

"A NEW EUROPE MUST EMERGE":

Power

RETHINKING

People

Pipelinas

IN
EUROPEAN
CINEMA

ARTEF THINK TANK REPORT 2026

A NEW EUROPE MUST EMERGE

Rethinking Power, People and Pipelines in European Cinema

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EXECUTIVE SUMMARY

The Anti-Racism Think Tank for European Film (ARTEF) was founded in 2020 as part of a global wave of collective consciousness following the murder of George Floyd. Institutions across sectors were prompted to examine their structures to ensure racial inclusivity.

Five years later, while many high-profile DEI (Diversity, Equity, and Inclusion¹) initiatives have been consolidated or eliminated, the fundamental challenges of diversity and inclusion in the European film industry persist. Technology continues to disrupt the sector and the traditional routes to market are evolving. In times of crisis, stakeholders become more risk averse and default to tried and tested formulas.

At the same time, in the 2025 State of the Union Address, European Commission President Ursula von der Leyen declared, "a new Europe must emerge," emphasising a need for European independence, unity, and strength to face global challenges. She framed this as Europe's "Independence Moment," urging collective action to secure its future against a challenging world.

ARTEF reflected on this statement through a series of think tanks in 2025 and asked: what does a new Europe emerging mean within the specific context of the European cinema business, to safeguard its independence and secure its future in an evolving screen world?

The research examined the film industry's foundational structures, recognising that these were created approximately 70 years ago and remain largely in place.

This report presents findings from the think tanks and consultations conducted across the European film value chain in 2025 with stakeholders from all segments. The think tanks documented in this report are deliberate, cross-sector spaces where different forms of power are engaged in transparent, constructive problem-solving. The recommendations offered here are intended as starting points for structural reform: collaborative, evidence-based and respectful.

The findings highlight collated perceptions from practitioners across the value chain, where structural reform may be needed and offer recommendations for funders, festivals, trade press and other industry stakeholders across the value chain.

We want to thank BFI Inclusion for supporting our London Think Tank in 2025, Göteborg Film Festival for hosting our launch and results presentation as well as all the participants who took part and shared their insights with us.

¹ See for example: UN Global Impact (no date) Diversity, Equity and Inclusion.
<https://unglobalcompact.org/take-action/action/dei>

KEY FINDINGS

The industry operates in a climate of fear, scarcity and pressure. Budget cuts, technological disruption, dominance of streamers and economic instability have created risk aversion at all levels of the value chain. In times of crisis, stakeholders default to tried and tested formulas rather than taking chances on new voices or unfamiliar narratives.

Power remains concentrated in the same structures. Festivals, funders, sales agents and established production companies continue to determine which careers accelerate, which films travel and what constitutes the 'European canon'. These gatekeepers, while often well-intentioned, reproduce patterns that inadvertently favour familiar profiles and established relationships, creating an unofficial pipeline that practitioners aspire towards, which is increasingly cluttered.

Film schools are the start of the pipeline. Across all discussions, the influence of film schools emerged as significant. Film schools are where networks are built, perceptions of what European narratives look like are formed, and routes to market are first introduced. They shape not only technical skills but also aesthetic sensibilities and professional networks that persist throughout careers.

There is a disconnect across the value chain. While the different players of the value chain are interlinked and look to each other for signals, they rarely engage with each other in practice or discuss their practices openly. Each segment operates in its own silo, assuming that others are making informed decisions.

There is an inadvertent lack of transparency throughout the system. From funding decisions to festival programming to trade press coverage and award longlists and shortlists, key stakeholders across the value chain work independently and do not always actively interrogate how decisions are made within the various segments. Yet they rely on these decisions, nonetheless, creating a circular system that reinforces existing patterns.

There can be diversity without inclusion. There is an awareness of the lack of racial diversity at all levels and, since 2020, a louder acknowledgement that this should change. In practice, however, this often translates to having different faces but retaining similar practices. True inclusion requires not just presence, but power, voice and influence in decision-making.

Diverse stories are funded, but ownership remains predominantly white. On-screen diversity is being used as a smokescreen for structural change. The same production companies are repeatedly funded to tell diverse stories, while Black and Global Majority producers are often attached as executives or associate producers in an 'identity service' role, providing cultural legitimacy without having ownership or creative control. Unfavourable working conditions and lack of transparency around contractual terms were also cited.

Stories from Black and Global Majority filmmakers are perceived as 'political' and 'risky'. Commissioning executives often question the authenticity of lived experiences that do not conform to expected narratives. Stories that do not fit recognisable patterns of 'migrant cinema' or 'crisis narratives' struggle to be understood within existing frameworks.

KEY RECOMMENDATIONS FOR THE INDUSTRY COLLECTIVELY

- Reframe conversations about representation to focus beyond on-screen visibility and interrogate inclusion in all segments of the value chain and at all levels of seniority.
- Rethink cultural definitions of success and the traditional routes to market. The current system was developed over seventy years ago and, whilst revolutionary at the time, may need to evolve to better serve practitioners and audiences today.
- Map and track the impact of diversity initiatives on participants and the industry as a whole, paying careful consideration to the nuanced differences between diversity in participation and inclusion in decision-making and power sharing.
- Recognise that terminology like 'racialised minorities', 'BIPOC', 'BAME' 'People of colour' 'Ethnic Minority' 'Minority Ethnic', while a useful shorthand, aggregates multiple racial identities which do not always face the same challenges. Intersectionality within specific communities must also be considered in any conversation about racial equality.
- Industry stakeholders should engage with film schools to encourage diversification of faculty, curriculum and student recruitment, recognising that change at this foundational level can have long-term impact across the entire ecosystem.
- Support niche circuits already doing the work of discovery and engaging with practitioners and audiences that mainstream institutions are not reaching.
- While it is efficient to use existing organisations to curate panels and supply mentors or trainers for programmes and talent, consider that these networks may also have their own taste and if you are simply endorsing their gatekeeping. Diversify sources.
- Create intentional interventions that plug the identified gaps, ideally through open calls with transparency on how selections are made followed by audits on impact.

