

# The power dynamics of film production in a global context

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## Abstract

The objective of this thesis is to shed light on the power relationships at stake in the international film industry. In the era of globalisation, numerous factors shake up the film industry, particularly its production processes. This paper investigates the following research question: how are power dynamics between actors of the film industry influenced by the globalisation of production processes? To answer it, I used qualitative research, an appropriate method to get an in-depth understanding of complex phenomena. What's more, I used an industry-level analysis method, as this paper is exploring the film industry at large. I found that while producers dominate the industry thanks to the power money gives them, producing abroad helped them extend their power to new regions and actors. Similarly, globalisation opened new production opportunities for producers and filmmakers in countries with an emerging or underdeveloped film industry. Streaming platforms also entered the film industry by the means of the global digitalisation of content. States, alongside institutions, are playing a role in shaping power dynamics in international production processes. Ultimately, the globalisation of production processes allowed a growing dominance of producers, the entry of new actors on the market, and made the understanding of international dynamics a necessity for stakeholders of the film industry.

## Resumo

O objectivo desta tese é esclarecer as relações de poder em jogo na indústria cinematográfica internacional. Na era da globalização, numerosos factores abalam a indústria cinematográfica, nomeadamente os seus processos de produção. Este trabalho investiga a seguinte questão de investigação: como é que as dinâmicas de poder entre os actores da indústria cinematográfica são influenciadas pela globalização dos processos de produção? Para responder a esta questão, recorri à investigação qualitativa, um método adequado para obter uma compreensão aprofundada de fenómenos complexos. Além disso, utilizei um método de análise ao nível da indústria, uma vez que este artigo explora a indústria cinematográfica em geral. Descobri que, embora os produtores dominem a indústria graças ao poder que o dinheiro lhes dá, produzir no estrangeiro ajudou-os a alargar o seu poder a novas regiões e actores. Do mesmo modo, a globalização abriu novas oportunidades de produção para produtores e realizadores em países com uma indústria cinematográfica emergente ou subdesenvolvida. As plataformas de streaming também entraram na indústria cinematográfica através da digitalização global dos conteúdos. Os Estados, juntamente com as instituições, estão a desempenhar um papel na configuração das dinâmicas de poder nos processos de produção internacionais. Em última

análise, a globalização dos processos de produção permitiu um domínio crescente dos produtores, a entrada de novos actores no mercado e tornou a compreensão da dinâmica internacional uma necessidade para as partes interessadas da indústria cinematográfica.

Keywords: Power dynamics, film industry, globalisation

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## Contents

Abstract .....	2
Contents.....	4
Preface.....	6
1. Introduction .....	7
2. Literature Review .....	9
2.1 The rising interest for the film industry .....	9
2.1.1 Interdependencies of actors in the film value chain .....	9
2.1.2 A flourishing but reductive literature .....	11
2.2 The inexorable impact of globalisation.....	11
2.2.1 The expansion of cultural industries .....	11
2.2.2 Blurring of barriers between countries.....	12
2.3 The challenges of power dynamics for the business environment.....	12
2.3.1 The notion of power .....	12
2.3.2 Power dynamics are shaping the film industry .....	14
3. Methodology chapter.....	15
3.1 Research design.....	15
3.2 The data collection .....	15
3.3 The data analysis .....	20
4. Empirical setting .....	22
5. Findings.....	23
5.1 Growing dominance of global producers .....	24
5.1.1 Polarisation of power among the value chain .....	24
5.1.2 Power comes from money .....	26
5.2 Balancing the power dynamics .....	28
5.2.1 Resisting the pressures of globalisation .....	28
5.2.2 Seizing opportunities for emerging filmmakers and producers .....	30
5.3 A new global organisation.....	31
5.3.1 Control and allocation of resources.....	31
5.3.2 Diagram of power.....	32

6. Discussion .....	33
7. Conclusion.....	34
8. References .....	35
9. Appendices .....	45
9.1 Appendix 1: Coding table .....	45

## Preface

First, I would like to thank my thesis supervisor, Laure Leglise, for her guidance and support all along this journey. I'm truly grateful for her engagement and enthusiasm, which kept me motivated until the last steps of writing. More generally, I would like to thank the teachers of Católica Lisbon School of Business and Economics. Learning from them was challenging and rewarding at the same time.

Thank you also to my parents and my brother, who got me where I am today and supported me from a distance throughout this year. Their unfailing back up has always been my greatest strength.

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## 1. Introduction

*“A filmmaker must above all have an ethic. I have never tried to crush anyone with my art. I am aware that I am entirely subject to nature. I try to stay away from political ideology as much as possible. However, an artist does not do anything naturally, his vision is the result of a precise education. The aim is to be as humanistic as possible. I am aware of the weakness of man, and therefore of my possibilities as a filmmaker.”* (Manoel de Oliveira, interview for L'Express, 2012)

Close attention has been paid to the film industry these past years, considering digitalisation and the way it changed our relationship to culture (Lang, 2023). Moreover, the public opinion being a major but subjective determinant for film success, the film industry is an unpredictable market (Müller-Trede et al., 2018). Among scholars, the attempt to make the film industry more predictable concentrated the research on the determinants for commercial success (Dalton & Leung, 2017; Lehrer & Xie, 2022). Such determinants are the impacts of distribution channels or film critics for a movie's success, among others (Kersten & Bielby, 2012; Benner & Waldfoegel, 2023). In addition, power dynamics are a common topic in sociology and management. Various studies showed how they take place in organisations and institutions, and how actors exert control and influence through relationships (Comi & Vaara, 2022). In the field of management, power dynamics have been studied with a quantitative approach, in non-creative industries for the most part. Little attention has been paid to the way power dynamics take place in creative industries. What's more, there is a gap in literature about power dynamics analysed with qualitative research. (Zhu & Westphal, 2021).

As a result, the study of power dynamics in the film industry has been left apart by researchers. The way actors of the film industry interact, exchange resources, and exert power is quite unknown. Specifically, understanding how power dynamics are exerted in the film production processes is crucial for managers and film professionals. Indeed, production processes of films involve creativity, and the junction of creativity and power dynamics has important managerial consequences such as complex decision making (Morley & Silver, 1977; Amabile & Khaire, 2008). However, in the same way power dynamics in the film industry have not been researched, production processes were also left apart. The way actors interact and exert power in the film production processes are not academically known. Furthermore, the globalisation of film production processes has expanded power dynamics to a worldwide ecosystem. New actors appeared, other actors lost power, and a new global order is being established (Calnan et al., 2023). Understanding the influence of globalisation on power dynamics is necessary for film professionals and managers to make better decisions and improve the production processes. To this day, research about globalisation mostly concerns digitisation or film distribution (Duan et al., 2011; Dalton & Leung, 2017). The way the globalisation of film production processes influences power dynamics between actors of the film industry is still unknown in literature.

In this sense, my research question is: “How are power dynamics between actors of the film industry influenced by the globalisation of production processes?”

Power dynamics refer to the balance of power between actors and the methods used by them to control and influence each other (French & Raven, 1959). Globalisation is the process by which organisations develop international relations or operate on an international scale. Globalisation has influence in the sense that it impacts relationships among actors of an industry, and it is a continuous, evolving phenomena (Friedman, 1999; Dreher et al., 2008). Production processes refer to the creation of films and are a catalyst for power dynamics. Production involves many different actors of the film industry, with different levels of power and interests, making it an important point of focus for my topic (Narayan et al., 2016; Jia et al., 2022).

To answer my research question, I used the theoretical framework of power, as commonly defined in power literature. Different forms of power have been defined, each of them having different impacts and ways of unveiling themselves. The framework I used gathered four types of power defined by different authors: “power over”, “power with”, “power to”, and “power from within” (Follet, 1940; Pitkin, 1972; Allen, 1998; Townsend et al., 1999). I used a qualitative method to answer my research question, and I chose to study the film industry at large. This choice seemed appropriate, since studying power dynamics in the light of globalisation involves broad and international trends, not observable in a single company or country. Besides, power dynamics encompass subjective and qualified phenomena, more easily revealed by qualitative research. The film industry is an interesting set up to study power dynamics, since many different actors are part of it and globalisation greatly impacted its business.

