

Emerging narratives in Spanish cinema: Thematic diversification in contemporary (local) production

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Abstract

During the first decades of this century, the Spanish film industry has undergone a profound structural transformation driven by the decentralization and diversification of its audiovisual industry. This process has created an unprecedented scenario for the production of works with greater thematic, cultural, and gender diversity, while simultaneously reshaping the geography of the industry and improving working conditions for professionals and companies, enabling them to carry out their activities in their places of origin without the need to relocate to hegemonic production centers. The analysis focuses on the production of fiction feature films in Spain between 2000 and 2023, based on a corpus of 5,246 titles. It examines growth trends, territorial patterns, and the explanatory factors underlying this reconfiguration, with particular attention to the regions that have experienced the most significant development.

Key words

“Spanish cinema”; “emerging narratives”; “film commission”; “audiovisual industry”, “film production”; “cultural diversity”

1. Introduction

On the threshold of completing the first quarter of the twenty-first century, it is pertinent to analyse the recent evolution of Spanish cinema in the present century and the transformative dynamics that have shaped its production in recent decades, specifically in relation to its thematic evolution. Domestic cinematography, historically conditioned by strong centralisation — in Madrid and Barcelona — and dependent on state subsidies, has undergone notable growth, overcoming crises and periods of uncertainty that have both constrained and stimulated its maturation and transformation, situating the sector in a plural, more decentralised scenario with greater thematic diversification (Pérez-Morán & Guarinos, 2021). This phenomenon, far from being coincidental, responds to profound cultural, historical, political and technological transformations that have fostered the emergence of new narratives and production centres with greater plurality and richness, reflecting, among others, the local realities, languages and customs of Spain's different regions, as well as a more diverse cinema, with new filmmakers and perspectives, with a gender lens and renewed traditions (Castelló, 2023).

At the beginning of the present century, around one hundred feature films were produced in Spain, whereas today this figure has more than tripled, reaching 376 productions in 2024. This increase should not be interpreted merely as quantitative growth, but also qualitative: Spanish films have broadened their thematic spectrum, incorporating new voices and experimenting with new aesthetics that respond both to local realities and to a globalised context.

This situation has led, among other developments, to a greater decentralisation of the film industry, traditionally concentrated in the hubs of Madrid and Barcelona — and to a lesser extent the Canary Islands and Balearic Islands, more associated with national and international production services. This shift has also fostered the emergence of new production clusters in other regions such as Andalusia, the Basque Country, Galicia, and the Valencian Community (Sarabia & Sánchez, 2019). It should be added that this phenomenon has favoured the emergence of narratives rooted in localities and cultural diversity, often with a more distinctive and niche character, employing the languages, customs, and traditions of the different regions, and at times reclaiming rurality or portraying a less hurried and more human view of contemporary life.

This process of decentralisation is particularly relevant in a country characterised by its linguistic and cultural diversity. In contrast to a centralised model, the emergence of peripheral narratives allows cinema to engage with local identities, portray traditions, display distinct languages, and present ways of life previously absent from the screen. These productions, often minority or experimental in nature, contribute to diversifying collective imaginaries and rethinking the homogeneity of the centralist narrative (Ledo et al., 2016).

However, decentralisation should not be understood solely in geographical terms. It is also a phenomenon linked to technological development, reduced costs, and the digitalisation of production processes; these have been key factors in enabling new generations of filmmakers, with fresh perspectives and often far removed from traditional industrial centres, to materialise their projects. In this respect, the emergence of regional production companies, the involvement of regional broadcasters, and the work of institutions such as Film Commissions have been decisive in fostering and supporting a local cinema, as well as in consolidating new narratives and cultural

references (Sarabia & Sánchez, 2022). These entities have not only attracted shoots but have promoted the professionalisation of local crews and the consolidation of an industrial fabric that develops autonomously.

Within this context, peripheral cinema has contributed to generating local industrial structures that support the consolidation of a strong and stable national industry. Juan Antonio Bardem's quote still resonates today: "Spanish cinema is politically ineffective. Socially false. Intellectually minimal. Aesthetically null and industrially rickety" (Juan Antonio Bardem, cited in Redacción AV451, 2016, para. 1). Today, the situation is radically different. Far from this diagnosis, contemporary cinematography approaches the aspiration of being politically independent, socially committed, aesthetically effective, narratively diverse, and industrially bold.