OBJECTIVES

This research programme was designed to gather insights from practitioners across the value chain about their experience of working in the film industry in order to:

1. Examine how European cinema's foundational structures shape business practices today.
2. Interrogate whether these structures serve Europe today as effectively as when they were first introduced.
3. Identify barriers to entry, retention and progression for practitioners and audiences from underrepresented backgrounds, specifically racialised minorities.
4. Develop actionable recommendations for structural reform.
5. Propose areas for further research.

METHODOLOGY

Approach

ARTEF's strategy, launched at Göteborg Film Festival 2025, centres on think tanks that bring together practitioners and policymakers to explore structural barriers and develop collaborative, solution-driven approaches.

The research was deliberately cross-sectoral, bringing together different forms of power within the industry to engage in transparent, constructive problem-solving. For this report, 'Europe' was defined geographically rather than through political organisation, recognising that Europe includes countries with different histories, demographics, languages and political contexts.

Think Tank Structure

Stakeholders from around Europe engaged in discussions, drawing from their practice and country-specific experience across four themed think tanks:

- **Development: What defines a European story?** Examining narratives supported by national and pan-European film funds and whether they reflect the diversity of lived experiences in Europe today.
- **Film Funds: Who owns European stories?** Analysing intellectual property ownership and market access for European stories funded with European public funds.
- **Film Marketing: The role of trade press.** Investigating how trade press shapes or limits films' success trajectories and how decisions are made on who or what is featured, in order to ascertain knowledge gaps.
- **Film Festivals and Awards: Barriers and pipelines.** Evaluating curatorial practices in reflecting Europe's cultural diversity and examining which films are ultimately presented to and celebrated with the European public as European.

Data Collection

Data was collected through in-person group sessions at London Film Festival with the support of BFI Inclusion, online group sessions and individual interviews with practitioners across the European film value chain in 2025.

The participants remain anonymous in this report in order to ensure privacy, openness and honesty in how knowledge was shared.

Special Considerations

Europe is vast. Demographics differ significantly between countries, as do the language used and approaches to diversity and inclusion.

Race and identity in Europe are a complex web and Western Europe has long dominated the output of European cinema. Deliberate interventions have been made from pan-European film funds, for example to boost output from countries considered low-capacity producing countries. Therefore, this report acknowledges that across Europe, whiteness does not guarantee advantage, but intentionally focuses on racial equality in accordance with ARTEF's founding mission.

While catch-all terms such as BIPOC (Black, Indigenous and People of Colour), people of colour, ethnic minority and racialised minorities are used by institutions, it is important to note the following:

- There is significant racial diversity within these groups.
- The dominant racial minority groups in different European countries vary considerably.
- Non-white populations do not necessarily see themselves as being part of a collective racial minority group.
- Being a racialised minority does not automatically mean an absence of inter-community prejudices and visibility of one group may not necessarily be seen as representative of all.
- Similarly, intra-community prejudices exist due to differing attitudes towards other factors such as gender, sexuality, disability or religion and intersectionality must be considered in conversations about race and representation.
- In some countries, collecting demographic data is legally restricted, making it difficult to quantify systemic issues.

Therefore, the findings in this report are indicative rather than exhaustive and also highlight areas for further research. We use the term Black and Global Majority in this report as developed by Rosemary Campbell-Stephens MBE².

² Campbell-Stevens defines the term in the following way: "Global Majority is a collective term. It refers to people who identify as Black, African, Asian, Brown, Arab, mixed-heritage, are indigenous to the global south, and/or, have been routinely racialised as 'ethnic-minorities'. Globally, these groups currently represent approximately eighty-five per cent (85%) of the world's population making them the global majority now." In this report, we also include indigenous people of the North. Read more: Rosemary Campbell-Stevens (2020) Global Majority: Decolonising the Language and Reframing the Conversation about Race. <https://www.leedsbeckett.ac.uk/-/media/files/schools/school-of-education/final-leeds-beckett-1102-global-majority.pdf>

CONTEXT: THE ARCHITECTURE OF EUROPEAN CINEMA

Why History Matters

Understanding the origins of European cinema's institutional framework provides essential context for this research. These structures were not neutral. They are largely publicly funded, were shaped by specific political objectives and reflect the Europe of their time.

The Film Festival System

The film festival system, an important pipeline to market entry today, started with the **Venice Film Festival (1932)**, which had fascist propaganda objectives alongside promoting cinema culture³. The second major festival, **Cannes Film Festival (1946)**, emerged as a response to fascism⁴, though it also reflected colonial France and Cold War politics. **Berlinale (1951)** started in West Berlin as a Cold War project, with earlier editions funded by the US Army⁵.

Subsequent film festivals almost always launched with a political purpose. To date, as part of this research, approximately 10,000 film festivals were identified globally, with approximately 3,200 existing in Europe.

Public Funds and Co-Production Treaties

Most European public film funds were established 60 to 70 years ago, starting with the CNC (Centre national du cinéma et de l'image animée) in France in 1946⁶.

