

Governance and incentives in the streaming era: lessons from Andalusia for the Valencian Community

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Summary

1. Introduction
2. Literature review and background
 - 2.1. OTT platforms: from programming schedules to portals and on-demand programming
 - 2.2. Multilevel governance of audiovisual media in the streaming era
 - 2.3. Production incentives and territorial competition
 - 2.4. Film offices and film commissions as soft production infrastructure
 - 2.5. Film studios and hard infrastructure: hub logic and agglomeration economies
3. Method
4. Analysis and results
 - 4.1. Incentives and policies to attract film shoots in the streaming era
 - 4.2. Andalusia as a paradigm of audiovisual management: stakeholders and the centrality of film shoots
 - 4.3. Audiovisual ecosystem of the Valencian Community (2012–2025): from institutional disruption to polycentric reconstruction
5. Discussion and conclusions
6. Bibliography
7. Appendix I. Bibliographic references for Table 1
8. Financing

Abstract

The expansion of OTT platforms has reshaped audiovisual production and shifted competition for projects to the intersection of governance, incentive design, and service/infrastructure capacity. This article examines the institutional and operational configuration of the Valencian Community between 2012 and 2025 and contrasts its performance with the Andalusian case, in order to identify transferable levers to attract and retain productions. Methodologically, we conduct a case study combining documentary and comparative analysis, benchmarking of instruments (incentives, one-stop services and film office/film commission networks), source triangulation, and pattern matching. Findings indicate that Andalusia consistently integrates three pillars (governance, financial and operational capacities, and measurement) through an autonomous umbrella with a formalized network, regular funding calls, standardized procedures, and annual reporting. In the Valencian Community, the reopening of Ciudad de la Luz and the rollout of a regional Film Commission coexist with room for improvement in integration, standardization, and evaluation. We conclude with actionable recommendations: consolidate a single point of reference, coordinate funding windows with stable calendars, standardize inter-municipal procedures, and establish an observatory with KPIs and SLAs to enable continuous monitoring and policy learning.

Keywords

“Andalusia”; “Audiovisual Industry”; “Governance”; “Stakeholders”; “Tax incentives”; “Valencian Community”

1. Introduction

Over the last decade, the implementation of over-the-top platforms (henceforth, OTT) has reconfigured the parameters of audiovisual production and the logic of media programming and consumption (Izquierdo-Castillo & Latorre-Lázaro, 2022, p. 2). Furthermore, it has precipitated a reordering of governance models and driven regulatory and fiscal adjustments oriented towards video-on-demand services (Vlassis, 2023, p. 1515). Within this framework, the practice and organisational architecture of film offices (henceforth, FO) and film commissions (henceforth, FC) have been challenged; in addition to facilitating management for production companies, these entities must reconcile advice on accessing incentives with the incorporation of sustainability criteria in film shoots (Rajas, Paz-Gil & Gértrudix-Barrio, 2025, p. 188).

This article examines the institutional and operational fit of audiovisual production in the Valencian Community during the streaming era. It adopts an applied comparative approach: taking Andalusia as a reference for an advanced articulation of public production policies and contrasting that model with the Valencian case. The analysis is organised around three aspects: 1) governance, visible in the management of the FO network and the transition from Valencia Region Film (henceforth, VRF) towards a regional FC; 2) capabilities, which combine promotion, incentives, and co-investment with the soft and hard infrastructure of the territory, with particular attention to the Ciudad de la Luz (henceforth, CDL); and 3) measurement, based on indicators and public monitoring reports. The objective is to define a governance model and identify competitiveness levers that allow for the attraction and retention of international projects and, thereby, the strengthening of the local industry.

The period of analysis, between May 2012 and September 2025, is based on a sequence of milestones that structures the case: the closure of the CDL in 2012 and the Valencian regional broadcasting corporation in 2013; the creation of Film València and the Costa Blanca Film Commission (henceforth, CBFC) in 2017; the constitution of the VRF in 2019; the reopening of the CDL in 2022; and the announcement, from 2023 onwards, of the composition of the regional FC. This period is also explained by regulatory and sectoral transformations of a broader scope, such as the European Commission Communication on state aid for cinematographic and other audiovisual works in 2013, the emergence and consolidation of OTTs in Spain between 2015-2020, and the approvals of Law 27/2014 on Corporate Income Tax (henceforth, LIS)—with amendments in 2017 and 2020—and Law 13/2022, the General Audiovisual Communication Law.

