Searchable multi-dimensional Data Lakes supporting Cognitive Film Production & Distribution for the Promotion of the EuropeaN Cultural HeritagE

Grant Agreement No 101095303

SCENE's Delphi Study

Findings on Future Policy Needs for the European Film Industry

Delphi Expert Study Round 2

Publishable summary

This report summarizes the results of **Round 2 of the Delphi study (R2)** on future policy requirements for the European film sector, carried out within the SCENE Horizon Europe project (Grant Agreement No. 101095303). While Round 1 (R1) was dedicated to exploratory mapping, R2 is a **confirmatory and prioritization round**, seeking to validate, sharpen, and stress-test the foresight dimensions previously identified. R2 concentrates on the degree of **expert convergence and divergence, relative salience of competing policy** and **technological priorities**, and perceived strength of key assumptions under different future scenario conditions. Instead of broadening the thematic remit of analysis, R2 implements the results of R1 in a judgment format, facilitating prioritization regarding policy levers, digital maturity gaps, technology investment requirements, and scenario-related uncertainties.

The Delphi survey of R2 **collected 29 expert responses** from the European film community. To ensure the privacy of the respondents, all results are presented in aggregate form. The sample combines three different stakeholder viewpoints**:** producers and freelancers **(62%),** film commissions and regional funds **(28%),** and technology suppliers and digital tool specialists **(10%).** The aim was to capture day-to-day production practice, enabling and regional development functions, and the technological layer that underpins digital transformation in EU filmmaking.

The findings of R2 suggest a **high level of convergence on structural conditions** that shape the future of European filmmaking, including the role of **digitalization and AI**, the role of **platform-driven asymmetries** in distribution and audience access, and **the current levels of digital maturity** in the value chain. At the same time, however, the findings suggest that there is variation in the degree of emphasis and priority across different roles in filmmaking, particularly about the accessibility of funding, the role of technology adoption barriers, and the effectiveness of current policy frameworks.

The patterns of responses also suggest that issues such as **technology adoption, market power, funding design, skills, and governance** are system-level issues and are interrelated. These observations are used to prioritize elements of the scenarios and to stress-test alternative future scenarios for the European filmmaking industry. In combination with the findings of R1, the results presented in this report provide an empirical basis for the development of the **scenario analysis and policy recommendations** that follow in the SCENE project (Deliverable D6.10: SCENE policy scenarios & recommendations R2).

Key messages emerging from R2 include:

- **Artificial Intelligence is a structural driver of competitiveness**, but its uptake in European filmmaking depends on enforceable safeguards for authorship, transparency, and creative labour. Governance is a prerequisite for adoption, not an afterthought.
- **Administrative complexity is the most consistently identified policy failure.** Simplifying access to funding and accelerating decision-making is seen as the single most effective lever to unlock innovation, skills uptake, and market adaptation.
- **The main competitiveness gap lies in distribution and audience reach.** Without targeted support for digital distribution, discoverability, and audience analytics, investments in production risk delivering diminishing returns.
- **The sector faces a cumulative competitiveness squeeze.** Rising production costs, unequal access to finance, and uncertainty around AI's impact on jobs and value creation are compounded by the risk of tightening public funding.
- **A technology-led growth trajectory is plausible but conditional.** Its realisation depends on coherent policy frameworks that align funding design, digital governance, market regulation, and skills development, and that can withstand external shocks such as platform rule changes and geopolitical instability.

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1 Introduction

European filmmaking is entering a decade of technological disruption, in particular the growing use of AI-enabled tools is interacting with platform-driven distribution models, changing audience behaviour and increasing production costs as well as continuing fragmentation of European production and funding ecosystems. These factors introduce several potential avenues for innovation, but also major challenges around competitiveness, diversity, and sustainability in the industry. In this regard, the SCENE project initiated a two-round Delphi survey exercise to collect structured expert feedback about future policy requirements in the European film sector. The aim is to provide resources for a foresight- informed analysis, capturing judgements from different stakeholders within the filmmaking ecosystem such as production practice, institutional and policy roles and digital technology experience.

This document reports the findings of R2 of SCENE’s Delphi study, produced under the funded by the European Union under Horizon Europe grant agreement 101095303. Building on the exploratory mapping carried out in R1, this survey round was designed as a **confirmatory and prioritisation phase**. It is meant as a method of testing, validating and weighting the main trends, constraints, policy levers and future uncertainties already identified in R1, which included a survey of 13 open-ended questions and 7 Likert scale rating items, and its findings where shaped by the detailed responses of 28 expert contributors from the EU filmmaking industry including producers, broader CCI professionals and relevant digital tool providers of the filmmaking horizontal.

Whereas R1 focused on surfacing the breadth of issues and clustering expert perspectives, R2 aims to translate those findings into tasks. This report includes an assessment of expert convergence and divergence, the relative salience of competing policy and technological options, and the perceived robustness of key assumptions under different future conditions for the industry. The R2 survey contributor group consisted of 29 respondents drawn (like in R1) from different parts of the European film ecosystem, including producers and freelancers, film commissions and regional funds, and technology and digital tool providers. As with R1, the objective was the synthesis of informed expert opinion across these professional roles and contexts, which shape the digitisation of the EU filmmaking industry.

How to read this report:

- Each chapter is organised by survey question, with tables and figures presenting the aggregated results, followed by analytical interpretation.
- Results should be read as indicators of **convergence, divergence, and priority**.
- These results **are not** to be treated as precise measurements of sector-wide opinion.
- Where subgroup results are shown, they illustrate positional perspectives linked to stakeholder roles.
- R2 findings should be understood in conjunction with the R1.

2 Participants and sample profile

2.1 Panel composition by region, stakeholder type, and professional background

R2 received **29 responses** from professionals across the European film ecosystem. The purpose of this exercise is to bring together **informed perspectives from different parts of the value chain** and different European contexts. To protect participants’ privacy, the analysis is reported only in aggregated form.

The sample combines three stakeholder lenses: (i) **producers and freelancers**, (ii) **film commissions and regional funds**, and (iii) **technology providers / digital tool experts**. This provides perspectives from day-to-day production practice, enabling and regional development organisations, and the technology layer supporting digital transformation in filmmaking.

Finally, respondents reported different professional backgrounds. For reporting clarity, we summarize backgrounds into three headline categories (filmmaking, broader CCI, and digital tools expertise). In a small number of cases where multiple backgrounds were selected, responses were grouped under the most relevant primary category for this analysis.

Table 1: Composition by region, organisation type and professional background (A1-A3)

Category	Group	Responders
Organization type	Producer / Freelancer	18
	Film Commission / Regional Fund	8
	Technology provider/digital tool expert	3
Professional background	Filmmaker	14
	Policy/institutional work	5
	Digital tools/technology expert	5
	Cultural and Creative Industries	4
	Other	1
Region	Southern Europe	19
	Central Europe	6
	Outside Europe/Pan-European	3
	Northen Europe	1

2.2 Experience and demographics

In terms of sector experience, the R2 panel is weighted toward mid-to-senior expertise. A substantial share of respondents report 11-20 years in the screen sector, while an equally strong share report 21+ years, indicating a panel with deep professional experience. At the same time, early-career professionals (0-10 years) are also represented.

Table 2: Years of experience in the filmmaking/screen sector among respondents (A4)

Years in the industry	Responders
0-5 years	4
6-10 years	2
11-20 years	11
21+ years	12

Regarding gender, the respondent group is predominantly male (69%). These distributions are reported only in aggregate form and are used solely to support high-level contextual interpretation of the Delphi results.

Table 3: Gender sector among respondents (A5)

Gender	Responders
Man	20
Woman	8
Prefer not to say	1

3 Methodology

3.1 Purpose and positioning of Round 2

R2 was building directly on the thematic structures, uncertainties, and emerging hypotheses identified in R1. While R1 served to map the landscape of trends, constraints, and policy issues affecting European filmmaking, the second round focused on **testing the robustness, salience, and relative importance** of those findings. Accordingly, R2 aimed to:

- assess levels of **expert convergence and divergence** on previously identified issues
- support **prioritisation** across competing policy levers and technological options
- **stress test key assumptions and scenario elements** under alternative future conditions

This design reflects a deliberate methodological progression from exploration to validation.

3.2 Questionnaire design and question logic

The R2 questionnaire was derived directly from the consolidated thematic outputs of R1. In R1 the responders were called to answer open-ended questions regarding the industry and the policy landscape. The survey of R1 was distributed through the EU survey service, the responses were aggerated and analysed word-by-word to identify thematic categories and assign codes to each response. The thematic codes assigned to each response were analytically studied to reveal the frequency a theme was mentioned under each question (e.g. trends, barriers, policy directions) and which themes were mentioned together as a package. Themes that emerged as prominent, contested, or policy relevant in R1 were translated into structured judgement tasks, using a combination open-ended and Likert scale rating question formats.

Question types were selected based on:

- **Prioritisation and selection questions**: where the objective was to identify relative importance or catalytic leverage among predefined options.
- **Likert scale questions**: to capture perceived performance or adequacy of existing policy frameworks, with attention to dispersion rather than aggregation.
- **Categorical choice questions**: to identify bottlenecks, weakest links, or dominant constraints within the filmmaking value chain.
- **Scenario oriented questions**: to assess sensitivity to external changes and to test alignment with alternative future pathways.
- A final **open corrective question** allowed respondents to flag any critical omissions from the R1 synthesis.

No new thematic coding frameworks were introduced in R2. All answer options and categories were grounded in R1 findings.

3.3 Analytical approach

The analysis of R2 responses followed a **descriptive and comparative logic**. For categorical and prioritisation questions, results are presented as **frequency distributions**, with each selection counted once per respondent. These distributions were used to identify areas of strong convergence as well as dispersion across options.

For Likert scale questions the analysis focused on:

- the distribution of responses across scale points
- visible clustering or polarisation
- differences in emphasis across stakeholder groups

No composite indices, weighting schemes, or inferential statistics were applied. Measures such as means or medians are used only for descriptive clarity and are to be interpreted cautiously. Where subgroup views are presented, they are intended to illustrate **positional perspectives** linked to professional roles within the ecosystem. They **are not intended to** support statistical comparison or claims of representativeness within subgroups of stakeholders, professionals or geographical group.

3.4 Scope and limitations

As with R1, the purpose of the R2 Delphi exercise is to synthesise informed expert judgement across different roles and contexts within the European filmmaking ecosystem. Results should therefore be read as **structured signals of convergence**, **divergence**, **and priority**. R2 complements the exploratory mapping of R1 by narrowing the analytical focus, strengthening prioritisation, and enhancing the policy relevance of the overall foresight exercise. The final combined outcomes of R1 and R2 were presented and discussed with participants from both rounds, as well as other external stakeholders from SCENE's Network of Interest (NoI), in the SCENE project's Online Policy Workshop, performed on 16/01/2026. The discussion followed an interactive form session and a Miro Board prioritisation exercise, where participants where invited to prioritise which policies should be treated now (this year), which next (2-3 years from now) and which could be addressed later (5 years).

4 Structural trends shaping the future of European filmmaking

Question B1 of the Delphi R2 survey:

"Top trends shaping European filmmaking (next 10 years)"

The objective of this question was to identify which trends experts across the European film ecosystem perceive as most influential for shaping European filmmaking over the next decade. Respondents selected up to three trends from a predefined list. Results are presented as total mentions, where each selection was counted once per respondent. Across the sample, the dataset contains 84 coded selections (mentions) distributed across 11 trend categories, summarised in Table 4.