Co-production treaties followed, supported by frameworks including the European Convention on Cinematographic Co-Production, Council of Europe agreements, bilateral treaties and Creative Europe⁷.

These instruments were innovative back then, post-World War II, and their founding objectives were to rebuild national identity, protect language and culture, guard against Hollywood dominance and promote European cooperation. Notably, these frameworks were built for a Europe that was pre-Schengen, pre-EU expansion, pre-digital technology, pre-internet and pre-streaming.

³ Christel Taillibert & John Wäfler (2016) Groundwork for a (pre)history of film festivals, *New Review of Film and Television Studies*, 14(1), 5-21. doi: 10.1080/17400309.2015.1106688

⁴ Festival de Cannes (no date) The History of the Festival.
<https://www.festival-cannes.com/en/the-festival/the-history-of-the-festival/>

⁵ Heide Fehrenbach (2020) The Berlin International Film Festival: between cold war politics and postwar reorientation, *Studies in European Cinema*, 17(2), 81–96. doi: 10.1080/17411548.2019.1631533.

⁶ CNC (no date) About Us. <https://www.cnc.fr/web/en/about>

⁷ See for example: Council of Europe Convention on Cinematographic Co-production (2017)
<https://www.coe.int/en/web/culture-and-heritage/cinematographic-coproduction>

Demographic Change

Immediately after World War II, when labour shortages were severe and economies needed rebuilding, European countries began recruiting workers from their colonies, former colonies and other territories.

The major migration recruitment waves happened from the late 1940s through the 1970s, though each country had its own policies and terminology⁸. These programmes included, but are not limited to:

- **UK's Windrush Generation (from c. 1948):** Workers recruited from Caribbean countries to fill post-war labour shortages
- **Germany's Gastarbeiter programme (c. 1955 to 1973):** 'Guest worker' recruitment from Turkey, Italy, Greece and other countries
- **France's postwar travailleurs immigrés system (from c. 1946):** Workers recruited from North Africa and former colonies
- **Belgium's mine and industrial labour agreements (from c. 1946):** Workers recruited primarily from Italy, Morocco and Turkey
- **Netherlands' postcolonial and contract labour schemes (1950s to 1970s):** Workers from Suriname, Indonesia and the Dutch Antilles
- **Sweden's labour migration programme (1950s to 1970s):** Workers recruited from Finland, Yugoslavia and Southern Europe

This is significant because those workers, who arrived as young adults, the average age of approximately 20, would today be at least 80 years old. Their descendants are now second, third and fourth generation Europeans: citizens by birth, culture and citizenship. Their lived experiences constitute European stories, and their tastes should form a part of what is considered as the European audience for cinema.

It is also important to note that non-white populations existed in Europe prior to this period, and new entrants to European countries from within and outside Europe continue to arrive.

These origin stories matter because institutions inherit the politics of their founding moments. The curatorial and funding frameworks established 70 years ago for a Europe that had a predominantly white population, remain largely intact today. Yet, Europe has expanded, diversified, digitised and globalised.

Is it time for a new European film business infrastructure to emerge?

⁸ Ahmet Akgündüz (2012) Guest worker migration in post-war Europe (1946-1974): an analytical appraisal. In M. Martiniello & J. Rath (Eds.), *An introduction to international migration studies: European perspectives* (pp. 181-209). (IMISCOE textbooks; No. 2). Amsterdam University Press.

DEFINING SUCCESS IN EUROPEAN CINEMA

Across the conversations, practitioners largely defined success through a pipeline that, while not codified in law, has become the de facto route to making films in Europe. This pipeline typically follows these stages:

- Authors attach producers (production companies)
- Apply for development funds from public funders
- Develop projects through labs and markets
- Secure coverage in trade press at every stage
- Attach cast and crew
- Secure production funding (public funds, broadcaster presales, tax credits, debt financing and rarely private equity)
- Selection at award-qualifying festivals
- Recognition through awards (notably national awards, European Film Awards, BIFA, BAFTA, Oscars)

Participants from across the value chain highlighted talent launched, funding secured from public funders, selection at film markets, selection at development labs, festival selection and award nominations as proof of ability and demarcation of success.

At every stage, securing a feature in the key trade press was seen as a good gauge of progress and marker of success. The most frequently mentioned trade publications were Screen Daily, Variety, Deadline, Cineuropa and Hollywood Reporter.

While notable examples outside of this pipeline were mentioned (e.g. webseries, building audiences online), the overall impression was that this was the accepted definition and route to success and emerging producers aspired towards this route. Notably, reaching consumer audiences and achieving a profitable return on investment was not cited as a primary marker of success.

The Pipeline

The following illustrates the typical journey of a European film through the industry pipeline, with trade press playing a consistent role at each stage:

Idea → Producer → Development Funding/Development Lab (eligibility often asks: have you made a film that has screened at a qualifying film festival?) → *Trade Press coverage*

Script → Package → Trade Press coverage

Public Funder Production Funding/Production Lab (eligibility often asks: have you made a film that has screened at a qualifying film festival?) → **Tax Credits** → *Trade Press coverage*

Film Festivals → Exhibition → Trade Press review (genius or flop: who decides?)

Sales Agent → Trade Press coverage (no sales, no press)

Distribution → Trade Press coverage (no distribution, no press)

Awards → Trade Press coverage (no awards, no press)

Next film, if you are lucky!

FINDINGS

Development: What defines a European Story?