2. Literature review and background

2.1. OTT platforms: from programming schedules to portals and on-demand programming

The expansion of OTT services has shifted the audiovisual centre of gravity from the logic of the broadcast schedule towards 'portalisation': subscription-accessible catalogues, global circulation, and data-driven distribution that reorders functions, timelines, and professional profiles. Platforms operate as portals that "collect, curate, and distribute television programming via the internet" (Lotz, 2017, p. 8) and differ from conventional channels by their non-linear nature, which allows them to focus content programming within the interface. Jenner (2023, p. 34) conceptualises this transition as a process of television reinvention, from the TV III stage to TV IV, with Netflix as a paradigmatic, though not exclusive, case.

More recently, production studies have provided data on streaming labour, despite the frequent information opacity of internal metrics, offering a European perspective on how creative teams interact with indicators and thresholds that condition the formal approval of projects (Rasmussen, 2024, p. 5245; Idiz, 2024, p. 2136). This ecosystem shifts the competition for projects towards the intersection of governance and regulation, incentive design, and service and infrastructure capacity (FO, FC, and film studios)—the framework from which the Valencian case is approached.

2.2. Multilevel governance of audiovisual media in the streaming era

The European Audiovisual Media Services Directive and its 2018 revision reinforce the obligations of on-demand audiovisual media services and incorporate video-sharing platforms into the common framework. The text empowers Member States to establish, among other measures, a minimum quota of 30% for European works in catalogues, ensure their prominence on interfaces (preferential visibility and accessibility), and set financial contribution obligations for European production (European Parliament & Council of the European Union, 2018, pp. 74 and 86). These competencies are deployed within a multi-level governance scheme (EU-State-regions-municipalities) with margins for national adaptation.

In Spain, Law 13/2022, the General Audiovisual Communication Law, transposes this framework and adapts the quota, prominence, and financial contribution measures to the domestic legal order, while distinguishing between linear on-demand services and video-sharing platform services, with differentiated obligations (Jefatura del Estado, 2022, pp. 52-53). Its application is articulated between state and regional authorities, with the National Commission on Markets and Competition (CNMC) as the competent body at the national level, and it leaves room for the specification of regional promotion policies within the limits of European regulations on State aid. Based on this regulation, we will examine the economic policy instruments, particularly fiscal and financial incentives, and their role in territorial competition for film shoots.

2.3. Production incentives and territorial competition

Incentives for audiovisual production (tax credits or deductions, cash rebates, and selective grants) operate as economic policy instruments aimed at attracting or retaining film shoots and strengthening the industrial and employment base (Christopherson & Rightor, 2010, p. 347). Within the European sphere, their design and application are framed within State aid policy and, specifically, the Commission Communication on state aid for films and other audiovisual works, which sets cultural eligibility criteria, expenditure territorialisation limits, and aid intensity caps (European Commission, 2013a, pp. 4-10). This framework allows States, and in some cases subnational levels, to adapt schemes to their productive structure, provided that competition and the objective of promoting European works are preserved.

For comparative purposes, it is useful to distinguish between the nominal percentage of each incentive and the conditions that determine its actual effect: eligible base (which costs are counted and up to what percentage of total expenditure), caps per work or episode, territorialisation requirements, cultural tests, certification and payment deadlines, legal certainty, and administrative capacity to process files. Cultural tests operate as an eligibility filter and governance mechanism since they translate cultural policy objectives into verifiable criteria, usually through scoring systems and supporting documentation. Their design affects the administrative burden and the temporal predictability of the incentive, which are critical aspects for platform commissions. Therefore, effective competitiveness depends less on the nominal percentage of the deduction and more on its operational architecture, understood here as the set of rules, procedures, guides, administrative capacities, and information systems that allow it to be applied quickly, predictably, and auditably (how it is applied, what it includes, and under what criteria).

Official guides from the British Film Institute (2025), through the Audio-Visual Expenditure Credit, and the Centre National du Cinéma et de l'Image Animée (2025), via the Tax Rebate for International Productions, demonstrate this circumstance. However, the intensification of territorial competition to attract film shoots entails risks: a "race to the bottom" in aid intensity, displacements without local roots, administrative bottlenecks, and leakages when not articulated with local filming services, infrastructure, and professional profiles (McDonald, 2011, pp. 104-106; Pollard, 2016, p. 443). Consequently, incentives work best when integrated into "hub" strategies equipped with performance metrics and public evaluation systems (Government of Spain, 2023, p. 1; British Film Commission, 2024, p. 11).