Table 4: Trend mentions in B1

Code	Trend	Mentions
F1	Artificial Intelligence & workflow automation	26
F2	Shifting audience behaviour & platform-driven distribution	12
F3	Sustainable / environmentally responsible filmmaking	9
F4	Diversity, inclusion & transnational storytelling	7
F5	Technological innovation beyond AI (e.g., VFX pipelines, new production tech)	6
F6	New creative aesthetics & narrative experimentation	5
F7	Workforce transformation & skills development	5
F8	Evolving financing models & market structures	4
F9	Immersive / virtual / interactive media expansion (XR, etc.)	4
F10	Regulatory & policy realignment	3
F11	Decentralisation of production & regional hubs	3

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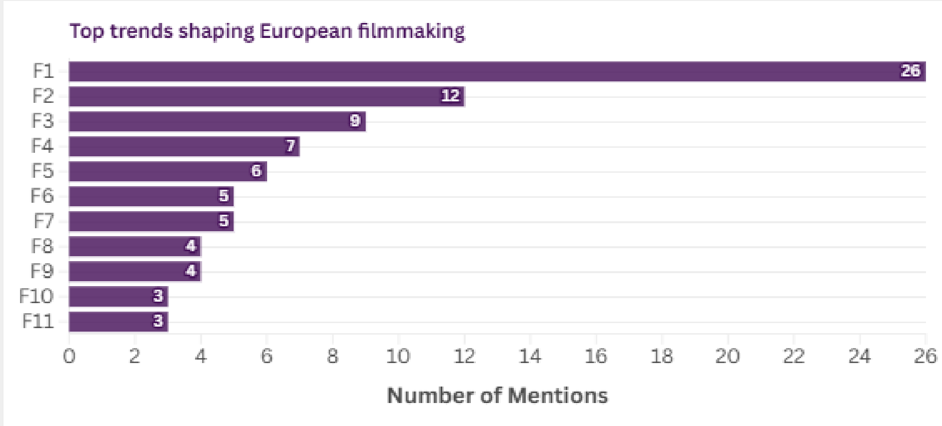

Figure 1: Distribution of trend mentions in B1

Artificial Intelligence & workflow automation (F1) is the most salient trend, accounting for almost a third of all selections. This is followed by Shifting audience behaviour & platform-driven distribution (F2) and Sustainable / environmentally responsible filmmaking (F3). Together, these three themes suggest that respondents understand the next decade as driven by a combination of AI-enabled transformation, platform dynamics and changing consumption patterns, and sustainability-related expectations and constraints.

A second tier of trends includes Diversity, inclusion & transnational storytelling (F4) and Technological innovation beyond AI (F5), signaling that respondents also anticipate shifts in what stories are told and by whom, as well as continued evolution of the wider production technology stack beyond AI. Workforce issues (F7) and creative/narrative experimentation (F6) appear in a smaller share of responses, while decentralization (F11) and regulatory realignment (F10) are present but less prominent overall.

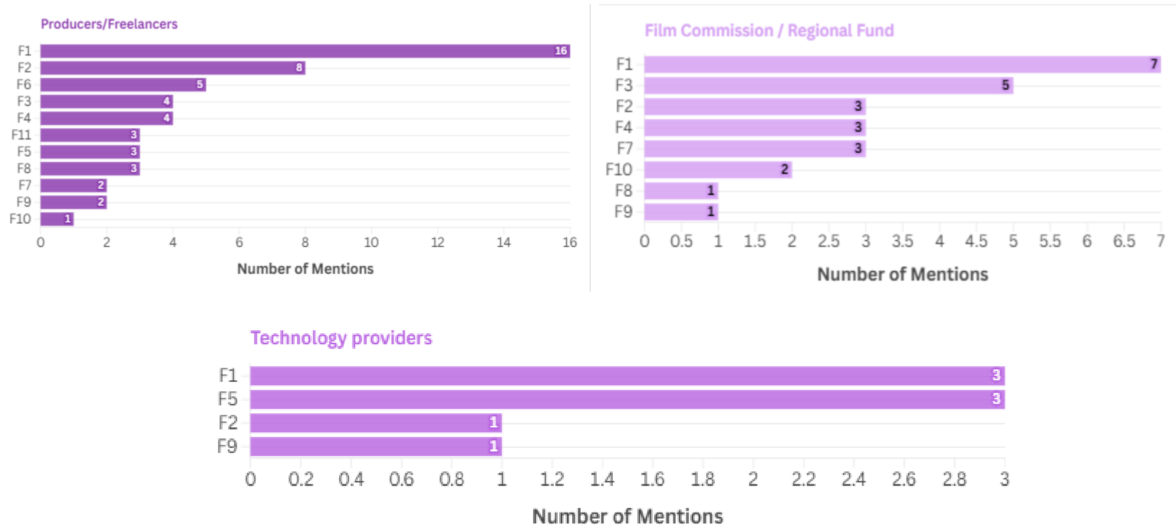

Figure 2: Trend mentions by stakeholder group (Producers/Freelancers vs Commissions/Funds vs Technology providers)

The stakeholder comparison highlights both convergence and differentiated emphasis. **All stakeholder groups converge strongly on Artificial Intelligence & workflow automation (F1)** as the dominant trend. Producers/Freelancers mention F1 **16 times**, Commissions/Funds **7 times**, and Technology providers **3 times**, confirming AI's cross-cutting relevance across production practice, institutional actors, and technology specialists.

Beyond AI, Producers/Freelancers distribute their remaining mentions across platform change (F2), sustainability (F3), diversity (F4), and a set of more practice-oriented themes such as creative experimentation (F6), decentralisation (F11), and technology beyond AI (F5). This reflects a stakeholder framing that combines structural shifts (audience/platform dynamics) with day-to-day implications for production practices and creative work.

Commissions/Funds, while also prioritising AI, place comparatively stronger emphasis on **sustainability (F3: 5 mentions)**, **platform-driven change (F2: 3 mentions)**, and **diversity and inclusion (F4: 3 mentions)**. This pattern suggests a more policy- and ecosystem-oriented agenda, aligned with institutional responsibilities around funding criteria, sector-wide transformation priorities, and social objectives.

Technology providers show a narrower distribution of mentions, reflecting the smaller number of respondents in this group. In addition to AI (F1: 3 mentions), they strongly highlight **Technological innovation beyond AI (F5: 3 mentions)**, reinforcing the importance of broader infrastructure, pipelines, and production technology in enabling the sector's transformation.

Overall, stakeholder patterns indicate that while **AI is the shared central trend**, institutional actors place relatively more attention on sustainability and structural policy-facing priorities, whereas producers/freelancers articulate a more diverse set of practical and creative implications alongside AI adoption.

5 Structural constraints affecting the competitiveness of European filmmaking

Question B2 of the Delphi R2 survey:

"Biggest constraints to EU filmmaking competitiveness"

The objective of this question was to identify the most frequently perceived constraints that may limit the competitiveness of European filmmaking in the coming years. Results are presented as **total mentions**, allowing comparison across themes and stakeholder groups. Across the sample, the dataset contains **78 mentions** distributed across **8 constraint categories**, as summarised in Table 5.

Table 5: Biggest constraints to EU filmmaking competitiveness (B2) — thematic mentions (G1–G8)

Code	Constraint category	Mentions
G1	Rising production costs / unsustainable budgets	17
G2	AI adoption risks (jobs, authorship, value of creative work)	15
G3	Unequal access to funding	14
G4	Difficulty retaining and growing audiences	9
G5	Platform / market power imbalances in distribution	8
G6	Workforce precarity / working conditions	6
G7	Restrictive / outdated policy & funding frameworks	5
G8	Skills gaps / training deficits for digital transformation	4

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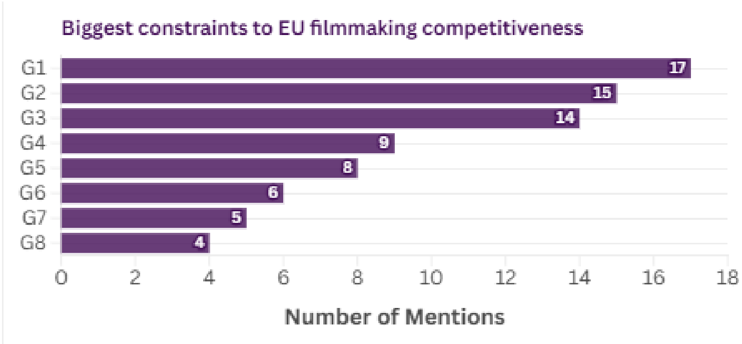

Figure 3: Distribution of constraint mentions for B2 (G1–G8)

Rising production costs and unsustainable budgets (G1) emerges as the most frequently cited constraint, followed closely by **AI adoption risks (G2)** and **unequal access to funding (G3)**. These three themes account for the majority of mentions, indicating that respondents frame competitiveness primarily through a combination of **cost pressures**, **technology-related disruption and uncertainty**, and **structural inequalities in financing opportunities**.

A second tier of constraints relates to **audience retention and growth (G4)** and **platform/market power imbalances (G5)**, highlighting that competitiveness is also perceived as being shaped by distribution dynamics and changing consumption conditions. Workforce conditions (G6), policy/funding framework constraints (G7), and digital skills gaps (G8) appear less frequently but remain important enabling factors, particularly when seen in combination with the top barriers.

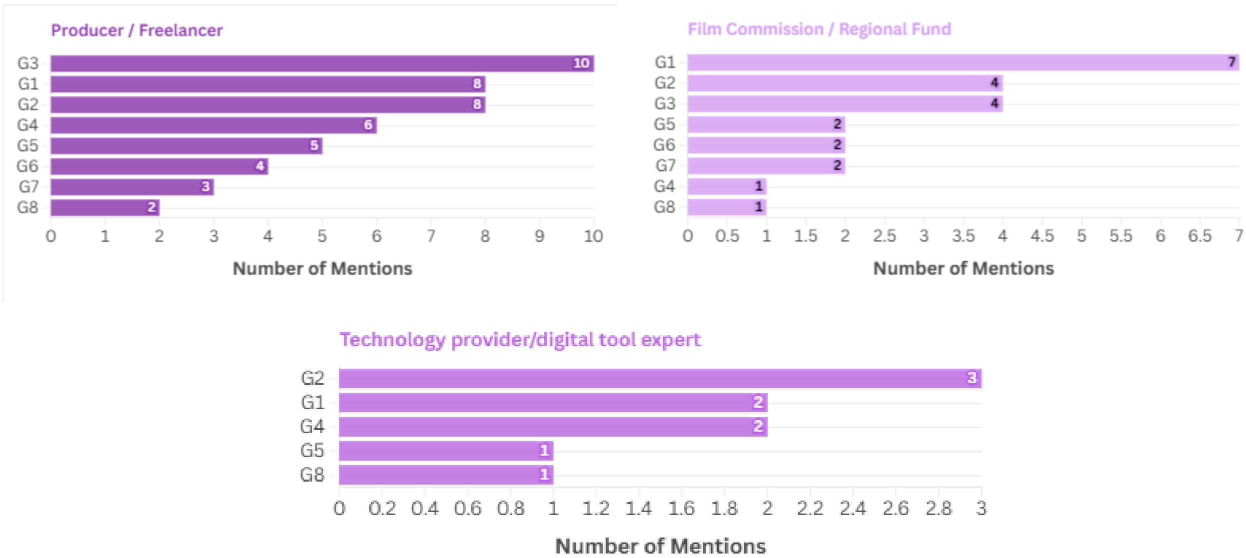

Figure 4: Constraint mentions by stakeholder group (Producers/Freelancers vs Commissions/Funds vs Technology providers)

Stakeholder patterns show both shared priorities and differences in emphasis across the ecosystem.

Producers/Freelancers highlight the **unequal access to funding (G3: 10 mentions),** reflecting funding barriers as a primary constraint on competitiveness for production-side actors. They also identify rising production costs **(G1: 8 mentions)** and **AI adoption risks (G2: 8 mentions)** as major pressures, alongside a notable focus on **audience-related challenges (G4: 6)** and **platform/market power imbalances (G5: 5).**

Film Commissions/Regional Funds highlight rising **production costs (G1: 7 mentions)** as their most dominant constraint, while also emphasising **AI adoption risks (G2: 4) and unequal access to funding (G3: 4).** Their responses additionally include references **to workforce precarity (G6: 2) and restrictive/outdated policy and funding frameworks (G7: 2),** reflecting a more system-level framing connected to institutional mechanisms and enabling conditions.

Technology providers/digital tool experts focus primarily on **AI adoption risks (G2: 3 mentions),** reinforcing technology governance and adoption uncertainty as central competitive constraints. They also **mention rising production costs (G1: 2) and audience-related issues (G4: 2)**, while smaller contributions appear for **platform power imbalances (G5: 1) and skills gaps (G8: 1).**

The stakeholder comparison suggests a convergent picture around cost **pressure, AI-related disruption, and funding inequalities,** while producers place relatively more emphasis **on financing access and distribution/audience constraints**, and institutional actors extend the framing toward **system enabling conditions**, including policy and workforce-related issues.

6 Priority policy levers for enabling systemic change in European filmmaking

Question B3 of the Delphi R2 survey:

"Which policy change best "unlocks the others?"

