Balkans – is particularly complicated, so that data harmonization confirms to be a priority to be put on the agenda. Additionally, in literature there is some confusion between the so-called "Netflix tax", by which we properly refer to the implementation of the AVMSD, and the broader issue of "digital tax", which has to do with fiscal treatment or privileges of digital platforms. The reported dates, finally, refer to the formal approval of the laws implementing Article 3(1), even though in all cases the legislative process has developed over the years.

Table 27. The implementation of the "Netflix Tax" in European countries: overview

Country	Since	Taxation Formula	Sources
Austria	2021	General taxation for VOD providers, without a specific fund for video productions. The tax is paid to the Regulatory Authority for Broadcasting and Telecommunications and Postal Services [RTR-GmbH], and the rate is based on its annual budget needs.	EFAD, 2020; Komorowski et al., 2021; Komorowski & Kostovska, 2021.

Belgium Flemish	2021	Each VOD provider has to pay an annual 3,000,000 € lump sum, plus a fee for each subscriber in the region [1.3 € per person]. The tax only funds *Flemish* works.	Donders, Raats & Van de Bulck, 2018; Iordache, Raats & Donders, 2022.
Belgium French	2021	The Netflix tax for VODs is based on the following progressive rate: - no-tax area below 300,000 €; - 1.4% of annual turnover, if 300,000-5,000,000 €; - 1.6% of annual turnover, if 5,000,000-10,000,000 €; - 1.8% of annual turnover, if 10,000,000-15,000,000 €; - 2% of annual turnover, if 15,000,000-20,000,000 €; - 2.2% of annual turnover, if above 20,0000,000 €.	Donders et al., 2018b; Raats, Evens & Ruelens, 2016.
Bulgaria	2020	In July 2020, the AVMSD has been formally introduced. So far, we could not find any information about taxation, but we will work on this along with the New Bulgarian University team.	European Audiovisual Observatory, 2020.
Croatia	2020	In the first version of the local law, platforms were allowed to choose between a given quota of European movies, or a 2% tax on the annual gross income. In the latter case, the tax would fund the local production, through the National Program for the Promotion of Creative Audiovisual Works. After 2021, both 2% tax and 2% funding of Croatian productions have become mandatory, and both are now calculated on the annual gross *turnover*.	Iordache, Raats & Donders, 2022; Kerševan Smokvina, 2021.
Cyprus	2021	A general law has been approved, about the promotion of European contents, with no quotas and no Netflix tax in place.	Donders et al., 2018b.

Czech Republic	2020	Blended solution, with programming quotas for EU *independent* productions; if not fulfilled, the Netflix tax rate is 1% of yearly programming budget (compared to 10% for linear providers).	European Audiovisual Observatory, 2019; Iordache, Raats & Donders, 2022.
Denmark	2020	Netflix tax rate is 2% of annual turnovers, with a no-tax area below 375,000 DKK. We have no academic sources for that, but the tax is reported to grew up to 6% in 2022 [23].	European Audiovisual Observatory, 2022; Iordache, Raats & Donders, 2022; Jorgensen, 2022; Vlassis, 2022.
Estonia	2020	There is a general law about the promotion of European contents, with no quotas and no Netflix tax in place. The option of a Netflix tax used to be discussed at the Ministry of Culture, a few years ago, apparently with no results [22].	Donders et al., 2018b; Ibrus, 2016.
Finland	2020	The law defines some requirements and duties about the promotion of European contents, with no quotas and no Netflix tax in place.	Donders, 2022; Donders et al., 2018a, 2018b; García Leiva & Albornoz, 2021;
France	2017	Investments quotas and tax are both mandatory. VOD platforms originally had to pay a 2% net of their annual turnover; currently, the rate is 5.15%, and based on legislation, it can rise up to 25% in particular cases. Direct investment obligations for funding national works are also in place, in the measure of 21% of the previous year turnover. VODs joined the French Broadcasting Authority [CSA] on June 22, 2021.	Kemppinen, 2021; Komorowski et al., 2021; Komorowski & Kostovska, 2021.
Germany	2014	Netflix tax is set at 2.5%, for VOD services with an annual turnover over € 20 million [calculated on the previous year]. The tax is directly paid to the German Federal Film Board	Donders et al., 2018b; European Audiovisual Observatory, 2019;

		[*Filmförderungsanstalt*], and therefore it only funds national works.	García Leiva & Albornoz, 2021.
Greece	2020	The tax is mandatory and set at 1.5% of the annual turnover, but the funding is limited to *national* cinematographic works.	European Audiovisual Observatory, 2022.
Hungary	2020	The law introducing the AVMSD has been approved on May 5, 2020. Financial obligation is in place, but only for funding national works.	European Audiovisual Observatory, 2020; Iordache, Raats & Donders, 2022.
Ireland	NA	There is still discussion about the possible introduction of the VOD tax. According to local sources, it would be used for funding national works, with an estimated yield ranging from 26 to 125 million €, over the first five years.	Komorowski et al., 2021.
Italy	2019	Contribution is mandatory after June 30, 2019, in terms of 5% of revenues [compared to 10% for private linear providers, and 15% for PSM]. Funds are destined to both national and European works. There is also an obligation to right purchasing of recent audiovisual works, 50% of which have to be Italian.	Apa & Gangemi, 2019; D'Arma, & Gangemi, 2021; Iordache, Raats & Donders, 2022.
Latvia	2020	General law about the promotion of European contents, with no quotas and no Netflix tax in place.	Donders et al., 2018b.
Lithuania	2020	As of December 2020, the AVMSD has been introduced in the national system. No information is available about taxation.	European Audiovisual Observatory, 2020.
Malta	2020	Information is hardly available. A system of *variable* and flexible quotas has been set, which does not include taxations.	Iordache, Raats & Donders, 2022.
Netherlands	2022	VOD platforms pay a 6% rate of their annual turnover, but for the funding of *Dutch* productions. The measure was lately introduced, on request of the Dutch Council for Culture.	Idiz et al., 2021.
Norway	NA	Norway not being a member state, no AVMSD measures are in place. In 2021, though, the	Kemppinen, 2021.

		government requested a preliminary study, in order to evaluate the introduction of the Netflix tax.	
Poland	2020	A Netflix tax is imposed, in the measure of 1.5% of annual advertising revenue, for funding *national* works. The tax is directly paid to the National Film Institute.	Jupowicz-Ginslaka & Wróblewska, 2021.
Portugal	2013	1% tax, in terms of obligation to purchase Tv rights for EU works or direct financial obligation. In the latter case, the funding is only for *national* works	Costa, Lameiras, & Lameiras, 2022; Ortigão Ramos, Gonçalves Marques & Gonçalves Dinis of Cuatrecasas, 2021.
Romania	NA	A draft law, not yet established, would introduce a 4% tax for VOD platforms for streaming services, and a 3% tax on revenues generated by film downloading. According to an EU report, taxes would be up to 40%.	European Audiovisual Observatory, 2022; Komorowski et al., 2021.
Slovakia	2021	Based on the limited available information, no Netflix tax is in place.	Donders et al., 2018a.
Slovenia	2021	Here we have slightly different indications. According to one source, a blended solution is still in place, with a 10% programming quota for EU productions; if not fulfilled, the Netflix tax is set at 1% of revenues for European works, either in terms of production funding or purchasing of rights. Another source reports a change in the regulation, with a flat 6% tax on annual gross income, for both national and international VODs [15].	European Audiovisual Observatory, 2022; Iordache, Raats & Donders, 2022; Kerševan Smokvina, 2021.
Spain	2020	Formally, no direct tax is in place, while funding of European works is mandatory. VODs have to invest 5% of income for the production of European works [6% in the case of public VODs]. 60% of the total amount has to be invested on cinema films [75% for public VODs].	Donders et al., 2018; Komorowski et al., 2021.
Sweden	2020	General legal framework about the promotion of European contents, with no quotas and no Netflix tax in place.	Donders et al., 2018.

Switzerland	2022	VOD platforms pay 6% of the annual turnover, for the funding of *national* productions	Komorowski et al., 2021; Revill, 2022.
United Kingdom	2020	Upon English laws, Netflix profits can not be subject to specific taxation.	Parkes, 2019.

