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# **ACCESS OVER ATTENTION:**

**HOW SMALLER EUROPEAN CINEMAS  
NAVIGATE STREAMING PLATFORMS**

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## Abstract

Small European cinemas face new opportunities and challenges in the streaming era. Global platforms such as Netflix and Amazon Prime extend the potential reach of national films, yet their catalogues are often shaped by market logic and linguistic dominance. This article focuses on two interrelated aspects: the distribution of films from smaller European countries through streaming platforms, and the role of policy and institutional support in sustaining access to audiences.

The concept of the attention economy provides the framework for the analysis. This perspective emphasises that cultural visibility is not shaped by production alone. It also depends on the ability to secure space within highly competitive digital platforms. Instead of primary audience surveys, the analysis draws on secondary sources, specifically reports from the European Audiovisual Observatory, Creative Europe funding data, and examples from smaller markets.

This analysis suggests that while streaming platforms expand the geographical availability of films, they do not guarantee sustained visibility. Drawing on policy documents, platform catalogue observations, and secondary research, the article indicates that films from smaller European cinemas more often achieve durable circulation through hybrid strategies, including co-productions supported by European schemes, festival premieres, and partnerships with curated or niche streaming services such as MUBI. Policy frameworks remain central in sustaining access, even when audience attention is uneven or limited.

The article concludes that “access over attention” provides a useful way of understanding the resilience of smaller cinemas. Success may no longer lie in attracting mass audiences, but in creating sustainable routes of availability across digital platforms. By highlighting distribution practices and institutional support, this approach contributes to ongoing debates about how European cinema can maintain diversity in the shadow of global streaming monopolies.

**Keywords:** Small European cinemas, Streaming platforms, Distribution strategies, Policy support, Attention economy

## Introduction

Streaming platforms like Netflix, Amazon Prime Video, and Disney+ are changing how films travel. Films from small European countries no longer depend only on theatres, festivals, or national TV. More films reach viewers through online platforms. This shift gives new options for small cinemas to share their work.

But there is a risk. Global content tends to dominate streaming platforms. Big budgets, familiar genres, and English or widely-spoken languages often get more visibility. Films from smaller nations may struggle to be seen, even when they are available. They may become lost among the many options.

This investigation looks at two things. First, it studies distribution strategies via streaming platforms, which is how small cinemas use online services, either global or niche, to reach audiences. Second, it examines policy and institutional support, looking at how governments, film institutes, and European funding programmes help small cinemas get access to streaming platforms and ensure films are visible and available.

The main question is: ‘How do smaller European cinemas sustain access to audiences in the streaming era?’

To answer it, this probe draws on recent research about streaming and film distribution in Europe. For example, Smits (2024) shows how European cinemas used different release strategies during COVID-19, mixing theatre and streaming options. Also, the book *European Cinema in the Streaming Era: Policy, Platforms, and Production* (Meir & Smits, 2024) discusses how policy and regulation affects film circulation in small national cinemas.

This paper uses secondary sources, specifically policy documents, reports, and published chapters. It does not use

surveys or interviews. It focuses on smaller European countries, not global big players. It aims to show what works and what fails in the existing strategies.

In doing so, this paper argues that access (making sure films can be seen) matters more than attention (large audiences or viral fame). Small cinemas may not get millions of viewers, but they can survive when their films are available through curated streaming, co-productions, and supportive policy.

The discussion proceeds by first outlining the theoretical lenses of the attention economy and policy support. It then turns to examples of distribution strategies, followed by policy roles, and concludes with observations on how small European cinemas may sustain access in a crowded streaming environment.

Methods include structured catalogue observations (Jan-Jun 2024) across Netflix, Amazon Prime Video, MUBI, and Arte.tv using keyword searches (e.g., “Portugal cinema,” “Baltic films”) and curated rows, plus the documentary analysis of policy reports.

## Defining “Small Cinemas”

In this article, the term “small cinemas” does not refer uniformly to all national film industries within Europe. Rather, it denotes cinema sectors that are structurally vulnerable within the contemporary streaming ecosystem, characterised by limited domestic market size, constrained production and marketing resources, and reduced bargaining power vis-à-vis global streaming platforms. This category includes cinemas from smaller European states such as the Baltic countries or Portugal, and also applies to specific strata within larger national industries where films operate outside mainstream, high-budget production and distribution circuits.

The analysis therefore focuses on export-oriented, festival-linked, and specialised or arthouse films. These categories are more dependent on cross border circulation, policy support, and platform access. Such conditions are necessary to sustain their cultural presence. Mainstream popular genres produced for domestic mass audiences are acknowledged in this analysis. This includes nationally oriented comedies. However, these genres fall outside the scope of the analysis, as they circulate according to different economic and cultural logics (Smits, 2022; Edmery, 2025).