Based on this conceptual foundation, the fourth section, dedicated to analysis and the extraction of results, will present Spain's relative position compared to its European environment using official sources (Section 4.1) and will connect these features with the service capacity and infrastructure available in Andalusia (Section 4.2) and the Valencian Community, particularly with the reopening of the CDL and the configuration of the FO network (Section 4.3). This comparative articulation will allow for the identification of improvement strategies and the proposal of operational indicators to guide the design of policies for attracting and retaining film shoots at the regional level.

2.4. Film offices and film commissions as soft production infrastructure

In contemporary audiovisual ecosystems, FOs and FCs operate as soft infrastructure, in the sense proposed by the OECD (2025)¹, and are complemented by the hard infrastructure consisting of studios and physical equipment. Consequently, their main contribution does not lie in the ownership of physical assets, but rather in inter-institutional coordination, the reduction of transaction costs, and the management of the operational risks faced by production companies during pre-production and filming. To this end, they act as one-stop shops that advise on permits and regulations (traffic, heritage, environment), manage locations, connect with professional technicians and local suppliers, provide information on incentives and their processing, and collect impact data for evaluation (Palmi, Caputo & Turco, 2016, p. 59).

A conclusion drawn from the best practices guide of the Association of Film Commissioners International (2024) is that the performance of FOs and FCs rests on governance, capabilities, and measurement. "Hand in hand" governance between municipal, provincial, and regional offices reduces duplications, homogenises protocols, and provides predictability in timelines. Capabilities depend on specialised profiles (permits, locations, vendor management) and service standards (framework agreements, time-to-permit objectives). Measurement requires comparable indicators, such as permit turnaround, percentage of local employment per department, local expenditure per category, or production satisfaction, which allow for the adjustment of policies and incentives and favour accountability.

Added to this set is a fourth variable increasingly demanded by financiers and platforms: sustainability. FOs and FCs act as nodes for the dissemination, support, and verification of environmental and social best practices (mobility plans, energy, waste management, accessibility, diversity, and inclusion), articulated with recognised certifications. Their effective incorporation into permit manuals and location agreements has ceased to be a reputational option and has become a competitive condition that attracts film shoots, as demonstrated by the FCs of Barcelona, Cantabria, Catalonia, and the Region of Murcia; the FOs of Malaga, Valencia, and Vitoria-Gasteiz; and Film Madrid (Rajas, Paz-Gil & G rtrudix-Barrio, 2025, p. 177).

In sum, effective FOs and FCs translate the regulatory framework and incentives into operable processes at the project level. Their performance, observable through comparable key performance indicators (KPIs) and service level agreements (SLAs) that set target deadlines and processing standards, is complementary to that of studios and suppliers. This integrated vision of services, incentives, and capabilities is consistent with the hub strategy approach, which we will analyse in the following section. Likewise, the

¹ A framework of local leadership, social capital, and territorial identity that drives socioeconomic transformations, especially in contexts with structural disadvantages (Organisation for Economic Co-operation and Development, 2025).

standardisation and publication of these KPIs and SLAs allow for inter-territorial benchmarking and policy evaluation—elements that we will articulate in the comparison between the Andalusian and Valencian audiovisual ecosystems.

2.5. Film studios and hard infrastructure: hub logic and agglomeration economies

Hard infrastructure, such as soundstages, backlots, tanks, workshops, and warehouses, constitutes the material anchor for large-scale and serial production. In the streaming era, the availability and scalability of stages dictate schedules and international commissioning decisions, with stage space demand on the rise and episodes of scarcity in leading markets (Knight Frank, 2022, p. 4; British Film Commission, 2024, p. 5). Research on creative clusters shows that the co-location of infrastructure, technicians, and suppliers generates agglomeration economies, in addition to fostering cross-project learning and resulting in lower coordination costs, higher talent density, and improved predictability for financiers (Medel & Gossel, 2015, p. 78; Zheng, 2014, pp. 10-11).

Beyond the number of stages, the functional quality of the complex is decisive, especially for major works, given that “higher spending on each production implies a greater demand for high-end, purpose-built studios” (Knight Frank, 2023, p. 8). In this sense, characteristics such as clear height and load capacity, acoustic insulation, electrical power and redundancy, the presence of support spaces—such as offices, dressing rooms, mill shops, warehouses, and adjacent backlots—and the quality of base logistics (access, parking, unit base) are evaluated, along with the integration of technical services (data connectivity, dailies, VFX, and virtual production volumes) and sustainability protocols. These attributes configure the hub's effective capacity and condition its attractiveness for potential commissions.