All in all, we can group European countries in three main clusters. The first includes the legal systems which have properly imposed a tax, based on Article 3(1): Austria (in its own way), Belgium, France, Denmark, Germany, Greece, Italy, Netherlands, Poland, Portugal, Romania, Spain, and Switzerland. A few countries rather opted for a blended solution, with taxation being alternative to the programming quotas: and namely, Croatia, Czech Republic, and Slovenia. In the third cluster we can put all countries where no taxation is requested: Bulgaria, Cyprus, Estonia, Finland, Ireland, Latvia, Malta, Norway, Sweden, and the UK. In the case of the remaining countries – Bulgaria, Hungary, Lithuania, and Slovakia – there is a lack of information, and some additional research will be needed.

With the exception of the United Kingdom, due to its very peculiar legislative tradition, the constant seems pretty clear: taxation and funding are commonly imposed by bigger countries and by those with a strong tradition in the audiovisual sector (four out of the classical Big Five: France, Germany, Italy, and Spain); whilst small countries, with a less consolidated production system, more often propose alternative measures. No geographical pattern does emerge, here, and the clusters do not overlap with the well-known regional models accepted in comparative media studies: Democratic Corporatist and Polarized Pluralist countries are rather represented in both the taxation and the no-taxation areas [see Hallin & Mancini, 2004]. Sticking to the big picture, we can say that the legal and the economic action converge towards the same goal: that of giving centrality to European works, with *prominence* being singled out as the real political priority [García Leiva, 2020]. With this respect, "levies and taxes" are part of a bigger arsenal of strategies, than can be synthetized as in the table below [Cappello, 2020]. Needless to say, if the availability of European works it is not enough, their *findability* is very difficult to measure and to assess, due to the extension of VOD catalogues, to the opaque role of recommendation algorithms, and to the default setting of interfaces and home devices [Cappello, 2020; ERGA, 2021].

Table 28. Synopsis of the AVMSD goals

Tool	**Main goal**
Levies and taxes	Indirect funding, through the support to Member States
Financial obligations	Direct support to European productions
Quotas	Access to screen
Prominence obligations	Findability of the works

[Various sources]

5.3 Brief considerations on the Netflix tax

Let us finally consider the limits and the problems connected to the use of the fiscal leverage for regulating the VOD market. First and foremost, there is no homogeneity in the application of Article 3(1) – which is hardly surprising, given the huge differences among national tax regimes in the EU. As a consequence, VOD companies themselves are physically based where fiscal advantages and exemptions are traditionally in place [Vlassis, 2021a, 2021b]. This being said, we may notice that differences are not only about political choices, while also affecting the *technical* implementation of the Netflix tax, for those who indeed opted for it. In most cases, the tax is calculated on the previous year turnover: such is the choice made by Germany and France, and after them by Spain, Netherlands, the French-speaking Belgium, Greece, Switzerland, and Denmark. In Italy and Slovenia – and in the draft law under discussion in Romania as well – the tax is rather based on the companies' revenues. In no particular order, the Netflix tax is calculated on the advertising revenues in Poland; on the programming budget in Czech Republic; on the number of subscribers in the Flemish part of Belgium; on the companies' gross income in Croatia; whereas in Austria the RTR-GmbH is vested with the power of setting the rate. The choice of the *turnover* as a pivotal parameter does not make things easier, in particular, as it may be defined as "the sums collected through the exploitation of the cinematographic or audiovisual work, with the deduction of the value-added tax and the Video and VOD Tax" [Komorowski et al., 2021, p. 48].

A second limitation has to do with tax shelters counter-balancing – if not *neutralizing* – at the national level the expected effects of the fiscal levy at the European scale [Parc & LaFever, 2021; Iordache, Raats & Mombaerts, 2022]. As we know, tax exemptions are commonly brought about by the governments of small countries, up to a 30% tax credit in Lithuania and to a 35% tax credit in Iceland: not accidentally, the same countries that are reluctant to introduce the Netflix tax, and that conversely offer the locations where main productions increasingly take place [Cho, 2022; Vourlias, 2021]. On the other hand, global companies rarely invest in local productions in those countries, as, "whatever tax benefit may be available", the small size of the market makes it hardly profitable [D'Arma, Raats & Steemers, 2021]. With this respect, tax shelters seem to engender negative externalities, as they favor the local shooting of global productions, rather than funding European works.

The third problem is way more important, in our perspective, as it directly impacts the process of cultural Europeanization, rather than the financial dimension of cultural industries. While almost all countries impose a minimum quota for both national and European audiovisual works, the Netflix tax usually funds *national* productions, and for such goal it is often directly paid to the entitled institutions: the National Program for the Promotion of Creative Audiovisual Works in Croatia; the German Federal Film Board; the Polish National Film Institute; the Austrian Regulatory Authority. Even when the tax recipient is not specified, funds are explicitly and legally destined to sustain national productions: it is the case of Flemish Belgium, France, Hungary, Netherlands, Portugal, and Switzerland; and that of the law under discussion in Ireland. In the end, only three countries – Italy, Slovenia, and Spain – allow for the funding of European works. It has to be considered, here, a possible negative externality: which is not only the strengthening of national productions, but also the risk of an increasing competition among State Members [Kostovska et al., 2022].

6 Best-Practices in Video Contents Circulation

Panos Kompatsiaris & Andrea Miconi

6.1 When European movies *do* travel across the borders

Based on the 2021 releases, we have come to identity a few exceptions of European movies with a wide geographical distribution across the continent. At a first glance, the table reveals a quite unusual pattern, with the VOD market apparently segmented into niches, and small countries and minor languages represented as well.

Table 29. Fifteen good practices of cross-European circulation

Title	Country	Countries of availability	Nominations and Wins	Ranking	Original Language	Genre
Beatrix	AT	27	1 win, 2 nominations	6.4	German	Drama
One Extraordinary Year	AT	27	--	7	English	Documentary
Parov Stelar: Voodoo Sonic	AT	22	--	NA	German	Documentary
Train Again	AT	31	1 win, 7 nominations	6.9	No dialogue	Documentary
Luzifer	AT	20	5 wins, 8 nominations	5.6	German	Drama, Horror
Ciary	SK	27	1 win	7.2	Slovakian	Documentary
The Sailor	SK	27	2 wins, 10 nominations	7.4	English	Documentary
Rekonstrukce okupace	CZ, SK	27	2 nominations	6.9	Czech	Documentary, History
Gads pirms kara	CZ, LT, LV	27	7 wins, 4 nominations	4.9	German, Latvian, Lithuanian, French	Thriller
Piligrimai	LT	8	5 wins, 7 nominations	6.1	Lithuanian	Crime, Drama
Techno, Mama	LT	31	3 wins, 7 nominations	6.9	Lithuanian	Drama
Imbolc	IE	11	--	NA	English	Music
Let the Wrong One In	IE	13	1 win, 1 nomination	5.4	English	Action, Comedy, Horror
The Crafty Irish	IE	5	--	NA	English	Documentary
Luzzu	MT	19	5 wins, 13 nominations	6.9	Maltese, English	Drama

[Source: IMDB]

At a closer look, though, we can see that no title – despite its availability – is included in the top watched movies of the considered countries [see WP3 national reports]. The commercial marginality of these works is also confirmed by the genre breakdown, with the most sophisticated and engaged format - the *documentary* - accounting for almost 50% of the total: precisely, for seven titles out of fifteen. As shown in the table below, we also considered the festivals where these movies have been presented or screened.