The results of this study show that while the globalisation of production processes gives more power to already established actors, particularly producers, it is a paradoxical phenomenon. By extending their power to new countries, producers reach a larger audience and earn more profits. Nonetheless, they also empower actors in these countries, by offering in turn more opportunities of film production. This two-sided process is backed by profits objectives, money being the main factor of power in the film industry. With the increasing pressures of globalisation and profits, resistance movements emerged. Whether collective or individual, these movements are an attempt for actors with less power to change the balance. Finally, the results of this study reveal the importance of states and institutions in the globalisation of production processes. Getting more power is a motive for internationalisation and building relationships with global actors.

Through this study, I contributed to the film industry literature, pointing towards a field distinct from the ones previously studied. Unlike the broad research about economics of movies, I enlarged the film industry literature to power dynamics. With a focus on globalisation and an in-depth understanding of its complexity through qualitative research, I yielded a new approach to power dynamics.

Following this introduction, the second part of my thesis will provide an overview of the literature about the film industry, focusing on globalisation and power dynamics. In a third part, I will introduce the methodology I used for my research and justify the choices I made based on previous studies. In a fourth part, I will present the empirical setting of my study before

presenting my findings in a fifth part. In the last part of my thesis, I will discuss my findings and compare them with what researchers previously discovered.

## 2. Literature Review

This literature review demonstrates that although the film industry has been defined and studied in academic papers, there are still some grey zones. Mainly, the focus of studies on the United States and Hollywood gives opportunity to study film production processes in other geographic zones like Europe and developing countries. What's more, most research was made about the determinants of sales and box office success for movies. Power dynamics, however, have been left apart. Their importance for industries and firms has been emphasised, but mostly for traditional and non-creative industries. Power dynamics are present in the film industry and reflect its mutations. The main mutation we will focus on is globalisation, as it is a catalyst for other phenomena like digital transformation.

First, I will present the film value chain and existing gaps in the film industry literature. In a second part, I will illustrate how globalisation has been a growing concern for academic research these past decades and why it is linked to major mutations of the film industry. Finally, I will outline the theoretical framework of power I used for my study.

### 2.1 The rising interest for the film industry

The film industry has been studied by scholars in the objective of explaining its successes and failures. Hence, academic gaps such as its organisational structure and the variety of countries studied exist. I will first present the film value chain as well as the organisation of the film industry before inspecting academic gaps and research opportunities in a second part.

#### 2.1.1 Interdependencies of actors in the film value chain

Nowadays the film industry is a major example of a complex system involving different players in the same creation process (Jia et al., 2022). Indeed, interaction between several professions is necessary and impacts the success of movies (Narayan et al., 2016). The film industry is structured around 3 main poles. The production is the development and creation of the movie. Distribution is supporting the diffusion of the movies and serves as an intermediary to collect revenues from the movies. Exhibition is the network of screens broadcasting the movies (Benghozi et al., 2015).

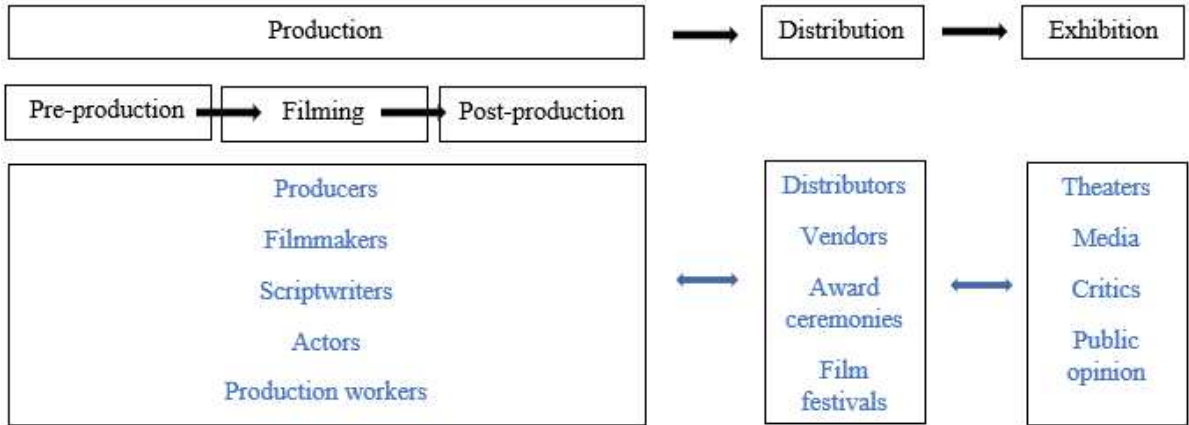
The production can be further segmented between pre-production, filming, and post-production. Pre-production mainly encompasses writing, acquisition, finance, development and formation of the cast and crew. After the pre-production comes the actual filming of the movie. Post-production encompasses editing, film calibration, sound mixing, music production and special effects also called VFX (Benghozi et al., 2015). A prominent player in the production stage is the producers who finance the movies. The biggest ones, also called studios, consist of large organisations that can carry the role of distributors too. In opposition, we find the

independent producers that are smaller entrepreneurial firms (Robins, 1993). Production also involves filmmakers, scriptwriters and actors (Lampel & Shamsie, 2003). Finally, production workers compose the production crew of a movie with many departments such as assistants, camera, photography, sound, wardrobe, craft service, grip, electricians, boom operators, visual and aerial effects (Bechky, 2006).

Distributors are the intermediaries between the producers and cinema operators. They decide on when and where a movie will be released to the public. (Dalton & Leung, 2017). Preceding the release of movies to the public, award ceremonies and festivals are a stepping-stone. Many distributors decide to invest in a movie depending on these events. They gather the most eminent players of the film industry and reward the best productions (Rossman et al., 2010).

The exhibition cycle is based on the release windows. Traditionally, it starts with theatrical distribution (domestic and then international), then DVD/rentals, pay-per-view, pay TV and ultimately free TV (De & Lindmark, 2013). Intervening during the exhibition cycle, media and critics are taste makers in the film industry and influence the fate of movies and filmmakers (Cattani et al., 2014). Public opinion is also a strong predictor for a movie’s success as movie-goers heavily rely on it for their movie choice, with phenomena such as word-of-mouth (Müller-Trede et al., 2018).

Figure 1: Interaction between actors in the film value chain



Source: Author

### 2.1.2 A flourishing but reductive literature

Recent studies in management about the film industry focus on its economic drivers and explore the consumer's point of view. A market-based vision of the industry is used, with consumers being the principal point of interest (Tan et al., 2017; Müller-Trede et al., 2018). Studies pick the final product, the films, as a starting point to understand which market forces are governing the film industry (Tang & Yu, 2021; Lehrer & Xie, 2022). Nonetheless, in recent years other topics received a great deal of interest among academics such as the representation of minority groups in the industry (Kuppuswamy & Younkin, 2019).

Wang et al. (2020) studied international research about creative industries and showed that there is a growing interest in it. It can be explained by the global economy switching from being production-based to being consumption-based and knowledge-oriented. However, countries are not equally studied: the United States is the most studied country with 29% of creative industries-based studies made about it. On the other hand, Africa, South America, and Asia are underrepresented. What's more, the audio-visual domain has one of the highest growths among cultural industries (the value of its global trade increased by 112% from 2004 to 2013). Scholars mostly chose to study creative industries at the firm and product level, which gives many prospects for studies at a global level. Global studies are highly relevant to the field of international business studies but are still poorly explored to this date.

Specifically, Wang et al. underline the need for greater comparative research about "central" vs. "peripheral" countries. Scholars tend to study national differences in general, leaving aside the industry-level analysis (Wang et al., 2020), which is what I will try to solve in this paper. To better understand the organisation at the industry-level and relationships between countries, the study of power dynamics is thus highly relevant.