Finally, in policy terms, a hub is not limited to the studio building itself. Its maintenance implies coordinated governance, qualified training, available suppliers, and metrics that allow for the calculation of performance, turnover, and local employment and spending. Under this logic, the reopening of the CDL in 2022 reintroduces a complex with unique assets into the Spanish system that raises the ceiling for possible projects in the Valencian Community, provided its operation is articulated with a one-stop shop, fiscal incentives, and filming services. Therefore, the hub's performance ultimately depends as much on its physical features as on the institutional capacity to integrate them into international production chains with quality, scheduling, and sustainability requirements.

3. Method

The objective of this study is to explain how the articulation between incentives, production support services, and hard infrastructure translates into the capacity to attract and retain film shoots within the context of OTT platforms. To this end, a comparative design with a case study logic is adopted (Flyvbjerg, 2006; Jackson, 2011), in which the Valencian Community constitutes the primary focus and Andalusia serves as the contrast pattern. The analysis incorporates a stakeholder typological scheme based on a previous

protocol updated for this research (Huerta-Viso, 2024) and triangulates regulatory frameworks, applied policies, technical documentation from competent bodies, and evidence of activity subjected to source criticism.

Benchmarking is conceived as a systematic performance comparison between two audiovisual ecosystems that share a general legal regime but differ in organisational design, trajectories, and service portfolios (Büyüközkan & Maire, 1998, p. 102). This approach equates operational measures that explain how instruments function (eligible costs, caps per work or episode, requirements, and timelines), service metrics (one-stop shop, permit lead times, scouting, incentive support, sustainability), and infrastructure parameters (technical capacity of film studios and their support spaces). From this mapping, we extract intermediate results that reflect the circumstances of each autonomous community.

Furthermore, the analytical procedure combines comparative description (side-by-side tables and descriptive graphs), pattern matching, and explanation building (Ridder, 2017; Vargas-Bianchi, 2025). First, the enabling conditions—governance, services, incentives, and infrastructure—are defined; second, they are contrasted with activity indicators and documentary evidence regarding their operation; subsequently, these inputs are linked to the institutional and operational design to propose plausible explanatory mechanisms; and finally, alternative hypotheses are considered to strengthen the traceability between analysis, findings, and recommendations. By way of illustration, this approach allows for the examination of the association between the operability of a one-stop shop and the reduction of lead times in permit processing, or the correspondence between available technical capacity and the typology of international commissions captured.

Finally, data quality is ensured through four guarantees: exclusion of figures without explicit methodology or verifiable traceability; double verification of critical values across independent sources; temporal harmonisation (annual alignment and control of regulatory changes); and sensitivity to divergent definitions. Limitations derive from the heterogeneity in the publication of metrics between territories and the absence of microdata in some series. In order to mitigate these, carefully defined proxy indicators and qualitative data triangulation are used (Yin, 2003). The operational hypotheses outlined in the theoretical framework are tested in the results section.

4. Analysis and Results

4.1. Incentives and policies to attract film shoots in the streaming era

The competition for OTT projects in Europe has been shaped by fiscal schemes that combine nominal rates with an operational architecture that determines their actual effectiveness. To establish a visual context that serves as a guide for the subsequent national and regional analysis, Table 1 is provided below, comparing the tax incentive percentages in effect in 2025 across several European countries.

Table 1. European comparison of audiovisual production incentives in 2025.

Country	Incentive (2025)	Brief Notes
Spain (Article 36 LIS)	30-25 %	30% on the first million of the tax base and 25% on the excess; €20M cap (€10M/episode for series).
France (TRIP)	30 % (40 % VFX)	40% if French VFX and over €2M with a €30M cap per project. Managed by the CNC.
Italy (Tax Credit)	40 % (30 % non-EU creative spend)	Includes cultural requirements. Managed by DG Cinema under Law No. 220/2016.
Ireland (Section 481 FCTC)	32 % (up to 40 %)	Selective increase for lower-budget feature films. Managed by Revenue.
Germany (DFFF I/II, GMPF)	En torno al 30 %	30% rebates on German costs; annual caps. Managed by Filmförderungsanstalt.
Portugal (Pic Portugal-Cash Rebate)	25-30 %	25% base; up to 30% with specific criteria; Portugal Film Commission one-stop shop. Managed by the ICA.
United Kingdom (AVEC)	34 % (39 % Animation/Children's)	VFX uplift to 39% from 2025 (no 80% cap on qualified expenditure). Official HMRC and BFI guides.
Belgium (Tax Shelter)	Approx. un 38-40 % in cash	Fiscal mechanism (not a rebate). Net funding for the producer from eligible expenditure. Managed by SPF Finances.
Malta (Cash Rebate)	30-40 %	Up to 40% refund on eligible local expenditure. Managed by the Malta Film Commission.
Poland (Cash Rebate)	30 %	15M PLN cap per project. Managed by the Polish Film Institute / Polish Film Commission.
Romania (Cash Rebate)	30 % (active)	Intention to expand to 40% starting in 2026. Managed by the Office of Film and Cultural Investments.
Czech Republic (Production Incentives)	25-35 %	2025 reform plans higher tiers for animation and digital. Managed by the Czech Audiovisual Fund and Czech Film Commission.
Hungary (Film Incentive – Tax Rebate)	30 % (up to 37,5 % base)	30% on Hungarian spend; part of non-Hungarian spend may be included in the calculation. Managed by the National Film Institute.
Lithuania (Film Tax Incentive)	Up to 30 %	Subject to cultural test; minimum expenditure of €43,000 in Lithuania. Managed by the Lithuanian Film Centre.