Table 30. Main festivals of screening of VOD movies

Title	**Country**	**Awards**	**Other festivals of screening**
Beatrix	AT	Viennale: Special Jury Prize; FID Marseille: Acting Award	Ji.hlava International Documentary Film Festival; CPH: DOX Documentary Film Festival
One Extraordinary Year	AT	--	--
Parov Stelar: Voodoo Sonic	AT	--	--
Train Again	AT	Cannes International Film Festival: Directors' Fortnight	Toronto International Film Festival; BFI London Film Festival; Mar del Plata International Film Festival
Luzifer	AT	Sitges- International Fantastic Film Festival of Catalonia: Best Actor; Best Actress	Locarno International Film Festival; Transilvania International Film Festival; Guanajuato International Film Festival; Diagonale: Festival of Austrian Film
Ciary	SK	Ji.hlava International Documentary Film Festival: Opus Bonum Award; *Best World Documentary; Best Debut*	--
The Sailor	SK	--	Ji.hlava International Documentary Film Festival; Hot Docs Canadian International Documentary Festival
Rekonstrukce okupace	CZ, SK	--	Karlovy Vary International Film Festival; Krakow Film Festival; Ji.hlava International Documentary Film Festival
Gads pirms kara	CZ, LT, LV	--	International Film Festival Rotterdam; Tallinn Black Nights Film Festival; Riga International Film Festival
Piligrimai	LT	Venice Film Festival: Orizzonti Award for Best Film; Thessaloniki Film Festival: Best Screenplay	Sao Paolo International Film Festival; Goteborg Film Festival; Melbourne International Film Festival; Tallinn Black Nights Film Festival; Taipei Film Festival; Viennale; Cairo International Film Festival;

			New Directors New Films; International Film Festival of Karala; Vilnius International Film Festival
Techno, Mama	LT	--	Venice Film Festival; BFI London Film Festival; BAFICI Buenos Aires; Festival du Nouveau Cinéma; Reykjavik International Film Festival; Clermont-Ferrand Short Film Market; Oberhausen International Short Film Festival; Santa Barbara International Film Festival; Helsinki International Film Festival
Imbolc	IE	--	--
Let the Wrong One In	IE		Dublin International Film Festival; Sitges- International Fantastic Film Festival of Catalonia
The Crafty Irish	IE	--	--
Luzzu	MT	Sundance Film Festival: World Cinema Dramatic Jury Award, Acting; Independent Spirit Awards: Someone to Watch Award	Sao Paolo International Film Festival; BFI London Film Festival; Karlovy Vary International Film Festival; Istanbul International Film Festival; Stockholm International Film Festival; Melbourne International Film Festival; Helsinki International Film Festival; Seville European International Film Festival; Philadelphia International Film Festival; Athens International Film Festival; Dublin International Film Festival; Hong Kong International Film Festival; Bergen International Film Festival; Norwegian International Film Festival; Shangai International Film Festival; Calgary International Film Festival; New Directors New Films; International Film Festival of Karala; Milwaukee International Film Festival; International Film Festival of India; Haifa International Film Festival

[Source: MUBI]

Besides the discrepancies between the MUBI and the IMDB database, a few considerations are possible about the role of film festivals in shaping of a European market.

According to scientific literature, and particularly to the recently established *festival studies*, international movie competitions have an impact at different levels: directly, on theatrical admissions [see Mezias & others 2008]; indirectly, on the process of canonization [Vallejo 2020]; and finally on cinema historiography as well [Di Chiara & Re 2011]. It has also been noticed that festivals play a peculiar role in the distribution of *European* cinema, due to its lack of geographical concentration and common structures [de Valck 2007: 104-108]. In this respect, festivals constitute a network scattered in the continent [Elsaesser 2005: 82-104; 2019: 277-279], also sustained by the activity of the European Coordination of Film Festivals (ECFF), which takes together around 250 regional kermesses [Ewans 2007].

To what extent the festival can be considered as a good practice in the promotion of European contents, this notwithstanding, is still under dispute, at both the theoretical and the practical level. Firstly, as Thomas Elsaesser observed, the "festival circuit" is not properly open to the world, as Europe and Hollywood "no longer confront each other", while each productive system works at the valorization – or even the "mise-en-abyme" – of its deep cultural specificities [Elsaesser 2005: 104]. Along with the risk of self-referentiality, it has to be considered that the externalities of festival networks are not clear, especially in the case of video-on-demand offer. In this sense, Christian Grece [2021a] analyzed the main drivers of VOD availability, by listing out: perceived quality of the movies, based on IMBD rating and awards; age of production; commercial success in theatres; and country of production. As a result, on average European award-winning movies are more present in the VOD libraries than non-award-winning, but the difference (+3.5) is way smaller than that related to theatrical exhibitions (+7.4).

Table 31. Impact of movie awards on releasing in theaters [1996-2020] and VOD [May 2021]

Number of countries where the film is available	**Non-award-winning movies**	**Award-winning movies**	**Difference**
Theaters	2.6	10	+ 7.4
VOD	3.2	6.7	+ 3.5

[Source: Elaboration on Grece 2021a, 2021b]

As limited as our data can be, the tendence detected by Grece seems to be confirmed. Out of fifteen good practices of cross-European exchanges, in fact, there are seven non-award-winning movies; and four of these movies have not been screened in any relevant festival. Probably due to the major distribution costs, therefore, theatrical offer is affected by the festival canon more than the VOD offer. As we already stated, what is more, none of these fifteen titles is included in the top-watched list of the analyzed countries. With this respect, the utility of festival promotion can still be questioned, as it may reinforce the stereotype of European cinema as being devoted to niche and brainy movies, as it would be confirmed by the high recurrence of documentaries.

6.2 How *European* are the European movies?

When we focus on the cultural facet of the process, it is a fact that the European origin of a film is by no means guarantee of a progress towards Europeanization. What makes the European movies *European*, at a deeper level, is actually a difficult question, and not only in the field of video-on-demand platforms. A main problem is that both national and European cinema have been defined in opposition to Hollywood, which plays the role of a *constitutive other* [see respectively, Higson 1985 and Elsaesser 2005][10]. In particular, Thomas Elsaesser notes how the "Europe versus Hollywood dualism" is based on a series of dichotomies: art/ entertainment; author/star; unique work/standardized commodity; program cinema/multiplex; critique/marketing; public funding/bank funding; and so forth [2005: 491-492]. Whilst both Higson and Elsaesser call for a *positive* definition of what European cinema is, a further complication is due to the fact that the most typical category for that – *art* movie or *auteur* movie – is itself compromised, as it also relates to national production. As Stephen Crofts put it, European cinema is mostly identified with art films, and still, "national pride and the assertion at home and abroad of national cultural identity have been vital in arguing for art cinemas" [1993: 50-51].

An alternative model has been proposed by Mette Hjort, in terms of an opposition between "marked" and "unmarked cinematic transnationalism". According to Hjort,

> a film might be said to count as an instance of marked transnationality if the agents who are collectively its authors intentionally direct the attention of viewers towards various transnational properties that encourage thinking about transnationality [2010: 13-13].

The application of Hjort's dyad to European audiovisual contents has been already called for by some scholars: for instance, by Marco Cucco [2015] and by Milly Buonanno, who speaks of "marked Europeanness", characterized by the "unmistakable evidence of European presence" in the creative process [2015: 210-211]. By *unmarked* Europeanness, we can refer to works produced by European countries, or in which a simple reference is made to the region: for instance, a movie set in a European city; or a title blinking an eye to European imagery (as in *Emily in Paris*). *Marked* Europeanness, more ambitiously, would require the European spirit somehow shaping the project. In the table below, we tried to adapt the nine *ideal-typical* forms proposed by Hjort to the case of the European cinema industry.

[10] That Hollywood - as *big other* - is key to the rhetorical definition of both national and European cinema may be accidental, or significant of a broader cultural trend. We are referring to critiques pointing to the idea that nationalist and European discourse are ultimately based on similar arguments, and especially on the essentialist view of an original *spirit* [see Weller 2021: 76-78, 143-144, 157-158 in particular].

