FILMIN

D1.4.
Policy-oriented roundtable

FILMIN ELEVATE - Elevating EU VOD and European content through innovative and collaborative approaches

Project 101191297

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Creative Europe MEDIA

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Creative Europe MEDIA

Executive summary & dashboard

Project FILMIN_ELEVATE, co-funded by the Creative Europe MEDIA Program of the European Union, organized a series of high-level Policymaker Roundtables between November 2024 and October 2026. The principal objective was to engage public authorities, regulatory bodies, cultural policy experts, independent producers, and youth organizations in direct strategic dialogue concerning the digital, ecological, and social transition of the European Video-on-Demand (VOD) ecosystem.

Core question addressed by Policy Dialogues

What public-policy conditions, regulatory frameworks, and co-funding mechanisms are required to cultivate a diverse, ecologically sustainable, and data-responsible European VOD sector while engaging next-generation audiences?

3	+25	3
Policy Roundtables	Public Authorities	Core Policy Axes

Task 1.3 Proposal Compliance Matrix

Task 1.3 Proposal Commitment	Compliance / evidence	Report Section Link
Execute 3 Policy Roundtables	3 high-level events organized in Palma de Mallorca and Madrid	Section 4 (Event Cards)
Engage Key EU & National Stakeholders	Attended by DG CONNECT (EC), Spanish Ministry of Culture, CNMC, INJUVE, ODA, PATE	Section 1 & Section 4
Publish Policy Signals / Action Plan	Formulated 5 prioritized policy recommendations with impact & timeline matrix.	Section 7 (Prioritized Policy Signals)
Direct Feed into Filmin Manifesto	Findings directly synthesized into the 5 core principles of the Filmin Manifesto.	Section 8 (Link to Manifesto)
Verification & Auditing	Attendance sheets, agendas, presentations, and event photos collected and logged.	Section 4 & Section 9 (Audit Log)

Briefly: Roundtables Dashboard

Roundtable / Theme	Date & Location	Format & Venue	Key Stakeholders Represented	Quantitative Summary
Roundtable 1: Present & Future of European Cinema: Sustainability	August 2, 2025 Palma de Mallorca	In-person Es Baluard	European Commission (DG CONNECT), Mrs.Greenfilm	**28 Participants** 4 EU Countries 12 Organizations
Roundtable 2: AI in European VOD: Young Audiences, Cultural Diversity & IP	April 17, 2026 Madrid	In-person Pérez-Llorca HQ	Ministry of Culture, Ministry of Digital Transformation, CNMC, IP Legal Experts	**35 Participants** 3 EU Countries 16 Organizations
Roundtable 3: Diversity in Fiction and Gen Z: A Love Story?	June 17, 2026 Madrid	In-person Museo del Romanticismo	INJUVE (Youth Institute), ODA (Observatory of Diversity), Producers, Creators & Actors	**32 Participants** 2 EU Countries 14 Organizations

Methodology: Participant selection & moderation framework

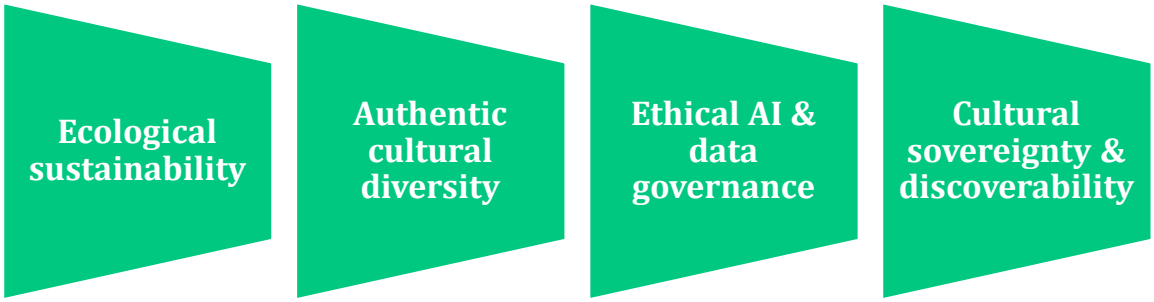
To ensure high-level institutional impact and grounded industry insights, a structured methodology was applied across all three roundtables:

1. **Participant Selection Strategy:** Stakeholders were mapped across four distinct pillars:
    1. Public & Regulatory Authorities (EC, Ministries, CNMC),
    2. Industry & Platform Operators (Filmin, FlixOlé, PATE, Telefónica),
    3. Civil Society & Diversity Coalitions (INJUVE, ODA),
    4. Creative & Gen Z Voices (creators, actors, youth communicators).
2. **Moderation Approach:** Dialogues were conducted under semi-structured moderation using principles to encourage candid, forward-looking policy debates. Each session combined keynote framing presentations with guided roundtable Q&A and policy formulation.
3. **Evidence Collection Governance:** Minutes, attendance rosters, agendas, slide decks, and photographic evidence were systematically recorded per session to form the audit baseline.

Why these dialogues matter?

The European Video-on-Demand (VOD) sector operates at the intersection of a complex triple transition: ecological, digital/technological, and social/demographic. European platforms face systemic competitive pressure from global US-based streaming giants (which command 85% of European SVOD subscriptions) while navigating strict regulatory frameworks, rapid AI disruption, and shifting youth media habits.

FILMIN convened these policymaker roundtables, collaborative policy forums designed to bridge the gap between regulatory legislative design and the operational realities of independent audiovisual platforms. Rather than viewing public policy solely as a compliance burden, these dialogues positioned public authorities as co-architects of European competitiveness.



1. **Ecological sustainability:** Integrating environmental criteria across audiovisual production, digital delivery infrastructure, server hosting, and platform usage without burdening independent operators.

2. **Authentic cultural diversity:** Moving from superficial tokenism toward structural inclusion in funding, screen representation, behind-the-scenes creative leadership, and socioeconomic accessibility for Gen Z.

3. **Ethical AI & data governance:** Establishing legal clarity around AI training, copyright preservation, ethical algorithm design, and transparent data sovereignty to foster European competitiveness.

4. **Cultural sovereignty & discoverability:** Ensuring cross-border circulation of European works within an "attention economy" dominated by viral social algorithms, requiring data-driven marketing, IP exploitation, and public-private co-financing.

Strategic mandate: Public authorities and VOD platforms must move beyond reactive regulation toward proactive, evidence-based policy design that equips independent operators with the digital tools, sustainable infrastructure, and inclusive frameworks necessary to thrive in a globalized market.

Event cards

Roundtable 1:
Present & future of European cinema — sustainability

Date & Location	August 2, 2025 Es Baluard Museu d'Art Contemporani, Palma de Mallorca
Co-organizers & Context	Organized as part of Manifestival / Atlàntida Mallorca Film Fest with MEDIA support
Key speakers	• **Lucía Recalde** (Deputy Director & Head of Unit, DG CONNECT, European Commission) • **Paloma Andrés Urrutia** (Co-founder & Sustainability Consultant at Mrs. Greenfilm) • **Jaume Ripoll Vaquer** (Co-founder & Editorial Director at Filmin)
Core Policy questions	1. How can the Creative Europe MEDIA programme evolve its 360º support structure to bolster VOD competitiveness against global tech platforms? 2. What is the true environmental footprint of digital streaming, server infrastructure, and AI deployment, and how can the sector prevent "greenwashing"? 3. How can data, audience research, and targeted marketing increase the cross-border circulation and discoverability of European independent films?
Key takeaways & signals	• MEDIA budget expanded to €2.5B (2021-2027), targeting a 360º ecosystem approach. • Sustainability is both ecological and economic: 'Without a planet, there is no cinema.' • AI data centre cooling and server energy present hidden carbon footprints. • Overcoming global platform dominance requires data-driven marketing and IP windowing.
Supporting evidence	Annex 1: Roundtable 1. Sustainability

Key quote — Lucía Recalde (European Commission)

"Filmin is one of the crown jewels of the MEDIA program—a project Brussels believed in 17 years ago. Our 360º strategy ensures European productions travel across borders, fostering societal resilience through cultural diversity."