Nonetheless, it is important not to adopt an excessively triumphant outlook. Although we observe that production is decentralising and diversifying, the main poles of film activity remain centred around the hubs of Madrid and Catalonia, which together account for more than half of total production. Likewise, consolidating a stable audiovisual infrastructure outside these regions continues to be a challenge: many peripheral projects depend on temporary subsidies and technical infrastructures that remain unevenly distributed. Hence, decentralisation must be analysed in relative terms — more as an ongoing process than as a completed achievement.

Regional and national film-support policies have played a fundamental role in this transformation. The approval of specific audiovisual laws (the regional law of Navarre 26/2016, establishing deductions for investment in film productions; the Andalusian Film Law 6/2018 of 9 July, aimed at strengthening and supporting cinematographic activity in Andalusia) and the creation of competitive tax incentives, alongside the promotion of training programmes, have enabled the consolidation of new production hubs. Examples such as the Valencian Community or Navarre, with exponential growth in the past decade, demonstrate how institutional commitment can translate into sustained increases in production and investment that return in the form of tourism promotion, job creation, filming-related expenditure, and the development of new infrastructures.

In parallel, the rise of digital platforms has altered the Spanish audiovisual ecosystem, generating new opportunities and flexibilities. The growing demand for content from companies such as Netflix, Amazon Prime, or Movistar+ has contributed to increasing production and internationalising the distribution of Spain's audiovisual output. However, it also raises questions about the homogenisation of narratives and the risk that local stories may be absorbed by global dynamics.

From this panorama, the present research seeks to answer the following questions:

- Has thematic diversification taken place in Spanish cinematography in the last quarter of a century?
- In what ways have decentralisation and regional support influenced the emergence of new production companies and local narratives?
- Why is it important to have a plural and diverse approach in the country's cinematography, as opposed to a more centralist concept?

These questions will allow us to address, from a critical and updated perspective, the scope and the challenges of thematic and territorial diversification in contemporary Spanish cinema.

Studies on contemporary Spanish cinema, beyond the commonplaces of auteurship and genre, must now attend to how productive decentralisation is generating rooted local stories. As Carlo F. Heredero emphasises, in times of greater demand for images, “if the aim is truly to promote diversity (both in industrial and creative terms), [state intervention] becomes as necessary as it is decisive” (Heredero et al., 2019, p. 21) (festivaldemalaga.com).

This work addresses the research gap concerning the emergence of peripheral “emerging narratives”: on the one hand, it offers a theoretical perspective by reconsidering the notion of national cinematic identity; and on the other hand, it analyses practical contexts (digitalisation, public policies, incentives, platforms) that have catalysed this phenomenon.

The hypothesis holds that contemporary Spanish cinema, far from having reached a uniform maturity, is undergoing a process of reconfiguration in which technological advances, institutional policies, and cultural diversification are enabling the consolidation of a plural and peripheral cinematography. It would appear that the industry’s state of permanent crisis has, paradoxically, favoured the present context of growth and current recognition.

With this aim, the present article proposes a quantitative and qualitative overview of the production of feature-length fiction films in Spain between the years 2000 and 2023. Based on the analysis of 5,246 titles produced in our country, examining growth rhythms, territorial patterns, and the possible explanatory factors of the phenomenon, with special attention to the regions that have experienced the most significant development. This analysis will make it possible to understand the extent to which the decentralisation of film production in our country is effective and what challenges it faces in sustaining this process in the future.

2. Theoretical framework

Spain is a decentralised state in administrative terms, where the autonomous communities assume competencies to promote culture and, therefore, the audiovisual sector. Within this model of fostering and protecting culture, the film industry is included — an activity that in our country presents a financing system deeply dependent on institutional support (Polanco, 2018; Fernández, 2014).

With the beginning of the new century, numerous changes have enabled a greater variety of productions that contribute to the film industry in our country. This has been a period of economic, social, and technological transformations that have profoundly impacted the production, distribution, and consumption of audiovisual content. Digitalisation has democratised access to filming and post-production technologies, reducing entry barriers for independent local production companies. Added to this is the growing demand for content from streaming platforms, which has broadened the funding and exhibition windows for projects with a strong local component or in co-official languages.

Emerging narratives on the periphery

Although the academic literature has addressed various aspects of recent cinematography, there is a need to examine the emergence of new voices and themes that reflect the country's cultural and linguistic diversity, as well as the impact of this decentralised production on the audiovisual landscape.