Table 32. Nine forms of cinematic transnationalism and Europeanness

Type of transnationalism	Original Description	Original Example	Application to Europeanization
Epiphanic	National aspects overlap with regional aspects	Nordic co-productions	Co-productions among *regional* countries [i.e., Nordics, Benelux]
Affinitive	Cooperation among similar countries [i.e., small countries]	Sigma films	Cooperation or successes based on common languages [i.e., France and Belgium; Germany and Austria]
Milieu-building	Projects aiming at building an original, specific perspective	Dogma films	*European* movies or TV-series in response to Hollywood, aiming at building a cross-European culture
Opportunistic	International cooperation based on economic reasons	Zentropa business model	The so-called "dumping", co-production with less rich countries
Cosmpolitan	Film realized for the diasporic communities	Chinese movies for Chinese immigrants	--
Globalizing	Co-productions based on the inadequacy of national resources	Co-productions of high budget movies	European blockbusters
Auteurist	Universal success of auteur films	Wong Kar-wai movies	European auteur movies
Modernizing	International cooperation aiming at fostering internal modernization	South Korean movie system	East-West cooperation
Experimental	Universal value of movies able to refine stylistic standards	High-quality short movies; Lars von Trier	High-quality short movies

[Source: Adapted from Hjort 2010]

Among the categories defined by Hjort, *cosmopolitan* cinema hardly fits the case of European production, as diasporic communities are usually identified based on nationality. As to the rest, we can group the forms of trans-nationalism into two clusters:

- Those which simply require co-productions, industrial synergy, and economic cooperation: namely, the *epiphanic*, *affinitive*, *opportunistic*, and *modernizing*;
- Those also implying a specific stylistic connotation of the movies: *milieu-building*, *globalizing*, *auterist*, and *experimental*.

All in all, we would expect to find the *marked* Europeanness in the second cluster – as the movies are not simply produced in European countries, while being shaped by some sort of European inspiration. Once again, though, we see how the category of European cinema is built in opposition to that of Hollywood cinema: where the alternative is between following the opposite path (*auterist* movies) or fighting the majors on their field (*globalizing* movies). It can not be accidental that Hjort - even without focusing on European cinema - put forward the example of Dogma, as the most ambitious form of creation (*milieu-building*): as the Dogma 95 manifesto is *itself* an expression of anti-Hollywood stance[11].

Reaching a positive definition of European cinema is not easy; and the dimension and characteristics of our sample would make it hardly possible. Due to these limitations, we will limit ourselves to the inverse exercise, starting from the empirical evidence – which European movies are popular in VOD platforms – rather than from the theoretical definition of what European cinema is or should be. In this sense, it is quite easy to spot the top-watched movies in VOD platforms in 2020-2021, and produced within the European Union (without considering the United Kingdom, therefore, whose production system is strongly connected to Hollywood). The four movies are:
- *Yara*, an Italian movie appreciated in Italy, Spain, Bulgaria, and Czech Republic;
- *My Best Friend Anna Frank*, a Dutch production popular in Italy, Spain, Czech Republic, Portugal, and Turkey;
- *The Privilege*, a German movie popular in Portugal, Spain, Bulgaria, and Turkey;
- *Munich: The Edge of War*, a German production popular in Italy, Czech Republic, Germany, and Turkey.

At the commercial level, *Yara* has been released by Tao Due, an Italian agency founded in 1991 and controlled by Mediaset, the Italian major private broadcaster; while *The Privilege* has been produced by Bavaaria Film, the German TV and cinema company established back in 1919. The other two movies, what is more interesting, have been realized by companies of recent creation: *Munich: The Edge of War* by Turbine Studios, funded in 2018; while *My Best Friend Anna Frank* results from a joint production between FATT (2014), Interstellar Pictures (2016), and Talent United (2012). As the rise of start-ups is expected to be a possible externality of digital platforms [i. e., Still & others 2017; Takagi 2020], the success of young companies

[11] See, for instance, Bagaskara, Amri, Choiron, & Eliyanah [2022]. Hjort himself, in another occasion, expressly refers to Dogma as a resistance against the power of Hollywood (M. Hjort *Resisting global Hollywood: How metacultural strategies create audiences for a small nation's minor cinema*, Video podcast, February 2, 2024, retrieved at: http://commons.ln.edu.hk/videos/225.

may well be considered as a positive effect of video platformization, though still limited to a handful of titles.

When it gets to the *cultural* aspect of the process, then, the European dimension of these movies will require some considerations. We can not help but notice how three of these movies are based on *real* events: the exception is *The Privilege*, directed by Felix Fuchssteiner and Katharina Schöde, which is a horror drama, also involving demons and exorcists. *Yara*, on the other hand, tells the story of a thirteen-year-old girl raped and murdered in Northern Italy in 2010; whilst *Munich: The Edge of War* and *My Best Friend Anna Frank*, starting with their very titles, refer back to World War II, the black hole of European consciousness (and in addition, by the way, one of the top-watched Tv-show in Greece is *WWII in color: road to victory*). Therefore, these cross-European successes, between 2020 and 2021, lead us back to the more or less recent past - and remind us of the weight of history. Hans Blumenberg, *The Legitimacy of Modern Age*:

> It is not only that there was a new founder figure, one who might seem to correspond better to this tendency to shift the beginning of the age to earlier periods; it is also that there was a different type of initiating gesture, one stamped by *not so much the pathos of beginning anew* and opposition to what is past *as concern for what already exists*, humility before what has already been said [Blumenberg 1966: 471; italics ours].

This is the curse of Europe, according to Blumenberg: being overwhelmed by its past and paralyzed by "the concerns for what already exists"; and never being able to start anew. Or, to put it in Thomas Elsaesser's words, if Europe "is haunted by history", the same will happen to European cinema [2005: 373-429]. As a matter of fact, that is the very opposite of the main mythology of American imagery: the exploration of the frontier and the regeneration through violence, on which cultural industries have largely drawn, and based their popular success [see Slotkin 1973: 281-282 in particular]. In other words, the reference to World War II and to the Holocaust - as it often happens to *extreme* cases - can reveal the nature of a broader process; and help us asking a crucial question, about what makes European movies really European.

What makes European works *European*, we stated, is not an easy question. We will provide a first answer by narrowing down the analysis to a smaller sample: the titles of the most-watched movies and Tv-series in Italy, in both Netflix and Amazon Prime. In particular, we will isolate the toponyms and the proper names included in the titles, and referred to Italy, Europe, United Stated, or the rest of the world. Without having the space for discussing the inferences that are made possible by the titles and their recurrences, we will consider them as a basic indicator of the contents[12].

[12] For the methodological framework and a reflection on the possible inferences, see Moretti 2009; Miconi 2014 and 2019.

Table 33. Geographical and local names in the most viewed Netflix movies and Tv shows in Italy [November 1, 2021- February 28, 2022]

Category/Region	IT	EU28	USA	Rest of the World
Toponyms	0	105	50	96
Proper names of persons	204	21	0	11
Other proper names [i.e., Juventus; Plaza Hotel; New Amsterdam Hospital]	58	3	26	1

[Source: Elaboration on FlixPatrol data]

Table 34. Geographical and local names in the most viewed Prime movies and Tv shows in Italy [November 1, 2021- February 28, 2022]

Category/Region	IT	EU28	USA	Rest of the World
Toponyms	47	54	17	68
Proper names of persons	180	21	0	0
Other proper names [i.e., Juventus; Plaza Hotel; New Amsterdam Hospital]	58	0	0	1

[Source: Elaboration on FlixPatrol data]

Let us focus on the most striking difference among the clusters. When audiovisual works refer to the United States or to the rest of the world, it is all about places: respectively, 67 out of 93; and 164 out of 177. All proper names have to do with regions, cities, or regions: *spaces*, which, as in Bakhtin's theory of "chronotope", are the "formally constitutive category of literature" [1937: 84], or what we can call the "elementary unit of imagination", in the creation of both novels and movies [Keunen 2010: 35]. Each place generates its own mythology; calls for a particular action; discloses a whole set of stories, events, adventures, encounters.

The mentions of proper names related to Europe, on the very contrary, often indicate *real people*: 384 times, compared to 47 toponyms, for Italy; and 42 times in the case of non-national European markers. If we go in the details of the Italian case, in particular, we see that references are made to the popular movie director and actor Carlo Verdone (89); to the most famous couple of influencers (81); to a swimmer and former Olympic champion (10); and to the already cited Yara Gambirasio (17), atrociously killed in winter 2010.