Roundtable 2:
AI in European VOD — Young audiences, cultural diversity & IP

Date & Location	April 17, 2026 Pérez-Llorca Headquarters, Madrid
Co-organizers & Context	Policy summit organized by Filmin in partnership with Pérez-Llorca Legal Advisors and MEDIA support
Key speakers	• **Carmen Páez** (Secretary of Culture, Ministry of Culture of Spain) • **Gema del Castillo** (Writer, Communicator & Gen Z) • **Fabia Buenaventura** (General Director, PATE - Independent Producers) • **Andy Ramos** (Partner IP/IT, Pérez-Llorca) • **Other Participants:** CNMC, Ministry of Digital Transformation, Telefónica, FlixOlé, MOD Producciones, Filmin.
Core Policy questions	1. How can policy balance AI efficiencies against strict copyright enforcement and human creative authorship? 2. How do material living conditions (housing precarity, smartphone-first viewing) dictate youth cultural access? 3. What public interventions (e.g., Cultural Vouchers, Cine Escuela) effectively reconnect youth with film heritage?
Key takeaways & signals	• Youth cultural consumption is growing via gaming, reading, and music, but digital cost is a major barrier. • Material reality: 85% of Spanish youth live in shared flats without TVs, consuming on laptops/mobiles. • Copyright protection requires human creative authorship; AI-generated works lack exclusive IP rights. • Public policy must combat 'territorial breaches' and support curated, high-integrity platforms.
Supporting evidence	Annex 2. Roundtable 2. AI, Data, IP Photos, Videos and Recordings 2 Interviews in Google Forms and 7 questionnaires in Google Forms

Key quote — Carmen Páez (Subsecretary of Culture)

"Young people are driving cultural consumption, but they face severe economic and territorial barriers. AI adoption in VOD must be supervised, fair, and sustainable to ensure datasets do not reinforce biases or erase European creative labour."

Roundtable 3:
Diversity in fiction and Gen Z — A Love story?

Date & Location	June 17, 2026 Museo del Romanticismo, Madrid
Co-organizers & Context	Co-organized with ODA (Observatory of Diversity in Audiovisual Media) and INJUVE, and with the support of MEDIA.
Key speakers	• **Margarita del Cisne Guerrero Calderón** (General Director, INJUVE) • **Paula Serna Arranz** (Research Lead, ODA - Observatory of Diversity) • **Samantha Hudson** (Artist, Actress & Activist) • **Cristina Rocamora Ardèvol** (Elastica Films) • **Ouyang Zhu** (Digital Content Creator & Influencer) • **Pilar Toro Trujillo** (CMO, Filmin)
Core Policy questions	1. Why does commercial youth fiction consistently rely on hypersexualized tropes and punitive "screen moral panics"? 2. How can the audiovisual industry move past tokenistic "pinkwashing" toward structural, politically honest representation? 3. What impact does platform algorithmic fragmentation have on youth loneliness and cinema attendance?
Key takeaways & signals	• ODA/INJUVE data reveals Gen Z is the most diverse generation, yet TV fiction remains conservative. • Female youth presence is inflated by hyper sexualization, dropping sharply with age. • Screens are demonized by 'moral panics' in fiction, ignoring digital spaces as lifelines for marginalized youth. • True diversity requires funding working-class youth behind the camera.
Supporting evidence	Annex 3. Roundtable 3. Diversity & Gen Z Photos and Recordings 1 Interview in Google Forms and 3 questionnaires in Google Forms

Key quote — Samantha Hudson (Artist & Activist)

"The industry loves sanitized, non-threatening caricatures of diversity. But real inclusion isn't a corporate checklist or a token character—it's breaking socioeconomic class barriers so working-class queer youth can write and direct their own stories."