## 2.2 The inexorable impact of globalisation

Impacting organisations and industries over the world, globalisation is nowadays a major concern for managers and researchers. Cultural industries are becoming more and more important and phenomena such as digitisation are transforming filmmaking. Firstly, I will demonstrate the importance of cultural industries on the international scene. Then, I will illustrate the consequences of globalisation for the film industry, such as the increase of the variety of movies and digitalisation.

### 2.2.1 The expansion of cultural industries

Cultural industries have shown to be an important asset of international trade for countries (Rosenzweig et al., 2021). They attract talents, business, and investments, and they contribute to placing countries in a global dominant position. Similarly, international trade of cultural products has grown these past decades (the value of global exports for cultural goods went from \$108 billion in 2004 to \$213 billion in 2013) and cultural industries have led the race to expand global markets. There is an emergence of multinational companies in cultural industries, but scholars have diverging theories about internationalisation. Its effects and the most efficient

strategies to adopt are being debated (Wang et al., 2020). A main gap is that scholars tend to focus on a country-level in their studies, and globalisation is being left apart.

### 2.2.2 Blurring of barriers between countries

Globalisation impacts the film industry in different ways, which is why it must be included in this study. For example, it is known to have provided access to culture to a greater number of people. However, inequalities persist, and researchers showed that there is an unequal access to culture for individuals coming from different backgrounds (O'Brien et al., 2017).

The film production processes were particularly impacted by globalisation, with phenomena such as glocalisation (blend of global and local production) emerging. Greater access to culture and the globalisation of production processes were both allowed by the digital transformation of the film industry (Jones et al., 2015), but digitisation had broader impacts because it transformed the way consumers buy and consume (Brynjolfsson et al., 2010). For instance, digitisation impacted the nature of movies produced by allowing more variety (Benner & Waldfogel, 2023), and increasing the variety of movies is likely to increase demand concentration (Tan et al., 2017). So, digitisation, and by extension globalisation, impacts consumers' behaviour towards movies. In 2013, cultural products even represented the most part of the digital products economy with a revenue of \$66 billion (EY, 2015). However, these studies are focused on digitisation and fail to consider the globalisation of production processes.

Hence, literature shows that digitisation caused the globalisation of the film industry, but globalisation also accelerated the digital era. Research has been made about how progress in a technology is promoted by innovation in its broader ecosystem. Therefore, technology adoption is influenced by the environment and the ecosystem of an industry (Adner & Kapoor, 2016). Since globalisation makes the film industry's ecosystem broader, the rise of innovations such as digital platforms were fast. Besides, the adoption of a technology differs depending on the type of actors in an industry (Benner & Waldfogel, 2016).

Lastly, as we emphasised the importance of film production processes and the gap in literature about its globalisation, my research question is:

*How are power dynamics between actors of the film industry influenced by the globalisation of production processes?*

## 2.3 The challenges of power dynamics for the business environment

### 2.3.1 The notion of power

One of the most accepted definitions of power in literature was first developed by Dahl who defined power as "a relation among people" where some agents have power over other agents (Dahl, 1957). Foucault further developed this definition in his work, asserting power as an

asymmetrical relationship between individuals or groups (Foucault, 1982). A framework based on this view of power as a resource to get things done through other people articulates four faces of power (coercion, manipulation, domination, and subjectification), imbedded in four sites of power (“in,” “through,” “over” and “against” organisations) (Fleming & Spicer, 2014). However, other conceptions argue for a multifaceted view of power. Power cannot be reduced to the influence of some people over others. Different forms of power are to be distinguished, the first one being the opposition between power over and power with. Power over is a “coercive” form of power where agents can constrain other agents to do something. Power with is “coactive” and results from a joint action of a group, as it has been developed in the study of organisations and in feminist studies (Follet, 1940; Allen, 1998; Pansardi, 2012; Rye, 2015).

Later, the notion of “power to” was developed as the ability of an actor to do something by himself, in opposition to being constrained by another agent who has power over him. This notion has been developed in the political and sociological fields (Pitkin, 1972; Pansardi, 2012; Abizadeh, 2023).

Lastly, “power from within” was introduced as an agents’ own awareness of his capacities that will motivate his action. This notion was firstly elaborated in the field of women empowerment (Townsend et al., 1999; Pansardi & Bindi, 2021), and later became part of the general forms of power accepted by scholars alongside power over, power with and power to in the field of development studies (VeneKlasen & Miller, 2002; Eyben, 2004).

Thus, I will use the notions of power over, power with, power to and power from within as my theoretical framework. The notion of power having a very broad sense, it is difficult to find the limits of its definition and its meaning has been greatly debated among scholars. Many other terminations have been defined such as “power-despite-resistance” (Abizadeh, 2023) but this notion is controversial and hasn’t been used by many scholars, so I won’t include it in my approach.

Table 1: Theoretical framework of power

Type of power	Definition
Power over	Coercive power, faculty to constrain other agents to do something.
Power with	Coactive power, results from the joint action of a group.
Power to	Ability of an actor to do something by himself, without constraint of another agent.
Power from within	An agent's own awareness of his capacities that will motivate his action.

Source: Author

### 2.3.2 Power dynamics are shaping the film industry

Power dynamics are influencing industries and organisations (Zhu & Westphal, 2021). They are the heart of relations among the players of an industry and the methods used by firms to gain power have been studied by scholars in industries such as machinery (Scott & Spadavecchia, 2022). Power and pressures from other stakeholders can also influence the dynamics of an industry (Pacheco & Khoury, 2023) or the type of products created. Main actors in an industry are more likely to produce mainstream and socially acceptable products because their reputation was built thanks to this type of products. Smaller actors, however, are more likely to depart from these norms because they don't already have an established reputation (Kremp, 2010; Sgourev, 2013). Yet, the film production processes haven't been studied in this angle. This paper should contribute to research about power dynamics in the filmmaking industry.

With its variety of actors, the film industry is greatly driven by power dynamics. Most research about the topic is oriented towards public recognition of movies and the relationship between critics, awards, and professional networks (Cattani et al., 2014; Luo et al., 2021). A common example is the effect of reputation and the importance of critics for the success of a movie (Kersten & Bielby, 2012). What's more, scholars who studied power dynamics in the film industry largely focused on the American industry. They paved the way for further research about dynamics in film production processes and in the worldwide film industry in general.

This study aims to answer this gap, using the perspective of globalisation. Indeed, globalisation has an impact on power dynamics: it has been shown that network effects can have great consequences in the film industry (Rossman et al., 2010), and globalisation is likely to increase the importance of these networks with more actors and countries involved. Besides, digital platforms and the global movie market they created were quickly adopted by newcomers in the film industry, but established film producers were more resistant to them, which created tensions. This shows how power dynamics and globalisation are linked (Benner & Waldfogel, 2016).

Finally, the study of power dynamics received little acknowledgement in qualitative research. It is thus one of my contributions to analyse power with a qualitative lens. Moreover, as power dynamics helps to understand the organisation of the film industry, including the context of globalisation in my research question allows me to be more actual and relevant.

### 3. Methodology chapter

To answer my research question, I used a qualitative approach specifically designed for an industry-level analysis. I will start by justifying this choice in the first part, supporting my arguments with recent literature from top management journals. In the second part, I will overview my primary and secondary data collection before introducing my data analysis technique in the last part.