Table 35. Geographical and local names in the top Prime and Netflix movies and Tv shows in Italy [November 1, 2021- February 28, 2022; at least ten weeks in the top 10]

IT	EU28	USA	Rest of the World
Vita da Carlo [89] *The Ferragnez* [81] *All or nothing: Juventus* [58] Come un gatto in tangenziale - ritorno a Coccia di Morto [38] *Yara* [17] *Federica Pellegrini – Underwater* [10]	Hotel Transylvania: Transformania [54] Emily in Paris [28] *The Electrical Life of Louis Wain* [21] The Girl from Oslo [12] *Munich: The Edge of War* [11]	New Amsterdam [26] Ozark [11]	Narcos: Mexico [27] Natale sul Nilo [17]

[Source: Elaboration on FlixPatrol data]

Similar evidence can be found in the other datasets: Louis Whain, Anna Frank, Carlo Verdone, Angèle, The Ferragnez, Neymar, Georgina Rodriguez, Federica Pellegrini, or the Juventus football team. These names do not have anything in common, besides the simple fact that, in all cases, they introduce to the stories of *real* persons, no matter how romanticized they are. A comparison with the American market will make clearer the cultural implications of these recurrencies. In Italy, the titles including proper names of persons (or sport teams) occupy 255 positions in the statistics of the top-watched movies and Tv-shows; in the United States – based on the same period and the same source – only *twenty* positions.

Table 36. Proper name of persons in the tiles of the most-watched movies and Tv-shows in the USA [November 1, 2021- February 28, 2022]

Category/Platform	Netflix	Number of weeks
Movies	*Alyleen Wournos: American Boogeywoman*	1 [Week 4]
Tv-shows	*Yara*	2 [Weeks 44, 46]
	King Arthur	2 [Weeks 44, 45]
	Mariah Carey's Merriest Christmas	1 [Week 47]

[Source: FlixPatrol]

Category/Platform	Amazon Prime	Number of weeks
Movies	*The Electric Life of Louis Wain*	1 [Week 45]
	House of Gucci	1 [Week 8]
	King Richard	4 [Weeks 1-4]
Tv-shows	*RuPaul's Drag Race*	8 [Weeks 1-8]

[Source: FlixPatrol]

When working on the "five major axes of differentiation: cultural, institutional, economic, spatial, and political", Elsaesser individuates in the "reference points" a difference between European and American cinema. European movies "carry linguistic boundaries", the idea goes, whilst Hollywood productions are "less particular", and devoted to universal poetics [2005: 492].

One may wonder, therefore, whether Europe is suffering from a lack of *imagination*, at the end of the story. For coming to terms with this doubt, let us now focus on a cultural field which has been increasingly attracting the audiences, and where imagination is notoriously unleashed: that of the Tv-series.

6.3 A Tale of Two Series: *SKAM*

6.3.1 Introduction

A noteworthy example of best practices in European video production and distribution is the series SKAM (Shame), a Norwegian web television series produced by the government-owned Norwegian Broadcasting Corporation (NRK) that ran from 2015 to 2017. Despite its initial low budget, it became the most commercially successful series in the country, received international acclaim and has been adapted in different national contexts, including in France, Spain, Italy and Germany (Krüger, 2017). SKAM is a high school drama with different protagonists in each season that revolves around the lives of teenagers, the majority of whom attend Hartvig Nissen School in Oslo. The series' main themes revolve around friendship, betrayal, religion, homosexuality, and sexual assault, with an emphasis on how these teenagers interact with digital technologies and particularly social media.

The relationship with social media is not limited to plot but is, innovatively, extended to the presentation of the series itself, to the point that the series is categorized as an "online drama" instead of classic television series (Sundet, 2020: 70). In this sense, the series format employs the logic of transmedia storytelling, a logic defined by "the multiplatform distribution of information and collective action for creative expansion of information" (Gambarato et al, 2021: 1), yet it expands this logic to the very narrative structure of the show. During its broadcast years, the series unravelled online and on an irregular basis every week via short clips in the NSK website (Sundet, 2020; Bengtsson, Källquist, Sveningsson, 2018). The clip segments were then combined at the end of each week to create whole episodes of varying length, which were then uploaded on NRK's website and broadcast on Norwegian TV as well as on the Swedish on-demand platform SVT Play (Bengtsson, Källquist , Sveningsson, 2018). The full episodes were later uploaded in the SKAM website (skam.p3.no), where, apart from the video material there existed a regular feed including photos, chats and communications of the main characters. The characters maintained fictional social media profiles in Instagram (which are open to this day), while later YouTube was also recruited as a distribution platform (Bengtsson, Källquist, Sveningsson, 2018: 63; Galli 2016). In addition, the series would spread in different national scenes via fan subtitling and dedicated fan art, which manifests the degree of Norwegian fan commitment to the show (Galvano, 2020; Sundet, 2020). The representation is realistic and the characters supposedly embody their 'authentic' selves, while the shooting mostly involves a shoulder-mounted camera.

Image 1. Screenshot from Scam.no showing a chat between characters

In the literature around the series, written mostly after 2017, when SKAM got bigger international attention, there are four principal trajectories attempting to explain the series' success: 1) its participatory and transmedia format 2) the public service ethos of its producer and broadcaster 3) its research and development model and 4) its engaging, contemporary content.

The first trajectory highlights its innovative format according to which television production embraces what Jenkins (2006) has called media convergence, the shifting landscape that rises with the internet and mobile devices where old and new media integrate. RK's initial goal was not to create an internationally acclaimed and adapted series, but rather to intervene in the country's youth media market by offering a product that was much closer to the lived reality of young people. In the context of an ongoing global "'youthification' of television", as Berber Hagedoorn et al put it (2020), that occurs in the age of streaming platforms and the shift from television screens towards mobile screens, the series was very successful in accurately tapping into the media habits of young Norwegians (Stollfuß, 2021). SKAM however not only depicted the fundamental impact and anxieties that digital and mobile media bring to youth cultures but furthermore performed an emerging media culture via a variety of formats. SKAM was thus successful "in the face of a change in policy by television executives who are impelled to align themselves with the social media culture" (Stollfuß, 2021: 516). Both in its distribution as well as in its production strategies, SKAM's transmedia storytelling constitutes a positive example for opening up a new space of interaction for audiences enmeshed in media connectivity (Redwall, 2018). For instance, for Krüger, the series success lies on the fact that it is not merely a web series "but rather a digital *space for interaction and experimentation*—a space deeply embedded in the users' networked lives and positioned in the interstices between fiction and reality, in which teenagers can negotiate their relation to their mediatized life-worlds" (2018). Krüger calls SKAM a "transitional object" that becomes part of the viewers' lifeworld instead of a traditional television product with a determined temporality and site specificity. The series in this sense summons a "social media-driven public" (Stollfuß, 2020) by utilizing the participatory affordances of social media and participatory culture.

However, the reasons for SKAM's success cannot be attributed solely to its innovative and participatory format, as similar formats have been used before and after SKAM with varying degrees of success. Another often cited reason for the series' popularity is the so-called public service ethos of the Scandinavian television and media institutions more generally (in literature, this appears as an often-cited reason for the previous success of the genre of 'Nordic noir', which has been exported to different media markets). SKAM was, according to this view, a product of a 'Scandinavian media mindset' that provided the hatching ground leading to the series' success. Media products are not independent from these contextual considerations as they affect production decisions and the overall production culture (Sundet, 2020: 71). For instance, drawing on interviews with executives and other key actors of NKS and SKAM, Vilde Schanke Sundet (2020) argues that SKAM's fame owes much to this "Scandinavian approach to 'public service'", which is significant because it allows media institutions to be both popular and flexible for delivering their goals, contrary to purely commercial media models where the profit-motive exclusively dictates decisions. SKAM is a "niche-oriented online drama series" within this larger media environment that combines "the 'popular' with the 'important' to create popular enlightenment" (Sundet 2020). In this regard, the public service ethos harbours an 'enlightenment vision', or 'Bildug', that bridges the sensibilities of youth cultures with the very real potential as well as risks and pitfalls of social media (Kruger, 2018). It thus allows for both a normalizing and reflective attitude toward social media usage, which is increasingly becoming a lived reality for youth cultures, rather than demonizing or discarding them entirely due to their distracting nature. The series overall was a successful example of NRK's "overall ambition of popular enlightenment through the use of innovative publishing strategies and storytelling techniques" (Sundet, 2020) via a strategy of reflective navigation resonated to young cultures.