Source: Own elaboration based on the sources from Appendix I.

In the Spanish context, the 2012–2025 period shows a clear shift from the absence of specific incentives to the consolidation of a competitive regime. The Media Research & Consultancy report (2012, p. 21), prepared prior to the regulatory change, quantified the cost of lacking tax exemptions with a severe diagnosis: potential annual losses close to

900 million euros, project diversion, and a significant reduction in filming volume in Spain. Another of its conclusions was that "1 public euro produces another 4 in the filming economy" and that "the application of a tax rebate with a 16% return for the foreign producer (...) would lead us to obtain an impact of another €5.25" (Ibid.).

Subsequently, Article 36 of the LIS (Corporate Income Tax Law), in effect since 2015, introduced for the first time a dual scheme that set a 20% refund on the first million and 18% on the excess for Spanish productions, and 15% for foreign productions, subject to minimum expenditure and with a refund cap. The 2017 reform increased the deduction for Spanish works to 25% for the first million and 20% for the remainder, and to 20% for foreign works. The May 2020 renewal brought the system to its current levels: 30% for the first million and 25% for the rest, with a limit of 10 million per episode for series and 20 million per production, except in territories such as Navarre and the Canary Islands, where the rebate stands at 35% and 50%, respectively (Jefatura del Estado, 2020, pp. 62-65).

Finally, the pull effect of these measures on the streaming market can be seen by overlaying the chronology of incentives with the arrival of OTT platforms. Following the entry into force of the aforementioned Article 36, Netflix announced its arrival and launched its service in Spain in October 2015 (Marcos-Guillamas, 2015); HBO has operated since November 2016 (Fernández-Díaz, 2016); Prime Video did so in December 2016 (La Vanguardia); and Disney+ started its service in March 2020 (Portal Disney, 2020). Without attributing strict causality, the temporal juxtaposition between the creation and improvement of the tax rebate and the commercial consolidation of OTTs in the country is potentially consistent with the projections made by Media Research & Consultancy (2012, p. 21) regarding the relationship between incentives and the volume of filming production.

4.2. Andalusia as a paradigm of audiovisual management: stakeholders and the centrality of film shoots

Andalusia's performance as a filming hub rests on a clear institutional architecture and strategically coordinated services (Huerta-Viso, 2024, pp. 507-511). At the regional level, the Andalucía Film Commission (henceforth, AFC) acts as the organizing node and underpins the Network of Film Cities (Red de Ciudades de Cine), a framework where 36 FCs/FOs converge (Table 2), as of September 2025 (Andalucía Film Commission, 2025a). This soft infrastructure provides territorial coverage, reduces pre-production friction, homogenizes documentation, and shortens processing times—critical factors for platforms and studios within tight scheduling contexts. Furthermore, the Network continues to expand, as evidenced by the recent addition of the FOs of Arcos de la Frontera, Baena, and Vejer over the last 12 months.

Table 2. FC/FOs making up the "Network of Film Cities," by provinces.