The objective of this question was to identify which single policy change respondents perceive as the most catalytic—i.e., the one that could "unlock" progress across multiple other dimensions of reform in the European filmmaking ecosystem. Respondents selected one option from a predefined list. Results are reported both overall (across all respondents) and by stakeholder type, to highlight convergence and differences in emphasis.

Across the R2 panel, the most frequently selected "unlocking" policy change is simplifying funding access and reducing administrative burden (H1), which receives the highest number of selections overall. This indicates that respondents see administrative complexity and friction in funding processes as a system-level bottleneck that affects multiple downstream outcomes, from innovation uptake and production capacity to cross-border collaboration.

Two additional options form a strong second tier: funding and financing innovation (H2) and market regulation and fair competition (H3). Together, these top-ranked choices reflect a clear emphasis on reforms that would improve the sector's ability to function under conditions of budget pressure, platform-driven market dynamics, and technology-driven transformation.

A third cluster of responses includes IP/rights protection (H4), infrastructure/shared facilities (H6), and cross-border cooperation mechanisms (H5), suggesting that respondents also recognise the enabling role of rights frameworks and infrastructure, alongside mechanisms that support European integration and regional cohesion.

Table 6: Policy changes perceived as most catalytic ("unlocking"), B3 (H1–H8)

Code	Policy change (answer)	Producers / Freelancers	Commissions / Funds	Technology providers
H1	Simplify funding access & reduce administrative burden	4	1	2
H2	Funding & financing innovation (new instruments for innovation/high-risk projects)	3	2	0

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H3	Market regulation & fair competition (platform responsibilities, fair monetisation)	3	1	1
H4	IP / rights protection (authorship, data rights, remuneration in digital workflows)	3	0	0
H5	Cross-border & regional cooperation mechanisms	1	2	0
H6	Infrastructure & shared facilities (studios, virtual production, compute, etc.)	3	0	0
H7	Skills & training (upskilling/reskilling at scale)	0	2	0
H8	AI governance & ethics (clear rules, transparency, accountability)	1	0	0
	Total mentions per stakeholder	**18**	**8**	**3**

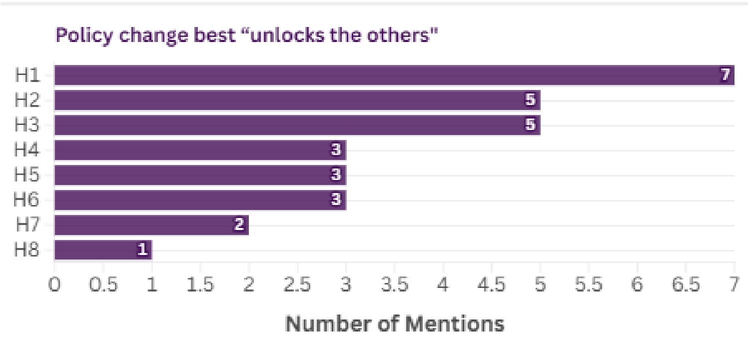

Figure 5: Distribution of "unlocking" policy choices in B3 (H1–H8)

Among producers and freelancers, the most frequently selected unlocking change is **simplifying funding access and reducing administrative burden (H1: 4 mentions)**. However, this stakeholder group also shows a strong spread across several other priorities—particularly **funding and financing innovation (H2: 3)**, **market regulation and fair competition (H3: 3)**, **IP/rights protection (H4: 3)**, and **infrastructure/shared facilities (H6: 3)**. This distribution suggests that production-side respondents perceive multiple interlinked bottlenecks, combining **administrative funding friction**, **market rules**, and **practical enabling infrastructure**, as well as the need for stronger rights protection in technology-driven workflows.

For commissions and funds, the strongest emphasis is on structural enabling mechanisms. The most selected changes are **funding and financing innovation (H2: 2)**, **cross-border and regional cooperation mechanisms (H5: 2)**, and **skills and training at scale (H7: 2)**. This indicates a more ecosystem-oriented view, where competitiveness and resilience depend on **institutional capacity**, **transnational coordination**, and workforce readiness—alongside some support for funding simplification and market regulation.

Technology providers primarily select **simplifying funding access (H1: 2)** as the key unlocking change, with an additional mention of **market regulation and fair competition (H3: 1)**. Although the subgroup is small, this pattern suggests a perception that **adoption and scale-up of innovation** is constrained less by technology availability itself and more by **access-to-support mechanisms** and **market conditions** shaping distribution, monetisation, and incentives.

R2 results show that the dominant "unlocking" lever is **funding simplification**, supported by calls for **innovative financing mechanisms** and **fairer market regulation**. Stakeholder patterns reinforce that while all groups recognise the importance of enabling financing, producers place relatively more emphasis on rights and infrastructure constraints, commissions prioritise coordination and skills systems, and technology providers point to adoption barriers in funding processes and market governance.

7 Perceived effectiveness of EU policy support for technology adoption in filmmaking

Question B4 of the Delphi Round 2 survey:

"How well do current EU policies support the adoption of new technology in filmmaking?"

The objective of this question was to assess how respondents evaluate the extent to which current EU policy frameworks support and enable the adoption of new technologies across the filmmaking value chain. Responses were collected on a **5-point Likert scale** and are reported in aggregated form, as well as by stakeholder type to capture differences in perceived policy effectiveness across the ecosystem.

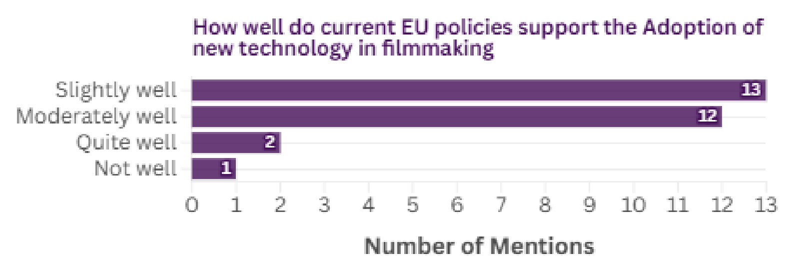

Figure 6: Distribution of responses on EU policy support for technology adoption in filmmaking (B4)

Across the R2 panel, responses cluster strongly in the middle of the scale. Most respondents rate current EU policies as supporting technology adoption only "slightly well" (13 responses) or "moderately well" (12 responses). Only two respondents selected "quite well", and one respondent selected "not well at all". Notably, no respondents selected the most positive option ("very well").

This pattern suggests that EU policies are perceived as providing some enabling support, but that this support is not viewed as fully effective or sufficiently strong to accelerate technology uptake at scale. The concentration around the mid-range indicates a sense of partial progress, rather than clear confidence that the current policy environment is effectively driving digital transformation across European filmmaking.

Table 7: Perceived policy support for adopting new technology in filmmaking (B4), by stakeholder type. (B4)

Code	Likert response	Producers / Freelancers	Commissions / Funds	Technology providers
1	Not well at all	1	0	0
2	Slightly well	9	3	1
3	Moderately well	7	4	1
4	Quite well	1	1	0
5	Very well	0	0	0
	Total responses per stakeholder	**18**	**8**	**2**

Producers and freelancers mainly rate current EU policies as **"slightly well" (9 responses)** or **"moderately well" (7 responses)**. Only a small number select more extreme ratings (1 respondent selecting **"not well at all"** and 1 selecting **"quite well"**). This suggests that, from a production-side perspective, policy support is perceived as **present but limited**, potentially reflecting barriers such as access to tailored support schemes, practical implementation gaps, or uneven availability of enabling infrastructure and incentives.

Institutional stakeholders show a similar pattern, with most responses concentrated in **"moderately well" (4)** and **"slightly well" (3)**, and one selection of **"quite well"**. This indicates that commissions and funds acknowledge the existence of policy support mechanisms for technology adoption, but still perceive room for improvement in their effectiveness, scale, or fit to sector needs.

Technology providers rate policy support as either **"slightly well" (1)** or **"moderately well" (1)**. While the sample size for this subgroup is small, these ratings align with the broader panel view that EU policies provide **moderate but incomplete** support for technology uptake.

R2 respondents converge on the view that EU policies support technology adoption **only to a limited-to-moderate extent**, with very few respondents rating policy performance as strong. Stakeholder patterns show broad alignment, suggesting a shared perception that while EU policy frameworks provide some foundation, more targeted and operationally effective measures may be needed to accelerate adoption of new technologies across the filmmaking ecosystem.

8 Perceived strengths and limits of EU policy support for diversity and creativity

Question B5 of the Delphi Round 2 survey:

"How well do current EU policies support the diversity & creativity in European filmmaking?"

The objective of this question was to assess how respondents perceive the effectiveness of current EU policies in supporting **diversity and creativity** within the European filmmaking ecosystem. Responses were collected on a **5-point Likert scale** and are reported both overall and by stakeholder type.

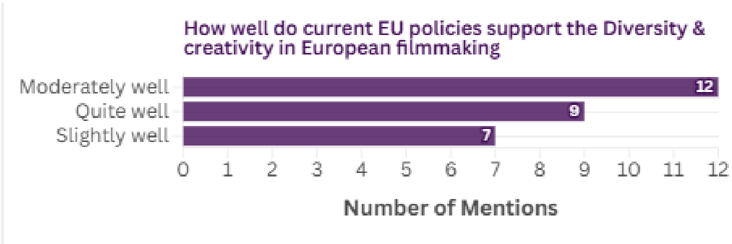

Figure 7: Distribution of responses on EU policy support for diversity & creativity in European filmmaking (B5).

Across the R2 panel, responses are concentrated in the middle-to-positive range of the scale. The most frequent rating is **"moderately well" (12 responses)**, followed by **"quite well" (9 responses)** and **"slightly well" (7 responses)**. No respondents selected the extreme ends of the scale (**"not well at all"** or **"very well"**).

This distribution suggests that EU policies are perceived as offering a **meaningful but not fully sufficient** level of support for diversity and creativity. Compared to technology adoption (B4), the responses for B5 appear slightly more positive, with a stronger shift toward **"quite well"**, indicating greater confidence in policy performance in this domain, while still falling short of "very well" assessments.

Table 8: Perceived policy support for diversity & creativity in European filmmaking (B5), by stakeholder type

Code	Likert response	Producers / Freelancers	Commissions / Funds	Technology providers
1	Not well at all	0	0	0
2	Slightly well	5	2	0
3	Moderately well	8	3	1
4	Quite well	4	3	2
5	Very well	0	0	0
	Total responses per stakeholder	**17**	**8**	**3**

Producers and freelancers most frequently rate policy support for diversity and creativity as **"moderately well" (8 responses)**, followed by **"slightly well" (5)** and **"quite well" (4)**. This suggests a generally positive evaluation, but with a consistent signal that policy support could be more impactful or more effectively implemented in practice.

Commissions and funds show a relatively even split between **"moderately well" (3)** and **"quite well" (3)**, with fewer selecting **"slightly well" (2)**. This indicates that institutional stakeholders tend to assess the policy environment slightly more positively, reflecting the presence of programmes and funding instruments that explicitly target inclusion, cultural diversity, and creative development.

Technology providers rate policy support mainly as **"quite well" (2)**, with one selection of **"moderately well"**. While the subgroup is small, this suggests that technology-oriented respondents perceive diversity and creativity support as an area where EU policy is comparatively stronger or clearer than in other domains.

R2 respondents converge on a view that EU policies support diversity and creativity **moderately to quite well**, with no respondents selecting extreme negative or extreme positive ratings. Stakeholder patterns are broadly aligned, but commissions/funds and technology providers appear slightly more favourable than producers/freelancers. This suggests that while EU policy support for diversity and creativity is visible and meaningful, it is still perceived as an area with **room for improvement in depth, reach, and sector-wide effectiveness**.

9 Perceived adequacy of EU funding and financial incentives for local film production

Question B6 of the Delphi R2 survey:

"How well do current EU policies support the availability of funding / financial incentives for local productions?"

The objective of this question was to assess how respondents evaluate the extent to which current EU policies support the **availability of funding and financial incentives** for local audiovisual productions. Responses were collected on a **5-point Likert scale** and are reported both overall and by stakeholder type.