Thematic synthesis of Policy Debates

Theme A: Authentic diversity & youth inclusion

The debates dismantled prevailing stereotypes regarding Gen Z cultural disengagement. Institutional research presented by INJUVE and ODA demonstrated that Gen Z represents the most diverse, multicultural, and inclusive cohort in European history. However, commercial television and film remain heavily conservative, relying on homogenized tropes.

Socioeconomic & gender distortions:

While young women appear frequently on screen, this visibility is driven by normative hyper sexualization and drops precipitously as actresses age out of youth brackets. Furthermore, screen narratives often demonize digital technology through punitive moral panics, ignoring how online spaces serve as lifelines for marginalized youth.

Behind-the-camera class barriers:

Tokenistic 'pinkwashing' strips diverse characters of political friction. Public funding policies must shift toward subsidizing underrepresented and working-class creators behind the camera as writers, directors, and producers.

Theme B: Ecological sustainability in the VOD ecosystem

The roundtable discussions highlighted that environmental sustainability in the audiovisual sector extends far beyond physical set production to encompass digital infrastructure, streaming servers, and cloud computing.

The double focus of sustainability:

Platforms and producers must evaluate both the messages conveyed in content and the environmental impact of producing and distributing that content. While cloud technologies enable paperless workflows, AI model execution and server cooling consume vast water and energy resources.

Avoiding greenwashing: Public subsidies must avoid incentivizing 'greenwashing.' Carbon offset programs should be paired with verified reductions in data transfer emissions and local server efficiencies.

Theme C: Ethical AI governance & Intellectual Property

AI integration across scriptwriting, subtitling, dubbing, and recommendation algorithms presents transformative efficiencies alongside severe legal and ethical risks.

Human authorship & Copyright protection:

Legal experts at Pérez-Llorca confirmed that fully AI-generated content does not qualify for copyright protection under European law. Human creative intervention remains mandatory for legal authorship.

Algorithmic bias & data sovereignty:

Unchecked AI models risk amplifying dataset biases and exploiting unauthorized creative IP. Public policy must enforce transparent training data disclosures and ensure AI acts as an assistant rather than a replacement for human talent.

Theme D: Digital competitiveness & discoverability

Independent European VOD platforms face an asymmetric market dominated by global US tech giants (Google, Meta, Netflix, Amazon, Disney).

From volume to curation:

In an era of hyper-fragmentation and algorithm fatigue, younger audiences increasingly seek curated, high-integrity platforms that foster genuine community rather than infinite scrolling.

Public marketing & promotion support:

Public support programs must allocate funding beyond physical production to support data-driven marketing, promotional algorithms, and targeted discoverability for European independent films

What we heard: Voices from the Policy Dialogue

A consolidated compilation of direct perspectives shared by public authorities, creators, legal experts, and platform leaders during the roundtables:

> *"The MEDIA program is a 360º shield for European cinema. Filmin is one of the jewels in our crown—proving that European platforms can achieve scale when backed by sustained public conviction."*
>
> — Lucía Recalde, DG CONNECT, European Commission

> *"Without a planet, there is no cinema. The audiovisual sector has an unmatched ability to shape culture, but it must audit its own digital and production environmental footprints with absolute rigor."*
>
> — Paloma Andrés Urrutia, MRS. Greenfilm

> *"Young people are not abandoning culture; they are abandoning inaccessible pricing and paternalistic storytelling. Only 15% of Spanish youth can live independently—subscription models must reflect their material reality."*
>
> — Gema del Castillo, Communicator & Gen Z Advocate

> *"Inclusion is regularly sanitized into sterile corporate pinkwashing to protect box office returns. True representation requires honouring non-normative, submissive, and politically complex lives."*
>
> — Samantha Hudson, Cultural Creator & Actress

> *"AI is a powerful operational tool, but copyright requires human creative authorship. We must ensure that European creators retain full rights and that AI training respects IP laws."*
>
> — Andy Ramos, Partner, Pérez-Llorca