Another reason for SKAM's unique success relates to its research and development model that purported to delve into the lifeworld of its intended audiences (Redwall, 2020). SKAM's R&D model drew inspiration from a method developed by Stanford Research Institute (SRI), the so-called NABC method — the acronym stands for Need, Approach, Benefits and Competition (Redwall, 2020: 144). This method was developed for business and commercial projects (and in this sense potentially contradicts the reasoning above linking the public service ethos with success) and has later been taken up by projects in cultural and media production. The main idea of NABC in film production is that, in contrast to the most common practice of desk research, which entails a mostly solitary investigation in archives and usually online on behalf of the screenwriter and production team, screenwriters and producers meet real people, conduct factual research, and understand their needs. The SKAM team led by director and screen writer Julie Andem conducted "50 in-depth 3-hour interviews and 200 school class 'speed interviews' with Norwegian 16-year-old girls and boys" (Redwall, 2020:151) in order to understand the habits, concerns of teenagers. SKAM in fact narrowed down the intended audience extremely to the point of only targeting 16-yearold girls instead of making a series with a wider appeal, employing the strategy of creating a niche product around which a strong following should be built. As, the NABC method strives to conceptualize and put emphasis on the *value* that a product will offer to customers, SKAM identified their mission as strengthening the self-esteem of 16-year-old girls "through dismantling taboos, making them aware of interpersonal mechanisms and showing them the benefits of confronting their fears"

(2020: 153). After understanding the audience producers should identify a unique customer *need*, which in the case of SKAM the customer was the teenage schoolchildren and then set out to explore the proper approach for realizing this mission.

A last often cited reason for SKAM's success, closely linked to the R&D aspect above, regards the actual content of the show as well as its overall ethics and politics. The latter harbour an open-minded, liberal and contemporary attitude that resonates with a forward-looking segment of the population in Norway and beyond. For instance, SKAM season 3 deals with the main character Isak struggling with his sexual desires and attraction towards a fellow student (Gitzen, 2022). The struggle of Isak's desire is interwoven with uneasy feelings of shame, guilt and moral questioning. In this sense, SKAM provides a narrative for queer youth to "grow sideways", as Timothen Gitzen puts it, to "embrace and reside in the messiness of being queer" in hostile contexts (2022: 1769). Another ethical consideration that the show that the show emphasizes is the solidarity between marginalized youths vis-à-vis their everyday problem; this relation of solidarity and bonding spillovers also to the fan communities of the show. For instance, the fan communities of the show are seen to be part of a big family, the so-called 'SKAMily' that according to Antonioni et al (2021) is composed by different elements: "the emotional engagement, the chance to share thoughts, personal feelings and experiences, the collaborative production of fan-art and fan-fiction, as well as offline meetings during conventions dedicated to the series" (:442). This feeling of fellowship, that is part of the emotional tonality of the show, is reflected on the level of audience following and fan labour.

Image 2. Still from the original SKAM Season 1

6.3.2 Countries and Adaptations

The series had seven adaptations, including in France, Germany, Spain, The Netherlands, Belgium, Italy, and the US. NRK sought to guarantees that the different adaptations would respect the series' format, aims and attitude as they convert in each national context. Below we discuss the most prevalent and successful adaptations in the European media market and public space.

6.3.2.1 Germany

In Germany, SKAM was premiered on YouTube in 2018 as *Druck* (*Pressure*) and the show it is still ongoing at the time of writing. This means that the German adaptation has already surpassed the original in terms of years being aired (it is currently in its 8th season). In this regard, while the concept and themes of the German adaptation were similar to the Norwegian original, the former expanded on them as well as included a larger variety, such as for instance a focus on substance abuse, sexual self-discovery, non-binary identities and COVID-19. While the idea of following different characters is the same, DRUCK started using a different company of friends after some seasons, in contrast to the original SKAM that stuck to the same group of friends throughout. Also, DRUCK heavily used the online to space to communicate its audience and expanded the transmedia narration to messaging platforms like WhatsApp and Telegram. The adaption followed the model of the original and adapted to the German society, as German society was "less middle-class and more diverse than the Norwegian one" (Krauß & Stock, 2021). The show was commissioned by ZDF (Second German Television) and the public service content network funk, a joint venture of Germany's leading public broadcasters (ARD). Funk is a content network privileging online media over television and distributes content via its website and different external platforms, including Youtube and Instagram (Stollfuß, 2021; Krauß & Stock, 2021); in this sense, SKAM was an ideal venture for the network to pursue its approach, notable for adapting "the mobile screen culture of social media" (Stollfuß, 2021: 130).

6.3.2.2 Italy

The Italian version of SKAM, titled SKAM Italia, began in 2018, covered five seasons and it is still ongoing. It is produced by Cross Productions and broadcasted by the VoD platforms Netflix and Tim Vision. This version of SKAM draws on similar themes to the original Norwegian work and, similarly to other adaptation cases, expands the original's topics to include more sensitive issues, including mental health issues, abuse and religious minorities. The show expresses a positive approach to LGBT and religious minorities, and along with a few other shows, legitimizes "a certain level of sexual and gender variance" in Italian society (Heim, 2020: 189). Yet, the show tried to differentiate itself from the original (as well as from the other adaptations that were already aired by adapting elements in the local context) to address local particularities. For instance, the show addressed the differences between the educational systems in Italy and Norway as well the fact that Italian parents are more protective of the children than the Norwegian counterparts. In this sense, the children, who were almost always portrayed without their parents from the age of 16 in the original Norwegian, here could hardly be imagined living alone, so the producers had to invent various excuses for their absence (Antonioni et al., 2021: 437). The transmedia narrative is here preserved with the mobilization of WhatsApp conversations and Instagram profiles for the main characters.

6.3.2.3 France

As with all the rest adaptations, the French adaptation of SKAM (SKAM France) has been running since 2018 and it is one of the more prolific ones in terms of durations as it already has10 seasons. It was the first adaptation to introduce characters that did not exist to the Norwegian counterpart in season 6 and while it was well-received by the public its success was indeed not comparable to the original Norwegian (Ballotti, 2020). SKAM France was directed and produced initially by David Hourrègue and later by Shirley Monsarrat and broadcast by France TVSplash both for French as well as Belgian (Wallonian) audiences. The series' transmedia format is maintained, as are the themes that extend to issues of self-destruction and mourning; frequently, the series' characters use specific linguistic expressions and slang language to appeal to youth audiences (рко & ононова, 2021). In terms of cultural transfer, the French adaptation too caters for constructions that are more specific to the French audience. In the Norwegian original, as the young characters had to appear more independent, the activity would barely involve adult characters, as the various problems the protagonists face are solved through the mediation, interference and support of friends. In the French case, authority figures such as parents and teachers do appear, as similar to the Italian case that we saw, authority figures play a more prominent role in the teenagers' life than in Norway. For instance, as Alessandra Ballotti notes the teachers are often present in the school contrary to the Norwegian original, serving mostly to show the intergenerational chasm between adults and teenagers (2020). Ballotti notes that this was indeed a questioning from the audience; as the parents' disappearance was taken up and the public would comment on the excessive freedom granted to the characters and ask: "who takes care of them?" (Ballotti, 2020).

6.3.2.4 Spain

The Spanish version of SKAM, titled SKAM España was produced by Zeppelin TV and screened from 2018 until 2020 in the paid platform Movistar Plus+. It ran for 4 seasons and, in this regard, it was one of the less successful adaptations in the context of Europe. The series themes, again, revolve around the familiar issues of young teenagers and include mental disorders, fluid sexual identities, female empowerment and bullying. The narrative followed the original's example that involves the breaking down of each episode into smaller clips as well as the creation of social network profiles for the main characters so as to maintain interaction with fans. One of the most prominent motives in the series is its feminist approach, involving the representation of sisterhood and female bonds as well as the non-sexualized representation of women.