## Methodology

This study employs a qualitative research design that combines descriptive catalogue observation with document-based policy analysis to examine how smaller European national cinemas are positioned within contemporary streaming platform environments. The study does not aim to produce statistically exhaustive or quantitative measurements of platform catalogues. Instead, it draws on the structured observation of selected streaming platforms. This approach is complemented by existing academic research, industry reports, and European audiovisual policy documents. Prior scholarship has demonstrated that platform catalogues play a central role in shaping access, representation, and circulation within digital film distribution (Smits, 2022; Ibrus & Rohn, 2019). Building on these established insights, the present analysis examines the current conditions in the streaming environment. It focuses on how policy frameworks, platform practices, and market structures shape access for smaller European cinemas.

Catalogue mapping focused on four platforms representing different circulation logics: Netflix and Amazon Prime Video as large global subscription video-on-demand (SVoD) services, and MUBI and Arte.tv as more curated or culturally oriented platforms. Platform catalogues were examined between January and June 2024. This observational mapping does not

constitute a comprehensive dataset and is intended solely to identify indicative patterns of availability and editorial framing rather than measurable prominence or audience reach.

The unit of analysis was the presence and positioning of feature films originating from smaller European audiovisual markets. For the purposes of this study, these markets include Portugal, Ireland, and the Baltic states (Estonia, Latvia, and Lithuania). Titles were identified through platform search tools, curated collections, and national cinema tags where available.

The analysis employed descriptive indicators rather than quantitative metrics. These indicators included catalogue inclusion, thematic framing, and editorial positioning (for example, inclusion in curated rows or collections). No claims are made regarding algorithmic ranking or audience reach.

Policy analysis drew on primary European Union legal and institutional documents, including the Audiovisual Media Services Directive (AVMSD) and Creative Europe programme materials, as well as reports from the European Audiovisual Observatory. These sources were analysed to contextualise the regulatory conditions shaping access for smaller European cinemas.

The catalogue observation helped to guide the initial selection of platforms (Netflix, Amazon Prime Video, MUBI, and Arte.tv), and also provided an overview of the descriptive patterns across the services. As the analysis developed, greater emphasis was placed on document-based policy examination to better understand the institutional conditions shaping access. Within the observed catalogues, MUBI's programming tended to foreground festival-linked arthouse cinema from smaller markets, including Baltic co-productions, while Arte.tv structured its offerings through thematic European collections. Although these observations were not intended to produce exhaustive catalogue data, they

**Table 1** Sample Catalogue Observations (Jan-Jun 2024, n=12 indicative titles)

PLATFORM	SEARCH TERMS/BROWSING	SAMPLE TITLES (SMALL MARKETS, JAN-JUN 2024)	FRAMING
Netflix	"Portugal films," national tags	1. Vitalina Varela (Portugal, 2019; Q1 avail) 2. Rose and the Men (Ireland, 2023; ongoing) 3. The Green Sea (Ireland, 2021; territorial Q2)	Limited territories; generic "EU Cinema"
MUBI	"Baltic cinema," festival collections	1. Blaze (Latvia co-prod, Feb-Mar rotation) 2. The Last Year of Darkness (Lithuania links, Apr) 3. Pilgrims (Latvia/Estonia, May festival slot)	Curated arthouse/festival
Arte.tv	"European small markets," themes	1. Lithuanian indie from ArteKino Festival (Q2) 2. Portuguese docu-short collection (Mar) 3. Baltic co-prod in Euro themes (Jun)	Thematic cultural/European arthouse
Amazon Prime	Country keywords, Irish/Portuguese tags	1. Handsome Devil (Ireland, ongoing Q1-Q2) 2. The Hole in the Ground (Ireland, avail Apr) 3. Cosmic Sin (Ireland links, licensing Q2)	Generic long-tail; low promo

reinforced the secondary evidence pointing to uneven access for smaller European cinemas (European Audiovisual Observatory, 2024). Table 1 shows sample observed entries (n=12 indicative titles). This analytical prioritisation is consistent with the study's qualitative scope, which focuses on structural and policy conditions rather than granular platform metrics.

The study's limitations include platform opacity, the non-transparency of recommendation algorithms, and the exploratory nature of catalogue observation. Accordingly, the findings should be read as indicative tendencies over generalised measurements.

### Source Selection and Analytical Scope:

The examination employs a qualitative document-based methodology. Sources were selected according to three criteria:

- (1) Direct relevance to European audiovisual policy, streaming regulation, or platform distribution practices;
- (2) Empirical engagement with catalogue composition, circulation patterns, or institutional support mechanisms; and
- (3) A focus on small, structurally vulnerable European markets.