In contrast to the centralised view of the Spanish film industry, the analysis focuses on emerging narratives that originate from the country's geographical and cultural peripheries. In this regard, there is a growing interest in making visible stories and characters that reflect the linguistic, cultural and social diversity of the different autonomous communities. The advent of the digital revolution and globalisation has blurred the boundaries of “national cinema” — as Sánchez-Noriega (2020) warns — by multiplying exhibition channels and possible narratives.

Authors such as Castelló Mayo (2023) and Pérez-Morán and Guarinos (2021) have also documented the expansion of the thematic repertoire and the emergence of a new production map that incorporates historically peripheral territories.

At present, sector data confirm the rise of peripheral production. Our quantitative analysis indicates that the number of “peripheral” films (productions made predominantly outside the Madrid/Barcelona production hubs) has increased considerably over the last two decades: from 17 titles in 2000 to 48 in 2023, reflecting sustained growth, in line with the expansion of national production. More than half of these films come from just four regions: Andalusia, Euskadi, Galicia, and the Valencian Community, which together account for 72.5% of peripheral cinematography (one third of total fiction production). Andalusia heads this list with approximately 140 titles (25% of peripheral production), driven in part by its early Film Commission (created in 1998) and competitive regional incentives. The Basque Country, having surpassed ten annual releases, now reaches a comparable volume (110 films). Galicia and the Valencian Community also maintain steady growth; in the Valencian Community, the reopening of the large Ciudad de la Luz studio in 2022 promises a new boost.

This phenomenon is manifested in the increase in productions made in co-official languages such as Catalan, Galician, and Basque, and in the way they address themes and aesthetics that explore the identity and memory of these territories. It is noteworthy that production companies are seeking scripts and productions filmed in other minority languages (such as Aranese), with the aim of obtaining greater subsidies, within the framework of support provided by the Film Law (European Charter for Regional or Minority Languages of the Council of Europe) (elconfidencialdigital.com).

Culturally, studying these narratives is essential for understanding how regional identities are constructed and transmitted in the collective imagination. It is also important to highlight the increase in productions made outside the traditional centres of Madrid and Barcelona, which evidences a process of geographical decentralisation of filmmaking activity. From an industrial perspective, the work shows that productive diversification can generate synergies that benefit the national whole — for example, co-productions between autonomous communities “allow us not to give up our homeland to develop our professional careers” (filmand.es).

The rise of peripheral narratives can be interpreted as a response to the need to construct a more plural and inclusive imaginary that accommodates the multiple voices and perspectives that make up the country's reality. Likewise, this phenomenon is related to the strengthening of regional audiovisual industries and the relevance of Film Commissions in promoting and supporting local production.

This expansion reflects how institutional decentralisation translates into production. For example, the Andalusian Film Commission's report documents 1,406 different shoots in 2022, 5.8% more than in 2021, with a direct and indirect economic impact exceeding 141 million euros (andaluciafilm.com). These figures encompass feature films, series, documentaries, and adverts, indicating that "Andalusia is positioned as a benchmark in the cinematographic and television sector" (andaluciafilm.com).

In Andalusia, the regional administration issues annual grants (2,3 M€ in 2022) and tax rebates that favour the hiring of local production companies (andaluciafilm.com). Similarly, institutions such as the Institute of Cinematography (ICAA) increase subsidies for projects with regional support, incentivising co-production between territories (filmand.es). It is noteworthy that the Spain Audiovisual Hub (a plan launched by the Government in 2021) explicitly refers to "new lines of support for audiovisual production and improved tax incentives" (avance.digital.gob.es), recognising the strategic value of the regions in the production chain. In short, recent public policies have strengthened the financial viability of cinema outside the traditional hubs, opening up space for new local narratives.

This diversification is not only quantitative but also qualitative. Emerging productions explore culturally specific themes and, in many cases, are filmed in co-official languages. Trend analysis reveals that films "draw from the territory where they are created": there is an abundance of narratives about regional identity, distinctive historical memory, and social realities different from those of the traditional centre-north axis. For example, in Basque there has been a rise in films such as *Akelarre* (2019) or *20,000 Species of Bees* (2023), while in Galicia authors such as Oliver Laxe stand out with *O que arde* (2019), alongside recent commercial successes such as *Cuñados* (2023). Each of these titles carries local culture and language beyond its borders: as a Basque producer notes, films in Basque allow audiences to "hear Basque for the first time" in countries as distant as Croatia or Brazil (filmand.es). Indeed, productions in minority languages have a "very significant cultural impact... beyond a country's borders" (filmand.es), reflecting growing interest in Spain's linguistic diversity. This phenomenon connects with the legal obligation: the Audiovisual Law and related regulations require quotas or deductions that favour works in regional languages (festivaldemalaga.com). Peripheral cinema enriches the identity map of Spanish audiovisual culture by incorporating pluralist viewpoints that until now have received little attention.