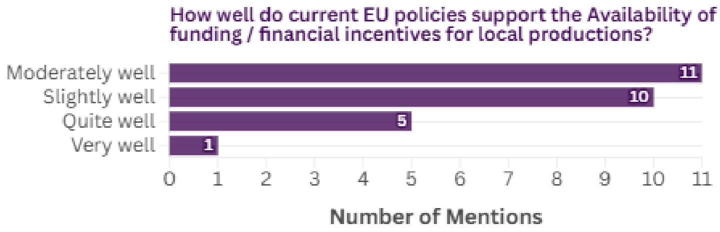

Figure 8: Distribution of responses on EU policy support for funding and financial incentives for local productions (B6).

Across the R2 panel, responses concentrate around the mid-range of the scale. The most frequent evaluation is "moderately well" (11 responses), closely followed by "slightly well" (10 responses). A smaller number of respondents rate policy support as "quite well" (5 responses), while one respondent selects "very well". No respondents selected "not well at all."

This distribution suggests that EU policy support for local production funding is perceived as present but uneven, with most respondents recognising some level of funding availability while still signalling limitations in accessibility, adequacy, or practical effectiveness.

Table 9: Perceived policy support for diversity & creativity in European filmmaking (B5), by stakeholder type.

Code	Likert response	Producers / Freelancers	Commissions / Funds	Technology providers
1	Not well at all	0	0	0
2	Slightly well	8	2	0
3	Moderately well	7	3	1
4	Quite well	2	1	2
5	Very well	0	1	0
	Total responses per stakeholder	**17**	**7**	**3**

Producers and freelancers most frequently rate policy support for local production funding as **"slightly well" (8 responses)** or **"moderately well" (7)**, with only **two** selecting **"quite well."** This points to a perception that, for production-side actors, current policy support mechanisms may exist but are not consistently experienced as sufficient or easy to access.

Commissions and funds show a more positive distribution, with responses spread across **"slightly well" (2)**, **"moderately well" (3)**, **"quite well" (1)**, and one response indicating **"very well" (1)**. This suggests that institutional stakeholders may perceive the policy landscape as somewhat more functional, likely reflecting their closer involvement with funding frameworks and incentive instruments.

Technology providers rate policy support more positively overall, with **two** selecting **"quite well"** and one selecting **"moderately well."** While this subgroup is small, it may indicate that technology-oriented actors view the funding environment as relatively supportive—particularly where incentives enable investment in infrastructure, tools, and innovation capacity.

R2 respondents converge on a view that EU policies support the availability of funding and incentives for local productions **only moderately**, with producers/freelancers being more cautious and institutional/technology stakeholders slightly more positive. The concentration of responses around "slightly" and "moderately well" suggests that while funding instruments are visible, stakeholders perceive ongoing constraints related to adequacy, accessibility, and administrative friction.

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10 Priority levers for rapid system change in EU film policy

Question B7 of the Delphi R2 survey:

"If you could change ONE thing in EU film policy to shift the system fastest, which would that be?"

The objective of this question was to identify the single policy intervention that respondents believe would deliver the fastest system-wide shift in European filmmaking. Respondents selected **one** option from a predefined list. Results are reported both overall and by stakeholder type to highlight areas of convergence and divergence across the ecosystem.

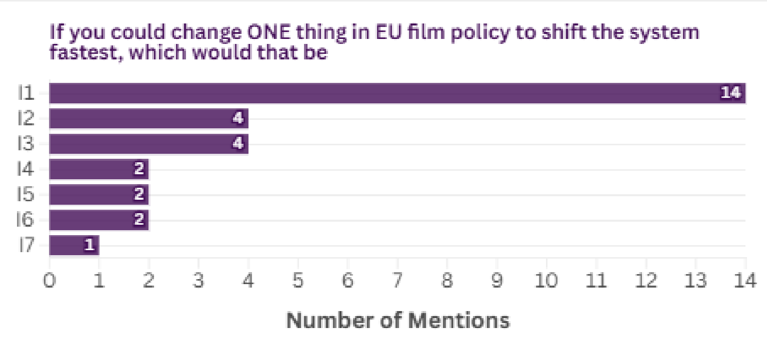

Figure 9: Distribution of priority policy changes for the fastest system shift (B7).

Across the Round 2 panel, there is a clear dominant priority: **making funding schemes simpler, faster, and more accessible (I1)**. This option receives **14 selections**, accounting for almost half of all responses, indicating that respondents perceive administrative complexity and slow or burdensome processes as the most immediate barrier to change.

A second tier of priorities includes **reforming platform/streamer rules (I2)** and **improving cross-border co-production and regional cohesion mechanisms (I3)**, which receive **4 selections each**. These choices highlight continued concerns around the **market power of platforms**, discoverability and fairness in distribution, and the structural need to strengthen European collaboration and cohesion.

Other proposed interventions, such as **dedicated innovation funding for AI/virtual production/XR adoption (I4)**, **investment in workforce skills and training systems (I5)**, and **incentivising sustainable production (I6)**, receive fewer selections, suggesting that respondents frame the "fastest shift" primarily through **simplification of funding access**. **Strengthening IP and remuneration rules for AI-era production (I7)** appears least frequently selected, although it remains part of the wider reform package identified in other questions.

Table 10: If one EU film policy change could shift the system fastest (B7), by stakeholder type.

Code	Policy change (answer)	Producers / Freelancers	Commissions / Funds	Technology providers
I1	Make funding schemes simpler, faster, and more accessible (less bureaucracy)	10	2	2
I2	Reform platform/streamer rules to improve fairness and European visibility	3	1	0
I3	Improve cross-border co-production and regional cohesion mechanisms	2	2	0
I4	Create dedicated innovation funding for AI/virtual production/XR adoption	2	0	0

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I5	Invest heavily in workforce skills & training systems	0	1	1
I6	Incentivise sustainable production (standards + funding alignment)	1	1	0
I7	Strengthen IP, authorship, and remuneration rules for AI-era production	0	1	0
	Total responses per stakeholder	**18**	**8**	**3**

Producers and freelancers strongly prioritise **simplifying funding schemes (I1: 10 mentions)**. Beyond this, their responses are spread across **platform/streamer rule reform (I2: 3)** and a small cluster of equally selected options including **cross-border mechanisms (I3: 2)** and **dedicated innovation funding for AI/XR adoption (I4: 2)**. This suggests that production-side respondents see change as primarily dependent on **faster and more accessible funding**, combined with a need to rebalance distribution power and improve support for innovation.

Commissions and funds also include funding simplification as a top choice (**I1: 2**), but show a more distributed pattern overall. Their selections place equal emphasis on **cross-border/regional cooperation mechanisms (I3: 2)**, reflecting institutional priorities around collaboration, cohesion, and enabling structures beyond national ecosystems. Additional mentions relate to **platform rule reform (I2: 1)**, **skills investment (I5: 1)**, **sustainable production incentives (I6: 1)**, and **strengthening IP/remuneration rules (I7: 1)**, reflecting a broader policy framework perspective.

Technology providers primarily select **funding simplification (I1: 2)**, while one respondent highlights workforce **skills and training systems (I5: 1)**. Although the subgroup is small, this suggests that technology actors perceive barriers to digital transformation as linked to **access-to-support mechanisms and implementation capacity**, rather than technology availability alone.

R2 responses identify **funding simplification and reduced bureaucracy** as the clearest single lever for fast system change. Stakeholder patterns reinforce the centrality of this priority across all groups, while institutional stakeholders additionally highlight the importance of **cross-border coordination**, and producers place relatively greater emphasis on **platform fairness** and **innovation funding**. These results suggest that accelerating EU filmmaking competitiveness requires immediate improvements in the operational effectiveness of funding systems, alongside complementary reforms that strengthen market conditions and collaboration structures.

11 Priority technologies for enhancing EU competitiveness in filmmaking

Question B8 of the Delphi R2 survey:

"Which technologies deserve priority investment/support for EU competitiveness?"

Table 11: Priority technologies for EU competitiveness (B8) — thematic mentions (J1–J8).

Code	Action (answer)	Mentions
J1	Digital distribution / audience tools (analytics, recommendation, discoverability, etc.)	19
J2	AI tools for production workflows	16
J3	Rights/IP technologies (e.g., blockchain-based systems, rights tracking, licensing)	10
J4	Virtual / real-time production (LED volumes, real-time pipelines, etc.)	10
J5	VFX and advanced post-production pipelines	6

J6	Interoperable data standards / metadata / asset management	5
J7	**Immersive/XR and interactive formats**	**3**
J8	**Other**	**3**

Two technology areas clearly dominate the priority landscape: digital distribution and audience tools (J1) and AI tools for production workflows (J2). They account for almost half of all selections, suggesting that respondents view EU competitiveness through both (i) the ability to reach and retain audiences in platform-shaped markets, and (ii) the capacity to upgrade production efficiency and capabilities through AI-enabled workflows.

A second tier of priorities includes rights/IP technologies (J3) and virtual/real-time production (J4), both receiving the same number of mentions. This indicates that stakeholders also see competitiveness as depending on the strength of the European ecosystem's rights infrastructure (to protect value and ensure fair remuneration) and high-end production capabilities (to compete technically and creatively at international level).

Lower-frequency but still relevant priorities include VFX/post-production pipelines (J5) and interoperable standards and metadata/asset management (J6), which can be interpreted as enabling infrastructure underpinning scalable production and cross-border collaboration. Immersive/XR (J7) and Other (J8) appear as smaller clusters, suggesting either more niche relevance or less immediate perceived impact compared to the top priorities.

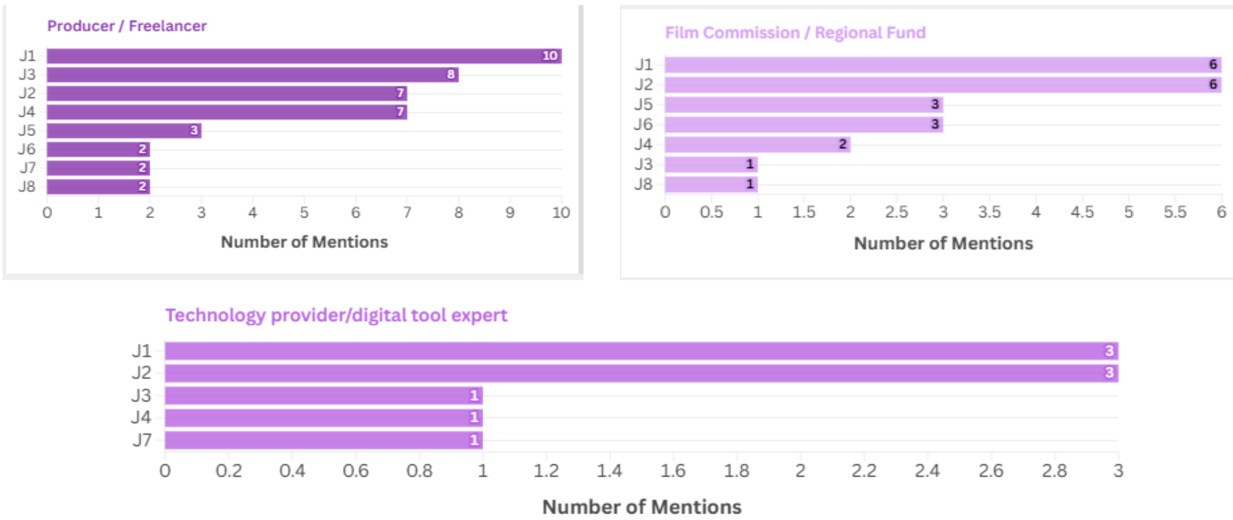

Figure 10: Priority technologies by stakeholder group (Producers/Freelancers vs Commissions/Funds vs Technology providers)

The stakeholder comparison reveals strong convergence on the top priorities, alongside some differences in emphasis.

Producers and freelancers prioritise **digital distribution/audience tools (J1: 10 mentions)** as their top investment area, followed by **rights/IP technologies (J3: 8)** and a joint cluster of **AI production tools (J2: 7)** and **virtual/real-time production (J4: 7)**. This pattern suggests that production-side actors frame competitiveness as a combination of **market reach and visibility**, the ability to protect value through rights infrastructures, and access to tools that upgrade production pipelines.

Commissions and funds concentrate strongly on two core categories: **digital distribution/audience tools (J1: 6)** and **AI tools for production workflows (J2: 6)**. They also highlight **VFX/post-production pipelines (J5: 3)** and **interoperable data standards/metadata systems (J6: 3)**, reflecting a more ecosystem-oriented focus on enabling infrastructures and capacity-building components that support coordinated industry development.