The selected materials include reports from the European Audiovisual Observatory, EU policy documents, national film institute publications, and peer-reviewed academic research on European film distribution. Rather than pursuing audience behaviour or interface-level prominence, the research concentrates on the structural conditions of access, understood as the presence, circulation, and availability of films across platforms and territories.

Policy documents provide a second layer of evidence. Laws, EU directives, and national funding reports outline the structural conditions under which films circulate. These documents show not only the rules that platforms must follow but also how consistently they are enforced across regions (European Parliament, 2022). Analysing Creative Europe reports, national film institute strategies, and levy mechanisms allows for the connection of catalogue presence with institutional support.

This dual approach captures both sides of the problem: the supply of films to audiences and the frameworks shaping that supply. While the enquiry does not analyse individual audience behaviour, this is a deliberate methodological choice. This research examines the conditions of access and

circulation, for which catalogue presence and policy frameworks constitute appropriate and established indicators (Smits, 2022; Damásio et al., 2025).

Recent scholarship demonstrates the value of analysing platform interfaces and recommendation systems for prominence (Iordache et al., 2025). While such approaches offer crucial insights into content surfacing, the research presented here operates at a different analytical level. It investigates the institutional, policy, and distributional conditions enabling small European films to gain and sustain catalogue access, rather than interface design or algorithmic visibility.

## Theoretical Framework

The idea of the attention economy is central to how culture circulates in the digital world. Beller (2006) argued that attention itself is now a form of capital. Platforms compete to capture and monetise the time and focus of audiences. Within platform environments, attention is structured through algorithmic recommendation systems that prioritise engagement, prior popularity, and platform-defined relevance. As a result, catalogue inclusion alone does not guarantee visibility, circulation, or audience discovery.

On streaming services, visibility is not only about producing quality films but also about working within algorithms, rankings, and recommendation systems. For smaller European cinemas, this creates a challenge. Global blockbusters and popular series often dominate rankings, while niche or regional works are pushed aside. The problem is less about production and more about sustaining visibility in a crowded digital space.

At the same time, European cinema has long been supported by cultural policy. Unlike the US, which is largely market-driven, European film cultures rely on institutional support. At the EU level, Creative Europe provides funds for

cross-border distribution, subtitling, and the promotion of films that might otherwise be invisible (European Commission, 2022). National funds, such as the CNC in France, the BFI in the UK, or the FFA in Germany, also help to balance market pressures. Regional initiatives, including independent networks, festivals, and cultural cooperatives, further support circulation by targeting audiences with shared languages and cultural ties (Jäckel, 2019). Together, these measures aim to preserve diversity and prevent small cinemas from being overshadowed by global media giants. In this article, “smaller European cinemas” refers to national audiovisual production contexts characterised by limited domestic language reach and comparatively lower production volumes, particularly in relation to dominant European producers such as France and Germany.

This is where the concept of “audience-to-platform access” becomes useful. Traditional success is measured by audience numbers: box-office figures, ratings, and subscription data. But for smaller cinemas, chasing mass attention can be an impossible task when competing against Hollywood or major streaming players (Loist, 2020). A shift in focus is needed. Instead of fighting for global attention, success can be measured by access: how widely films are made available, across platforms, languages, and cultural spaces.

Access highlights circulation rather than raw consumption. A film may not trend globally but if it reaches diasporic communities, academic circles, or niche audiences, it still maintains a cultural presence. For small cinemas, this presence is as vital as high viewership numbers. Institutional support plays a key role here. Subtitling grants, cross-border distribution networks, and co-funding arrangements extend access even when attention is scarce (Bondebjerg, 2021).

The paradox is clear. On the one hand, the attention economy rewards a handful of winners in algorithm-driven environments. On the other, cultural policy provides structural ways

for smaller cinemas to remain visible and relevant. By prioritising audience-to-platform access, success is reframed not as dominance in mass markets but as sustained presence across diverse communities. This perspective allows small cinemas to keep cultural continuity alive, even if their audiences are fragmented and modest in size.

Putting these ideas together, the framework holds three parts:

1. Visibility shaped by digital competition. Films must compete in recommendation systems and platform catalogues, not only in production quality.
2. Institutional support. Grants, policies, funding schemes that help smaller cinemas cover the costs of distribution, translation, and licensing.
3. Access over mass viewership. Metrics of success include availability (platform presence, subtitles) and circulation (festivals, regional streaming), not just total viewer numbers.

This lens maps to the observations as follows: attention scarcity explains low prominence despite quotas (catalogue table), while policy access counters via funding for co-prods/subtitling (Baltic/Portugal cases). Hybrid niches (MUBI/Arte) sustain circulation absent algorithms. The framework helps analyse how small European cinemas can sustain access. It shows where policy works and where it fails. It probes into whether distribution strategies succeed even without large attention.