Technological and industrial factors

Several technological and industrial factors have amplified this trend. Digitalisation has drastically reduced the costs of audiovisual production, democratising access to filming and post-production tools. This has enabled independent production companies to establish themselves in provinces and autonomous communities, since investing in

equipment is more easily amortised and editing can even be carried out remotely. At the same time, the boom of global streaming platforms (Netflix, Movistar+, Prime Video, Disney+, etc.) has sharply increased the demand for content in Spanish. By expanding the potential market of a film, they make financially viable projects with a local focus that previously would have had very few cinema screenings. This creates a virtuous circle: greater demand leads to more funding, which in turn attracts shoots and generates employment in peripheral regions. The government's own strategy recognises this transformative power: the 2021 Spain Audiovisual Hub Plan places among its main pillars the full digitalisation of production and distribution (including support for dedicated platforms) avance.digital.gob.es, as well as allocating funds for specialised training in digital technologies.

This study is justified by the need to understand the transformations that Spanish cinema is undergoing in a context of globalisation and digitalisation, and by the importance of making visible the emerging narratives that originate in the country's geographical and cultural peripheries. The results of this research are expected to contribute to enriching the academic debate on Spanish cinema, as well as guiding public policies aimed at fostering the development of the audiovisual sector.

3. Methodology

To respond to the main objective of this study — confirming the emergence of new production hubs far from the usual centres (Madrid–Barcelona) — the principal source consulted has been the data provided by the Institute of Cinematography and Audiovisual Arts (ICAA), through its various publications in the form of film yearbooks, the institution's film catalogue, sectoral databases and publications made available by the different Film Commissions involved, analysing and extracting conclusions from them.

The research is based on a mixed design, both quantitative and qualitative. The main database is composed of 4,870 feature-length fiction films produced in Spain between 2000 and 2023 (conclusive data for 2024 are not yet available). The primary criterion for discrimination concerns the locations where the different productions were filmed, selecting those that took place outside the usual production centres — that is, the Community of Madrid and Catalonia — together with the Canary Islands and the Balearic Islands, territories historically associated with international production services.

Moreover, once the different locations were distinguished, classification by autonomous community was taken into account, not only considering the permanence or headquarters of a shoot in the territory — since many outdoor shoots take place across different sites or locations (intra-regional productions) — but also taking into account the origin or participation of production companies, as well as, to a lesser extent, the involvement of regional broadcasters.

The classification is also circumscribed exclusively to feature-length fiction films, excluding documentaries and other types of productions, such as series, short films, advertising, etc. For these, either there is no reliable tracking, or no official figures exist, as they do not depend on subsidies or direct aid, nor is there a requirement to notify the carrying out of the shoot. On the other hand, we considered it appropriate not to evaluate documentary productions, despite their weight and importance in our cinematography — and whose figures amount to approximately half of the total annual production —

since their filming and creation require lower investment, as well as smaller technical and human teams, with minimal economic return for the locations where they are carried out.

Therefore, the result obtained relates to fiction films that have been shot in peripheral regions. These have been grouped by autonomous community, considering whether productions were filmed wholly or partially in these regions, produced by local production companies, through participation with other production companies in the territory, or as production services facilitating national or international shoots.

Complementarily, enquiries were made to the various territorial Film Commissions, through direct contact by email or by searching for data available on the websites of each office, to corroborate and cross-check the information obtained concerning aid and economic returns from shoots. This triangulation of sources has made it possible to validate territorial patterns and explain the observed dynamics.

The study takes into consideration the different Film Commission offices of the autonomous communities, grouping the data according to this premise. Although there exists a wide and complex variety of film offices, it was deemed appropriate to bring together the data and communication around these centres.

Another source consulted consisted of various reports on the state of the audiovisual sector published by different regional governments, although there are few initiatives dedicated to documenting and monitoring the advance financing of audiovisual production by audiovisual media service providers, except for the Consell de l'Audiovisual de Catalunya, the Consell de l'Audiovisual de la Comunitat Valenciana, the Consello da Cultura de Galicia, the Consejo Audiovisual de Andalucía and the audiovisual policy reports of the Government of Navarre. Likewise, with the aim of gaining a broader overview, the websites of the respective regional bodies responsible for promoting cinema were consulted.