#### 3.1 Research design

I employed a qualitative approach for my thesis, as it is the most appropriate method to discover, explore and understand in-depth a complex phenomenon (Rynes & P.Gephart Jr., 2004; Birkinshaw et al., 2011; E.Graebner et al., 2012). Conducting qualitative research allowed me to gather rich, contextual, and detailed data to answer my research question. Choosing to study power dynamics between different actors required me to analyse the film industry. With an industry-level point of view, I could fully understand the power mechanisms at stake and get results that are representative of the film industry in general. Thus, I used the method for industry-level analysis used by the top management journals, classified and rated with at least 3, 4 or 5 stars by the Academic Journal Guide. These papers, studying industries with a qualitative approach, helped construct my methodology (Fineman & Clarke, 1996; Holbrook et al., 2000; Van Tulder & Kolk, 2001; Farjoun, 2002; Sharratt et al., 2007; Singh & Jayanti, 2013; Van Burg et al., 2014; Hahn, 2019; Figueiredo & Cohen, 2019; Smolka & Heugens, 2020; Agarwal et al., 2021; Cancellieri et al., 2022; Scott & Spadavecchia, 2022; Ferns et al., 2022).

I collected primary data as well as secondary data for this research as this combination is well suited to have a global viewpoint on an industry (Hahn, 2019; Ferns et al., 2022). Secondary data is a main source for industry-level studies as it allows to quickly gather lots of information about different types of actors, in different countries and over different periods of time. Secondary data enhanced the reliability of my findings, as it allowed me to triangulate interviews, which represent a certain point of view, with facts and general trends (Holbrook et al., 2000; Van Tulder & Kolk, 2001; Singh & Jayanti, 2013).

#### 3.2 The data collection

The primary data I relied on consisted in semi-structured interviews with professionals from the film industry as well as field observations.

Table 2: Primary data collection

Type of data	Name	Organisation	Position	Date	Length
Interview	Richard Berthollet	D-vox	CEO, producer, and filmmaker	08/03	45min
Interview	Nicole Bastin	Independent	Chief editor	16/03	30min written answers +
Interview	Juliette Boucheny	Independent	Filmmaker and scriptwriter	09/03	1h
Interview	Jessica Bethouart	BUF Compagnie	VFX Producer	01/03	1h
Interview	Vincent Choukroun	Cascade8	Director of developments	27/04	40min
Interview	Joana Gusmão	Independent	Producer	16/05	40min
Direct observation	NA	Indielisboa	NA	01/05	NA

Source: Author

I interviewed managers from different companies or freelance in the film industry, so I could include different perspectives about the topic of my thesis (Fineman & Clarke, 1996; Sharratt et al., 2007; Van Burg et al., 2014; Agarwal et al., 2021). My interviews lasted between 45 min and 1h, one lasted 30 min due to time constraints and was followed by written answers to the rest of my questions as a complement. I prepared an interview guide to construct semi-structured interviews with open-ended and exploratory questions. The interviews were conducted online or by phone and were recorded to keep track of these exchanges. I adapted my interview guide over time, and I focused on the questions that would provide me with the most interesting insights for my research question. I also adapted the themes of my interviews as my research question was getting more precise. The main themes broached were the role of the interviewees vis-à-vis other actors of the film industry, their position in the production process and the impacts of globalisation on their work.

Overall, the interviews helped me to both define my research question by understanding the challenges faced by film professionals and answer my final research question. I initially contacted people from my private network, as well as from my university network. I identified professionals with different positions in the film industry, and who worked for all types of companies: big firms, small firms and independent. This allowed me to get insights from a variety of stakeholders, with different experiences of power dynamics and who intervene at

various stages of film production. I used snowball sampling to identify other actors I could interview. I also contacted international professionals on LinkedIn to include actors from different countries. Finally, I tried to contact Portuguese film associations via e-mail, but this was unsuccessful as I never received any reply. The main limitation of my panel of interviewees is that they are mostly working for the European film industry. I would have liked to get interviews with professionals from several countries, to study the different impacts globalisation had in other regions of the world. To this end, I used secondary data so I could get an international panel of information. Eventually, I conducted a total of 6 interviews, this method not being widely used in industry-level qualitative research since interviews only represent an individual viewpoint. The emphasis is put on secondary data which is more reliable to analyse bigger phenomena occurring in a whole industry (Holbrook et al., 2000; Van Tulder & Kolk, 2001; Farjoun, 2002; Singh & Jayanti, 2013; Scott & Spadavecchia, 2022). The other type of primary data I used was field observations, which is complementary to interviews in a qualitative approach (Figueiredo & Cohen, 2019; Smolka & Heugens, 2020). I managed to get an accreditation for IndieLisboa, an international film festival taking place in Lisbon each year. I attended film screenings and Portuguese film organisations were present.

The secondary data collection consisted of online press articles, governments and public reports, film festivals communications and professional associations reports.

Table 3: Secondary data collection

Title	Author	Organisation	Date	Type
Souffrance au travail des auteur(ices) et réalisatr(ices) : la fin du silence ?	NA	La GARRD	2023	Study report
De Hollywood à Bollywood, la Pologne attire le cinéma mondial	Mary Sibierski	Le Point	2014	Press article
Bombay à retardement	Benjamin Tainturier	Libération	2020	Press article
Festival et marché : le rôle du festival Cinélatino de Toulouse dans l'industrie du « cinéma d'auteur »	Amanda Rueda	Entrelacs	2018	Press article
Le financement des industries culturelles face au numérique	NA	French Ministry of Culture	2019	Public report
Ten reasons on the importance of film festivals	Elliott Grove	Raindance	2019	Public communication

The African film industry: Trends, Challenges and Opportunities for growth	NA	Unesco	2021	Book
Location Innovators Lure Productions with Incentives, Crews and Locales	Longwell et al.	Variety	2022	Press article
Restless Global Aims to Be Africa's One-Stop Shop for TV, Talent, Production, Distribution	Christopher Vourlias	Variety	2015	Press article
New AFCI President Sets Long-Term Goals for Film Commission Org Ahead of Annual Event That Features 'Last of Us' Location Panel	Carole Horst	Variety	2023	Press article
Sundance, once a Hotbed for Film Deals, Tries to Find Its Footing	Nicole Sperling	New York Times	2023	Press article
Global Screen Production – The Impact of Film and Television Production on Economic Recovery from COVID-19	NA	Olsberg SPI	2020	Study report
Asia's crouching cinematic tiger	David Cox	The Guardian	2009	Press article
What next for the global blockbuster?	Phil Hoad	The Guardian	2012	Press article
Has Sony become the entertainment group it always wanted to be?	Leo Lewis & Christopher Grimes	Financial Times	2022	Press article
Streaming shrinks the Hollywood star	John Gapper	Financial Times	2020	Press article
Hollywood strikes back against streaming	Christopher Grimes	Financial Times	2023	Press article
Curator June Givanni on African cinema: 'Films need to be seen in their own countries'	Maya Jaggi	Financial Times	2023	Press article
Potential Writers Strike Presents Disruption (and Opportunity) to Global Content Creators	Scott Roxborough & Etan Vlessing	The Hollywood Reporter	2023	Press article

Portugal's Tage Studios Promises to Be Europe's First Entirely Green Shooting Facility	Scott Roxbourough	The Hollywood Reporter	2023	Press article
Doing the Math: International Talent Dominated the 2023 Oscars	Scott Roxbourough	The Hollywood Reporter	2023	Press article
HBO CEO Casey Bloys on How the Network Has Adapted to Streaming	Chris Ryan and Andy Greenwald	The Watch	2023	Podcast
UIS Statistics	NA	Unesco	2017	Database
How São Paulo is aiming to be the city of dreams for international film and TV producers	Malila Ohki	Screen Daily	2023	Press article
Japan studio Toho launches production services firm to support foreign shoots	Michael Rosser	Screen Daily	2023	Press article
Totem Films revamps team with new hires, powers up co-production slate heading into Cannes	Rebecca Leffler	Screen Daily	2023	Press article
Japanese cinema goes global	Yoshiharu Tezuka	TransAsia: Screen cultures	2012	Book

Source: Author

Having a broad variety of secondary data was a necessary step so I could test my findings against different sources and triangulate my data (Farjoun, 2002; Scott & Spadavecchia, 2022). Especially for the primary data from interviews, I could compare the insights of my interviewees to other sources of information who are closer to the viewpoint of the industry. Press articles, industry reports and books are commonly used as sources to study industries with a qualitative approach (Cancellieri et al., 2022). I selected newspapers specialised in cultural industries or mainstream newspapers that are frequently cited by other newspapers as trustworthy sources of information. Press articles were a good way to triangulate my data since they often include interviews with actors having a different role in the film industry than my interviewees. Books provided me with a more detailed and in-depth analysis of phenomena occurring in the film industry. I tried not to choose only documents about Hollywood since it has already been through a lot of research in the past, so I chose documents about more diversified regions in the world. A main difficulty was that many documents about globalisation and the film industry are academic papers and essays. Industry reports and official databases provided me with figures about the film industry, particularly about the phenomenon of globalisation. I could compare the evolution of these figures over the years.