## Distribution via Streaming Platforms

Streaming platforms affect how small European cinema reaches people. They can help or hurt access. This section looks at how big platforms include or exclude small cinema titles. It then examines niche platforms and hybrid paths. We finish by noting the tension: more access, but often less visibility based on descriptive observation of platform catalogues rather than exhaustive quantitative measurement.

## Audience Behaviour and the Limits of Access

Existing audience research consistently shows that viewing on subscription video-on-demand platforms is highly concentrated around a limited number of popular titles. Studies by the European Audiovisual Observatory and academic analyses of platform consumption patterns indicate that a large proportion of available films receive little sustained audience engagement, reflecting long-tail dynamics in digital catalogues (European Audiovisual Observatory, 2024; Smits, 2022).

According to industry reporting by Screen Daily (2022), around 38% of European films available on Netflix originate from smaller markets (figures consistent with European Audiovisual Observatory catalogue monitoring). Yet these titles often account for a much smaller share of actual streams, as global hits dominate algorithms and recommendations. Studies of video-on-demand consumption confirm this “long tail” dynamic, where most films remain technically available but attract little or no audience (Smits, 2022).

This gap between access and attention underlines why policy support is essential. Without measures to promote visibility, not just catalogue inclusion, smaller cinemas risk invisibility even when present on major platforms. The idea of “access over attention” points to success as circulation and availability, but the evidence on audience behaviour makes it clear that sustaining meaningful engagement requires more than quotas or technical compliance.

## European SVOD Viewing Shares

The European Audiovisual Observatory (2024) found that about 30% of all viewing time on subscription video-on-demand (SVOD) platforms in Europe is of content from the European Union, plus the UK. Netflix leads with 53% of the viewing share, followed by Prime Video at 19% and Disney+ at 12%.

These figures show that although European content is present, global platforms dominate what audiences actually watch.

### How big SVoDs include or exclude small titles

Global platforms often choose shows and films with wide appeal. Big budgets, known names, or English language use helps. Small films face harder odds. They may get deals only for limited territories. They may not get visible placement on the home page or in the recommendations.

Research shows that streaming firms invest in local productions but this investment is not evenly spread (Iordache, 2022). Some countries get local originals. Others see only a few home titles in platform catalogues. The EU rule changes (AVMSD) now allow member states to ask SVoDs to invest in local productions, yet the rules are implemented unevenly across countries (European Parliament, 2022). This makes platform presence patchy.

Industry actors report mixed expectations regarding the long-term implications of these measures, particularly concerning whether increased investment obligations will translate into sustained availability or enhanced visibility on global platforms. The existing research primarily documents industry perceptions and policy processes rather than demonstrable effects on catalogue composition or audience engagement (Sampaio, 2025).

Within platformised media environments, visibility and circulation are shaped by algorithmic recommendation systems that prioritise engagement, prior popularity, and platform-defined relevance. Consequently, formal access to streaming platforms does not necessarily translate into meaningful visibility, audience reach, or cultural circulation.

Ireland shows a different pattern. Irish film policy and industry action has helped some titles reach global streamers. But

many Irish films still depend on festival runs and national broadcasters before streaming deals occur. Policy changes have raised production and skills. They have not guaranteed platform prominence (O'Brien et al., 2022).

In the Baltic States, domestic markets are small and fragmented. Local telecoms and broadcasters often run local OTT services. These platforms list local films but global platforms rarely commission in the region. As a result, local films can be available at home, yet are missing from global catalogues (Ibrus, 2019; Rietuma, 2025).

### Inclusion and Exclusion by Major SVoDs (Netflix, Amazon, Disney+)

Big platforms often make licensing deals for global hits. Films with large budgets or popular stars get priority. Smaller films may be licensed, but often only in limited regions. Many are excluded altogether because of cost, language, or anticipated low viewership.

A probe into German VoD platforms shows that Netflix, Amazon and similar services offer many specialised films. But many are available on only a few platforms. Smits (2022) found that 89% of 150 specialised German films appear on at least 5 out of 19 platforms, but few get strong promotion or shelf-space.

Damásio et al. (2025) show that the catalogue presence of local films on global platforms is uneven. Their research looked at content diversity in small European countries. Some small countries get many local titles on VoD, while others get almost none.

In Portugal, a "Netflix tax" was introduced to support local audiovisual productions. The law ensures that part of the streaming platform revenue helps local cinema. But having that tax does not automatically lead to local films getting strong visibility on the platform.

Earlier catalogue monitoring indicated that European-produced titles constituted approximately 38% of Netflix's European catalogues, with countries such as the Netherlands reaching 43% and several Central and Eastern European markets approaching 42% (Screen Daily, 2022). These figures illustrate early compliance trends following regulatory changes, though more recent catalogue observations suggest that inclusion does not necessarily translate into sustained visibility or prominence. Industry reports indicate that this growth reflects Netflix's strategic emphasis on acquiring and producing local European content to meet regulatory requirements and compete with regional broadcasters (Screen Daily, 2022). While these aggregate figures reflect compliance with European content quotas, they obscure substantial variation at the level of individual titles, where films from smaller markets often remain unevenly distributed, territorially limited, or weakly promoted.