Meanwhile, to obtain information on the emergence and creation of new production companies in the different regions, we relied on the data provided by the ICAA in its yearbook-style publications, contrasting these with information provided by the different Film Commissions involved, along with sectoral studies published by business associations such as Spain Film Commission and Profilm.

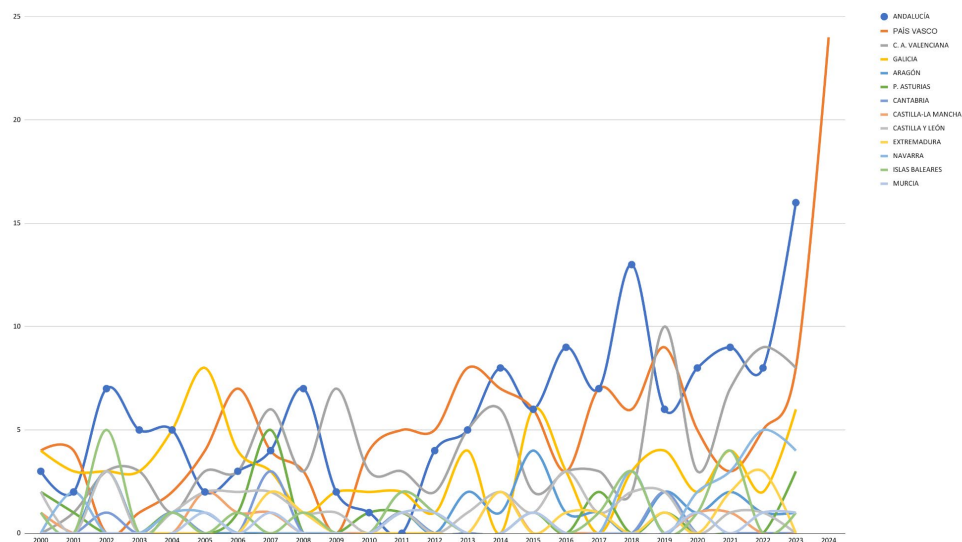
We also made use of the support of generative AI, consulting programmes such as ChatGPT, Perplexity, and TextCortex for the purpose of support, contribution, and interpretation of data, as well as structural assistance in text formatting.

4. Analysis and results

The quantitative results confirm sustained growth in peripheral production during the period studied. The number of titles with a peripheral character rose from an estimated 17 films in the year 2000 to 48 in 2023, which represents a notable increase in relative terms, revealing steady growth in peripheral productions in line with the expansion of national production over the period considered.

Figure 1: Evolution of film production by Autonomous Community (CCAA) between 2000 and 2023

Evolución PRODUCCIÓN CINEMATOGRÁFICA por CCAA periféricas 2000 -2024



Source: Authors

As we can observe in the graph, only four communities — Andalusia, the Basque Country, Galicia, and the Valencian Community — account for approximately 72.5% of peripheral cinematography, representing nearly one third of the country’s total fiction production. Therefore, the territorial distribution presents a strong concentration, as more than half of productions remain linked to Madrid and Catalonia.

There are several factors that explain this concentration: on the one hand, Madrid and Barcelona continue to be clear nerve centres, with companies and services devoted to the audiovisual sector and a long trajectory, which grants them a clear competitive advantage.

On the other hand, there is greater talent and a higher concentration of artistic and technical professionals in regions with more activity. And finally, financing: these central regions benefit from more developed public and private funding policies.

Andalusia heads this list with approximately 140 titles (25% of peripheral production), driven partly by its early Film Commission, established in 1998, which coordinates the local industry and public administrations, and by its competitive regional incentives, along with its locations, infrastructures, communication facilities, and so forth.

The Basque Country, after surpassing the threshold of ten annual premieres, now reaches a comparable volume (110 films). Galicia and the Valencian Community also maintain steady growth; in Valencia, the reopening of the large Ciudad de la Luz studio in 2022 promises renewed momentum.

It is observed that this increase in production follows a global trend of rising demand for content creation within a globalised world, where there is a need to provide specific

content for the different platforms. In recent years, our country has ranked second in Europe, behind the United Kingdom, in the number of films and television series commissioned by television networks or video-on-demand platforms. It has also placed second — after Italy and ahead of France — in volume of film production.