Technology providers show a narrow distribution (reflecting the smaller subgroup size), with emphasis on **AI tools for workflows (J2: 3)** and **digital distribution/audience tools (J1: 3)**, plus smaller mentions of **rights/IP technologies (J3: 1)**, **virtual production (J4: 1)**, and **immersive/XR (J7: 1)**. This suggests that technology-oriented actors perceive both AI and distribution-layer tooling as the most scalable and strategic priorities for EU competitiveness.

R2 responses indicate that stakeholders see competitiveness as increasingly dependent on **distribution intelligence and audience reach tools**, alongside **AI-enabled efficiency gains within production workflows**. Rights infrastructure and real-time/virtual production technologies emerge as secondary but important investments, highlighting the need to protect value creation while strengthening Europe's high-end production capacity.

12 Digital maturity gaps across the European filmmaking value chain

Question B9 of the Delphi R2 survey:

"Where is the "weakest link" in digital maturity today?"

The objective of this question was to identify which stage of the filmmaking value chain stakeholders perceive as the least digitally mature at present. Respondents were asked to select a single area representing the primary digital bottleneck, allowing the analysis to surface relative weaknesses across different stages of production and distribution rather than to assess policy performance or funding adequacy.

Figure 11 and Table 12 present the distribution of responses across four value chain segments: planning and pre-production, production, post-production, and distribution and audience reach.

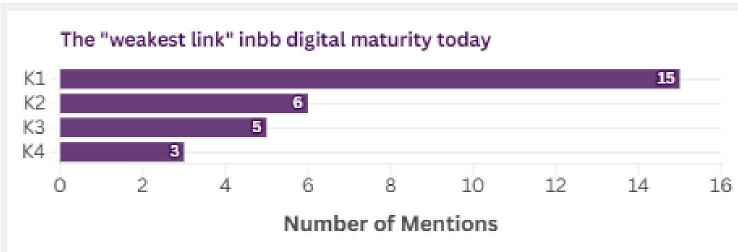

Figure 11: Perceived weakest link in digital maturity across the filmmaking value chain (B9)

Across the R2 panel, responses show a clear concentration on **distribution and audience reach**, which is identified as the weakest link in digital maturity by a substantial majority of respondents. This category receives the highest number of mentions across all stakeholder groups, indicating a shared perception that digital capabilities related to visibility, discoverability, audience analytics, and market access lag behind other stages of the value chain.

Planning and pre-production and **production** emerge as secondary areas of weakness, with a smaller but still notable number of mentions. These responses suggest that while digital tools are increasingly embedded in early-stage development and production workflows, gaps remain in areas such as project planning, coordination, and the integration of digital processes across teams and partners.

Post-production is least frequently identified as the weakest link. This result aligns with earlier findings in the Delphi exercise, which indicate that post-production is generally perceived as the most digitally mature segment of the filmmaking value chain, reflecting longer-standing adoption of advanced software tools, automated workflows, and digital infrastructures.

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Table 12: Perceived weakest link in digital maturity across the filmmaking value chain (B9), by stakeholder type

Code	Area (answer)	Producers / Freelancers	Commissions / Funds	Technology providers
K1	Distribution / audience reach	10	5	0
K2	Planning / pre-production	3	2	1
K3	Production	3	0	2
K4	Post-production	2	1	0
	Total responses per stakeholder	**20**	**8**	**3**

Producer and freelancer responses drive the strong emphasis on distribution and audience reach, reflecting practical challenges in engaging audiences, navigating platform environments, and leveraging data and digital tools for market positioning. Commissions and funds also identify distribution as the primary digital gap, while showing a more even spread across other stages, consistent with a system-level perspective on capacity gaps. Technology providers, although few in number, point primarily to production and planning-related weaknesses, suggesting a focus on workflow integration and operational readiness.

Overall, the results indicate that digital maturity in European filmmaking is **unevenly distributed across the value chain**, with downstream activities related to distribution and audience engagement representing the most significant bottleneck. This pattern reinforces earlier findings on platform dependence and visibility constraints and highlights distribution-related digital capacity as a critical leverage point for future policy intervention and support measures.

13 Key enablers for closing digital maturity gaps

Question B10 of the Delphi R2 survey:

"What would help most to raise that weakest link?"

The objective of this question was to identify which single intervention respondents believe would be most effective in strengthening the "weakest link" in digital maturity identified in the previous question (B9). Respondents selected **one** option from six predefined actions. Results are reported both overall and by stakeholder type.

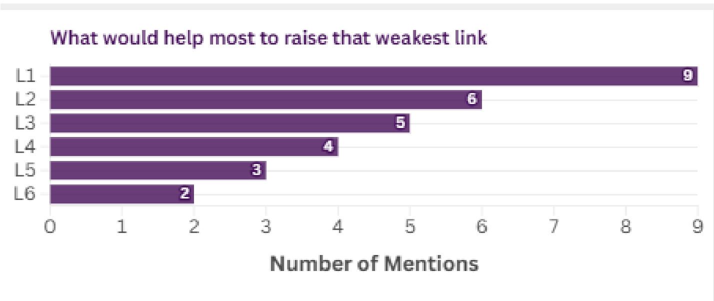

Figure 12: Distribution of responses on actions to raise the "weakest link" in digital maturity (B10)

The most frequently selected action is **funding reform / less bureaucracy (L1)**, which receives **9 selections**. This highlights a strong perception that strengthening digital maturity depends first on making public funding and support mechanisms **faster, easier to access, and less administratively burdensome**.

The second most common response is **training and skills programmes (L2: 6 selections)**, followed by **affordable access to tools (L3: 5 selections)**. Together, these results indicate that respondents view both

human capacity (skills) and **practical access to digital tools** as essential enabling conditions for improving digital maturity across the filmmaking ecosystem.

Smaller shares of respondents select **shared infrastructure facilities / regional hubs (L4: 4)** and **clear legal/rights frameworks (L5: 3)**, suggesting these are recognised but less frequently prioritised as the single most important lever. **Better standards/interoperability and support for integration (L6)** receives the fewest selections (**2**), though it remains a relevant structural prerequisite for long-term scaling and collaboration.

Table 13: Priority actions to address digital maturity gaps (B10), by stakeholder type

Code	Action (answer)	Producers / Freelancers	Commissions / Funds	Technology providers
L1	Funding reform / less bureaucracy	7	0	2
L2	Training & skills programmes	1	5	0
L3	Affordable access to tools (subsidies/shared services)	4	1	0
L4	Shared infrastructure facilities (regional hubs)	2	1	1
L5	Clear legal/rights framework (esp. for AI and data)	3	0	0
L6	Better standards/interoperability and support for integration	1	1	0
	Total responses per stakeholder	**18**	**8**	**3**

Producers and freelancers prioritise **funding reform / less bureaucracy (L1: 7)** as the most important action, followed by **affordable access to tools (L3: 4)** and **clear legal/rights frameworks (L5: 3)**. This pattern suggests that for production-side actors, improving digital maturity requires **practical enablers**: easier access to resources, lower cost barriers for tools, and clearer frameworks—especially around AI and data—that support adoption in real workflows.

Commissions and funds overwhelmingly prioritise **training and skills programmes (L2: 5)**. This indicates a strong institutional emphasis on **workforce readiness and capacity-building** as the most effective lever to raise digital maturity. Smaller numbers select affordable tools (L3), shared infrastructure (L4), and interoperability support (L6), reinforcing a policy framing focused on structural ecosystem development rather than administrative simplification.

Technology providers primarily select **funding reform / less bureaucracy (L1: 2)**, with one mention of **shared infrastructure (L4: 1)**. Although the subgroup is small, this suggests that technology actors perceive adoption barriers as heavily shaped by **how support instruments are operationalised** and whether enabling infrastructure exists to scale solutions.

R2 respondents identify **funding reform and reduced bureaucracy** as the most direct lever to strengthen digital maturity, complemented by calls for **skills development** and **affordable access to tools**. Stakeholder patterns highlight a clear division: producers and technology providers emphasise funding accessibility and operational constraints, while commissions and funds place greater priority on building **workforce capability**. Together, these results suggest that raising digital maturity requires both immediate improvements in the efficiency of support mechanisms and longer-term capacity-building investments.

14 Core governance principles for AI use in European filmmaking

Question B11 of the Delphi R2 survey:

"AI in filmmaking: select up to THREE "non-negotiables" for Europe?"

The objective of this question was to identify which AI-related safeguards and principles respondents consider non-negotiable for the European filmmaking ecosystem. Respondents selected up to three priorities from a predefined list. Results are presented as mentions, where each selected item was counted once per respondent, and are reported both overall and by stakeholder group. The dataset contains 79 coded selections (mentions) distributed across seven priority categories (M1–M7), summarised in Table 14.

Table 14: "Non-negotiables" for AI in European filmmaking (B11) — thematic mentions (M1–M7)

Code	Constraint category	Mentions
M1	Protect authorship/credit and human creative contribution	21
M2	Transparency: clear disclosure when AI is used	19
M3	Human oversight requirements in key creative decisions	12
M4	Consent & data rights for training/inputs	9
M5	Fair remuneration and labour protection for affected professionals	7
M6	Measures to avoid cultural homogenisation (support diversity/plurality)	6
M7	Clear liability/accountability rules	5

Two priorities clearly dominate the landscape: **protecting authorship/credit and human creative contribution (M1)** and ensuring **transparency through disclosure when AI is used (M2)**. These two account for just over half of all selections, indicating that respondents frame Europe's AI agenda primarily around safeguarding **creative ownership and recognition**, alongside basic standards of **traceability and disclosure**.

A strong second tier includes **human oversight in key creative decisions (M3)** and **consent/data rights for training inputs (M4)**, reflecting the view that AI in filmmaking should remain anchored in **human agency** and **rights-based governance** over data and content use. Additional priorities, such as **fair remuneration and labour protection (M5)**, **avoiding cultural homogenisation (M6)**, and **liability/accountability rules (M7)**, are less frequently selected as top-three non-negotiables, but remain important supporting safeguards in a comprehensive governance framework.

This distribution suggests that respondents prioritise governance principles that protect the **human core of creative work**, while demanding operational policy clarity on transparency and rights.

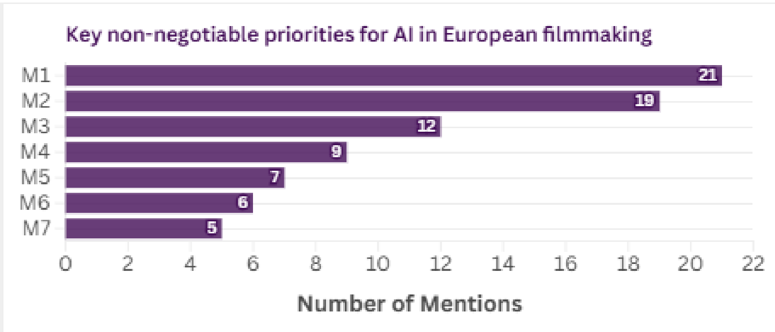

Figure 13: Distribution of AI "non-negotiable" priorities in European filmmaking (B11)

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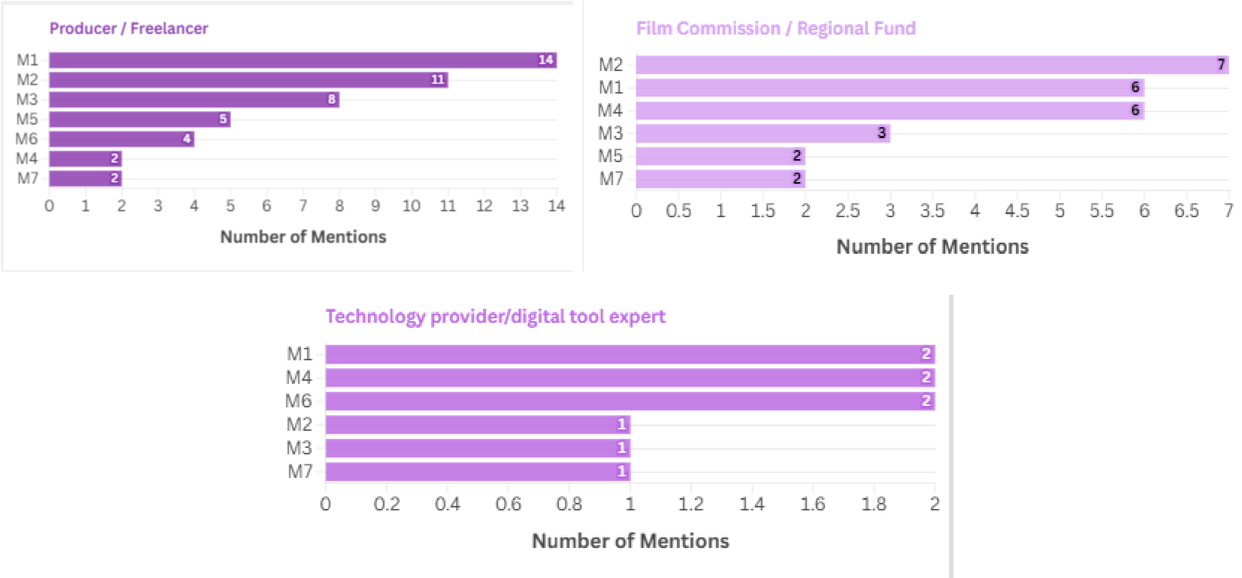

Figure 14: AI "non-negotiable" priorities (B11), by stakeholder group

The stakeholder comparison shows broad convergence on the top safeguards.

