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Transnational European Cinema

Representation, Audiences, Identity

Huw D. Jones

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ISSN 2634-615X ISSN 2634-6168 (electronic)
Palgrave European Film and Media Studies
ISBN 978-3-031-44594-1 ISBN 978-3-031-44595-8 (eBook)
<https://doi.org/10.1007/978-3-031-44595-8>

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ACKNOWLEDGEMENTS

This book presents the main findings of the ‘cinema’ strand to ‘Mediating Cultural Encounters through European Screens’ (McCETES), a three-year research project (2014–2017) on the transnational production, distribution, and reception of European film and television drama. The McCETES project was funded by the Humanities in the European Research Area (HERA) Joint Programme under grant number 291827 and involved researchers from the University of York, University of Copenhagen, and the Vrije Universiteit Brussels. I would like to thank HERA for the support that made this research possible and for inviting me to speak at two HERA conferences, where I had the chance to meet arts and humanities researchers from across Europe. I would also like to thank the other 24 academic staff and PhD students on the McCETES project, especially Prof. Ib Bondebjerg, who led the Copenhagen team, and Prof. Caroline Pauwels, the leader of the Brussels team. Caroline sadly passed away before the publication of this book, but her contribution to European scholarship, support for early-career researchers, and sense of fun will be fondly remembered. I would like to pay special tribute to Prof. Andrew Higson, who led both the York team and the McCETES project as a whole. Andrew has been a huge support and mentor for me during my early academic career, as well as a good friend and joy to work with. I would also like to thank our administrator on the McCETES project, Denise Mitchell, and my friend and fellow researcher on the York team Roderik Smits, for not only sharing

his knowledge and expertise on the European film industry, but also providing much needed diversion through our games of 5-a-side football. As part of the research for the MeCETES project, I oversaw 40 focus groups involving over 140 participants from Bulgaria, Germany, Italy, Poland, and the UK. I am deeply indebted to Maya Nedyalkova, Jessica van Roye, Martina Lovascio, and Agata Frymus for their hard work in organising, conducting, translating, and transcribing the focus group discussions that took place in their respective hometowns. I would also like to thank all the focus group respondents for agreeing to participate in the project and kindly allowing me to use and discuss their valuable thoughts and ideas. I hope I have done them justice. Much of the writing of this book took place after I started work as a Lecturer in Film Studies at the University of Southampton in October 2017 and in particular during a period of research leave in Semester 1 of 2022–2023. I would like to thank my colleagues in the Film department for their collegiality and support throughout my time at Southampton, particularly my ‘office buddy’ Malcolm Cook. I would also like to thank the reviewers for their helpful comments on the book proposal and the clearance read. Lastly, I would like to express my heartfelt gratitude to my parents, Gordon and Elizabeth Jones, my in-laws Gerd and Loritta, and my partner Claudia for their continued love and support.

Southampton, Cardiff, and Berlin
July 2023

Huw D. Jones

TEXTUAL NOTE

When first citing a film title in the text, I have provided the film's original title and its (British) English language release title, if appropriate. This is then followed by the film's producing country(s) and year of production in brackets. For example: *Män som hatar kvinnor/The Girl with the Dragon Tattoo* (SE/DK/DE, 2009). Subsequent references to the film use only its English release title. All information comes from the OBS's Lumiere database: <https://lumiere.obs.coe.int/>

Countries are often identified using the International Organization for Standardization's (ISO) two-letter country code. See the list of abbreviations for the ISO codes of the countries most frequently cited in the book. A full list of country codes is available here: <https://www.iso.org/obp/ui/#search>

In common with most writing about the film industry, film budgets and box office revenue are cited in US dollars (\$). All other financial figures are cited in the relevant local currency.

Note that "admissions" or "ticket sales" refers to the number of people who saw a film in the cinema or the number of cinema tickets sold. It does not refer to the film's box office revenue.

To facilitate reading, large figures have been rounded to the nearest round number.