Province	FCs/FOs associated with the AFC's Network of Film Cities
Almería	Almería FO, Níjar FO, Roquetas FO y Tabernas FO
Cádiz	Arcos de la Frontera FO, Bornos FO, Cádiz FO, Conil FO, Jerez FO, Puerto de Sta. María FO, Rota FO, San Fernando FO, Tarifa FO y Vejer FO
Córdoba	Baena FO, Cabra FO, Córdoba FO, Montilla FO y Priego de Córdoba FO
Granada	Granada FO y Guadix FO
Huelva	Almonte FO y Huelva FC
Jaén	Jaén FO
Málaga	Axarquía FO, Málaga FC, Málaga FO y Marbella FO
Sevilla	Alcalá de Guadaíra FO, Carmona FO, Cazalla de la Sierra FO, Écija FO, La Rinconada FO, Morón FO, Osuna FO y Sevilla FO

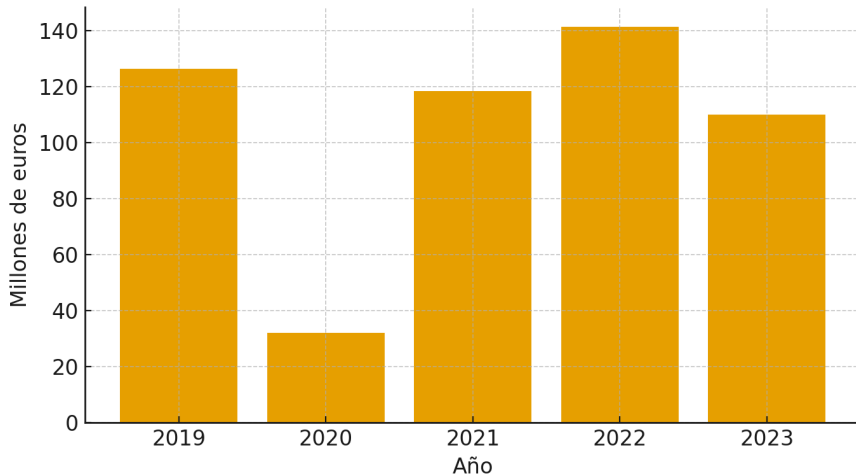
Source: Prepared by the author based on AFC (2025a).

Multi-level governance adds promotion instruments that complement the state regime and help turn the intention to film into a funded project. On one hand, the Andalusian Agency of Cultural Institutions (henceforth, AAICC) (2025) publishes annual competitive calls for the development and production of audiovisual works, governed by 2022 regulations and with active calls for 2023–2025. On the other hand, Radio and Television of Andalusia (2025), through Canal Sur Produce, has standardized project submission and public participation and co-production procedures, increasing transparency, predictability, and risk-reduction pathways for regional and international promoters. Furthermore, the AFC (2025b) has developed a production guide that allows production companies to find local professionals and firms.

At the municipal level, the standardisation of procedures coexists with local margins used as competitive levers. To cite a few examples, Sevilla Film & Events (2025a; 2025b), acting as the Seville Film Office, allows for the online processing of general filming requests and public space occupation, and provides for fee exemptions in certain cases outlined in its Filming Guide. For its part, the Malaga Film Office (2025) centralises procedures through a single form and sets a fee of 117 euros/day for filming on public roads, which provides budgetary certainty and speeds up authorisation. In essence, the combination of these measures allows the operational package to be adjusted to the type of production, maintaining intra-regional competitiveness and clarity for the producer.

Performance indicators are consistent with the ecosystem's absorption capacity and show a recovery following the pandemic shock, although the series does not describe linear growth. In 2023, Andalusia recorded 1,381 film shoots with an economic impact of 110,031,600 euros and 21,018 jobs, according to the 2023 Activity Report, the latest published to date (Andalucía Film Commission, 2024, p. 8). 2019 closed with 126,197,190 euros, 2020 dropped to 32,023,320 euros, 2021 recovered to 118,365,200 euros, 2022 reached 141,242,800 euros, and 2023 fell to 110,031,600 euros (Figure 1). Therefore, these data are read alongside the described institutional architecture to argue, without strict causal attribution, that coordination and service density contribute to maintaining a project flow compatible with OTT demand.

Figure 1. Economic impact of film shoots in Andalusia (2019-2023).



Source: Prepared by the author based on AFC activity reports (2024).

In summary, the Andalusian model combines a regional coordination body with a formalized municipal network, recurring promotion policies, and the participation of the public broadcaster through standardized procedures—all supported by operational services, such as the one-stop shop or the creation of guides and directories, and the periodic preparation of reports that evaluate audiovisual activity. This framework integrates soft infrastructure and state incentives into a stable and measurable project flow, aligned with the demands of serial streaming production. The following section examines, with the same approach, the institutional configuration and capabilities of the Valencian Community.