- Ultimately, there is a fundamental question to be answered: what, or who, is considered European considering the continent's racial makeup today? This is critical because public film funds are set up to support European narratives. If the definition of 'European' is not linked to present demographics, then the stories funded will not reflect the Europe that exists today.
- European identity is crucial in stories funded by public bodies, often valued for cultural significance rather than commercial appeal. While this is welcome and public funders are seen as risk-takers compared to private investors, there appears to be a narrow definition of what qualifies as a European story. Stories that do not fit established patterns of what European cinema 'looks like' face additional barriers.
- Perceptions of what constitutes a European narrative are shaped early. Participants who are racialised minorities and attended leading film schools felt that the faculty was often predominantly white with similar tastes, influencing pedagogy. The canon of 'great European cinema' taught in these institutions often excludes or marginalises films by and about Global Majority people. Where there is racial diversity on screen, viewing texts sometimes reinforced negative stereotypes and subjectivity in taste that, while not intentional, created visible narrative gaps for students with different cultural reference points.
- Development executives in public funds are rarely from racialised minority backgrounds. While well-intentioned, development efforts often focus on shaping stories to match known patterns and themes. Some writers and producers from racialised backgrounds often feel compelled to accept recommendations rather than challenge them, for fear of being labelled 'difficult' or marginalised as a result.
- Volunteer juries and selection committees are usually unpaid, meaning not everyone has the privilege of participating. Furthermore, these committees are often selecting narratives that have already been shortlisted by development executives who may have unconscious bias, due to the subjectivity of taste, limiting the range of perspectives at each stage of the process.
- Development labs have increasingly become an unofficial requirement for projects to be validated, yet attendance is costly and unpaid, which makes them inaccessible to some. Furthermore, participation in development labs is not a guarantee of success, as decision-makers, tutors and mentors are often overlapping across programmes, reflecting the same taste patterns and potentially creating an echo chamber.
- Trade press highlights of European narratives selected by labs or funders often centre known practitioners, creating a visibility gap for emerging voices and reinforcing existing hierarchies.

- Nationality in cinema is also funding dependent. European public funders fund stories from the Global South which then qualify as European narratives even if set abroad, which has given the continent a positive endorsement as an avid backer of world cinema. However, as a counterpoint, the prevalence of world cinema as European films masks the lack of racially diverse narratives from within Europe itself.
- Racially diverse narratives from within Europe largely fall into 'migrant cinema' which has increasingly become a recognised category, but tends to focus on arrival, integration or crisis narratives. These stories, while valid and important, represent only a fraction of the experiences of Europeans of colour and increase the danger of perpetuating the single story⁹.
- Europeans of colour who are not recent migrants do not see their lived experiences reflected in funded narratives. Second, third and fourth generation Europeans often find that stories about their everyday lives, relationships, ambitions and experiences are not visible as 'European stories' within existing funding frameworks.

Film Finance: Who Owns European Stories?

- Funding largely dictates ownership of European stories. As funding is awarded to production companies, intellectual property ownership is dominated by a few established companies, even while there is an increasing number of diverse narratives on screen. This means that economic benefits flow to the same entities regardless of whose stories are being told.
- It is fair that funders expect a production company to have a track record. However, without opportunity, you cannot build a track record. Therefore, most Global Majority descent-led companies struggle to compete effectively, with most participants maintaining full-time jobs and self-funding their slate of projects.
- Whilst everyone acknowledged that investments are generally risky and films struggle to compete in the marketplace, Global Majority practitioners felt there were limited opportunities to grow or fail up¹⁰.
- Global Majority-led production companies are more likely to embrace online platforms and emerging technologies, or work from an audience-first approach. However, this appears to be largely to demonstrate their worth and enter what is seen as the approved pipeline, instead of building sustainable business models. A few examples were mentioned of filmmakers who established success online or self-funded films, but they subsequently abandoned these innovative models after securing traditional commissions. The resulting impression is that producers from these backgrounds must make excessive effort compared to their white counterparts to be seen as capable.

⁹ See: Chimamanda Ngozi Adichie (2009) The danger of a single story.
https://www.ted.com/talks/chimamanda Ngozi Adichie_the_danger_of_a_single_story

¹⁰ To fail up means to progress in your career despite mediocrity or mistakes. See for example: Zulekha Nathoo (2021) 'Failing Up.' BBC. <https://www.bbc.co.uk/worklife/article/20210226-failing-up-why-some-climb-the-ladder-despite-mediocrity>

- A significant number of practitioners from racialised minority backgrounds admitted having either stopped or never applied to traditional funds due to confirmation bias¹¹ from peers. This presents a complex situation: film funds are accused of not being representative by people who have never applied, or who have been discouraged from trying with new projects because of previous experiences with specific executives, which are then used to define the character of the fund.
- Letters of intent from sales agents or distributors are often a requirement from film funds during the application process, but these are harder for newer entrants to secure without access to established relationships. A common problem is that some sales agents and distributors ask for evidence of public funder support as a marker of the likelihood for the film to receive support for its route to market further down the line, creating a chicken-and-egg situation.
- Short films are still seen as proof of ability to produce feature fiction films, despite the proliferation of other content forms across platforms that, unlike short films, directly interface with and aggregate significant audience reach. This narrow definition of 'track record' excludes producers who have demonstrated success through other formats.
- Global Majority-led production companies are more likely to be set up by multihyphenates (writer-directors, actor-producers) to develop their projects, but these producing ventures are more of a felt necessity than a passion to produce. However, this often conflicts with a system that values the auteur approach and sees creatives as separate from the business side.
- It is possible to partner with established companies that have relationships and track records that the pipeline understands and film funds often matchmake authors with their preferred production companies. However, this can mean being a lone voice in a space that introduces a power imbalance and cultural disconnect from the narratives that can sometimes be strenuous.
- Sweat equity and unpaid development time, which solo independent producers invest to develop their projects, can go unrecognised by larger players that subsequently incubate projects. Years of work building a project can be diminished when a more established company comes on board. Their proximity to power means that unfair contracts are often accepted without disclosure of discomfort.
- The idea that diverse narratives are more likely to be funded post-2020 gave rise to a trend of white-led production companies increasing 'loan out' or producer-for-hire arrangements, where producers from the respective ethnic background that the story world explores are brought in on a paid basis. This serves the qualified perspective awareness; however, questions were raised as to why the funding system does not create targeted interventions for