The different communities finance and promote the audiovisual sector in their region through various programmes and initiatives. As provided for in our constitution, the autonomous communities may assume competences in this area. They embrace a model of decentralised public cultural spending, with a lesser role of the State compared to the autonomous communities and municipalities; however, within this model of fostering and protecting culture, the film industry is included. Institutional decentralisation has resulted in active policies supporting local cinema and the creation of infrastructures aimed at attracting film shoots (Sarabia & Sánchez, 2019; Heredero & Reyes, 2017).

The qualitative analysis reveals that peripheral productions tend to incorporate local cultural elements more frequently: the use of co-official languages (Basque, Galician, Catalan), references to historical-territorial memory, and a greater presence of social themes linked to rurality, migration, or local economic transformations.

Thus, the different projects tend to rely on the grants and subsidies issued by the Institute of Cinematography, complementing other aspects of their funding with aid from the autonomous communities in their different forms — whether for development, production, promotion, and dissemination, and so forth. These grants require certain conditions to be met in order to participate and obtain the requested benefit; however, these often stipulate that a percentage of the shoot must take place in the territory, or that there must be participation from a local company or production company, the hiring of local technical crews and resources, and so forth, thereby enabling eligibility for a grant or tax rebate.

Thus, for example, the Basque Country has stood out in recent years as one of the regions committed to fostering investment and supporting the growth of the audiovisual sector, attracting national and international shoots to its locations. To this end, the different regions within the community have implemented a programme of tax incentives, with the possibility of benefiting from rebates ranging from 35% to 70% of the project's total costs, which may be complementary to the aid offered by the ICAA. This initiative led to the attraction of 151 productions in Bizkaia in 2023, including the shooting of twelve national films, generating an impact of 58.5 million euros on the region's GDP. Observing the success of the programme, the regions of Gipuzkoa and Álava have decided to replicate it, each with certain nuances and according to their competences (Cinco Días, 2024).

The city council of Bilbao has also announced the tender for an audiovisual hub with more than 100,000 square metres of audiovisual facilities, housing studios, production and post-production spaces, warehouses, and a training centre for professionals, addressing the shortage of technicians required to meet the current high demand for productions (Cinco Días, 2024).

This announcement adds to other new facility initiatives promoted in various regions and municipalities, such as the Cidade das Tics in Galicia, Green Film Studios in Majorca, the Ciudad del Audiovisual in Murcia, the Ciudad del Cine in Almería, and the projected

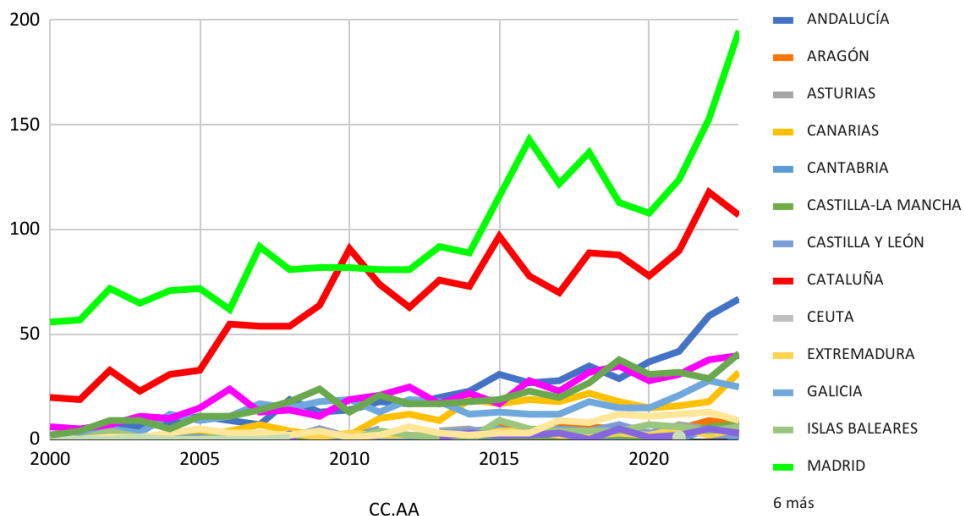
aquatic set in the Bay of Cádiz... though it remains to be seen how many of these projects will materialise and become reality.

A distinctive and noteworthy case is the initiative of the Government of Navarre to support animation and post-production projects under the umbrella of Navarra Animation.

These business opportunities are valued by different companies, expanding the volume and investment of those already existing, or creating cooperative processes between local business groups and national or foreign companies that identify a moment of opportunity and open branches or production companies, seeking advantageous conditions for their productions.

Figure 2: Evolution of film production companies by Autonomous Community (CCAA) between 2000 and 2023

ANDALUCÍA, ARAGÓN, ASTURIAS, CANARIAS, CANTABRIA...