4.3. Audiovisual ecosystem of the Valencian Community (2012–2025): from institutional disruption to polycentric reconstruction

The 2012–2018 cycle was marked by a dual institutional breakdown. On one hand, the disqualification of Ciudad de la Luz (CDL) following the European Commission's May 2012 decision—ratified by the EU General Court in 2014—which found the Sociedad Proyectos Temáticos de la Comunidad Valenciana S.A.U. (under the Generalitat Valenciana) guilty of distorting competition among European film studios (European Commission, 2013b, p. 14). On the other hand, the closure of Canal 9 in November 2013 under Law 4/2013 suppressed the Valencian public broadcasting service (Presidencia de la Generalitat, 2013, pp. 34416-34417), leaving the industry without a local demand engine until the launch of the Corporació Valenciana de Mitjans de Comunicació (henceforth, CVMC) under the À Punt brand (Presidencia de la Generalitat, 2018, p. 23987).

Prior to 2012, CDL acted de facto as a regional FC, centralizing dialogue with production companies and articulating the municipal FO network; thus, its cessation left the territory without a regional-scale coordinating framework. Since then, sector organization has adopted a provincial and independent approach. In 2017, the Provincial Council of Alicante created the CBFC as a one-stop shop for permits and filming assistance. As of September 2025, it coordinates a network of 21 municipal FOs: Agost, Alcoi, Alfàs del Pi, Alicante, Altea, Benidorm, Benissa, Calpe, Castalla, Dénia, El Campello, Elche, Finestrat, Guardamar del Segura, Ibi, Jávea, Pilar de la Horadada, Santa Pola, Torrevieja, Villajoyosa, and Villena (Costa Blanca Film Commission, 2025).

Also in 2017, Film València was consolidated, promoted by the Tourism Board and the Institut Valencià de Cultura (henceforth, IVC), as a municipal service and coordination structure for the province of Valencia, articulating a network of 27 municipal FOs: Ademuz, Alzira, Ayora, Bétera, Bocairent, Buñol, Carcaixent, Catarroja, Cheste, Cullera, El Puig, Gandía, Gavarda, Hoya de Buñol-Chiva, Lliria, Llutxent, Manises, Oliva, Paterna, Requena, Ribarroja del Turia, Ribera de Xúquer, Sagunt-Camp de Morvedre, Sueca, Utiel, Valencia, and Xàtiva (Film València, 2025). However, the majority of these towns do not operate as effective FOs because they lack specific websites or identifiable procedures, limiting their operational utility.

Filming activity in the province of Castellón is significantly lower than in Alicante and Valencia. The territory only possesses one recognized public FO in Peñíscola, integrated into the Tourism Department's portal, and a private location services platform, Castellón Film, created in 2005 as a private initiative lacking institutional backing from city councils or tourism boards (Peñíscola Turismo, 2025; Castellón Film, 2025).

The lack of regional coordination prompted the launch of the VRF in September 2019, initially conceived as a location bank and common access point for stakeholders. In its early stage, it prioritized promotion and the cataloging of filming spaces (currently holding 94 entries) over the development of regional activity metrics or the procedural standardization of the FO network (Valencia Region Film, 2025). Furthermore, while the Generalitat announced a future Comunitat Valenciana Film Commission at FITUR 2023 (Castellón Plaza, 2023), as of September 2025, its service charter and regional integration/measurement scheme have not been published, leaving centralization limited.

The lifting of the European sanction and subsequent reopening of CDL in July 2022 introduced a change in scale: the complex, now managed by the Societat de Projectos per a la Transformació Digital de la Generalitat (henceforth, SPTD), regained its vocation as a multi-purpose studio and its role as a flagship infrastructure for the Valencian audiovisual ecosystem (Burgos, 2022). The 2024 official balance reports 14 productions and over 60 million euros in economic impact, confirming the reactivation of the pipeline around the Alicante hub (Presidencia de la Generalitat, 2024). Today, three vectors coexist: the hard infrastructure and services of CDL/SPTD; the regional FC being

deployed by the Generalitat; and the VRF platform, the provincial CBFC and Film València, and the municipal FOs that maintain territorial capillarity.

Finally, the Valencian Community lacks its own regional fiscal framework analogous to those in the Canary Islands or Navarre. Municipal action has alternatively focused on implementing facilitation measures and filming fee exemptions. For instance, the Valencia City Council announced in November 2015 the elimination of public space occupation fees for productions promoting the city's image, while maintaining fees for strictly commercial or advertising shoots, except in specified cases (Levante EMV, 2015). This criterion is further detailed in the regulatory Tax Ordinance (Finance Department of the Valencia City Council, 2021, p. 7). Additionally, the Valencia Film Office has made progress in its one-stop shop, the distribution and evaluation of impact forms, and the development of protocols.