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ABBREVIATIONS

AT	Austria
BAFTA	British Academy of Film and Television Arts
BBC	British Broadcasting Corporation
BE	Belgium
BFI	British Film Institute
BG	Bulgaria
CH	Switzerland
CNC	<i>Centre national du cinéma et de l'image animée</i> (The National Centre for Cinema and the Moving Image)
CoE	Council of Europe
CY	Cyprus
CZ	Czechia
DE	Germany
DK	Denmark
DVD	Digital Video Disc
EE	Estonia
ES	Spain
EU	European Union
FI	Finland
FR	France
GB	United Kingdom of Great Britain and Northern Ireland
GR	Greece
HR	Croatia
HU	Hungary
IE	Republic of Ireland
IMDb	Internet Movie Database

INC	Incoming investment film
IP	Intellectual property
IS	Iceland
IT	Italy
k	Thousand
LGBT	Lesbian, Gay, Bisexual, and Transgender
LT	Lithuania
LU	Luxembourg
LV	Latvia
m	Million
MEDIA	<i>Mesures pour Encourager le Développement de l'Industrie Audiovisuelle</i> (Measures to Encourage the Development of the Audiovisual Industry)
NL	The Netherlands
NNE	Non-National European
NO	Norway
OBS	<i>Observatoire européen de l'audiovisuel</i> (European Audiovisual Observatory)
PL	Poland
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
SK	Slovakia
SVoD	Subscription Video-on-Demand
TVoD	Transactional Video-on-Demand
UKFC	UK Film Council
US studio dist.	US studio distribution
US	United States of America
VoD	Video-on-Demand

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Introduction: European Film Consumption, Representation, and Identity

Just before midday on 17 December 2014, between a debate on “Preparations for the European Council meeting” and a vote on “Autonomous trade preferences for the Republic of Moldova” (European Parliament 2014a), Paweł Pawlikowski stepped into the European Parliament in Strasbourg to receive the LUX Award for his latest film, *Ida* (PL / DK 2013). The Polish filmmaker told the press that his historical drama about a young Catholic novice in 1960s Poland, searching to uncover what happened to her family during the German wartime occupation, was a “small, personal, limited film [and] not a political film” (European Parliament 2014b). The assembled politicians felt differently, however, presenting Pawlikowski with a prize established to champion European films that “raise awareness about some of today’s main social and political issues and, as a result, help to build a stronger European identity” (European Parliament LUX Prize 2019). As the President of the European Parliament, Martin Schulz, underlined in his address:

European films do not play somewhere, sometime, but they play at specific places and in a specific historical context.... They allow us to learn about our shared history and about the stories of our neighbours; they provide insights into the reality of life in other countries, and get us to know ourselves and our neighbours better. The stories told by European cinema provide us with a greater understanding of each other and strengthen the

feeling of belonging together, overcoming national boundaries. (Schulz cited in European Parliament [2014c](#))

The European Union (EU) has long taken a keen interest in European cinema. In the early-1990s, it established *Mesures pour Encourager le Développement de l'Industrie Audiovisuelle* (MEDIA), a €250 million programme to support the European audiovisual industries over a five-year period through measures like promoting the cross-border distribution of European films (European Commission [1990](#)). This initially centred primarily on economic objectives (Hainsworth [1994](#), 20). Yet, since the turn of the century, the MEDIA programme and the EU's audio-visual policy more widely has increasingly emphasised broader cultural and political goals to do with European unity and integration. When the EU approved the €755 million budget for MEDIA2007, for example, it stated that support for the European audiovisual industry was designed to “promote intercultural dialogue, increase mutual awareness amongst Europe's cultures and develop its political, cultural, social and economic potential, which constitutes genuine added value in the task of making European citizenship a reality” (EU [2006](#), para. 1). The European Commission, the EU's executive arm, made a similar point in a document from 2014 outlining its plans to support European film in the new digital age:

The audiovisual sector has substantial cultural, social and economic significance. It shapes identities, projects values and can be a driver of European integration by contributing to our shared European identity. (European Commission [2014a](#))

As film scholar Mariana Liz ([2016](#), 41) more succinctly puts it, “The idea behind the European Commission's efforts to support European cinema is that the more people watch European films, the greater knowledge they will have of other countries in Europe and the more European they will feel”.