The presence of small and mid-sized European films on Netflix varies significantly by market, genre, and language. Some titles appear in specific national catalogues. Others remain absent or are available only in limited territories. This uneven inclusion contrasts with the aggregate quota-based statistics cited earlier, highlighting the gap between formal availability and effective circulation. Many films from smaller markets remain marginal or absent from major SVoD catalogues, despite the overall growth in European content quotas (Lotz, Eklund, & Soroka, 2022).

Netflix's distribution reach is often facilitated through licensing agreements with telecommunications operators, local distributors, and content aggregators, which enable territorial access but do not necessarily translate into editorial visibility within the platform. (Lotz, 2022). Examples of European films showcased include a wide variety of productions from different countries, such as "22 July" (Norway), "Close Enemies" (France), and many others listed on Netflix's European Movies and TV categories, showcasing diverse storytelling approaches and cultural perspectives.

Research from the European Audiovisual Observatory confirms Netflix's dominant position as the streaming platform with the largest content catalogue in major European markets, emphasising original programming and licensed international content. Despite vast catalogues, audience engagement tends to concentrate on fewer select titles. The platform's global streaming infrastructure enables cross-border cultural exchange while emphasising national and localised content preferences (Lee & Ji, 2024).

### **Amazon Prime Video and Disney+ in Europe**

Netflix dominates the research on European streaming, but Amazon Prime Video and Disney+ also shape access for smaller cinemas. Their strategies differ, often making them less open to small or independent titles (Bengesser, 2024).

Amazon has pursued local originals in major markets. In Germany, it backed *Deutschland 83* and later *Deutschland 86*, which were among the first non-English-language global series (Lotz, 2022). It has also commissioned works in Italy and Spain, such as *Bang Bang Baby*. Yet research shows that Amazon's overall catalogue includes fewer European films compared to Netflix, with content often clustered in countries with stronger production sectors (Lobato, 2019). This creates uneven access: Germany and the UK gain visibility, while smaller markets are overlooked.

Disney+ takes a more selective approach. Its platform prioritises its own franchises, Marvel, Pixar, Star Wars, and animation. Local acquisitions are limited, though EU quota rules still require it to list European titles (European Parliament, 2022). Studies note that Disney+ often fulfils quotas through older, lower-profile works rather than high-profile originals (Iordache, Raats, & Afilipoaie, 2022). This makes access technical rather than meaningful, as films may be buried in catalogues without strong promotion.

Both platforms face the same policy pressures as Netflix, including “streaming levies” in France, Portugal, and other EU states. Yet they invest less in small cinema content. For local filmmakers, this means that policy helps ensure a nominal catalogue presence but does not guarantee visibility or circulation (Kostovska et al., 2023).

Amazon and Disney+ illustrate a broader pattern. Policy opens doors, but platform strategies define what viewers actually see. Without stronger policy enforcement, smaller cinemas risk being sidelined on these services. The French model raises questions for small markets. Given their low bargaining power and sparse catalogue presence (as noted earlier), similar shortened windows or investments seem unlikely without EU-wide mandates, limiting replication in Portugal or the Baltics.

### **Disney+ Regulation in France**

In France, Disney+ recently struck a deal to shorten its streaming window. Films can now appear on Disney+ nine months after cinema release, compared with the earlier 17 months (Walfisz, 2025). At the same time, French regulators require Disney+ and other global streamers to invest 25% of their French net turnover into European and French works. These conditions show how policy pushes platforms toward stronger local engagement.

### **Illustrative Examples: Baltic States, Portugal, Ireland**

These examples are presented illustratively to highlight the recurring structural dynamics across different European contexts, rather than as a comparative or representative sample. The data for Baltic States, Ireland, and Portugal comes from the CresCine project and other studies. The CresCine report (Nielsen & Øfsti, 2024) shows that in countries like Ireland and Portugal, global SVoDs do license local content but the

titles are few. Many films are not on Netflix or Amazon in the same way they are in home markets.

In the Baltics, smaller film industries often rely more on festivals and national platforms (Karjus & Žemaitytė, 2025). Streaming visibility on global platforms is limited because local films often lack large marketing budgets. Policy support is weaker or subject to stricter conditions. These observations are based on studies focused primarily on the Baltic region and should be read as illustrative of structural tendencies rather than representative of all small European audiovisual markets.