Source: Authors

A progressive and exponential increase in the number of production companies in the autonomous community can be observed each year, coinciding at the peripheral level with the regions previously mentioned. All these regions have gone from having barely fewer than ten companies to multiplying this number by six in the case of Andalusia, by four in the Basque Country and the Valencian Community, or by two in Galicia. Navarra follows to a lesser extent, though still notably, surpassing the threshold of ten companies. Naturally, the increase in companies and services is not associated solely with film productions, but also with the provision of services required by the audiovisual sector in these regions, whether in the form of television programmes, outsourced production services, advertising, series, support services for international shoots, and so forth.

It is worth noting that in those regions where public regional television is more firmly established, there is greater development of audiovisual production and, therefore, an industry capable of undertaking its own film projects, with companies that can provide the services and necessities of a shoot, together with technical and artistic professionals, as well as other material requirements. This is the case of Andalusia, the Basque Country, Galicia, and Valencia. This dynamic may also explain some of the milestones or crises undergone by the sector due to lack of funding or support, including the closure of certain regional channels (Canal 9, 2013), since regional broadcasters demand services from local production companies, generating employment both around their own operation and through the outsourcing of production services; moreover, they are required to promote and foster the region's culture, and they must comply with the law obliging them to allocate part of their revenue to financing European films.

Despite the favourable factors associated with cost reduction thanks to digitalisation, sustaining peripheral production is not automatic, since without regional investment and local industrial infrastructure, such cinematographies would lack viability. In the Basque Country, ETB regional television stands out as one of the main investors in regional cinema, being “one of the principal reasons why Basque cinema has stood out in recent years” (filmand.es). Likewise, the Provincial Council of Valencia, together with regional cultural funds and tax incentives for projects produced in Valencian, has contributed to supporting local titles. While state subsidies (through the ICAA) are common across the country, regional administrations have diversified their support — short films, feature films, international shoots — to safeguard the “sustainability of the industry” in their territories (andaluciafilm.com). This emerging “local productive fabric” is evident even in the university sphere: the proliferation of regional film schools and regional festivals demonstrates the emergence of local cultural ecosystems.

This global trend of increased audiovisual production and the demand for specialised technicians in different regions has led to an increase in admissions to local Film Schools, as well as specific training initiatives carried out by the different institutions to ensure the supply and generation of specialised professionals. This is the case of the Basque Country's Film School, which has achieved a 20% increase in enrolment; meanwhile, in the region of Aragón, the Centre for Advanced Technologies has been established under the coordination of the Aragón Film Commission, with the aim of addressing the need for professionals. Local authorities meanwhile, run specific courses in collaboration with training schools such as ESCAC, ECAM, and the consultancy Mrs. Greenfilm. At the national level, training programmes developed under RTVE's Haz project stand out, with certificates issued by the corporation and the ICAA, whose cost may be fully subsidised.

Economic and social impact

At the industrial level, the growing peripheral activity has economic and strategic repercussions. The added value for each community can be seen in the employment generated: Andalusia surpassed 21,000 jobs (direct and indirect) linked to film shoots in 2023 (andaluciafilm.com), while in Bilbao–Bizkaia a total of 1,113 technical and artistic crew members were mobilised, an increase of 74% compared to 2022.

The tax incentives and aid promoted by the Provincial Council of Bizkaia have led to an increase in demand and interest in filming in the region, doubling the number of shoots

in 2024 (a total of 28 feature films, compared to 12 in 2023 and 5 in 2022), along with the need to have human and technical teams able to supply the requirements of these productions. Local production companies have had to double the hiring of labour, as well as the acquisition of equipment to provide services for the needs presented.

The need to hire qualified personnel has encouraged the return of many professionals who had been developing their careers in Madrid or other parts of Spain, finding the opportunity to return to their homeland, or opting for geographical mobility due to improved conditions. This situation is linked to a current period of rising rental prices and cost of living at the national level, prompting individuals to consider alternative life projects or relocation to less pressured areas, in territories where long commutes are not required and which offer more friendly and natural surroundings.

Moreover, the presence of several production zones enriches the national whole: the governmental plan highlights that one of its objectives is to “achieve the connection between the expressive vocation of our creators and its conversion into competitive and profitable industrial products” (avance.digital.gob.es). In this sense, provincial and regional Film Commissions have acted as logistical and promotional catalysts. As noted by Sarabia & Sánchez (2022), these offices not only offer locations but also produce catalogues of technical services, encourage business collaboration, and participate in international fairs (ojs.ehu.eus). The Spanish Film Commission network consolidates Spain’s visibility as a filming destination, which also attracts foreign productions. Part of the economic stability of the autonomous regions stems from attracting international projects, incentivised by tax deductions and co-production agreements.