¹¹ Confirmation bias is a psychological term to describe the tendency to seek and process information that confirms our existing beliefs. See for example: Nickerson (1998) Confirmation Bias: A Ubiquitous Phenomenon in Many Guises. *Review of General Psychology*, 2(2), 175-220 or Simkus (2023) Confirmation Bias in Psychology: Definitions and Examples. <https://www.simplypsychology.org/confirmation-bias.html>

Global Majority-led companies to be supported to bring narratives that reflect their lived experience to screen.

- While it is understandable that an investor would want assurance that a production company has the right to execute a story unperturbed, intellectual property is often demanded to be transferred as a funding condition by more established production companies, though there are many options for ensuring exclusivity in the right to produce. Public funders, probably by virtue of their nature as non-profit structures, may unintentionally create a culture where independent producers are stripped of intellectual property they originated and enter partnerships with an underlying power imbalance through standard application requirements.
- Actor-led production companies increasingly receive funds because their notoriety is seen as guaranteeing an inbuilt audience, but they are not subject to the same eligibility criteria of having a project delivery track record. This has created a new subculture of actors demanding producer credits on projects and sometimes shared intellectual property rights, as a condition of attachment.
- Europe's support for films from the Global South makes European producers attractive as co-production partners and increases diversity in narratives on screen. However, this raises questions about intellectual property ownership, perpetuates 'crisis and trauma' narratives about certain regions, and proliferates inequitable co-producing trends due to funding application requirements of qualified applicants.
- Established producers continue to apply for the same funds as emerging producers, despite having greater market access. As public funds continue to decrease but the number of applicants rises, the current approach feels strenuous as rejections are on the rise for the mere fact that the same funds are receiving more applications.
- The decision-makers in most public funds can stay in their jobs for lengthy periods of time, or rotate amongst similar institutions, limiting the diversity of perspectives in funding decisions.
- There is gatekeeping within DEI. The perception that racialised producers are seen as risky has led to a proliferation of diversity schemes and initiatives. Whilst DEI initiatives are meant to improve inclusion, they have often created a sub-industry with its own gatekeepers who define what exclusion looks like and who should be included, based on their own biases. It should not be assumed that DEI schemes have led to structural changes without research mapping impact.
- There is no shortage of entry-level training schemes backed by film funds. However, upward mobility into leadership or sustainable careers is scarce. Racialised minorities are often not allowed to fail up in the way that their white counterparts might be given second chances.

The Trade Press

- The trade press was seen as an important signal for all segments in the value chain. Coverage in key publications is used by funders, festivals, sales agents and distributors as a marker of a project's potential and legitimacy. Being featured in the trade press can open doors, while absence from coverage can reinforce invisibility.
- The trade press, however, faces significant budget cuts and commercial pressures, impacting what gets covered. With fewer resources, journalists must make choices about where to focus their attention, often defaulting to established names and known quantities that are more likely to generate reader engagement.
- The editors and contributors in the dominant trade press do not reflect the diversity of Europe, with participants being able to name a majority of the Global Majority journalists based in Europe and working in the major trade publications mentioned. This lack of diversity in newsrooms affects which stories are prioritised and how they are told.
- Even when films are selected into top-tier festivals, trade press coverage is not guaranteed. Journalists only review certain festivals or competition categories even within leading festivals, limiting visibility for films in other strands such as sidebar sections or parallel programmes. This means that even festival selection does not guarantee the press attention needed to progress through the pipeline.
- Journalists need hooks or established profiles to pitch stories; editors require the same to engage audiences. This impacts choices because there is a commercial reality for the trade press which influences how the resulting copy is presented. This means that even within editorial coverage for labs and markets, some projects may be highlighted because of attachments, and lesser-known talent are not likely to be as visible.
- Publicists, agents, film funds, advertisers and managers court the press and are often seen as a pipeline for stories, which could also include trade-offs to manage critical relationships. Access to these intermediaries is not equally distributed, creating advantages for those already connected to industry networks.
- Producers without existing relationships struggle to secure coverage, creating a visibility gap that compounds other barriers to market entry. Without press coverage, projects struggle to gain momentum, making it harder to attract the attention of funders, festivals and sales agents.
- Annual 'talent to watch' lists are used as industry signals but replicate similar profiles and projects; some suggestions come from paid publicists, influential agents/managers, or film fund executives with access to editors. While these lists are a useful filtering tool for the industry, they also act as gatekeepers, and this could compound marginalisation. The selection criteria and juries for these lists are rarely transparent.