Producers and freelancers strongly prioritise protecting authorship/credit (M1: 14 mentions) and transparency/disclosure (M2: 11), followed by human oversight (M3: 8). This indicates that production-side respondents place core importance on ensuring that AI adoption does not erode creative recognition, blur accountability for authorship, or weaken the central role of human decision-making in creative processes. Lower but still visible mentions relate to fair remuneration/labour protection (M5: 5) and liability rules (M7: 2), pointing to concerns about labour impacts and responsibility in AI-era workflows.

Commissions and funds emphasise transparency (M2: 7), alongside strong attention to authorship/credit protection (M1: 6) and consent/data rights for training (M4: 6). This pattern reflects an institutional governance perspective that prioritises clear rules ensuring visibility of AI use and rights compliance in data practices, alongside protection of creative contribution. A smaller number of selections also highlight human oversight (M3: 3) and safeguarding diversity (M6), suggesting awareness that AI governance needs to support cultural policy objectives as well as legal compliance.

Technology providers show a more distributed pattern, with strongest emphasis on protecting authorship/credit (M1: 2), consent/data rights (M4: 2), and fair remuneration/labour protection (M6 appears as 2 in your graph; if that bar corresponds to M6, we keep it), alongside smaller mentions for transparency (M2), oversight (M3) and liability (M7). While the subgroup is small, this suggests that technology-oriented respondents recognise the need for a governance baseline that protects rights and the creative economy, while enabling practical adoption.

R2 respondents converge on a clear set of foundational non-negotiables: protecting human creativity and authorship, ensuring transparent disclosure of AI use, and establishing human oversight and rights-based governance for training inputs. Stakeholder patterns indicate that producers prioritise safeguarding creative ownership and decision-making in daily practice, commissions stress transparency and rights compliance as a governance baseline, and technology providers align with the importance of rights protection while reflecting a broader spread of enabling safeguards.

15 Implementation barriers to digital adoption in European filmmaking

Question B12 of the Delphi R2 survey:

"Biggest barrier to integrating digital tools in practice"

The objective of this question was to identify what respondents perceive as the single most significant barrier preventing the practical integration of digital tools into filmmaking workflows. Respondents selected **one** barrier from a predefined list. Results are reported both overall and by stakeholder group.

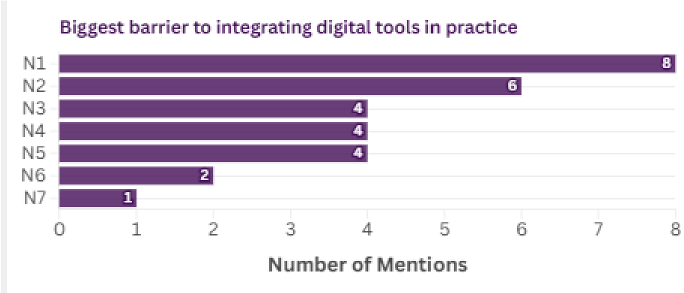

Figure 15: Distribution of responses on barriers to integrating digital tools in practice (B12).

Across the Round 2 panel, the most frequently selected barrier is **AI-related risks to jobs, authorship, and originality (N1)**, with **8 selections**. This indicates that the strongest perceived obstacle is not only technical readiness, but also the degree to which digital tools (especially AI-enabled ones) are associated with concerns about **creative ownership, originality, and employment security**.

The second most frequently selected barrier is **lack of training and digital skills (N2: 6 selections)**, highlighting a persistent gap in workforce preparedness and capability to adopt and use new tools effectively. A third cluster of barriers includes **unequal access to tools/knowledge/resources (N3: 4)**, **high costs of tools/infrastructure (N4: 4)**, and **rapid tool change/obsolescence (N5: 4)**, suggesting that practical adoption is also constrained by **financial barriers**, **uneven access**, and the pace of technological turnover.

Lower-frequency responses include **market power imbalances in digital monetisation (N6: 2)** and a **weak investment environment (N7: 1)**, which appear less central as immediate "single biggest" barriers, but still reflect structural constraints within the wider digital ecosystem.

Table 15: Biggest barrier to integrating digital tools in practice (B12), by stakeholder type

Code	Barrier (answer)	Producers / Freelancers	Commissions / Funds	Technology providers
N1	AI risks to jobs/authorship/originality	7	0	1
N2	Lack of training / digital skills	3	3	0
N3	Unequal access to tools/knowledge/resources	2	2	0
N4	High costs of tools / infrastructure	1	1	2
N5	Rapid tool change / obsolescence	3	1	0
N6	Market power imbalances in digital monetisation	1	1	0
N7	Weak investment environment	1	0	0

Producers and freelancers overwhelmingly select **AI risks to jobs/authorship/originality (N1: 7)** as the biggest barrier. This highlights a strong perception that integrating digital tools (particularly AI) raises concerns around **creative identity, ownership, and livelihood impacts**. Additional barriers include **lack of**

training/digital skills (N2: 3) and **rapid tool change/obsolescence (N5: 3)**, suggesting that adoption challenges are also driven by fast-moving technology and skills gaps.

Commissions and funds show a different pattern, with responses distributed across training and access-related constraints. The most frequently selected barriers are **lack of training/digital skills (N2: 3)** and **unequal access to tools/knowledge/resources (N3: 2)**. This indicates an institutional framing where adoption barriers are strongly linked to **capacity-building and systemic inequalities**.

Technology providers primarily identify **high costs of tools/infrastructure (N4: 2)** as the biggest barrier. This suggests that technology-oriented actors see practical adoption as being constrained by **investment requirements and infrastructure affordability**, rather than skills or governance concerns alone. One technology provider also selects **AI-related risks (N1: 1)**, indicating that ethical and rights-related issues remain relevant even within the tech stakeholder perspective.

R2 respondents identify AI-related concerns, particularly around **jobs, authorship, and originality**, as the most prominent barrier to integrating digital tools in practice, alongside workforce skills gaps and cost/access constraints. Stakeholder patterns show that producers emphasise creative and labour risks tied to AI, commissions highlight skills and access inequalities, and technology providers point to infrastructure and cost barriers. These results suggest that accelerating digital tool adoption will require stronger governance, capacity-building, and affordability measures apart from technological enablement.

16 Uneven experiences of EU film policy across the filmmaking ecosystem

Question B13 of the Delphi R2 survey:

"Why do people experience EU film policies so differently?"

The objective of this question was to understand why stakeholders perceive and experience EU film policies in markedly different ways across the sector. Respondents were asked to select up to **two** reasons from a predefined list. Results are reported as **mentions**, where each selected reason was counted once per respondent. Findings are presented both overall and by stakeholder type. The dataset contains **56 coded selections (mentions)** distributed across **seven explanatory categories (O1–O7)**, as summarised in Table 16.

Table 16: Reasons for differing experiences of EU film policies (B13), mentions by thematic category (O1–O7).

Code	Reason (answer)	Mentions
O1	Country context / national implementation differences	22
O2	Organisation size & administrative capacity	12
O3	Administrative burden / bureaucracy	8
O4	Region/hub vs peripheral ecosystem differences	6
O5	Access to networks / co-production partners / ecosystem connections	5
O6	Other	2
O7	Genre / project type differences (docs, fiction, etc.)	1

The dominant explanation is **country context and national implementation differences (O1)**, accounting for **22 mentions (~39%)**. This indicates that respondents perceive large variation in how EU policies are **translated into national practice**, including differences in local funding systems, administrative processes, institutional effectiveness, and alignment between EU-level frameworks and national industry realities.

The second most frequently selected reason is **organisation size and administrative capacity (O2: 12 mentions)**. This suggests that the ability to benefit from EU policies depends strongly on whether organisations have sufficient internal resources (time, staff, experience, and administrative know-how) to navigate complex programmes and requirements.

A third tier of factors includes **administrative burden/bureaucracy (O3)** and **hub vs peripheral ecosystem differences (O4)**, indicating that respondents also see variation driven by systemic friction and structural inequality between well-connected production centres and smaller or less-resourced regions.

Finally, **access to networks and ecosystem connections (O5)** emerges as a meaningful driver of different experiences, reinforcing the idea that EU policy effectiveness is mediated by **who has access to partnerships, consortia, and cross-border collaboration opportunities**.

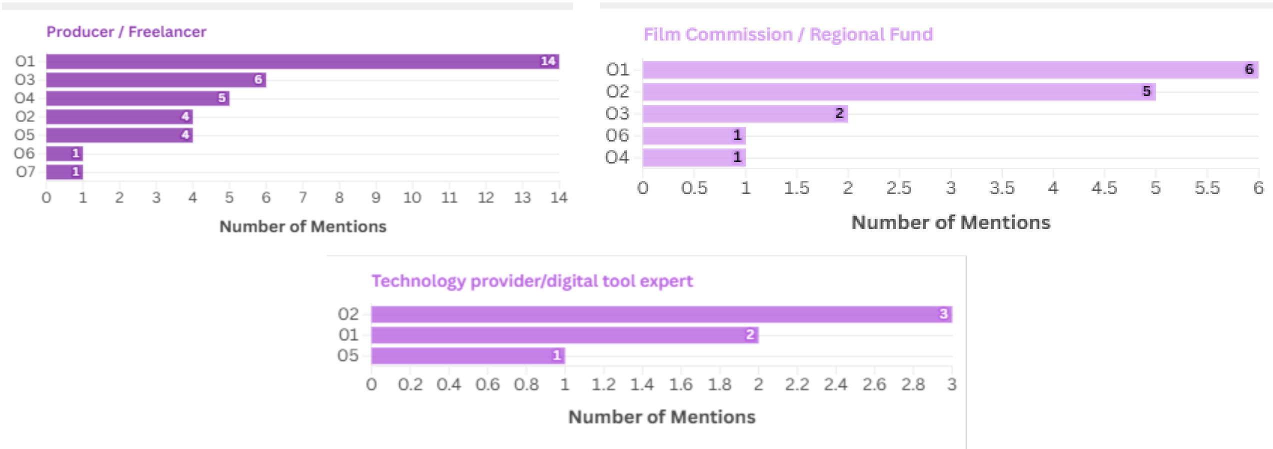

Figure 16: Reasons for differing experiences of EU film policies (B13), by stakeholder group.

The stakeholder breakdown shows a broad shared core, with differences in which structural barrier is emphasised most strongly.

Producers and freelancers overwhelmingly select **country context / national implementation differences (O1: 14 mentions)** as the main reason for uneven experiences of EU film policies. They also highlight **administrative burden/bureaucracy (O3: 6)** and **hub vs peripheral ecosystem differences (O4: 5)**, alongside **organisation size/capacity (O2: 4)** and **access to networks (O5: 4)**. This pattern suggests that production-side respondents experience EU policy variation primarily through the lens of **local system quality and friction**, and through unequal regional conditions affecting opportunity and access.

Commissions and funds prioritise **country context/national implementation differences (O1: 6)** and **organisation size and administrative capacity (O2: 5)**. Smaller mentions appear for **bureaucracy (O3: 2)** and a minor set of "other" responses. This indicates that institutional stakeholders recognise variation largely as a function of **national frameworks and organisational capability**, reflecting an ecosystem-level focus on implementation capacity and structural differences across Member States.