### **Role of Niche Platforms and Hybrid Routes**

Niche platforms like MUBI help small cinemas. They curate films carefully, and they rotate titles so then each has attention. Smits and Nikdel (2018) show that MUBI uses a model of limited curated selection that helps smaller films find an audience.

Research on changes in the European audiovisual sector show that arte.tv, developed by the Franco German public broadcaster ARTE as part of its move into digital media, is known for its early focus on themed online curation and multilingual cultural content (Kitsopanidou, 2024). The platform was designed not just to stream television programs, but to present them in a structured and meaningful way.

Instead of simply uploading broadcast content, arte.tv groups films and documentaries into clear thematic sections. This has made European cultural works easier to discover and understand, especially for audiences outside their country of origin. In this context, arte.tv shows how public service streaming platforms can help maintain the visibility of non-mainstream and culturally important cinema in a global and highly competitive streaming market.

Research on the digital circulation of European film content highlights how platforms tied to open service broadcasters, including Arte's online service arte.tv, function as curated niche venues that support visibility for non-mainstream cinema (Iordache & Raats, 2023). Within the European streaming landscape, spare video on demand services operated by broadcasters are positioned as culturally oriented alternatives, offering themed catalogues of feature films, documentaries, and arthouse content that would otherwise struggle for audience attention in algorithm-driven environments (Parvulescu & Georgescu, 2024). These platforms balance substantial access with editorial priorities rooted in ethnic policy and open service mandates, enabling small European films to circulate beyond national markets and find engaged audiences across lingual regions. arte.tv's curated European catalogue exemplifies this hybrid niche role by organising cinema and embedding films within a broader ethnic context.

Another example: German platforms in the Smits (2022) show that specialised films are available on smaller local or art-house VoDs. This gives access even when Netflix or Amazon do not include them.

Hybrid routes also matter, and domestic festivals premiere films. Later, films move to online platforms or local streaming services. This allows for some visibility in home markets even when global platforms offer limited exposure.

### **Tension: Broader Access vs. Reduced Visibility**

Streaming increases the number of platforms and channels where films can be seen. Access is broader: people can watch at home, in diaspora locations, or through niche services. This is good for distribution.

Visibility is often low. On big platforms, local films may be buried in catalogues. They may lack subtitles or promotion, and algorithms may not favour them. This means that many

films are technically "available" but are hard to find or overlooked.

For example, although German specialised films may exist on multiple VoDs, most are listed with low prominence. Few get featured banners or new-release slots.

Small European film policy reports show that many local films depend on niche platforms or publicly funded or public-service video-on-demand platforms for visibility (European Audiovisual Observatory, 2023). These platforms reach smaller audiences, so access exists, but attention remains with global hits or mainstream content.

Hybrid paths matter too. Festivals still launch many small films. A festival premiere can lead to a curated platform deal. Some films move from festivals to regional VOD services. In addition, some films circulate through educational and cultural streaming services, including platforms linked to public broadcasters, film archives, and university libraries, which prioritise access and preservation over mass audience reach.

Co-production and distribution networks help as well. Creative Europe and national funds often support subtitling, festival promotion and sales trips. These supports increase the chance that a small film gets platform deals in several countries (Smits, 2024; Kostovska et al., 2023).

### **Tension: more access, less visibility**

There is a clear tension. Streaming expands access. Films can be placed online and reach diasporas yet visibility on major platforms is scarce. Being available is not the same as being seen.

Studies of catalogue data show that many local films are technically present across platforms yet lack prominent placement or marketing. Algorithms and editorial choices

shape which titles appear on front pages or recommendation lists (Damásio et al., 2025; Smits, 2024). A title may be searchable but it may not be suggested to viewers. This reduces real reach.

Policy steps such as investment obligations, levies, or quotas can increase supply. They can fund local production and distribution support. They do not always change how platforms promote titles. Smaller films may appear in catalogues but still get low viewer numbers (Iordache, 2022; Kostovska et al., 2023).

Niche platforms and local OTTs offer better visibility per title but their reach is limited. They do not replace the mass audiences of global streamers. The trade-off is clear. A film may be visible in one curated space, while it may remain invisible in large platform ecosystems.

## Policy and Institutional Support

Policy shapes what films can reach viewers. Funding, rules, and public bodies make distribution possible. This section looks at EU programmes, national film institutes, and cross-border co-production. It also shows how policy funding links to streaming availability.

### EU Programmes and Rules

Creative Europe's MEDIA strand supports many film activities. It offers grants for distribution, subtitling, and festival promotion. These grants lower the costs for crossing borders (Damásio et al., 2025). The programme helps small producers prepare titles for multiple markets.

The Audiovisual Media Services Directive (AVMSD) sets a rule for European works. Member states must ensure a share of European content on on-demand services (European Parliament, 2022). The rule aims to keep space for local works on big platforms. Its impact varies by country. Some states

use it to require investment or quotas from streamers (Hagedoorn & Becker, 2025).