- The subjectivity of entertainment also applies within the trade press. Writers often have their own preferences and unconscious biases, and this impacts what is written about and how it is written. The framing of stories about diverse filmmakers can sometimes reinforce stereotypes or reduce practitioners to their identity rather than their craft.
- The trade press looks to the film institutions and funders as a signal of what is newsworthy. This centres projects funded or supported by the reputable institutions, creating a circular pattern where institutional approval generates press coverage, which in turn generates further institutional interest. Projects outside this loop struggle to break through.
- Journalists also commented that producers and publicists often ranked their importance, and on some occasions Global Majority journalists who may be interested in content from Global Majority creators are not given similar access to talent as their white peers. This hierarchy among journalists themselves affects whose stories get visibility and undermines the opportunity that a diverse pool of journalists with diverse taste could have on the range of perspectives covered.
- Producers who were more entrepreneurial and built audiences on social media, or raised private equity or crowdfunding, struggled to gain features in the trade press, leading to the belief that there is an approved route to market and efforts outside the public funding scheme are not welcome. Alternative success stories are not celebrated in the same way as traditional pipeline successes. This has resulted in everyone aiming for the same route.
- Global Majority film writers and critics were more likely to own their own blogs or online communities with an active and engaged niche community, sometimes with significant audiences, but were less likely to receive trade press accreditation or access to press junkets and industry events. These writers have built alternative platforms for coverage, but these platforms are not always recognised within the traditional industry press hierarchy.

Festivals and Awards

- Top-tier festivals and selections at key awards were seen as the ultimate marker for success in European films. This creates enormous pressure to secure festival slots in a handful of film festivals, with careers often perceived as being made or broken by selection decisions. The importance placed on festival selection means that curatorial decisions have outsized influence on the entire ecosystem.
- The perception of what constitutes a top tier festival is defined by the concept of the 'qualifying festival list', which validates pre-existing hierarchies. ARTEF mapped the qualifying festival lists and the FIAPF (International Federation of Film Producers Associations) accredited festival list: approximately 120 unique festivals emerged out of a global aggregate of over 10,000 festivals, and approximately 3,200 in Europe specifically. This means that most festivals, regardless of the quality of their programming, are not recognised within the industry's formal structures.

- Eligibility criteria for some funds cited festival selections from predefined lists, creating a direct link between festival programming decisions and access to future funding. This means that a film's rejection from a qualifying festival can have long-term consequences for the filmmaker's ability to secure support for future projects.
- Film festivals themselves are operating under enormous pressure and fear for their survival. They must evolve in an industry marked by rapid change and evolution of traditional release windows. This creates tension between risk management and risk aversion, with festivals often defaulting to safer programming choices and may conflict with the goal of discovering new voices.
- For curators, festivals based on their history have a specific curatorial voice and outlook which must be preserved. This impacts selection and some films may naturally fall outside this taste. The reliance on curation from certain festivals as the definition of a good film is not the intention, but it has become a de-facto standard that shapes the industry's understanding of quality and producer aspiration.
- Curators are guarded about their strategies of programming, but producers also felt it was an open secret that programmers invited films, and therefore submitting films without any lobbying was a waste of time.
- The open submission process, while it exists, is often not the primary route to selection for the most prestigious slots. Transparency in selection processes was debated, with some arguing for more openness and others defending curatorial independence. The lack of transparency creates uncertainty and advantages those with insider knowledge.
- Even for qualifying narratives, subjectivity of taste and relationships with filmmakers also influence programming decisions, creating an additional layer of gatekeeping that is difficult to navigate for newcomers. Filmmakers without existing relationships with programmers face additional barriers even when their work is strong.
- Many selections come through sales agents and relationships rather than open submission, creating an uneven playing field for filmmakers without industry connections. Some public funds also fund film festivals. Some broadcasters sponsor key awards, and it is prudent to ask if this is a conflict of interest or legitimate trade-off that public funders ensure that they back the showcase and celebration of European films that they fund.
- Risk management also means that there is a rationale for not curating 100% of selected films from submissions but inviting films that are already generating buzz as film festivals face commercial pressures and must increase appeal to audiences and ticket sales, attract high-profile cast/crew which increases press coverage, and improve likelihood of sponsorship. This commercial reality means that festivals are not purely curatorial exercises but are also marketing events and businesses that must remain financially sustainable.

- Awards representatives saw the qualifying lists as a way of filtering the quantity of submissions but recognised that this increasingly meant that awards could only consider films that have come through a pipeline over which the awards bodies have no influence. This creates a dependency on festival curatorial decisions and means that awards are ratifying choices made earlier in the pipeline rather than discovering new work.
- For awards bodies, the qualifying list is very important but they expressed that it is crucial that programmers have an eye on the European audiences that they serve and ensure that award-recognised films resonate beyond industry circles. There is a tension between industry prestige and audience relevance.
- Award bodies have been intentional about diversifying their membership and, in turn, voters. However, high annual membership fees were cited as prohibitive for some practitioners who might otherwise contribute to more diverse voting outcomes.
- Festivals have been intentional about diversifying their pool of programme consultants and curators. However, some programmers or consultants from diverse backgrounds often felt their invitations to recommend films were political posturing, and their recommendations did not often make the final programme. This raises questions about whether diversity in programming teams translates to diversity in programming outcomes.