6.3.3 European Identity: Embracing the Values and Digital Nativism of Gen Z

In terms of Europeanization, the series intervenes in a number of discursive and material parameters enacting what we can call as a new European identity. The discursive constitution of European identity is “highly contingent” (Carpentier: 2021: 234), and in this sense conflicting notions about what Europeanness is are articulated in the public space. The signifier ‘Europe’ is in this sense a battleground for hegemony that can be filled with contradictory and opposing significations from different political horizons and orientations. In the constitution of hegemonic, counter-hegemonic and generally all articulations of ‘Europe’, the discursive and the material are, according to Nico Carpentier, always acting upon each other, they are knotted together (2021). By performing certain attitudes, ethical positions, and ways of relating cultural products, such as television series, legitimize values and shape audience perceptions in the context of public spheres.

In all of its European variations, SKAM enacts an identity that is reflective, open-minded, independent, tech-savvy and confessional that is in many ways representative of Gen Z. Gen Z (the people who were born at the end of the 1990s and early 2000s) is the first generation of digital natives, defined by openness, reflection and more liberal values than their predecessors while they are more likely to be stressed and develop depression and mental disorders (Seemiller & Grace, 2016; Pichler, S., Kohli, C. & Granitz, N., 2021). SKAM enables a forward-looking, LGBTQ+ positive and accepting value system that constructs a particular version of European identity that is tolerant, independent and empowered. Furthermore, it is a European identity that is empowered, feminist, open to diversity and reliant on connections with friends instead of parents or other figures of authority. In terms of its relation with technology, SKAM enacts a reconciliatory relation with the mobile screen that highlights both the pitfalls as well as the opportunities of its usage. It generates a public perception of technology that places new media as an integral part of contemporary life. In all adaptations, the characters maintain Instagram profiles, where followers could stay informed of all their activity through posts linked to the story, deciding for themselves who to follow and who not to.

6.4 A Tale of Two Series: *Money Heist (La Casa De Papel)*

6.4.1 Introduction

La Casa de Papel (2017-), which translates to *Money Heist* in English, is a Spanish crime-drama television series that was developed by Alex Pina and was produced by Vancouver Media, which is a Spanish production firm (Castro & Cascajosa, 2020). The show initially run for two seasons (15 episodes) in the Spanish television network Antena 3 from May to November 2017. In late 2017, Netflix acquired global streaming rights and re-cut the first 15 episodes of the Spanish version to 2 seasons of 22 episodes and released it in the streaming platform (the first episode aired on December 20, 2017). When *Money Heist* was made available on Netflix, it not only became a tremendous success in Spain, but rose to the top of the most watched non-English-language series in the history of Netflix as of April 2018 (Castro & Cascajosa, 2020: 157); it garnered an enthusiastic following all over the world, developed an unprecedented cult around its name and was the first Spanish series to win an International Emmy Award for Best Drama Series at the 46th International Emmy Awards. The series has been concluded in 2022 with 5 parts (seasons) on Netflix and several spin-offs while two Netflix original documentaries have been made to the chronicle the show’s success (*Money Heist: The Phenomenon* and *Money Heist: From Tokyo to Berlin*).

The plot of the series revolves around an initial group of eight people who are recruited by a mysterious persona, known as The Professor, in order to commit a robbery at the Royal Mint of Spain. The code names of the group are borrowed from cities, including Berlin, Tokyo, Nairobi and Moscow, offering thus a cosmopolitan identity to the show. The series features a cast of several actors, and the starring roles go to Ursula Corberó, who plays Tokyo and is the (unreliable) narrator of the events, and Alvaro Morte, who plays The Professor. The show runs for five parts. The first part tells the robbery of the Royal Mint, during which the gang attempts to print billions of euros and then flee with the money. It has an unexpected ending, as the main state detective working to arrest the gang falls in love with The Professor and ends up becoming a collaborator in the heist. The second part focuses on the events that occur following the robbery, including their attempt to avoid being apprehended and cope with the effects that the robbery had in their lives. The plot of the third part revolves around the Professor formulating a strategy to free one of his team members who has been detained by the government. During the fourth part the crew again commits a robbery, this time at the Bank of Spain, and in the fifth the members are trapped inside the Bank while waiting for rescue and while battles between the police and their supporters rage in the streets of Madrid. Throughout the course of the series, the characters are put in hard moral situations, and the drama explores topics such as loyalty, solidarity, friendship and the price needed to pay for achieving one's ambitions. There are often flashbacks and the narrative is not always linear, during which the viewers delve into the motives and emotional lives of the heroes who despite their criminal undertakings are presented as having a very fragile and humane side. A new Korean adaptation of the series was aired in Netflix in June 2022 titled *Money Heist: Korea – Joint Economic Area* (which is a similar story adapted to Korean audiences and narratives) and there is an upcoming Netflix show titled Berlin and starring Andrés de Fonollosa (Berlin's original actor in Money Heist).

6.4.2 Global Resonance

The series became a truly global viral phenomenon, with several of its themes, symbolism, imagery and paraphernalia rising to an unprecedented cult status. Several motives from the show turned iconic symbols, including the Salvador Dali masks, the red uniforms of the robbers and the partisan antifascist song Bella Ciao (the combination of these three motives made the identity of the show and has been reproduced in various formats globally). Compared to SKAM, which has very dedicated fans in national and sometimes trans-European settings, *Money Heist* far exceeded the European borders and became a global media event (Lash & Lury, 2007).

To start with, judging at least from the number of followers on their social media accounts, the actors of the series became international celebrities. Alvaro Morte (The Professor) has 11.6 million followers, Ursula Corbero (Tokyo) has 22.9 million followers and Pedro Alonso (Berlin) has 9 million followers. The comments in their accounts show a global following with languages represented, ranging from English to Arabic and from Russian to French. The Facebook official page of the show is liked by 3,4 million people and in TikTok the hashtags *#casadepapel* has 1,3 billion views and the hashtag *#moneyheist* has 3,8 billion views respectively. In this sense, we can argue that apart from the fact that Netflix is a global streaming platform and can communicate the series to various locations, the global resonance of the show was accelerated via social media platforms. By following the characters personal profiles, the series' official accounts and relevant hashtags, users were daily updated on issues around the series.

The virality of *Money Heist* slid to the offline space occupying various events across the world in what we can call as 'distributed fandom', ranging from football to festivals and video games to actual protests in vastly heterogeneous locations. Indicatively, in order to demonstrate its geographical spread and heterogenous appropriation we can mention the football fans of the Saudi football club Al-Etihad raised a banner of La Casa de Papel with the team manager José Luis Sierra as Professor and the footballers as the characters of the show (Qutub et al., 2021), while the fans of the Greek football team Olympiakos rose several banners with the Dali mask during the team's games. Here, football fans wish to identify not simply with the series' characters and plot but with an underdog and revolting subjectivity, which they attribute to their teams. The most paradigmatic viral item associated with the show is the Italian partisan anti-fascist song Bella Ciao, which is sang by the protagonists several times throughout the show, usually to manifest their determination, courage and unity. The song literally "exploded as a pop phenomenon in 2018" as a result of the show: the Youtube scene where Berlin and Professor sing the original Bella Ciao has almost 100 million views in Youtube and the last Bella Ciao scene of part 5 is recreated became a 11 million views indicatively the edit by Hugel has 95 million views and by SOUNDTEC 11 million views in Youtube, among countless others (Spinetti, Schoop & Hofman, 2020: 2). The song, accompanied with the series' imagery, also spread massively in the Middle East used as an inspiration in protests in Lebanon, Syria, Palestine and other parts of the region.[13]

Image 3. Olympiakos fans showing La Casa De Papel imagery.

[13] This can be found here: https://www.youtube.com/watch?app=desktop&v=TapUKADMIlU.