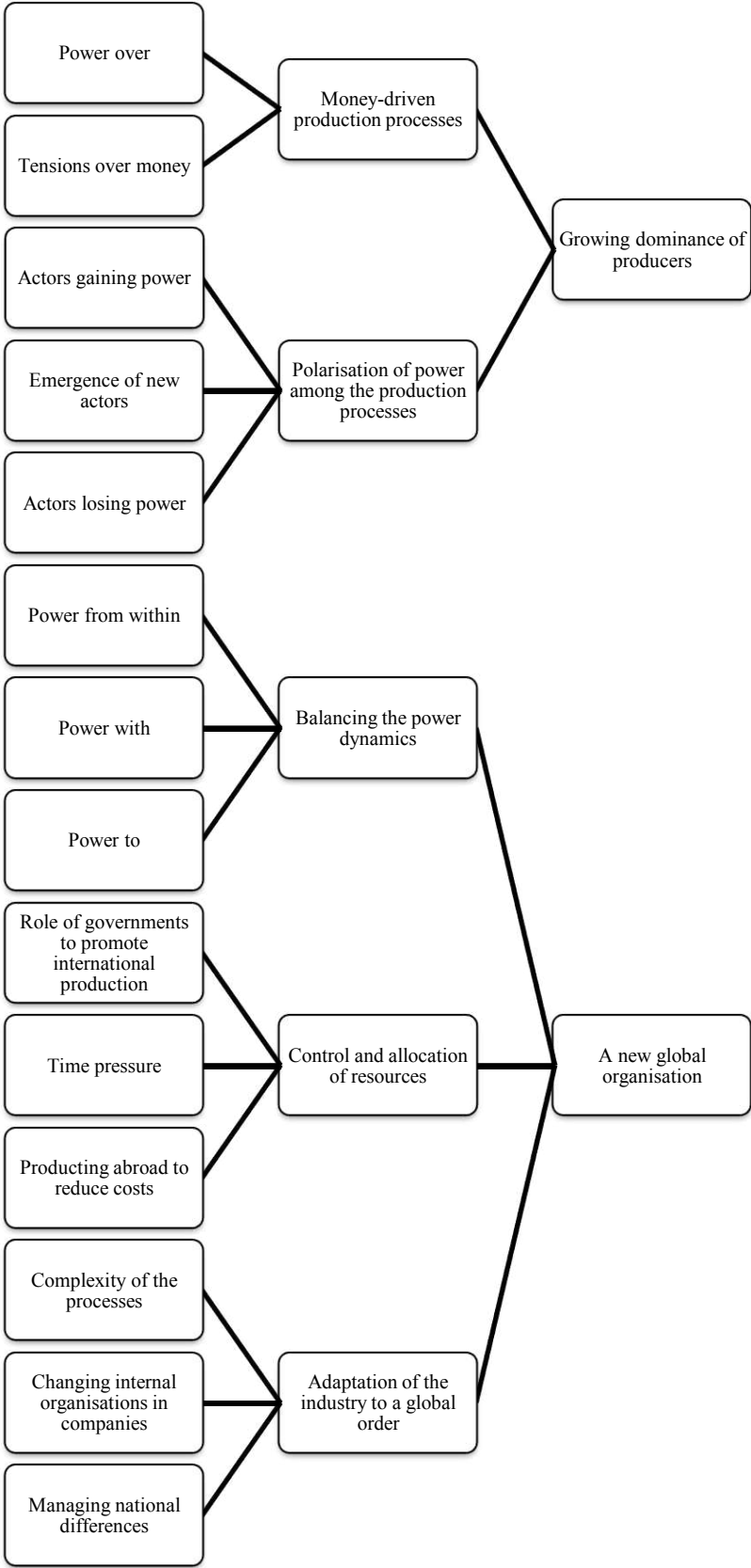
### 3.3 The data analysis

To analyse the data collected, I used a coding method. I started by identifying codes based on my research question, my theoretical framework and later, emerging codes from the data I collected. Then, I gathered codes around different categories before I linked the categories to overarching themes. I began first-order coding by reviewing my research question and identifying the main topics it was encompassing. As I analysed my data, I used an iterative process where I either categorised it under an existing code or I created a new code if I identified a new topic. The predefined codes coming from my research question and literature was: “Power over”, “Power to”, “Power with”, “Power from within”, “Actors gaining power”, “Actors losing power”, “Emergence of new actors”. The codes I built based on the data are: “Tensions over money”, “Role of governments to promote international production”, “Time pressure”, “Producing abroad to reduce costs”, “Complexity of the processes”, “Changing internal organisation in companies” and “Managing national differences”.

When possible, I used “in vivo” codes so I could be as close as possible to the viewpoint of my interviewees (Patvardhan et al., 2015). I made sure each code was applicable to the whole industry and not only to one of my interviewees. I always compared the codes to the terminations used by my primary and secondary data sources. An example of a quotation I coded with a pre-defined code is: *“There was a movement, that I partly created, to uniformise the salary of all editors.”* that I linked to the code “Power with”. An example of a quotation I coded with a new code is: *“Money makes power in this industry”* that I linked to the code “Tensions over money”.

I constructed a coding tree, where I connected my 14 codes, 5 categories and 2 overarching themes (See Appendix 1 for the coding table).

Figure 2: Coding tree



Source: Author

#### 4. Empirical setting

The empirical setting for my research is the global film industry. This industry appeared in 1891 with the invention of the cinematograph by the Lumière brothers in France. Since then, the film industry underwent a lot of mutations such as the apparition of colour in the 1920's, the end of mute cinema in the 1930's, or the apparition of TV in the 1950's. The film industry is traditionally defined as the production of motion pictures aimed for theatrical release. However, with the digitalisation of the sector, this definition is no longer relevant as movie production also includes contents released on streaming platforms, VOD, and online TV channels. Different forms of films also make part of the industry, the main distinction between them being their length: feature films and short films. The film industry has long been concerned by globalisation, with international policies being developed as early as in 1930 to promote foreign production. Since then, production companies and governments kept developing international policies, like the Marshall plan post World War II who imposed quotas on American movies in countries who wished to erase their debt following the war or the creation of a special commission in the European Union in the 1990's to promote pan-European film production. At the same time, Hollywood, originally purely American, extended its hegemony globally thanks to international investments and eventually became the Global Hollywood we know today. In the 1990's, acquisitions, and mergers of production companies by global stakeholders marked the acceleration of globalisation in the industry. We can cite for example the \$3.4 billion purchase by the Japanese Sony of Columbia Pictures or the \$6 billion purchase by another Japanese, Matsushita, of MCA-Universal (Tezuka, 2012).