5. Discussion and Conclusions

The available evidence suggests that the performance of both ecosystems is explained by three components: governance; financial capacity (promotion and co-investment) and operational capacity (soft and hard infrastructure); and measurement. Andalusia presents a stable integration of these elements: the AFC acts as a regional umbrella and publishes activity metrics; the AAIICC regularly opens development and production aid calls; the RTVA operates with public participation procedures; and the Network of Film Cities applies standardized documentation and processes—all of which are consistent with a sustained portfolio of film shoots. The Valencian Community, for its part, has undergone an institutional interruption followed by a decentralized reconstruction. Consequently, the primary gap is not one of provision, but of integration, standardization, and evaluation.

In this context, it is worth asking what lessons Andalusia offers and what recommendations would allow the Valencian Community to improve its management and expand its portfolio of audiovisual projects. A priority is to consolidate and increase the visibility of the Comunitat Valenciana FC as a single point of reference, reducing the current organizational dispersion (CDL, VRF, etc.) described in the analysis. To achieve this, it should be equipped with its own web portal that explicitly details its mission, functions, organizational chart, and service charter, and maintains an activity record with annual reports. This space must integrate a single regional network of FOs, a location directory, and a regional production guide featuring verified companies and professionals, thereby reinforcing the ecosystem's legibility and increasing predictability and operational efficiency.

Furthermore, the regional FC should strengthen the sector's financial capacity through promotion windows coordinated with the CVMC and the IVC, featuring stable schedules aligned with state incentive deadlines to facilitate access to financing under competitive

conditions. In parallel, operational capacity should be raised through an inter-municipal standardization of forms, documentation, exemption criteria, and service level agreements (SLAs) regarding permits, addressing the heterogeneity observed in the current network. The adoption of a model ordinance at the regional level, a single procedure portal, and a common catalog of fees and refunds would replicate an organizational pattern associated with better results in Andalusia, thus reducing processing times for producers.

Finally, it is essential to institutionalize a framework for measurement and learning to close the management cycle, addressing the lack of regional metrics noted in the analysis. It is proposed to create, under the regional FC, an Audiovisual Production Observatory with an explicit methodology and annual publication of results. The system must integrate both process KPIs (response and permit times, application approval and filming conversion rates, studio occupancy, SLA compliance, etc.) and outcome KPIs (number and typology of shoots, disaggregated local expenditure, employment by department, participation of Valencian suppliers, etc.), as well as sustainability and diversity indicators. To ensure data traceability, agreements should be established with the FOs, CDL, IVC, and CVMC, guaranteeing a public dashboard that allows for continuous monitoring.

In conclusion, the Valencian Community has faced an institutional reconfiguration process over the last decade that has allowed it to recover its management agents and partially reorder its relationship with the industry. These advances are significant, but there remains room for improvement to turn this heritage into a sustained competitive advantage: consolidating a single and visible regional umbrella, coordinating promotion windows with stable schedules, and standardizing inter-municipal procedures to reduce friction. All of this should be supported by a measurement framework and an observatory to provide feedback for decision-making. In this way, the territory's hard and soft infrastructure will be strategically leveraged, public policy will be aligned with the effective demand of OTT platforms, and the project portfolio and sector impact will be strengthened.

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7. Appendix I. Bibliographic references for Table 1

País	Institución	Enlace web del <i>tax rebate</i> correspondiente
España	Jefatura del Estado / Agencia Tributaria	https://bit.ly/49drI6n
Francia	Centre national du cinéma et de l'image animée	https://bit.ly/4pol69T
Italia	Direzione Generale Cinema e audiovisivo	https://bit.ly/3YvTKUo
Irlanda	Revenue Irish Tax and Customs	https://bit.ly/4pvI9Mv
Alemania	Filmförderungsanstalt	https://bit.ly/3Lh9XtH
Portugal	Instituto do Cinema e do Audiovisual	https://bit.ly/3LA7VF6
Reino Unido	Her Majesty's Revenue & Customs	https://bit.ly/451hMKL
Bélgica	Service Public Fédéral Finances	https://bit.ly/3Lh9IPj
Malta	Malta Film Commission	https://bit.ly/49oOKpx
Polonia	Film Institute / Polish Film Commission	https://bit.ly/4jzIqQQ
Rumanía	Oficiul de Film și Investiții Culturale	https://bit.ly/4qIQMI0
República Checa	Czech Audiovisual Fund / Czech Film Commission	https://bit.ly/4jvJ6ql
Hungría	National Film Institute	https://bit.ly/4pt4wFO
Lituania	Lithuanian Film Centre	https://bit.ly/4pywWOS

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