RECOMMENDATIONS

For Public Funders

1. Implement fixed terms for development executives to prevent entrenchment, ensuring they are not simply rotated across institutions with similar funding sources, such as staff moving between film funds, public broadcasters and other film institutions if funded publicly.
2. Recruit development executives from diverse backgrounds and perspectives to bring different viewpoints to funding decisions.
3. Introduce anonymised application processes where feasible to reduce unconscious bias in initial selection stages.
4. Publish transparent submission, eligibility and selection criteria, especially for public broadcasters, so that applicants understand how to access these funds and how decisions are made.
5. Go beyond funding diverse stories: examine and publish data on ownership of funded productions to track whether there is economic equity.
6. Discourage blanket intellectual property assignations without competitive fees for buyouts in budgets and consider exclusive licences or shared ownership for originating persons and funded production companies.
7. Discourage the practice of attaching Global Majority producers as a 'qualifying face' to 'diverse stories'. Instead, support their companies to grow their own slates through targeted interventions.
8. Create separate funding streams for newcomers so they do not compete directly with established companies that have existing relationships and market access.
9. Make funding available for capability building to help emerging producers build track records.
10. Map ownership decisions and revenue flows from publicly funded films annually to understand where public investment is going and who is benefiting.
11. Map the impact of the plethora of diversity schemes so that interventions benefit the marginalised practitioners instead of creating a training industry, run by the same gatekeepers.
12. Circulate decision-making personnel and ensure diverse representation in funding committees and juries.

13. Redefine the eligibility criteria often required for applications to consider non-traditional pathways into the film business, including online content creation and alternative distribution models.
14. If funding film festivals, ensure that there is visibility for newer entrants so that the film festival or market is effective in supporting films' route to market in an increasingly competitive space.

For The Trade Press

1. Create opportunities for emerging critics, editors and writers from diverse backgrounds to enter and progress within trade journalism, including mentorship programmes and pathways to senior roles for existing writers.
2. Public funders should explore supporting trade press and film journalism financially, recognising their role in the ecosystem and the commercial pressures they face that limit their ability to cover diverse stories.
3. Expand coverage beyond competition sections at major festivals, especially for festivals that receive public funds, to increase visibility for films in sidebar and parallel sections where diverse voices are often programmed.
4. Be transparent about areas where the trade press may have gaps in knowledge and coverage and actively work to address them.
5. Engage film influencers and online communities to diversify routes to visibility, recognising that audiences discover content through multiple channels and that Global Majority writers have built significant platforms outside traditional trade press.
6. Expand the pool of film reviewers and consider syndicating content from writers already serving niche communities with engaged audiences, bringing diverse perspectives into mainstream trade coverage.

For Festivals and Awards

1. Improve communication between players up and down the value chain to better understand the impact of programming decisions on filmmakers' careers and access to funding.
2. Democratise decision-making by including more voices in programming, ensuring that diverse perspectives are represented not just as consultants but as decision-makers with real influence over final selections.
3. Invest in training for programmers to develop awareness of unconscious bias and expand curatorial horizons beyond familiar networks and aesthetics.

4. Publish data on how many selections come through open submission versus invitation or sales agent relationships to increase transparency about selection processes and help producers understand how the system works.
5. Consider options to submit to awards without requiring festival premiere, potentially through a separate category, to create alternative pathways to recognition for films that do not fit the festival calendar.
6. Review the qualifying lists and consider expansion or alternatives that recognise a broader range of festivals and platforms, reflecting the diversity of ways audiences now discover and engage with cinema.
7. Create a 'counter list' for festivals that creates access to media opportunities, has screening fees that support filmmakers, and demonstrates diverse programming as a model for inclusive curation.
8. Audit film festivals funded with public funds in terms of stories: who programmes Black and Global Majority films, and what proportion of programming reflects diverse European voices? Make this data publicly available.

AREAS FOR FUTURE RESEARCH

The following areas were identified as requiring further investigation:

- **Narrative mapping:** Analyse narratives funded in Europe through public funds over the past three years to identify recurring themes and frames of representation, examining which stories are repeatedly funded and which remain invisible.
- **Ownership tracking:** Systematically map ownership structures of funded productions in the past three years to understand where public investment is flowing and who holds intellectual property rights.
- **Route to market tracking:** Map the narratives funded by the major public funders and their route to market to examine if they dominate trade coverage, qualifying festival selection and celebration at key awards over a couple of years to ascertain that the perception is accurate that the current infrastructure selects itself, funds itself and rewards itself.
- **Perception of risk:** Examine how perceptions of risk among producers and commissioners are racialised; consider intersectionality and how these perceptions influence funding and programming decisions (building on Coles & Eikhof, 2021¹²).
- **Symbolic capital:** Analyse how festival prizes, awards and prestige function as gatekeeping mechanisms that determine career trajectories and access to resources (following De Valck, 2016¹³; Mitric, 2025¹⁴).
- **Lab and market impact:** Examine the role of development labs and markets in shaping which stories advance through the pipeline, and whether participation correlates with success.
- **Panelists, mentors and tutors:** Map the panelists, mentors and tutors across key industry events to highlight repetition and the potential danger of an echo chamber that reinforces existing tastes and preferences.
- **Institutional racism:** Apply multilevel frameworks to understand and address systemic discrimination within European film institutions (Hennekam & Syed, 2018¹⁵).

¹² Amanda Coles & Doris Ruth Eikhof (2021) On the basis of risk: How screen executives' risk perceptions and practices drive gender inequality in directing. *Gender Work Organ*, 28(6), 2040–2057.

¹³ Marijke de Valck (2016) Fostering art, adding value, cultivating taste: film festivals as sites of cultural legitimization. In M. de Valck, B. Kredell & S. Loist (Eds.). *Film Festivals: History, Theory, Method, Practice*. Routledge.

¹⁴ Petar Mitric (2025) The Co-production Landscape in Europe: From Eurimages to Netflix. Palgrave. doi: 10.1007/978-3-031-92341-8

¹⁵ Sophie Hennekam & Jawad Syed (2018) Institutional racism in the film industry: a multilevel perspective. *Equality, Diversity and Inclusion: An International Journal*, 37(6), 551–565, doi: 10.1108/EDI-05-2017-0108

- **Alternative routes to success:** Document production companies and filmmakers who have built sustainable careers outside the traditional festival pipeline and use these as a starting point to encourage multiple pathways and reduce the overall reliance on public funding support.
- **Human Resources:** Research how employment laws operate in practice in the film industry where contracts are often short-term, to highlight gaps in protection for the workforce. Examine how practitioners can address unfair practices in a more protected environment, considering mechanisms for reporting grievances, accessing support, and ensuring accountability without fear of career repercussions.