What's more, the global production of films kept increasing over the last decade, with some countries dominating the output. India led with 1255 national feature films produced in 2011 and 1986 produced in 2016. In second position, Nigeria produced 997 national feature films in 2011. In comparison, China only produced 584 national feature films in 2011, but this number increased to 874 in 2017. US, who produced 660 national feature films in 2017, also co-produced 95 international films in 2011 and 133 in 2016. In fifth and sixth positions, Japan produced 441 national feature films in 2011 and 594 in 2017, against 216 and 494 for the Republic of Korea. In 2017, the UK produced 285 national feature films and 18 internationally co-produced films. France produced 272 national feature films in 2012 and 300 in 2017. Its number of international co-produced films remained steady around 120 in 2011 and 123 in 2017 (UNESCO, 2017). Globalisation has been raising many discussions when it comes to its impacts on the film industry. Sometimes perceived as a positive or negative phenomena for different stakeholders, one of its most visible effects is the standardisation of the industry. These past years a concentration on the production of blockbusters has been observed, gathering armies of professionals working on billion-dollar-budget films (Tezuka, 2012; Grimes, 2023). The average budget for a worldwide top 10 hit rose from \$72.8M in 1995 to \$146.6M in 2011 (Hoad, 2012). One recent example is *Dune*, a 2 hours and 35 minutes feature film released in 2021, with a budget of \$165M. For the creation of its visual effects alone, it required a team of 700 professionals (Interview of a VFX producer at BUF Compagnie). With the rise of the blockbuster era, reaching a global audience and exporting films all over the world became a necessity to guarantee their profitability (Hoad, 2012; Gapper, 2020). This new international

set-up led to the development of hegemony from dominant parts of the world. Specific social and economic structures in the film industry systematically advantage certain groups, like the US. Thanks to Hollywood and the soft power it has globally, the US is able to influence different stakeholders from other countries (Tainturier, 2020). It is considered as a figure of authority concerning the evolution of the film industry, notably on digitisation, the topics treated in films and their format. Big US production companies represent the utmost institutions of this hegemony (Levy & Newell, 2002; Levy & Egan, 2003). The recent introduction of streaming platforms in the film industry sacralised the US hegemony and the standardisation of contents (Interview of the CEO, filmmaker, and producer at D-Vox). What's more, internal production processes of companies in the film industry also got uniformised (Interview of a chief editor working with Warner). But the US does not have the monopoly of influence and countries get influenced by different actors depending on the parts of the world. In Africa for instance, France is a major player and is spreading its "Auteur model" based on diversity and state support (UNESCO, 2021).

The nucleus of the study are the power dynamics between the different actors of this industry in reaction to the phenomenon of globalisation of the production processes. In the film industry, different actors have traditionally been involved in the production processes of movies. As in other economic fields, the film industry was impacted by globalisation and today movies are not solely produced in one and only country. It is very common for movies to be financed and produced by several actors coming from different countries. The different steps of the production process as presented in the literature review are occurring in different places around the world for the same movie. New actors appeared thanks to the internationalisation of the relations between actors of the industry and countries. For example, the share of developing countries in world movies production went from 51% in 2006 to 61% in 2015 (UNESCO, 2017). This globalisation also impacted the power dynamics between the traditional actors of the production process.

## 5. Findings

Literature about the film industry fails to show how power dynamics between its actors are operating. Moreover, the impact of the globalisation of production processes on these power dynamics has not been demonstrated. In these circumstances, my research question is: "How are power dynamics between actors of the film industry influenced by the globalisation of production processes?" To answer this question, I will use the theoretical framework of power such as defined in literature (Follet, 1940; Pitkin, 1972; Allen, 1998; Townsend et al., 1999) with four concepts of power: "**power over**", "**power to**", "**power with**" and "**power from within**". In the first part of this chapter, I will demonstrate how the globalisation of production processes accentuated the power of producers globally. In a second part, I will show that globalisation also balances power dynamics by opening opportunities for emerging filmmakers and producers. Finally, in a third part I will show how the globalisation of production processes reallocated power between actors of the film industry.

## 5.1 Growing dominance of global producers

### 5.1.1 Polarisation of power among the value chain

There is a hegemony of the big production studios coming mainly from the United States, but also from France and the United Kingdom. This hegemony is caused by the great number of resources these studios can invest in the film production processes.

*“The people who pay have the most power. So, the studios, the producers [...] You will have small local studios but at the end of the day you always find the same studios. And it is always English, French and American studios.”* (Interview of a VFX Producer at BUF Compagnie).

This hegemony is a form of **power over** that production studios exert on international actors. The more resources a production structure has, the more power it will have over international actors (Interview of an independent producer). As a cause and a consequence, countries where the biggest producers are from have a more developed cinema-going culture. It helps them gain power by having a direct local audience with sufficient disposable income, and eventually make profits faster and more easily. In 2020, the United States had a total of 44,111 screens, namely one per 7,503 people. At the same time, France had 6,114 screens, namely one per 10,958 people. In comparison, Africa, which is the region with the least developed cinema network in the world, only had a total of 1,651 screens, namely one per 787,402 people (UNESCO, 2021). With globalisation, these big production companies can extend their power abroad over other countries.

*“These new stakeholders, mostly from the United States and China, are private companies with a decidedly commercial approach. The most visible American player so far has been Netflix, which has produced a number of high-profile moves since its launch on the continent in 2019.”* (UNESCO, 2021).

International co-productions became a major strategy for producers to extend their power while benefiting from the resources of actors established in foreign markets (Leffler, 2023). At the same time, the films produced are more and more generic and avoid present-day, political topics so they can please the broader audience possible.

*“Avoiding real-world, present-day specifics that might exclude, or bring in awkward politics, is good.”* (Hoad, 2012).

The consolidation of studios that began is an illustration of this polarisation of power as producers are buying out their competitors (Sperling, 2023). Even the most recent actors in the industry, the streaming platforms, are dealing with consolidation.

*“Everybody talks about consolidation, how many streaming services can be out there, all of that is happening now.”* (Ryan & Greenwald, 2023).

Amidst the polarisation of power in favour of the producers, streaming platforms made their apparition thanks to globalisation. Platforms changed the power dynamics in all cultural sectors.

*“Digitalisation deeply and permanently modified the ecosystems of cultural industries.”* (French Ministry of Culture, 2019).

As the most recent actors entering the film industry, streaming platforms quickly gained power as they both hold the role of producers and distributors. Like the big production studios, streaming platform have a form of **power over** that they exert in international production processes.

*“The past 10 years what changed is Netflix, Amazon, Apple, the platforms... They bring the money, they have a global striking force that others don't have.”* (Interview of the CEO, producer, and filmmaker at D-Vox).

In this respect, they challenged the power traditionally held by the production companies.

*“Digitalisation deeply modified the value chain of cultural sectors by challenging the dominance of content producers (upstream), in favour of distributors (downstream).”* (French Ministry of Culture, 2019).

The film industry is becoming dependent on these platforms because of the money they make and invest in the industry (Interview of the CEO, producer, and filmmaker at D-Vox). The power these platforms have over the industry is the main challenge the movie world must face nowadays.

*“The concurrence of streaming platforms is the main challenge today.”* (Interview of a chief editor working with Warner).

Besides making films available worldwide, streaming platforms invest in international film industries to increase their global power. For instance, in 2022 Amazon announced that it would more than double it spend on Prime Video India over the next 5 years. From 2022 until 2024, a slate of 40 local Indian projects produced by Amazon will debut (Longwell et al., 2022). By increasing the film demand, streaming platforms boosted the global film production (Horst, 2023; Ryan & Greenwald, 2023).

On the other side, global production processes can make filmmakers, technicians, and other actors lose power. The globalisation of production processes accentuated **power over** for big producers, at the expense of the other actors (Interview of an independent producer; Interview of a VFX producer at BUF Compagnie). These smaller actors who work with production companies are only a link in the production chain and cannot have power over it.

*“As entertainment freelancers we don't have a global vision of the company.”* (Interview of a chief editor working with Warner).

With the takeover of streaming platforms in the film industry and the way it changed its remuneration system, small actors are losing power.

*“More than cinematic pride lies behind the anger at films such as the science fiction epic Dune becoming subscription fodder. Stars, agents, and directors depend for their wealth on sharing in box office profits, as well as being paid a fee.”* (Gapper, 2020).

With globalisation comes a struggle to adapt in a new, more complex context. Production processes and regulations are becoming more sophisticated, and getting international funds requires experience and resources. This is preventing emerging filmmakers from gaining power because they are lost in this complexity.