EU monitoring shows uneven results. Catalogues do include more European films yet placement and promotion still favour high-budget content. Policy raises supply. It does not always change platform algorithms or editorial choices (Damásio et al., 2025).

## Regional Differences in Policy and Capacity

Policy frameworks across Europe are uneven. While EU-wide initiatives such as Creative Europe offer shared funding streams, national enforcement and industrial capacity vary sharply.

Western and Northern Europe, including France, Germany, and the Nordic states, benefit from strong public funding, the consistent application of quotas, and larger production sectors. For example, France enforces streaming levies that require platforms like Netflix, Amazon, and Disney+ to invest a portion of revenue into local content (Kostovska et al., 2023). In Denmark and Sweden, robust film institutes fund both domestic production and international co-productions, creating a stable pipeline of content for streaming platforms (Meir & Smits, 2024). These states often succeed not only in ensuring catalogue presence but also in generating original works that achieve visibility.

In the Baltic region, smaller industries face market constraints. Portugal's ICA sustains output but yields a limited SVoD presence (Nielsen & Øfsti, 2024). Zemaityte et al. (2025) examined Baltic festival dynamics, underscoring VoD gaps. Similarly, Baltic countries have increased their output through regional co-productions, but platform inclusion remains sporadic (Dabrovolkskas, 2024).

These contrasts matter for "access over attention." Western and Nordic countries secure both circulation and visibility

through stronger policy and industrial ecosystems (Karjus & Zemaityte, 2025). In Southern and Eastern states, catalogue access may exist, but without strong promotion or a critical mass of titles, visibility is harder to achieve (Parvulescu & Hanzlík, 2021). The uneven geography of policy implementation reveals how pan-European goals for cultural diversity remain undermined by local disparities (Pauwels & Loisen, 2016).

### National Film Institutes

EU subsidiarity supports national cultural policy (TFEU, Art. 167); national bodies complement EU efforts by filling in local gaps through targeted funding (Poort, 2020). Portugal's ICA funds projects at many stages. ICA grants can pay for distribution, festival runs, and online release preparation (Sampaio, 2025). Such support makes streaming deals more likely.

The Lithuanian Film Centre supports production and promotion. It funds translations, festival entries, and international promotion (Dabrovskas, 2022). These funds increase a film's chance of landing on a platform outside Lithuania. National funds often back subtitling and festival tours. These actions matter for access (Kostovska et al., 2023).

Other countries use tax incentives and levy schemes. These can direct platform revenue into local production funds. Portugal introduced investment obligations for SVoDs, where producers report mixed expectations regarding the long-term outcomes of these measures (Sampaio, 2025).

### Cross-Border Co-Productions

Co-production networks are a survival tool. Small producers join partners across borders. Co-productions share cost and risk. They also widen the market for a film before any platform deal.

EU funds and national bodies often support co-productions. Creative Europe and national institutes offer production and distribution support tied to co-production projects (Smits, 2024). A film co-produced in two or three states can qualify for several national funds. It then gains multiple routes to festivals and buyers.

Co-production also helps with subtitling and rights clearance. These tasks are costly for small teams. Shared budgets make platform licensing feasible. The result is higher availability across regions, even if the film still lacks strong promotion on global streamers (Audiovisual Observatory et al., 2025).

### Policy Impact and Structural Limits

Policy funds affect where films appear online. Grants for subtitling, dubbing, and sales missions make streaming deals easier to secure. Films with such support often get listed on niche platforms. Some also appear on larger SVoDs for limited windows.

These examples illustrate how smaller European film industries engage with streaming platforms under differing policy and market conditions. Portugal offers a clear policy pathway, with ICA grants and SVoD investment rules increasing opportunities for licensing, although placement and promotion remain inconsistent. Producers reported limited marketing support from global streamers (Sampaio, 2025). The film may be available but it may not be easy to find.

Lithuania and the Baltics provide a useful example where national funds and Nordic-Baltic co-op projects have helped local films reach regional platforms. These films often appear on local OTTs or curated services. Global platforms still commission a few originals from the region. Policy supports local presence but does not guarantee front-page promotion (Ibrus, 2019).

## Limits and Trade-offs.

Policy cannot force viewer attention. Public money can fund supply and routes to platforms but it cannot change algorithms or global marketing budgets. Big streamers still push titles that promise large audiences.

At the same time, niche platforms and public support create visible pockets. Curated services and national VoDs can highlight local works. These outlets reach smaller but focused audiences. The trade-off is clear: broader access often means less mass attention.

## Practical Implications.

Policy should target specific barriers. Grants for subtitling and sales work. Funds for festival promotion help to secure platform deals. Co-production schemes spread risk and open markets. Investment obligations from SVoDs add to local budgets. These measures increase the chance that a film is both available and findable.