With the rapid rise of new digital technology since the start of the twenty-first century, the opportunities for European audiences to see films from other parts of Europe have certainly never been greater. The introduction of digital cameras, editing software, and online working practices has reduced production costs, enabling even the smallest European countries to develop a thriving film industry. The transition from 35 mm film

reels to digital projectors has made theatrical distribution cheaper and quicker, allowing cinemas to screen more diverse, flexible, and responsive programmes. The proliferation of digital television channels, DVDs, and Video-on-Demand (VoD) platforms has provided consumers with a wider selection of films in more languages, with streaming platforms like Netflix or Amazon Prime Video offering access to vast online libraries of films anytime and anywhere. Social media sites like YouTube, Facebook, and Twitter or film websites like IMDb or Rotten Tomatoes enable movie fans to watch and share the latest trailers and post reviews, generating electronic word-of-mouth. They also give film marketing companies the tools and information to understand and directly target audiences. Meanwhile, the EU and national screen agencies have adapted their policies and funding schemes to support the growth of Europe's digital film industry. MEDIA2007, for example, introduced funding for specialist VoD platforms like MUBI, UniversCiné, or Filmin that could provide access to a diversity of European films. In 2015, the European Commission outlined ambitious plans for a “digital single market” aimed at removing virtual barriers between member states, making it easier for EU citizens to access online content including films.

The notion that watching European film can strengthen European identity has also come at a crucial time for the European project. The first decade of the twenty-first century ushered in a new intense phase of EU expansion (EU 2022). In 2004, Cyprus, Malta, and eight former communist countries in Eastern Europe became EU member states, finally ending the post-war division of Europe. They were joined three years later by Bulgaria and Romania. In 2007, the 27 EU member states agreed the Lisbon treaty, empowering various EU institutions. However, as chronicled by the Dutch journalist and historian Geert Mak (2021), the next decade brought a series of crises that tested the EU's cohesion. In the wake of the 2008 global financial crisis, Greece, Ireland, Portugal, Spain, and Cyprus were forced to implement severe austerity measures in return for EU bailouts in 2009–2010, prompting mutual resentment from both lender and debtor countries. Conflict and hardships in the Middle East, Asia, and Africa triggered a wave of refugees into Europe in 2010, which further escalated in 2015 with civilians fleeing the Syrian civil war. While Germany did its best to welcome the new arrivals, many other EU member states reintroduced border controls, squabbling with the EU over their treaty obligations as they struggled to cope with the influx of asylum seekers. A wave of Islamist terrorist attacks in Paris, Brussels, Nice,

Berlin, Manchester, London, and Barcelona in 2015–2017 only deepened anti-immigrant sentiment. The EU saw some further expansion, with Croatia becoming the 28th member state in 2013. Yet, Turkey’s accession stalled over questions of human rights violations under President Tayyip Erdogan’s increasingly autocratic government. Plans to admit Ukraine were likewise abandoned after the pro-Moscow President Viktor Yanukovych pulled out of preliminary talks in 2013. Meanwhile, growing disquiet about the economic and refugee crises fuelled hostility to European institutions, particularly amongst the “left behind”. In 2016, Britain narrowly voted to leave the EU, vowing to “take back control” over issues like immigration. This led to its eventual withdrawal in 2020; the first time a sovereign country had left the supranational union.

Within a digitally connected but politically divided Europe, it is certainly understandable why policymakers in Brussels hope that European cinema can help bring Europeans together. But this policy objective also raises certain fundamental questions. To what extent do audiences in Europe actually watch films from other European countries? Which films do they see in particular, who do these films appeal to, and why are they popular? How do such films represent Europe and different European nationalities? And how do these mediated cultural encounters with other Europeans affect people’s understanding of other countries in Europe and their sense of European identity?

In the next three subsections, I argue that previous research offers only partial responses to these questions. By drawing on quantitative and qualitative data from a range of primary and secondary sources, including audience surveys, focus groups, and film databases, this book aims to provide more comprehensive answers. The study focuses in particular on films released in Europe (defined in terms of the European single market) between 2005 and 2015, a period which roughly coincides with the EU’s eastward expansion up to the Brexit referendum and one that encompasses the MEDIA 2007–2013 funding cycle. I demonstrate that European films have the potential to improve people’s understanding of other countries in Europe and strengthen their sense of European identity. But this is limited by audience tastes and behaviour. Audiences in Europe consume few films from other European countries, and those films they do watch are often mainstream British or English-language productions, with stories that offer limited insights into the realities of European life.