*“Most broadcast ecosystems across the continent also suffer from overly complex, overzealous and often contradictory regulations [...] the grant proposal process is so complex that it requires experienced producers to unlock it. [...] Regulations, when they do exist, are sometimes seen as obstacles rather than enablers.”* (UNESCO, 2021).

For some countries like France, these production processes are even more complex, and funds are hard to get (Interview of an independent producer; Jaggi, 2023).

*“It's more complicated (in France), it's less processed, it's a lot more uncertain, peregrinations, filmings are postponed, they (filmmakers and producers) will ask lot of questions, they need to be reassured. [...] The French want to control everything”* (Interview of a VFX Producer at BUF Compagnie).

Producing a film in a different country than its own raises cultural challenges that are hard to navigate for the filmmakers (Interview of an independent filmmaker). Even independent producers are struggling in the complexity of the production processes (Interview of the CEO, producer, and filmmaker at D-Vox).

### 5.1.2 Power comes from money

The film industry is money-driven and controlling the money gives producer **power over**. Producers are the actors with the most power among the production process of films. There is a dominance of producers because money gives them power over the other actors and power to make and implement decisions. By investing money in the production process, they have power over the other actors of the value chain (Interview of a freelance producer; Interview of a VFX producer at BUF Compagnie). Producers get the power to decide which movies are going to be put in production or not by controlling the money (Interview of the CEO, producer, and filmmaker at D-Vox). They have power over filmmakers and other actors during the entirety of the production process (Interview of an independent filmmaker). There is evidence of technicians, for instance, adapting their organisation to fit the requirements of the producers and satisfy them.

*"It is our job, internally, to make sure [...] the clients (the filmmaker and the producer) are happy. [...] There are some complicated projects. [...] We went from a team of 20 people to a team of 40 at some point. All those who had finished their other productions, we put them on this complicated production."* (Interview of a VFX Producer at BUF Compagnie).

Producers aim to expand globally and invest money in countries where the film market is profitable. Globalisation opens new markets for them, with more opportunities to make profits and have more power.

*"Warner's main objective is presumed to be snatching a share of Asia's own booming box-office...It seems hard to believe that Warner won't use its Mumbai toehold to propel Asian filmmaking onto a wider stage if it sniffs the prospect of profit."* (Cox, 2009).

Globalisation is part of the strategy of production studios to increase their profits and hence their power. US annual box office sales have been stagnant around \$10 billion in the first decade of the 21st century, while overseas revenues rose to \$22.4 billion in 2011 (Hoad, 2012). Even with the breakout of streaming platforms in the film industry, producers still get power over them by holding rights of the movies. In 2022, the top 8 US media companies were to spend around \$140 billion to buy content rights for their streaming services. This streaming war, as it is called, is exponentially increasing. Indeed, streaming platforms depend on the movie rights they buy to the producers to become profitable (Lewis & Grimes, 2022).

Money is the principal factor allowing an actor to get **power over**, but it also creates **power to**. Indeed, as a resource, money allow actors to make their own decisions. Hence, there are tensions over it. Getting money from producers is the starting point of the production process (Interview of an independent filmmaker). Even reputation or fame is not enough for an actor to get a lot of power without money, as it is the case for arthouse movies with typically low budgets.

*"For arthouse movies, they (filmmakers) need to be reassured, money is very important compared to Netflix."* (Interview of a VFX producer at BUF Compagnie).

For global producers and platforms, the profitability of films is the main concern (Ryan & Greenwald, 2023). In this respect, money creates tensions between producers and other actors who don't have the same interests regarding the outcome of movies.

*"We (filmmakers) have the tendency to put everything in the movie because it's our business card. If it's cheap, if it's bad, we don't work anymore. When the producers have the tendency to put just the minimum in the movie and that's it."* (Interview of the CEO, producer, and filmmaker at D-Vox).

The amount of money allocated by producers on a movie impacts its production process, its timing, and its quality (Interview of an independent filmmaker). With globalisation, more international funding opportunities are available for filmmakers (UNESCO, 2021). Globalisation is even a necessity for some filmmakers and other organisations.

*“Working on international projects became almost compulsory for non-mainstream directors rather than a matter of choice and cultural privilege.” (Tezuka, 2012).*

Having international clients is a perk when their home country is not receptive to their work (Interview of the director of developments at Cascade8).

In this rush to be the most profitable, organisations in the film industry must adapt and change their traditional ways of doing movies. Money gives producers **power over** and **power to**, forcing other actors to adapt to them. Actors with less power in the production process are the first ones to suffer from it.

*“All of this is part of a movement of internationalisation of production processes and making them shorter. Working conditions changed a lot between the time I started to work for Warner and 15 years later. We didn’t have the same time to do the same things [...] At one point I thought it was going too far in the cost cuts.” (Interview of a chief editor working with Warner).*

International producers have the power to influence the way films are produced in the regions they are investing in (UNESCO, 2021). Thus, smaller local producers are adapting their production processes and infrastructures to please these international producers.

*“Toho, Japan’s leading film studio, has launched a subsidiary to provide production services for the growing number of international productions filming in the country. In recent years, we have seen an increase in foreign productions developing stories to shoot in Japan, and feel our industry needs to fully prepare and be ready to offer top notch production services.” (Rosser, 2023).*

Big producers are the main investors in other continents like Africa and Asia, so they also must adapt to these markets. Producers are adapting their production locally with Asian-language film in Asia for example and are setting up physical studios abroad dedicated to this international production (Hoad, 2012).

*“Warner isn’t alone in heading East. Twentieth Century Fox and News Corporation have set up a studio in India to produce Asian-language films for worldwide distribution. Sony Pictures has already produced its own Hindi-language musical, Saawariya.” (Cox, 2009).*

Even in Bollywood, there is an increasing number of English-speaking films produced to export them abroad (Cox, 2009).

## 5.2 Balancing the power dynamics

### 5.2.1 Resisting the pressures of globalisation

There is evidence of actors resisting globalisation and the power of producers. Resisting the globalisation of production processes is a form of **power from within**. Some countries, for instance, try to protect their national industry (Interview of the CEO, producer, and filmmaker

at D-Vox; Interview of the director of developments at Cascade8). This can be seen as a mistake, but it is also a way to preserve culture and heritage.

*“Another major component of its success has been its ability to largely ignore the external cinema world and American and European tastes to develop a home-grown style of storytelling that resonates deeply with Nigerian and African audiences, in part through its blunt portrayal of popular themes such as religion, witchcraft, morality and revenge. Liberated from Western expectations of what cinema should look like, Nollywood (just like Bollywood) has proven that another path is possible.”*  
(UNESCO, 2021).

Resisting globalisation can even be seen as a competitive advantage.

*“He (the CEO of BUF Compagnie) has his own small network, and he doesn’t want to sell his company. And it can be an advantage sometimes. Because there are people who want this artisanal side, independence.”* (Interview of a VFX producer at BUF Compagnie).

Power from within emerges with the resistance to globalisation, as actors are liberated from the hegemony of big producers (Interview of an independent producer).

Professional movements are resisting globalisation and the pressures on working conditions. Group resistance to dominant players is the most obvious way of **power with** for actors of the film industry. This collective resistance can take several forms, the first one being the formal professional union (Interview of an independent producer; Interview of the CEO, producer, and filmmaker at D-vox). As the production steps of a movie can be split between several countries, professional movements can impact actors of the industry all over the world.

*“If Hollywood writers go on strike the impact will be felt far beyond New York and Los Angeles. Around the world, producers and distribution companies are closely watching the ongoing negotiations, with an expectation that a WGA (the American scriptwriters union) walkout could mean a boost in demand for new international content.”* (Roxborough & Vlessing, 2023).

Professional resistance can also be informal and punctual.

*“There was a movement, that I partly created, to uniformise the salary of all editors [...] We all got together, all the freelancers, we were around 30, and we said that we wanted things to be equal.”*  
(Interview of a chief editor working with Warner).