CONCLUSION

The European film structures and route to market were built for a different Europe. They served important purposes in their time: rebuilding national identity, protecting culture and language, fostering European cooperation. But that Europe is 70 years behind us.

Today's Europe is multicultural, digital and global. Our cinema infrastructure must evolve to reflect who we are. A workforce that does not reflect its audiences cannot stay aligned with them. A system with leaky pipelines cannot sustain itself.

The question of European identity is central to this report. There are citizens of colour across Europe who are not recent migrants. They are second, third and fourth generation Europeans whose families have been part of this continent for decades. Alongside having stories to tell, they are also audiences: potential paying audiences who could engage more with cinema if they felt that the output catered to their tastes and reflected their experiences.

This is not to say that on-screen racial representation is the only factor for Global Majority audiences when deciding to go to the cinema. But stories that are currently seen as 'risky' simply because there is not enough market precedent could be market drivers. These audiences exist. They have spending power. They are underserved by current output and for this reason are more likely to be found online where there is more meritocracy in discovery and audience building.

If public funds for promotion could also explore developing and engaging new audiences, this perceived risk could become an opportunity. The absence of market data for diverse stories is not evidence that audiences do not exist; it is evidence that the industry has not yet learned how to reach them. Building these audiences is an investment in the future sustainability of European cinema.

This is not about replacement. It is about belonging. Nothing is lost when the picture widens; it becomes complete. DEI language has often framed this work as a zero-sum game. When no one feels excluded, when institutions reflect today rather than yesterday, when power expands and pipelines open, the entire system becomes stronger.

ARTEF's aim is not to critique but to repair. A new Europe can emerge for cinema. If we want it.

WHAT COMES NEXT: WORKING WITH ARTEF

This report marks the beginning of a new phase in ARTEF's work. The findings and recommendations presented here provide a foundation for action, but implementation requires partnership, commitment and sustained effort from stakeholders across the European film ecosystem.

Starting from 2026, ARTEF is offering tailor-made workshops for stakeholders across the value chain seeking to explore country-specific solutions.

These workshops are designed for organisations including:

- Film funds and public funders
- Producer associations
- Film schools
- Development labs
- Co-production markets
- Film festivals
- Other companies and institutions across the film ecosystem

ARTEF's workshops can be tailored to explore how the recommendations in this report might be implemented within your specific national or organisational context, ensuring relevance to local demographics, funding structures, industry practices and regulatory frameworks.

ARTEF is also launching targeted initiatives to give visibility to emerging talent across the value chain and seeks to do this in partnership with film institutions. These initiatives will create platforms and opportunities for underrepresented practitioners including producers, writers, directors, critics, curators and executives to be seen and to connect with decision-makers across the industry.

If you are interested in working with ARTEF, whether as an institution seeking workshop support or as a practitioner looking to engage with our visibility initiatives, please get in touch.

Contact: artef@artef.org

ABOUT ARTEF

The Anti-Racism Think Tank for European Film (ARTEF) aims to drive forward structural change within the European film ecosystem by highlighting how power structures, exclusionary networks and institutional policies that maintain racism in the industry can be reimagined.

ARTEF works with:

- Leaders and decision-makers at European funding bodies and film festivals
- Organisations, networks and advocacy groups who address racism in the film industry

ARTEF aims to be a constructive link between these stakeholder groups in order to establish critical thinking among leaders and decision-makers, offer support for their anti-racist practice and strengthen existing networks and efforts towards a just and equitable film industry.

ARTEF works with transformative and collaborative methods. ARTEF produces research and facilitates knowledge exchange through think tanks, networking opportunities, case studies and talks.

ARTEF also works strategically with institutions through advice, training and co-hosting events.

ARTEF was founded in 2020 and is currently led by the following Steering Committee of volunteers:

Filson Ali, producer & director (Camera X, Sweden)

Veronique Doumbé, director & editor (Ndolo Films, France/US)

Helene Granqvist, producer (WIFT+ and Nordic Factory Film, Sweden)

Emile Hertling Périnard, producer (Ánorák Film, Greenland/Denmark)

Johanna Makabi, producer & director (Sirens Films, France)

Dr Regina Mosch, filmmaker & researcher (UK)

Victoria Thomas, producer & film educator (Republic of Story, UK)

REPORT AUTHORS

Victoria Thomas is a BAFTA and Emmy-nominated producer based in Glasgow, working across both fiction and documentary projects for television and film. In addition to her filmmaking work, she is a practice led academic researcher and educator, currently serving as the Course Leader for the MA International Film Business program at the London Film School and a Lecturer at Queen Margaret University Edinburgh. She is also the founder of No Password Required, a Europe wide database of Global Majority led production companies that uses a data first approach, to build strategic interventions.

Dr Regina Mosch is a documentary filmmaker and researcher. Her work explores the resonances between film, bodies and power. She worked as programme producer for WIFT International, amongst others co-directing the prolific digital conference Carla 2020. Between 2018 and 2023, she was the co-director of the Copenhagen Web Fest, Scandinavia's first film festival for digital series. She obtained her PhD from Queen Margaret University Edinburgh in 2025.

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