## Discussion

The intersection of distribution and policy in European cinema reveals a complex dynamic: access to films has broadened, yet audience attention has fragmented. This duality underscores the interdependence of distribution channels and policy frameworks.

## Access Broadened, Attention Fragmented

Streaming platforms have democratised access to a vast array of films, including European productions. Policies such as the EU's Audiovisual Media Services Directive (AVMSD) require that platforms allocate at least 30% of their catalogue to European works and encourage measures to

enhance their prominence. However, implementation varies across member states, and prominence obligations are interpreted and enforced unevenly within platform environments.

Access is not limited to the availability of films within catalogues. It also depends on the audiences' access to the platforms themselves, including awareness of niche services, affordability, and subscription limits. While curated platforms such as MUBI or national VoDs may offer greater visibility per title, their reach is constrained by market size and audience awareness. This introduces further tension within the "access over attention" framework: access may be structurally enabled yet socially limited by platform fragmentation and economic barriers. The sheer volume of available content has led to audience fragmentation. While viewers have more choices, the abundance of options can dilute attention, making it challenging for individual films to stand out. This phenomenon is particularly pronounced for smaller, independent films that may lack the marketing budgets of major productions.

## Interdependence of Distribution and Policy

The relationship between distribution channels and policy is symbiotic. Without robust policy support, streaming platforms may prioritise content that guarantees higher viewership, often sidelining smaller European films. Conversely, without access through streaming platforms, the impact of policy measures is diminished, as films remain inaccessible to audiences.

For instance, the EU's Digital Single Market strategy aims to eliminate barriers to online content access across member states. While this policy facilitates cross-border access, its effectiveness hinges on the willingness of streaming platforms to invest in and promote European content.

## Resilience and Risks

The European film industry's resilience is being tested by the dominance of global streaming giants and shifting audience preferences. While policy measures provide a framework for support, they cannot guarantee success without the active participation of distribution platforms. The risk lies in the potential for policy measures to become mere formalities without tangible outcomes if not accompanied by strategic collaboration between policymakers and distributors.

While access to European cinema has expanded through streaming platforms and supportive policies, the challenge remains of capturing and retaining audience attention. A balanced approach that aligns policy objectives with distribution strategies is essential to ensure the visibility and success of European films in an increasingly crowded digital marketplace.

## Conclusion

This study underscores the critical interplay between distribution channels and policy frameworks in sustaining smaller European cinemas. While streaming platforms have expanded access to diverse content, audience attention has become increasingly fragmented. Policies like the EU's Audiovisual Media Services Directive (AVMSD) mandate that platforms allocate at least 30% of their catalogue to European content and ensure its prominence, aiming to bolster the visibility of European cinema on global platforms. However, the sheer volume of available content can dilute attention, making it challenging for individual films to stand out.

The relationship between distribution and policy is symbiotic. Without robust policy support, streaming platforms may prioritise content that guarantees higher viewership, often sidelining smaller European films. Conversely, without access through streaming platforms, the impact of policy measures

is diminished, as films remain inaccessible to audiences. A balanced approach that aligns policy objectives with distribution strategies is essential to ensure the visibility and success of European films in an increasingly crowded digital marketplace.

The notion of "access over attention" is proposed here as a conceptual distinction that separates formal platform inclusion from effective visibility and audience reach. Existing platform scholarship often treats attention as a scarce resource. This concept instead foregrounds how policy-driven access mechanisms can expand availability. These mechanisms do not address the structural asymmetries that shape how attention is allocated. This distinction helps explain why regulatory inclusion does not necessarily result in cultural circulation or economic sustainability for smaller European cinemas. This distinction does not resolve the structural inequalities of platformised distribution but offers a conceptual lens for understanding why regulatory inclusion and cultural availability do not necessarily translate into sustained visibility or economic viability.

Looking ahead, the challenge lies in balancing global platform dominance with the preservation of local cinematic identities. While global platforms offer unprecedented reach, they also risk overshadowing local narratives. Future policies should focus on fostering partnerships between global platforms and local filmmakers, ensuring that local content is not only accessible but also prominently featured. Platforms-producer partnerships could include AVMSD-based commissioning (direct investments in small-market originals) or co-funding via Creative Europe, mitigating hierarchies through EU-mandated transparency and quotas. This avoids dependency by prioritising non-exclusive licensing and national levy reinvestments, empowering small producers despite bargaining limits.

Further research is needed to conduct empirical audience studies, examining how viewers engage with European films

across different platforms and regions. Understanding audience preferences and behaviours will inform more effective distribution strategies and policy interventions. Additionally, studies on the impact of co-productions and cross-border collaborations can shed light on the dynamics of European film distribution in a globalised market.

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