> *"Video games are booming because youth demand participation over passive viewing. European VOD must evolve from static storytelling into interactive, community-driven 'story living."*
>
> — Carmen Páez, Subsecretary of Culture, Spain

Policy signals for the European VOD ecosystem

Synthesizing the rich debates across the 3 roundtables, five practical policy signals emerge to guide regulatory authorities and independent VOD operators:

1. **Democratize creative access behind the camera:**
   Establish dedicated public funding grants, mentorship tracks, and production stipends targeted specifically at working-class, LGBTQ+, and minority youth creators to ensure authentic storytelling and dismantle class barriers in European cinema.
   Target Policy Level: National Ministries & Regional Film Funds
   Expected Impact: High (Structural Change)

2. **Mandate transparent AI & Copyright safeguards:**
   Implement strict transparency requirements for AI training datasets, enforce human creative authorship standards for copyright eligibility, and subsidize ethical, locally hosted AI models (e.g., Whisper fine-tuning) for independent VOD localization.
   Target Policy Level: European Commission (EU AI Act Execution) & National Authorities
   Expected Impact: High (Legal Protection)

3. **Embed eco-calculators into digital distribution funding:**
   Expand Creative Europe MEDIA sustainability requirements beyond physical filming to include digital infrastructure—rewarding VOD platforms that optimize server energy efficiency, utilize local green hosting, and reduce data streaming footprints.
   Target Policy Level: Creative Europe MEDIA & EACEA
   Expected Impact: Medium-High (Environmental)

4. **Rebalance public support toward marketing & discoverability:**
   Shift public funding models from exclusive focus on production toward post-production discoverability, AI-enhanced recommendation engines, and targeted micro-marketing campaigns to ensure European works reach young audiences.
   Target Policy Level: Creative Europe MEDIA & National Film Institutes
   Expected Impact: High (Economic Viability)

5. **Expand youth access mechanisms & co-funding models:**
   Scale public cultural pass initiatives (such as Spain's Cultural Youth Voucher / Bono Cultural Joven) across EU member states while encouraging public-private hybrid funding models that combine public support with local platform innovation.
   Target Policy Level: EU Member State Cultural Ministries
   Expected Impact: Medium (Audience Building)

Direct link to the Manifesto

The outcomes and consensus derived from these three policymaker roundtables directly inform the foundational principles of Filmin Manifesto. The Manifesto translates these policy insights into concrete commitments for European VOD platforms:

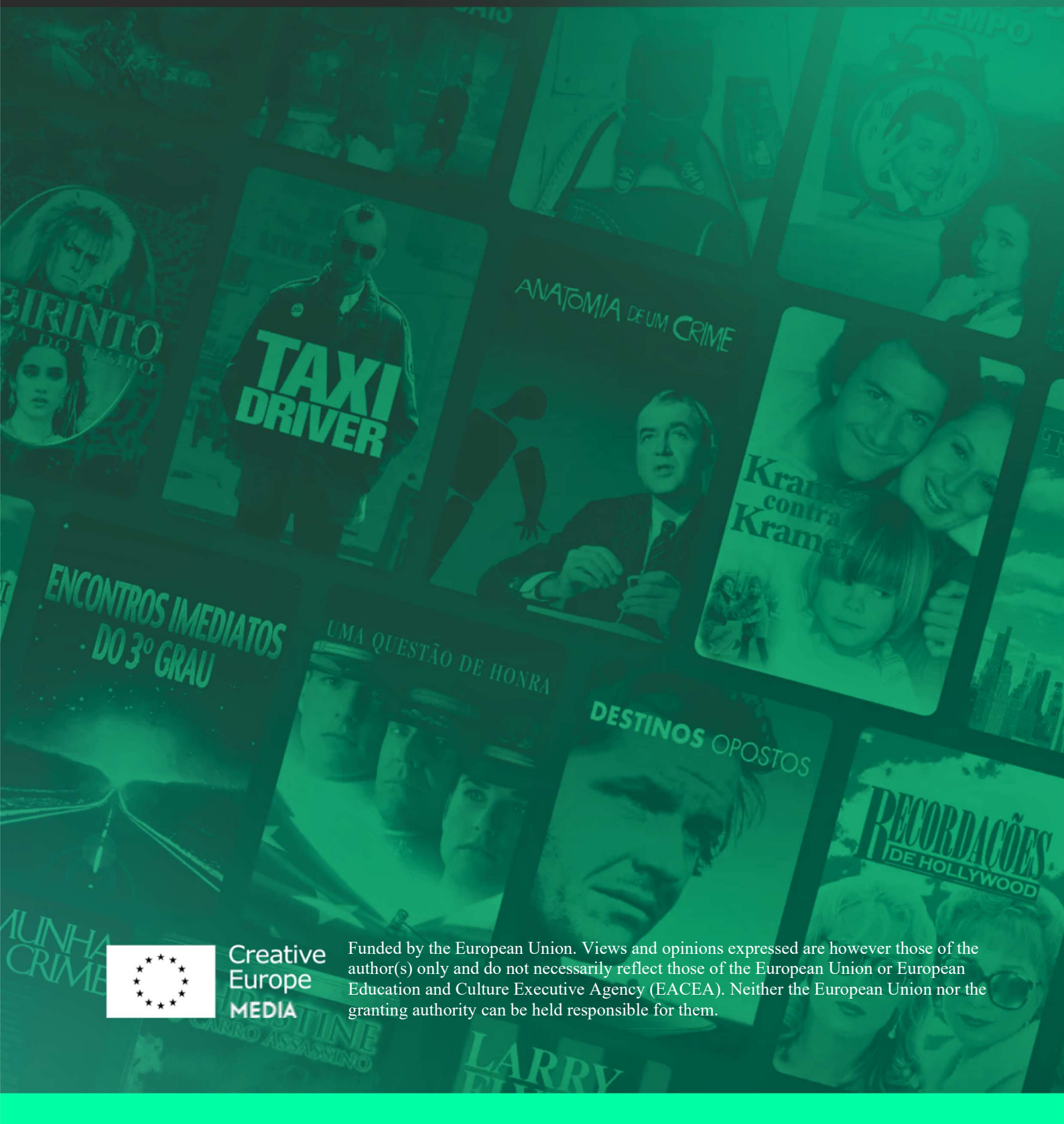
- **Principle 1: Cultural integrity over algorithmic impermanence:** Commitment to human-curated catalogues that preserve European film heritage against disposable content cycles.
- **Principle 2: Structural diversity & anti-tokenism**: Active collaboration with independent creators and diverse advocacy groups to reflect real societal plurality.
- **Principle 3: Responsible AI & intellectual property defence:** Ethical deployment of AI strictly as an efficiency assistant with complete respect for human creative authorship.
- **Principle 4: Green streaming & infrastructure efficiency:** Optimization of platform delivery systems to minimize carbon emissions and technological waste.
- **Principle 5: Cross-Border European solidarity:** Shared knowledge transfer and joint technology experimentation across independent European platforms.

Evidence annex & Audit log

To verify the execution and institutional attendance of the policymaker roundtables, the following administrative audit log is provided:

Roundtable	Date & Location	Institutions & Authorities Attending	Documentation & Proofs
Roundtable 1: Sustainability	August 2, 2025 Palma de Mallorca	European Commission (DG CONNECT / MEDIA Unit), Mrs. Greenfilm, Atlàntida Mallorca Film Fest	Minutes, Attendance Log, Event Photos
Roundtable 2: AI, Data & IP	April 17, 2026 Madrid	Ministry of Culture, Ministry of Digital Transformation, CNMC, PATE, Pérez-Llorca, FlixOlé, MOD	Minutes, Attendance Log, Event Photos
Roundtable 3: Diversity & Gen Z	June 17, 2026 Madrid	INJUVE (Ministry of Youth & Social Rights), ODA Observatory, Elastica Films, Museo del Romanticismo	Minutes, Attendance Log, Event Photos

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