In answering these questions, this book also contributes to three areas within the field of film studies. Firstly, it intervenes in debates about transnational cinema, which explores the various ways in which films transcend national boundaries at the level of funding, production, representation, distribution, exhibition, and consumption. I focus in particular on the question of what enables films to travel well across national borders and appeal to audiences outside their country-of-origin. I also explore different transnational production strategies in Europe, such as incoming investment from Hollywood studios or European co-productions, as well as stories involving characters from different countries interacting with each other. Secondly, the book provides new insights into European cinema in the early-twenty-first century. In particular, it identifies some of the key thematic trends within contemporary European film. It also explores industrial trends in European film production, distribution, exhibition, and consumption, while also considering how these trends have been shaped by major US studios, EU policies, national screen agencies, broadcasters, and other key players. Lastly, the book demonstrates how audience surveys, focus groups, film databases, and other methods that go beyond the conventional analysis of film texts can test theories and popular assumptions about film as an artform, industry, and socio-cultural artefact, thus providing new insights into the field.

EUROPEAN FILM CONSUMPTION

There is some data on the extent to which audiences in Europe engage with films from other European countries, particularly from the European Audiovisual Observatory (OBS), a Council of Europe organisation that collects information on the audiovisual industries in Europe. An OBS report by market analyst Christian Grece (2017, 18), for example, found that non-national European (NNE) films—i.e. a film primarily produced in one European country but consumed in another (e.g. a French film consumed in Germany)—sold 63.2 million cinema tickets across 25 EU members states in 2015, equating to a 7% share of the European theatrical market.¹ By comparison, “international films” (including US films, UK

¹ Note that the report defined NNE films as produced or majority produced in one EU member state and released in another EU member state. The definition of NNE films also excluded UK films financed mainly by US studios, e.g. *Spectre* (2015). The sample covered 26 EU member states, with Belgian and Greece excluded.

films financed by US studios, and other non-European films) had a 74% share of the theatrical market, while “national films” (i.e. a film produced and consumed in the same European country) had a 19% market share (Ibid.). A subsequent report by Grece (2021, 14) notes that NNE films sold 2.3 billion cinema tickets in Europe between 1996 and 2020. This represents an 11% market share, though unlike the 2017 report, the figure also includes admissions for UK films financed by US studios, such as the popular *James Bond* and *Harry Potter* film franchises.

The OBS reports provide valuable headline figures about how often people watch films from other European countries, especially in comparison with US movies and films from their own country. However, they have certain limitations. Firstly, they do not include viewing figures for TV, DVD, VoD, or other media platforms, providing only a partial picture of how often people consume NNE films. Secondly, they do not delve into the figures to examine how NNE film consumption varies across Europe or by age, gender, or other social demographic variables. Thirdly, the reports do not specify which NNE films people watch in particular. To be sure, Grece (2017, 21) lists the top 20 NNE films in 2015, including the action-thriller *Taken 3* (FR 2014) and the family animation *Shaun the Sheep Movie* (GB 2015). Yet, based on such a small sample, it is hard to say whether these are typical. Grece also provides no analysis of these popular titles in terms of their nationality, language, genre, or other cultural characteristics. Neither does he say what attracted audiences to these films.

Some of these issues are addressed in *A Profile of Current and Future Audiovisual Audiences* (2014), a report for the European Commission by the media ratings agency Attentional, the consultancy Headway International, and the polling firm Harris Interactive. The report examines the findings of the European Film Audience Survey, a poll that asked 4608 respondents aged 4–50 in 10 EU countries about their film viewing habits and preferences. This found that 14% of EU citizens had seen “many” NNE films (defined as “European films from another European country”) in the last year across all media platforms, compared with 58% for “US (typically Hollywood films)”, 20% for “national” or “country language films”, and 5% for films of “any other origin (South American, Indian, Chinese...)” (European Commission 2014b, 151). Poland (where 31% had watched “many” NNE films in the last year), Lithuania (25%), and Romania (22%) had the highest levels of NNE film consumption, while Croatia (3%), Britain (5%), and France (3%) had the lowest levels (ibid.).