The most relevant explanatory factors identified are:

- Tax incentives and regional aid, with deductions that in some cases reach between 35% and 70% of costs, which have attracted shoots and encouraged the establishment of local production companies.
- Work carried out by Film Commissions in the promotion of locations and the professionalisation of local technical services.
- Presence of regional broadcasters that act as co-producers and rights buyers, ensuring a funding window.
- Demand for content from streaming platforms, which has expanded the potential market for titles with a strong local imprint.

Film commission management models

It is worth noting the work carried out by the different bodies, but also the inexplicable situation of lack of coordination and fragmentation at the regional level, since there are regions where several district offices exist and yet no regional office is available, or it has only recently been created. This prevents the centralisation of data that would support and justify their work, as well as the establishment of a clear and determined policy of support for the audiovisual sector. Clear examples are the regions of the Basque Country, Valencia, and Galicia.

There are two management models: a centralised coordination model through a regional Film Commission, and a model of decentralised offices, along with those of single-province autonomous communities (Sarabia Andugar & Sánchez Martínez, 2017).

Thus, for example, in the Valencian Community there are a total of 27 regional film offices, closely linked to the tourism promotion of filming locations, but without an entity that brings together the work of all of them — at least in terms of clarity regarding the funding and incentives available to the different productions, the development of their work in the region, lists of professionals and companies that support a film shoot, and a more global monitoring framework that offers perspective on economic benefits, job creation and tourism attraction, among others.

A similar situation, although to a lesser extent, occurs in Galicia, with five local or provincial entities that seek to attract audiovisual projects or promote the area touristically. Recently, the launch of the Galicia Film Commission was announced, which was expected to become operational by the end of 2023, but at present, the Xunta is still awaiting the publication of the tender for an external specialised agency to manage and promote the initiative.

As for the Basque Country, the Film Basque Country platform was recently created (in 2025) as a brand that centralises information from the territory's film commissions, but it does not function as a Film Commission office; instead, it serves as a place where information from the other offices can be accessed, as well as where aid and incentives for film productions can be offered, clarified and encouraged. One of the main difficulties expressed by production companies when filming and obtaining permits is the lack of a one-stop office, highlighting the need for coordination among the different audiovisual promotion offices.

The implementation of aid policies and tax incentives also plays a leadership role in public initiatives that seek a more sustainable and environmentally respectful industry, promoting efficient and effective productions both economically and in terms of resource and material management, reducing emissions and waste, and increasing the use of renewable energies. In our country, the first initiatives are linked to the Green Seal of Málaga, the Basque Green Film Protocol in Euskadi, or the Ten-Point Protocol of the Tenerife Film Commission.

5. Discussion and conclusions

The findings confirm that the decentralisation of Spanish cinema is a complex and multifaceted process: it is not only a matter of relocating shoots outside the main centres, but of developing local industrial and cultural ecosystems. Regional policies and Film Commissions have acted as effective catalysts, but their results are uneven: the regions with greater administrative capacity and resources have advanced more dynamically.

The emergence of peripheral narratives simultaneously presents opportunities and risks. Among the former are the expansion of the identity repertoire of Spanish cinema, the promotion of local talent, and the generation of regional employment. However, there is a risk that the internationalisation promoted by platforms homogenises stories and aesthetics if cultural singularity is not preserved. Moreover, the dependence on public

funding and temporary fiscal dynamics raises questions regarding the long-term sustainability of certain projects.

Film Commissions and shooting funds have driven the local economy through multiplier effects (services, tourism, employment), although the precise quantification of the impact is difficult to determine, requiring more precise and longitudinal evaluation studies. Technological democratisation has reduced barriers, but the concentration of technical and artistic talent in major hubs hinders the definitive consolidation of a fully autonomous industrial fabric.

A relevant aspect identified is the lack of coordination at the regional level, where some regions have several district offices but no centralised regional office. This prevents the centralisation of data that would support and justify their work, as well as the establishment of clear and determined audiovisual support policies.

The thematic and territorial diversification of Spanish cinema represents an unprecedented opportunity to enrich the national cultural heritage, provided that a balance is maintained between opening to global markets and preserving the local singularities that constitute the true richness of this transformation.

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