Technology providers place their strongest emphasis on **organisation size and administrative capacity (O2: 3)**, with additional mentions for **country context (O1: 2)** and **access to networks (O5: 1)**. This suggests that technology-oriented actors perceive policy experience differences as driven primarily by whether organisations have the capability to adopt, manage, and scale innovations—not only in technical terms, but also in their ability to engage with policy and funding mechanisms effectively.

R2 responses show that variation in how EU film policies are experienced is perceived to be shaped primarily by **national implementation differences** and **organisational capacity**, with additional influence from bureaucratic complexity and structural inequalities between hubs and peripheral regions. Stakeholder patterns indicate broad convergence on the centrality of country context, while producers emphasise bureaucracy and regional disparity more strongly, and technology providers highlight the role of organisational capability.

17 Impact of tightening public funding conditions on European filmmaking

Question B14.1 of the Delphi R2 survey:

"How much would each external change affect EU filmmaking by 2030? Funding tightens (public support / incentives shrink)"

The objective of this question was to assess how strongly respondents believe a tightening of public funding and incentives would affect European filmmaking by **2030**. Respondents rated the expected impact using a four-level scale (**Low / Medium / High / Unsure**). Results are reported overall and by stakeholder type.

Respondents overwhelmingly perceive tighter public funding as a **high-impact** external change. **High** is selected **22 times**, compared to **5** selections for **Medium** and **1** for **Low**. Only **one respondent** selects **Unsure**.

This distribution indicates a strong convergence of expert judgement: shrinking public support is seen as a **system-level risk**, likely affecting production volume, sustainability of local industries, and the ability of European works to compete in a market where costs are rising and financing models are already under strain.

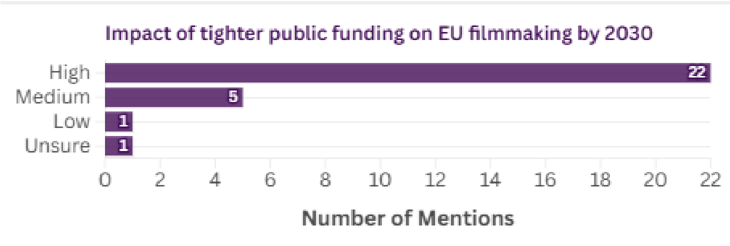

Figure 17: Perceived impact of tighter public funding on EU filmmaking by 2030 (B14.1)

Producers and freelancers show the strongest concentration in the **High** category (**14 responses**). Only a small number rate the impact as **Medium (3)** or **Low (1)**. This suggests that production-side stakeholders experience funding as a direct determinant of sector survival: reduced support is expected to quickly translate into fewer productions, greater precarity, and reduced capacity to innovate or take creative risks.

Commissions and funds also largely rate the impact as **High (6)**, with the remaining assessments falling into **Medium (2)**. This indicates strong agreement among institutional actors that tighter funding would have major consequences for regional production ecosystems, incentives, and support structures—although a small share perceive the impact as somewhat less immediate or uniformly severe compared to producers.

Technology providers select **High (2)**, with one respondent selecting **Unsure (1)**. While the subgroup is small, the results suggest that technology actors generally align with the view that reduced public support would substantially affect sector capacity—particularly as innovation and technology adoption often depend on the availability of enabling funding and incentives.

R2 responses show a clear and strong consensus that tighter public funding would have a **high impact** on EU filmmaking by 2030. This effect is perceived consistently across stakeholder groups, indicating that funding is viewed as a foundational condition for European competitiveness, resilience, and long-term sustainability in an environment already shaped by cost pressures and digital transition demands.

Table 17: Perceived impact of tighter public funding on EU filmmaking by 2030 (B14.1), by stakeholder type

Response	Producers / Freelancers	Commissions / Funds	Technology providers

Low	1	0	0
Medium	3	2	0
High	14	6	2
Unsure	0	0	1
Total responses per stakeholder	18	8	3

18 Impact of changes in platform rules on European filmmaking

Question B14.2 of the Delphi Round 2 survey:

"How much would each external change affect EU filmmaking by 2030. Platform rules change (algorithms, visibility, revenue share, obligations)?"

The objective of this question was to assess how strongly respondents believe changes in platform rules—such as algorithmic visibility, revenue sharing arrangements, and regulatory/contractual obligations—would affect European filmmaking by **2030**. Respondents rated the expected impact using a four-level scale (**Low / Medium / High / Unsure**). Results are reported overall and by stakeholder type.

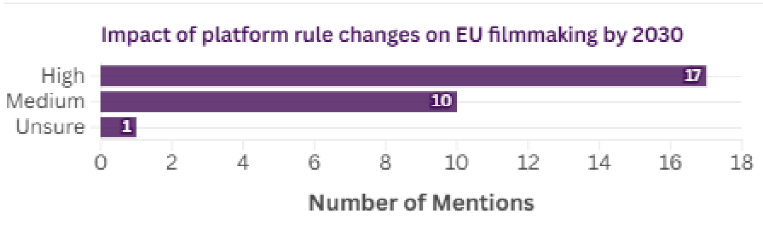

Figure 18: Perceived impact of platform rule changes on EU filmmaking by 2030 (B14.2).

The respondents largely perceive platform rule changes as a **high-impact** external factor. **High** is selected **17 times**, compared to **10** selections for **Medium**, and **1** for **Unsure**. No respondents select **Low**, indicating that platform governance and platform-driven market dynamics are widely seen as a **structural force** shaping EU filmmaking competitiveness, audience reach, and monetisation potential.

This distribution suggests that respondents view platform rule changes as a major driver of outcomes in discoverability, revenues, and strategic positioning for European works, though with slightly more variability than in the funding-tightening scenario (B14.1), where responses were even more concentrated in "High".

Table 18: Perceived impact of platform rule changes on EU filmmaking by 2030 (B14.2), by stakeholder type.

Response	Producers / Freelancers	Commissions / Funds	Technology providers
Low	0	0	0
Medium	10	6	1
High	7	2	1
Unsure	0	0	1
Total responses per stakeholder	**17**	**8**	**3**

Producers and freelancers split their responses between **Medium (10)** and **High (7)**. This indicates that while producers clearly recognise platforms as influential, a notable share anticipates that impacts could vary depending on the specific type of rule change (e.g., visibility algorithms versus revenue shares), and how quickly such changes translate into direct consequences at production level.

Funded by the European Union

Commissions and funds show a strong concentration in **Medium (6)**, with fewer selecting **High (2)**. This suggests an institutional view that platform rule changes are important, but that their impact may be more indirect, mediated through distribution ecosystems, national regulation, and market structures rather than immediately shaping production capacity.

Technology providers are distributed across **Medium (1)**, **High (1)**, and **Unsure (1)**. While the subgroup is small, this suggests that technology actors recognise potential for strong platform-driven disruption, but may also see uncertainty around what future platform rules will look like, or how they will be implemented across different markets.

R2 results indicate that platform rule changes are perceived as a **high-impact** external driver for EU filmmaking by 2030, with no respondents considering the impact "low". Stakeholder patterns show that producers express the strongest "high impact" responses, while commissions/funds lean toward "medium", reflecting a more moderated assessment of how platform governance translates into sector-wide change. Taken together, the findings reinforce that platform environments remain central to the future competitiveness and visibility of European filmmaking.

19 Impact of intensified geopolitical shocks on European filmmaking

Question B14.3 of the Delphi R2 survey:

"How much would each external change affect EU filmmaking by 2030. Geopolitical shocks intensify (instability, wars, supply/cost disruption)?"

The objective of this question was to assess how strongly respondents believe intensified geopolitical instability (such as wars, supply-chain disruptions, cost shocks, and broader uncertainty) would affect European filmmaking by **2030**. Respondents rated the expected impact using a four-level scale (**Low / Medium / High / Unsure**).

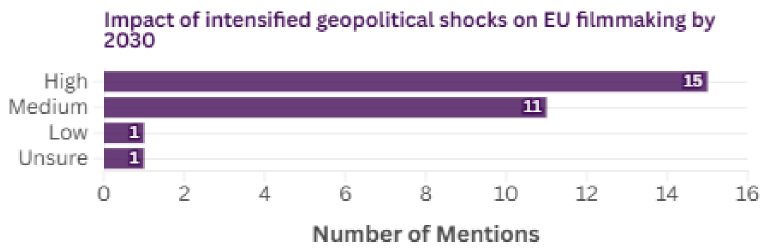

Figure 19:Perceived impact of intensified geopolitical shocks on EU filmmaking by 2030 (B14.3).

The respondents largely perceive intensified geopolitical shocks as a **high-to-medium impact** external factor for EU filmmaking by 2030. **High** is selected **15 times**, while **Medium** receives **11 selections**. Only **one respondent** selects **Low**, and **one respondent** selects **Unsure**.

This distribution indicates that respondents expect geopolitical shocks to shape the sector primarily through **cost volatility**, disruptions to production planning and supply chains, reduced predictability for investment, and broader uncertainty affecting markets and public support. Compared to B14.1 (funding tightens) where the "High" category dominates overwhelmingly, geopolitical shocks show a slightly more **balanced** split between High and Medium, suggesting greater perceived variability in how directly geopolitical instability translates into filmmaking outcomes.

Table 19: Perceived impact of intensified geopolitical shocks on EU filmmaking by 2030 (B14.3), by stakeholder type.

Response	Producers / Freelancers	Commissions / Funds	Technology providers

Funded by the European Union

Low	0	0	0
Medium	10	6	1
High	7	2	1
Unsure	0	0	1
Total responses per stakeholder	**17**	**8**	**3**

Producers and freelancers largely rate geopolitical shocks as **Medium (10)** or **High (7)**. This indicates that production-side respondents anticipate tangible pressure from instability (particularly through rising costs and planning disruptions) while also recognising that impacts may vary depending on location, production scale, and exposure to international supply chains.

Commissions and funds rate geopolitical shocks predominantly as **High (6)**, with one response each in **Medium (1)** and **Low (1)**. This suggests that institutional actors may perceive geopolitical instability as a high-impact risk for regional production ecosystems, potentially influencing public budgets, cross-border collaboration, and the stability of enabling conditions for production.

Technology providers primarily select **High (2)**, with one selecting **Unsure (1)**. While the subgroup is small, this indicates that technology stakeholders recognise strong potential impacts—possibly through cost disruption and shifts in investment climate—while also facing uncertainty about how geopolitical dynamics will shape the sector's technology pathway.

R2 results indicate that intensified geopolitical shocks are expected to have a **substantial impact** on EU filmmaking by 2030, with most respondents selecting either High or Medium. Stakeholder patterns suggest that commissions/funds perceive particularly high risk, while producers anticipate a mix of medium and high impacts. These findings highlight geopolitical instability as a significant external stressor—likely influencing costs, planning reliability, and the broader resilience of European production ecosystems.

20 Perceived most likely future scenario for European filmmaking by 2035

Question B15 of the Delphi Round 2 survey:

"Most likely 2035 scenario (single choice)"

The objective of this question was to capture respondents' expectations about the **most likely future trajectory** of European filmmaking looking ahead to **2030**. Respondents selected **one** scenario from a predefined set. Results are reported overall and by stakeholder type.

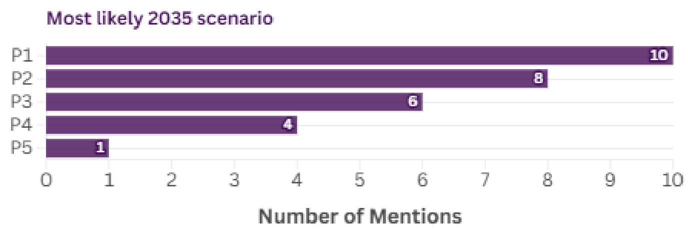

Figure 20: Distribution of responses on the most likely 2035 scenario for EU filmmaking (B15).

Across the Round 2 panel, the most frequently selected scenario is **growth led by new technology and innovation (P1)**, with **10 responses**. This suggests that despite the pressures and uncertainties captured across earlier questions (funding constraints, platform power, AI governance challenges), respondents still see the most plausible long-term direction as one in which competitiveness and growth are driven by continued technological transformation.

Funded by the European Union

The second most common scenario is **moderate growth with some challenges (P2: 8 responses)**, indicating that a large share of respondents expects progress, but framed as **uneven or constrained** by ongoing structural issues rather than a smooth expansion pathway.