6.4.3 Interpretations of Success

While there is very little academic literature explaining (or speculating on) the reasons on why the show turned into a viral global phenomenon, we can venture into some hypotheses. Probably the most obvious reason for the show's success relates to the actual plot and character development that includes risk-taking, "bad boy" and morally complex characters. The criminal characters in the show are far from common thugs: they seem at times to be motivated by a sense of justice and Robin Hood mentality (such as giving out some of the money they took to the people) and some of their brutalities seem to be explained or morally justified. Also, they are social outcasts either due to their social position (coming from less privileged backgrounds or from problematic family backgrounds) or because they simply do not want to live the mainstream life of a common white-collar or blue-collar worker (such as *The Professor*). In this sense, the series characters are vindicated for carrying out criminal activities, and more so, some of these activities appear as revolutionary acts; since criminality occurs as a result of social repression and alienation this criminality is partly revolting against mainstream society. Similar character development proved to garner a "revolutionary" or "reactionary" (depending on the interpretation) fandom at least since the tremendous success of *Fight Club* (1999) and continued to be gathering heterogeneous fan audiences in more recent productions such as in *Breaking Bad* (2008-2013), *Mr. Robot* (2015-2017), and in *Joker* (2019). For instance, all characters in a recent research in audience reception of the series in Saudi Arabia the authors point out that the publics empathize with all criminal characters and regard the law enforcement agencies as the threat (Qutub et al., 2021).

A closely related reason is the boosting of reputation and further capitalization of the virality of the series by Netflix, which has been extremely effective in tapping into the iconography of the show. Netflix's re-editing of the two first seasons for instance made emotions higher and the endings more suspenseful encouraging a continuous viewing rhythm and binge-watching (Kint, 2021). In this sense, Netflix intervened into the original narrative development of Antena 3, which was less dramatic. Netflix "Americanized" (or "de-Europeanized") this narrative, turning it into a transnational product in Hollywood, emotional-marketing standards. Netflix has also commissioned, as mentioned above, two documentaries on the series that have been key in consolidating a sense of history and legend around the show, while it has also released in its official YouTube channel several versions of Bella Ciao, including a Arabic one in order to tap into the virality of the song and the series in Middle Eastern protest environments. [14] In other words, Netflix was key in managing the virality of the show and while the show was not produced as a transmedia project (as SKAM did), it incorporated connectivity practices in its marketing and promotion.

Finally, *Money Heist* made the (traditionally more macho and male-oriented) heist genre more inclusive by incorporating themes such LGBTQ+, feminism and women

[14] The song can be found here: https://www.youtube.com/watch?v=-b2IPaO9hH4&list=RD-b2IPaO9hH4&start_radio=1&ab_channel=NetflixMENA.

empowerment (Kint, 2021). This inclusivity has been important in Netflix and global streaming productions in general as they are a way to raise audience engagement via 'positive' identifications. Similar tropes were also developed by Alex Pina in his other productions, namely in White Lines and Sky Rojo, which were also on Netflix.

Image 4. Protests in Lebanon, source (https://www.the961.com/la-casa-de-papel-money-heist-netflix-featured-lebanese-revolution/)

6.4.4 European Identities and Values

In terms of constructing 'Europeanness', *Money Heist* was an extremely important vehicle for spreading *certain* values and cultural forms that are associated with Europe around the globe. As mentioned above, European identity (as any social identity) is "highly contingent" (Carpentier: 2021: 234), and in this sense Europe is not composed by a concrete set of values; different social agents articulating discourses around 'Europe' in the public space would disagree upon which values are 'essentially' European. In the case of Money Heist, a set of European values relate to anti-fascist imagery and protest (as extensively communicated via Bella Ciao) as well as Spanish language, culture, emotional connectivity and art figures (e.g., Salvador Dali).

Vis-à-vis the Bella Ciao case, its extensive popularization and commodification represents a double-edged sword. On the one hand, the song has become a global commodity, stripped out of any anti-fascist meaning, it turned into a form without content. In its dance remixes, for instance, Bella Ciao is simply a 'beat' upon which people dance without necessarily having in mind an antifascist purpose (probably not having an antifascist purpose at all). These circulations of the song testify to "how an antifascist song can become an outlet for market commodification and the strategies of the entertainment industry", as the authors on an essay on contemporary antifascism in Europe put it (Spinetti, Schoop & Ana Hofman, 2020: 2). On the other hand, the song has been deployed in diverse cultural political contexts as a means to challenge power from a (broadly understood) left wing perspective. We already mentioned the case of the Middle East, but the song has been used in numerous protests around the world including workers strike such as Nissan in Spain (image 5). We can also mention the 2018 version of Bella Ciao in the US by Marc Ribot and sung by Tom Waits. The song was made during Donald Trump's presidency and in this sense it was contextualized within this tense political climate for America politics. The video clip of the song shows different protests, where it is obvious that 'antifascism' is recontextualized as 'anti-Trump' as the label 'fascist' is here meant to express Trump politics or supporters (Spinetti, Schoop & Ana Hofman, 2020: 2). Here, the Italian (and European) legacy of antifascism becomes a source of inspiration for real world actions and achieves wide popularity.

Another example of 'Europe' that achieves popularity via the show is 'Spanish culture' ranging from the actual emotional connectivity of the characters to Spanish language and Madrid as a city to the already renowned painter Salvador Dali, whose face decorates the masks of the robbers. Dali is even more decontextualized than Bella Ciao, as there is often very little reference to the content of his paintings; instead, what seems to be the only aspect that makes the mask unique is Dali's characteristic, inverted and long moustache. The moustache of Dali in many ways becomes an empty signifier that points towards an eccentric painter, adding to the outcast status of the robbers. This effect of decontextualization and alienation is constant in any commodification practice in capitalism yet from a 'Europeanization' perspective we can argue that Dali achieved indeed a new wave of fascination that adding to the overall touristic fascination with the brand 'Spain'.

Image 5. Nissan workers protest – more: https://www.youtube.com/watch?v=0kCgDG2KMoI&ab_channel=GlobalNews

6.5 *SKAM* and *Money Heist* – Are there any patterns?

There are few obvious patterns linking the success of these series as they differ in important ways. In terms of genre, SKAM is a teenage drama while Money Heist is a crime series, in terms of plot, SKAM is focused on different companies and individual protagonists each season while Money Heist follows the same group of characters over a course of several seasons and is in terms of production, SKAM has been first popular internally in Norway and later grew virally while with Money Heist the opposite had happened. In terms of age demographic, they both appeal to younger audiences yet SKAM is obviously more popular among younger ages.

Despite big differences and despite the need for more systematic research on the issue, we could discern a set of common elements arising from both series that can serve as a first as a material for more detailed future analysis. Both series, *SKAM* and *Money Heist* grew from a small-budget, national series to a viral phenomenon and success and it is characteristic that in both series the creators enjoyed a significant degree of independence in their artistic choices. For SKAM, this was obvious with Julie Andem, as it was for La Casa De Papel in its first two seasons (which were arguably the best of *Money Heist*). Alex Pina, the series' screenwriter and producer, together with the show's director created their own production company and they developed the series there with little external interference. This shows that the genre of *auteur cinema* may still be an important legacy of European filmmaking and an interesting one to explore further for European productions. This contemporary version of auteur cinema that these series express is less male dominated and much more collaborative than the original genre in the 1960s and 1970s.

This is enlarged version of authorship is further reflected in another common element in terms of the values of both series, that is their commitment to inclusivity; as discussed in some detail above, SKAM welcomes LGBTQ narratives and feminist tropes as did Money Heist (three of the main characters, Helsinki, Palermo and Manila were gay and there were often references to matriarchy as the preferred administrative model). In this sense, both series expand audience identifications and enable fandom across larger segments of the population.

There is also a common aspect of media generated virality, which is an effect of intensive "fan labour" (Proctor, 2021; Baym & Burnett, 2009). In this sense, both shows made the fans identify with the show and motivated them *to work* for its promotion of the show. SKAM's fan labour was much more insular, dialogical and, in a way, systematic (as with the case of subtitles) while in the case of Money Heist it was entertaining, outward-looking and often part of larger social causes. The fan labour then in each was stemmed from different motivations yet in both cases it turned the show into an expended media project instead of simply a TV series. There is of course no recipe for European productions (or any productions) to achieve this type of intense (free) labour on behalf of the fans, but it is important to emphasize that productions need to develop and plan a socially aware transmedia strategy either as a means of curating an appeasing image of the show or as a means to be ready to capitalize on the show's initial success.

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