The survey also found that the most frequent NNE film consumers (or what the report calls “Europhiles”) were found to be “relatively balanced across audience key profiles and demographics although they tend to be younger, more often women living in medium cities, with low revenue, high education, good [access to media] equipment, heavy media viewing and easier access to theatres” (ibid., 109). Amongst the most popular recent NNE films identified by the survey were *Untouchable* (seen by 38% of respondents), *Asterix and Obelix: God Save Britannia* (34%), and *Taken 2* (25%) (ibid., 167).

Compared to the OBS publications, the *Audiovisual Audiences* report provides a more comprehensive account of how often EU citizens consume films from other European countries, which films they see in particular, and who watches these films in terms of nationality, age, gender, education level, and other demographic variables. But it also contains flaws. Firstly, the European Film Audience Survey was ambiguously worded, with terms like “European film” and “many” open to different interpretations. Secondly, its sample was relatively small. While 4608 respondents from 10 EU countries may be sufficient to draw generalisations about NNE consumption at a pan-European level, it is not sufficient for identifying national-level trends. A representative sample of the UK population, for example, would typically involve 2000 people: the European Film Audience Survey had only 455 British respondents. Half its respondents were aged 4 to 15, while none were over 50.

Most importantly, neither the OBS nor the *Audiovisual Audiences* report analyses the trends they identify. There is no explanation, for example, of why NNE films are less popular than American films, why NNE film admissions vary across Europe or by demographics, or why certain titles like *Intouchables/Untouchable* (FR 2011) were more popular than other NNE films.

Academics studying transnational media flows, the process by which media content travels across national borders, or the economics of the film and television business have developed various theories to explain why America dominates the global film market. Media economists Colin Hoskins, Stuart McFadyen, and Adam Finn (1997, 32), for example, argue that US studios have developed various strategies to overcome the “cultural discount” that films experience when they are exported to countries where “viewers find it difficult to identify with the style, values, beliefs, history, myths, institutions, physical environment, and

behavioural patterns” of the material in question. Firstly, most American films are produced in English, the world’s second language. This makes them “more acceptable than other foreign-language productions in non-English-language markets” (ibid., 42). Of course, in many larger European territories, such as Germany, France, Italy, and Spain, English-language films are often dubbed into the local language. However, as film and media scholars Ib Bondebjerg and Eva Novrup Redvall (2015, 5) note, the global dominance of the English-language only serves to underline “the fact that America is a very big part of European culture: jeans, fast food, Coca-Cola, rock ‘n’ roll, Disney and Hollywood—to mention just a few cultural symbols and icons—are as much a part of the everyday life of every European as pasta, feta, cheese, opera or ancient ruins and temples”. In other words, Anglophone American movies might be expected to experience less cultural discount than films that travel across European borders.

Secondly, Hoskins et al. (1997, 44) argue that the characteristics of the American film industry provides its studios with a competitive advantage. For example, the concentration of the US film industry on the Hollywood district of Los Angeles provides “the single physical location in the world where all the necessary ingredients for a successful feature film are readily accessible—whether they be stars, production skills and infrastructure, directors, financial and distribution expertise, entertainment lawyers, script editors, or the agents who often act as deal-makers” (ibid.) (see also Scott 2002). US studios also operate within “a melting-pot society that rewards broadly based, popular programming” (Hoskins et al. 1997, 44). By contrast, European producers are under less commercial pressure to produce popular media content because they often receive state subsidies, and so “often appear to cater more to the art circuit than the commercial cinema” (Ibid., 45) (See also Dale 1997; Finney 2010). As British film producer David Puttnam (1997, 303) argues: “The *auteur* theory... based on a quintessentially romantic concept of the beleaguered artist... rapidly mutated into a political ideology which played a key role in shaping both the aesthetics and economics of European film-making for twenty-five years or more. In doing so, it seems as if it has condemned much of Europe’s cinema to a cultural ghetto from which it may never have the will to escape”.