A smaller but significant cluster of respondents select **stagnation due to rules/policy/funding issues (P3: 6 responses)**, highlighting persistent concerns that Europe's regulatory and funding environment may limit competitiveness and sector dynamism if reforms do not keep pace.

Finally, fewer respondents anticipate **decline due to global competition (P4: 4)**, and only **one respondent** selects **Other (P5: 1)**. Overall, the distribution suggests a cautiously optimistic outlook, with growth scenarios outweighing stagnation/decline, but with meaningful recognition of risk.

Table 20: Most likely 2035 scenario for EU filmmaking (B15), by stakeholder type.

Code	Scenario (answer)	Producers / Freelancers	Commissions / Funds	Technology providers
P1	Growth led by new technology & innovation	6	2	2
P2	Moderate growth with some challenges	3	4	1
P3	Stagnation due to rules/policy/funding issues	5	1	0
P4	Decline due to global competition	3	1	0
P5	Other	1	0	0

Producers and freelancers most frequently select **technology-led growth (P1: 6)**, but their responses are more spread across the full scenario set than other groups. A notable share anticipates **stagnation linked to rules/policy/funding issues (P3: 5)**, and additional respondents select **decline due to global competition (P4: 3)**. This suggests that while producers recognise technology as a driver of change, they also express stronger concern that structural conditions (funding, regulation, and market pressures) could slow or constrain European competitiveness.

Commissions and funds lean most strongly toward **moderate growth with challenges (P2: 4)**, followed by **technology-led growth (P1: 2)**. Only one response is recorded for stagnation (P3) and one for decline (P4). This pattern indicates a more **balanced and institutional framing**, where growth remains likely but is expected to be shaped by policy implementation complexity and ongoing ecosystem constraints.

Technology providers strongly favour the most optimistic scenario: **technology-led growth (P1: 2)**, with one selecting **moderate growth with challenges (P2: 1)**. No technology providers select stagnation or decline. While the subgroup is small, this suggests that technology-oriented stakeholders expect innovation pathways to remain central and see strong potential for competitiveness gains through digital transformation.

R2 results suggest that respondents view **technology-driven growth** as the most likely 2035 trajectory for European filmmaking, though many anticipate that progress will be accompanied by ongoing constraints and uneven capacity across the sector. Stakeholder patterns show that technology providers are most optimistic, commissions/funds anticipate steady but moderated growth, and producers express the strongest concern that policy and funding conditions could lead to stagnation or competitive decline if not addressed.

21 Additional critical issues identified beyond the Round 1 synthesis

Question C1 of the Delphi Round 2 survey:

"Anything critical missing from the Round 1 synthesis that Round 2 should still consider?"

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A small number of respondents used this open question to highlight additional issues that they believe deserve stronger attention beyond the Round 1 synthesis. One institutional respondent emphasised the need for **clearer definitions and stronger standardisation across EU Member States**, arguing that data and industry statistics are often not comparable "like for like". They proposed strengthening shared European infrastructures such as **EAO and the Lumière directory**, including more systematic use of identifiers such as **ISAN/EIDR**, and building an EU-wide accessible directory for creatives, crews and distributors. The same response also stressed the importance of **audience recovery**, suggesting a more active role for public broadcasters (e.g., the EBU) in countering audience loss to platforms.

Several producer-side responses raised structural concerns about **how funding and support systems are designed and distributed**. One participant suggested shifting the balance of financing toward **private equity and audience-driven investment**, while another argued that access to grants should be based more on **merit and proven work**, rather than formal educational background, noting that alternative professional pathways can currently be excluded. Audience development also emerged as a missing pillar: one respondent underlined that long-term sector resilience depends on rebuilding **cinema culture and audience literacy**, starting from early education and treating audience-building as a strategic priority alongside production and funding. Finally, one participant noted that while the survey coverage was strong, some questions would benefit from allowing respondents to select more than the maximum number of options, reflecting the interconnected nature of challenges in the sector.

22 Summary of Round 2 main findings by question

Delphi Round 2 was designed as a confirmatory and prioritisation phase, building on the exploratory findings of Round 1. Its purpose was to validate key trends, constraints, and policy levers identified earlier, assess levels of expert convergence and divergence, and support prioritisation across competing issues relevant to the future of European filmmaking. The table below summarises the main findings of R2 by survey question. For each question, it consolidates the dominant outcome and highlights the key signals emerging from stakeholder responses, with attention to recurring patterns across the dataset rather than isolated results.

Table 21: Summary of Delphi Round 2 main findings by question

Question	Focus	Consolidated Key Outcome	Dominant Signals Emerging
B1	Top trends shaping EU filmmaking (10 years)	**AI and workflow automation** is the dominant trend, clearly ahead of all others	AI is the systemic convergence point. Audience behaviour and sustainability form a second tier. Institutions emphasise sustainability and policy alignment; producers emphasise platform dynamics and creative experimentation
B2	Biggest constraints to competitiveness	A **triple constraint** dominates: rising production costs, AI-related risks, and unequal access to funding	Competitiveness is framed as a cost–governance–access problem. Producers foreground funding barriers; institutions stress cost inflation; tech actors focus on AI governance uncertainty
B3	Policy change that "unlocks the others"	**Simplifying funding access and reducing administrative burden** is the most catalytic intervention	Administrative friction is perceived as a system-wide bottleneck. Secondary levers include innovation financing and market regulation, reflecting both growth and fairness concerns
B4	Effectiveness of EU policy for	Policy support is rated **only slightly to moderately effective**	Support exists but lacks scale, speed, and operational fit. No stakeholder group

	technology adoption		perceives current frameworks as transformative
B5	Effectiveness of EU policy for diversity and creativity	Performs **better than tech support**, rated moderately to quite effective	Institutions and tech actors are more positive than producers, who point to implementation gaps rather than policy intent
B6	Effectiveness of funding/incentives for local production	Overall **moderate effectiveness**, with mixed views	Producers show higher dissatisfaction, signalling access and adequacy issues. Institutions assess frameworks more favourably, reflecting proximity to instruments
B7	Fastest lever for system change	**Funding simplification** again emerges as the top priority	Strong cross-stakeholder convergence. Producers emphasise urgency; institutions pair simplification with coordination needs
B8	Priority technologies for EU competitiveness	Focus on **digital distribution/audience tools** and **AI for production workflows**	Competitiveness is dual: reach audiences and increase efficiency. Producers strongly emphasise rights and value protection infrastructure
B9	Weakest link in digital maturity	**Distribution and audience reach** is the weakest segment	Post-production is seen as digitally mature. Distribution gaps are experienced most acutely by producers, linked to discoverability and market access
B10	Key enabler to raise the weakest link	**Funding reform and reduced bureaucracy**, followed by **skills and training**	Split in emphasis: producers and tech actors prioritise operational barriers; institutions emphasise workforce capacity
B11	AI governance "non-negotiables"	**Authorship protection** and **transparency of AI use** are top priorities	Producers focus on protecting creative agency and labour; institutions focus on governance baselines, data rights, and accountability
B12	Barriers to digital adoption	**AI risks to jobs, authorship, and originality**, followed by skills gaps	Digital adoption is framed as a cultural and labour issue, not only technical. Tech actors additionally stress cost and infrastructure constraints
B13	Reasons for uneven policy experiences	**National implementation differences** and **organisational capacity** dominate	Producers highlight bureaucracy and centre-periphery divides. Success is linked to internal capacity rather than formal eligibility alone
B14	Impact of external shocks by 2030	**Tightening public funding** has the highest perceived impact	Funding contraction is viewed as an existential risk. Platform rule changes and geopolitics are high-impact but more unevenly felt
B15	Most likely 2035 scenario	**Technology-led growth** is the most selected pathway	Cautious optimism overall. Producers express concern about stagnation risks; tech actors are most optimistic
C1	Additional critical issues	Need for **data standardisation** and **audience literacy**	Calls to rebalance public and private finance, reduce formalism in funding criteria, and strengthen evidence-based policy design

23 Conclusions

The conclusions presented below synthesise the results of Delphi R2 into a set of cross-cutting themes that recur consistently across survey questions and stakeholder groups. These themes capture the structural conditions, tensions, and leverage points shaping the future of European filmmaking as perceived by experts. They translate the R2 evidence into system-level insights that inform the scenario analysis and policy recommendations of the SCENE project.

23.1 AI as the dominant force, with human protection as the condition for adoption

R2 confirms Artificial Intelligence and workflow automation as the single most influential force shaping the future of European filmmaking. AI features consistently across trends, priority technologies, and competitiveness debates, and is widely recognised as essential for maintaining production efficiency and international relevance.

However, the findings also make clear that AI adoption is perceived as a high-stakes trade-off rather than a straightforward productivity gain. The primary barriers to implementation are not technical but cultural and existential, centred on risks to jobs, authorship, originality, and creative agency. As a result, expert consensus converges on two governance "non-negotiables": the protection of human authorship and the transparency and disclosure of AI use.

The implication is that successful AI integration in European filmmaking is conditional. Technological uptake will depend on the credibility of governance frameworks that safeguard creative labour and ensure accountability, rather than on tool availability alone.

23.2 Bureaucratic friction as the primary blockage to systemic change

Across multiple questions, administrative complexity and funding accessibility emerge as the most consistently cited obstacles to sectoral adaptation. Simplifying funding access and reducing bureaucratic burden are repeatedly identified as both the most catalytic policy reform and the fastest lever for system-wide change.

This signal cuts across assessments of policy effectiveness, digital adoption, and innovation capacity. Current policy support for technology adoption is rated only slightly to moderately effective, not due to a lack of instruments, but due to speed, complexity, and misalignment with operational realities.

The conclusion is structural rather than incremental: improving administrative efficiency and access conditions is perceived as more urgent than introducing additional policy schemes. In the context of rapid digital transformation, bureaucratic friction functions as a binding constraint on competitiveness.

23.3 Distribution and audience reach as the weakest link in the value chain

While parts of the European filmmaking ecosystem, particularly post-production, are seen as digitally mature, Delphi R2 identifies a severe digital maturity gap at the distribution and audience engagement stage. Distribution and audience reach are consistently ranked as the weakest link in the value chain.

This finding directly reshapes technology priorities. Digital distribution and audience tools, including analytics, discoverability, and audience development technologies, are identified as the most urgent investment needs, in some cases ranking higher than AI tools for production workflows.

The conclusion is: European film policy has historically prioritised production capacity, but future competitiveness depends increasingly on the ability to reach, retain, and monetise audiences within platform-dominated ecosystems. Without strengthening distribution capabilities, upstream investments in production and innovation risk underperforming.

23.4 A triple threat to competitiveness under conditions of economic fragility

Despite cautious optimism around a technology-led growth trajectory, the sector perceives itself as structurally fragile. Delphi Round 2 highlights a convergent "triple threat" to competitiveness:

1. Rising production costs and unsustainable budgets
2. AI adoption risks related to labour, authorship, and value capture
3. Unequal access to funding across actors and territories

These pressures are compounded by the perceived high impact of tightening public funding conditions by 2030, which respondents view as an existential risk to sector volume and diversity. This suggests a system that remains highly dependent on public support levels that stakeholders fear may not be sustained.

Growth is therefore seen as possible, but contingent on addressing underlying economic vulnerabilities rather than relying on technological momentum alone.

23.5 A strategic disconnect between producers and institutions

Finally, R2 reveals a persistent divergence in how key stakeholder groups interpret both problems and solutions. Producers and freelancers emphasise structural and financial barriers, focusing on bureaucratic burden, funding reform, rights protection, and market power asymmetries. Institutional actors, by contrast, prioritise skills development, sustainability objectives, and cross-border coordination.

This is not a conflict of values, but a misalignment of sequencing. Institutions tend to frame capacity building and upskilling as prerequisites for transformation, while producers argue that operational barriers must first be removed in order for skills, tools, and innovation support to be usable in practice.

Bridging this gap emerges as a critical governance challenge. Without alignment between institutional design and production realities, policy interventions risk reinforcing frustration rather than enabling transition.

23.6 Overall conclusion

The findings depict a European filmmaking sector that is cautiously optimistic about technology-led growth but constrained by systemic frictions in funding design, governance, and market access. The central message is not a lack of innovation potential, but a misalignment between technological possibilities and the institutional conditions required to realise them.

These consolidated themes provide a coherent analytical foundation for the policy scenarios and recommendations that follow, underscoring the need for coordinated, system-level interventions rather than fragmented or tool-specific responses.

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