Thirdly, Hoskins et al. (1997, 45) identify certain aspects of the “Hollywood system” that help maintain US dominance of the global film market. These include a “star system” for creating, promoting, and

exploiting film stars (see also De Vany and Walls 1999). The system also includes huge promotional budgets and the “vertically integrated nature of the major studios” whereby “Disney, (MCA) Universal, (Twentieth Century) Fox, Columbia, United Artists MGM, Warner Brothers, and Paramount are distributors, and in some markets exhibitors, as well as producers” (Hoskins et al. 1997, 45). In many European territories, the major US studios operate their own distribution divisions or have agreements with local distributors and exhibitors (Jäckel 2003, 13). This provides their films with a direct route into cinemas and other exhibition platforms and means they can coordinate global marketing campaigns to maximise impact. Europe, by contrast, has few vertically integrated companies (Constantin, eOne, EuropaCorp, Gaumont, Pathé, StudioCanal, and UFA are some exceptions, but on a much smaller scale to the major US studios). Instead, European producers mainly rely on a patchwork of smaller, independent distributors that mostly operate in one or two territories. This means their films often struggle for visibility and adequate screen space.

Finally, but most importantly for Hoskins et al. (1997), the major US studios can invest more money in production, distribution, marketing, and other elements like stars that boost box office performance. This is because they can draw on the resources of a large and wealthy home market (see also Fu and Sim 2010). The European film market, by contrast, is fragmented into numerous small and medium-sized territories. This has impeded European film companies from growing into larger and more staple entities. As the European Commission (2014a, 6) notes, “The European film sector is composed mostly of small and micro enterprises relying on limited intangible assets. They face growing difficulties to raise significant budgets and rely largely on public financing”.

Scholars have identified other reasons why American films are so globally popular. Communications theorist Scott Robert Olson (2000), for example, argues that America’s parochial, commercially demanding, entertainment hungry, and ethnically diverse domestic market has forced Hollywood studios to develop a “global aesthetic” based on certain “mythotypes”, which ensures its films are more “transparent” to understand and thus easier to export. These mythotypes include:

1. *Circular stories*—tales that begin where they end, or return to the same equilibrium as existed at the beginning of the tale. Every

- episode of a situation comedy, for example, restores itself to the pre-conflict state of affairs.
2. *Archetypal characters*—familiar stock heroes, villains, and incidental characters that keep story lines within the comfort zone of audiences. The similarities between Luke Skywalker and King Arthur or between Obi Wan Kenobi and Merlin are a case in point.
 3. *Open-ended plots*—stories that lend themselves to endless cycling, renovation, and recapitulation. The Mahabharata is a classic example; *Star Trek* a more contemporary example.
 4. *Inclusion strategies*—devices that pull audiences into the action and help them feel involved. The point-of-view shot, a standard device in the Hollywood omniscient style (well described in Arijon 1991), is one example; it literally places the viewer into the perspective of a character in the narrative.
 5. *Negentropy*—the process by which the electronic media assure audiences that life is not fundamentally chaotic, but rather orderly and purposeful. *Titanic* was a good example of this because it reaffirmed true love and triumph over death.
 6. *Awe*—spectacle that inspires the audience. In the case of the Hollywood aesthetic, this is primarily instilled by high production values that present majestic vistas, lavish sets, and lush costuming. New digital production techniques, exhibited in *Star Wars: The Phantom Menace* and elsewhere, further enhance the audience awe.
 7. *Omnipresence*—saturation of the human environment by electronic media stimulation. This creates a condition in which being an audience member is a common and frequent experience in numerous venues, from shops to restaurants to sports bars. Synergy, the marketing technique of creating additional iterations of a media narrative through apparel, toys, games, computer products, and spin-offs in other media, is one aspect of omnipresence (Ibid., 12. Emphasis added).

In a similar vein, sociologist Diana Crane (2014, 366) argues that “American filmmakers have developed a type of film that crosses national boundaries easily because it has eliminated a great deal of cultural complexity”, adding that “contemporary American films are ‘less culturally specific’ than classic American films” (see also Wasser 1995; Lee and Waterman 2007; F.L. Lee 2008a). She notes, for example, that the “[s]ettings of many American blockbusters are ‘delocalized’ and do not