Besides, these movements are not only defensive. Some collective organisations aim to promote national industries, which place them in the opposite of globalisation.

*“In parallel, throughout the continent a plethora of small, commercial and non-profit independent initiatives have taken up the mission to develop or revive local cinema cultures, build new audiences and bring local films closer to the public through the management of mobile or community cinemas.”*  
(UNESCO, 2021).

Bigger professional organisations can support smaller ones, to help them get more power in their region (Horst, 2023).

### 5.2.2 Seizing opportunities for emerging filmmakers and producers

Independent filmmakers and producers can gain power with internationalisation thanks to new financing opportunities and a larger audience. These new opportunities create or reinforce **power to** for these actors. As globalisation allowed filmmakers to get financed by actors all around the world, we saw a trend of international empowerment between actors from different countries.

*“International coproductions of movies were allowed in 2000, diversifying even more the financing sources for Indian cinema.” (Tainturier, 2020).*

The diversity of funds to support production processes empowered filmmakers and producers.

*“Globalisation of the production is based on a large network of actors and support mechanisms allowing a same project to benefit from different funds.” (Rueda, 2018).*

It allowed independent filmmakers who couldn't find a market in their home country before, to produce their movies (Tainturier, 2020).

*"From the perspective of national producers, international dynamics of film production are a valid strategy to make their movies, because in most countries they can't[...]develop national markets. [...] Without a market favourable to independent cinema inside their own country, the only choice left for young Columbian filmmakers is to open their work to "different parts of the world" (Rueda, 2018).*

International co-production is a strategy for emerging filmmakers to gain power with a worldwide exposure (Interview of a freelance producer; Tezuka, 2012). As international contents are booming and get an international audience, new relationships are created between non-historical partners.

*“Here, technology coincides with a global movement towards more diversity on screen, opening doors for African filmmakers to find new markets both at home and abroad. As African stories become more globally appealing, African producers are attracting the interest of new, non-historical partners such as the United States and China.” (UNESCO, 2021).*

In the same dynamic, some countries benefit from the intervention of foreign companies in terms of education. These countries can educate a new generation of workforce that will contribute to their national production (UNESCO, 2021). Some countries also adopt models, such as the Auteur model, to access international fundings. The Auteur model is focused on the filmmakers and considers cinema as an art form that shouldn't obey the market rules.

*"The Auteur model is particularly relevant for countries lacking the local market to support a full-fledged film and audio-visual sector. A key criterion is the ability to access funding from institutions such as the CNC (through the Aide aux Cinémas du Monde), IOF, ACP-EU, and the Berlinale World*

*Cinema Fund, and through co-productions with European countries with strong film support mechanisms such as Belgium, France, Germany, and the Nordic countries." (UNESCO, 2021).*

Producers can promote local film industries by investing in region-specific contents and even creating specific organisations for these regions (Longwell et al., 2022). These kinds of organisations aim to promote and give exposure to local industries on the international scene (Vourlias, 2015).

By lowering the power held by traditional production companies, streaming platforms are empowering new international actors and give them **power to** (Jaggi, 2023).

*"The new ability to distribute but also monetize content directly to consumers via online platforms [...] is giving rise to a new economy for African content creators which bypasses traditional gatekeepers. In countries like Kenya, Rwanda, Ethiopia, and Senegal, for instance, new generations of filmmakers are now able to live from the online revenue generated by their work." (UNESCO, 2021).*

Also, the digital revolution spread by globalisation in the film industry was a turning point for many countries to expand their power (Sibierski, 2014).

## 5.3 A new global organisation

### 5.3.1 Control and allocation of resources

Considering the importance of international relations to gain power in the film industry, governments have a part to play. By controlling resources and regulations, governments hold **power to**. Governments use policies and regulations to redirect the production of international films in their country. Money incentives are particularly common and saving money is one of the main reasons why films are produced internationally (Interview of an independent producer). For a long time, producers have been relocating some parts of the production processes abroad. The lower cost of technicians to perform low-added value tasks in some countries was attractive to filmmakers and producers (Interview of a VFX Producer at BUF Compagnie). Countries are going even further with cash rebates that allow filmmakers and producers to get money back if they produce a film in a specific country (Direct observation at the film festival Indielisboa; Interview of a VFX Producer at BUF Compagnie; Longwell et al., 2022; Ohki, 2023)

*"Portugal, with its 30 percent tax incentive and stunning national vistas, has been successful in attracting some big international projects: Fast X, the latest in the decidedly carbon-heavy Fast and the Furious franchise, shot in the Viseu and Vila Real regions last spring; Netflix thriller Heart of Stone, starring Jamie Dornan and Gal Gadot, filmed scenes in the coastal town of Bordeira last summer." (Roxborough, 2023).*

The workforce is also cheaper in some countries which explains why producers and filmmakers are producing abroad. For instance, a day of shooting in Poland costs between \$35,000 and

\$150,000. In Western Europe, this cost is 30% to 50% higher (Sibierski, 2014). International co-production between different countries is also a way for filmmakers to get around protectionist regulations in some countries and benefit from local funds or support.

*"The key attraction of a treaty co-production is that it qualifies as a national production in each of the partner nations and can therefore access the multiple benefits available to the local film industry in each country."* (UNESCO, 2021).

Using resources such as money is thus a way to gain **power to** and exert **power over** actors in the film industry. Time is also another resource used by producers to exercise **power over**. Globalisation and the arrival of streaming platforms accentuated these time pressures to face the competition.

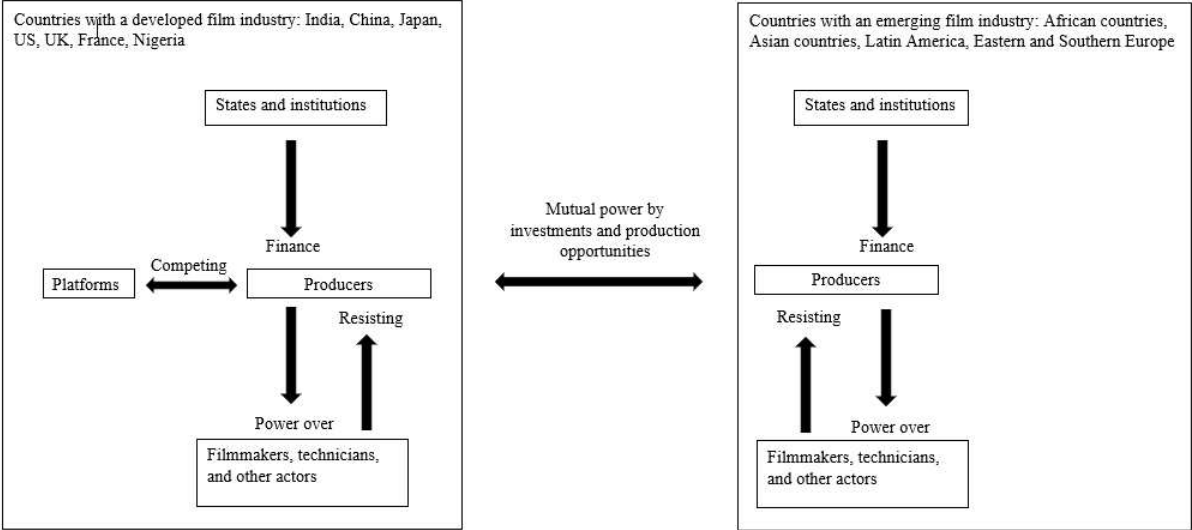
*"It (time pressure) puts us under a huge pressure because if we don't keep up, we won't be hired again. So clearly at one point we were in a precarious situation because of this."* (Interview of a chief editor working with Warner).

Being time-efficient is a way to gain power.

*"There is a monopoly by the big VFX studios because they (the filmmakers and the producers) want someone who already has experience, and they want someone who can start quickly and have a big team. So, it only leaves a few chances to the small ones."* (Interview of a VFX producer at BUF Compagnie).

### 5.3.2 Diagram of power

Figure 3: Diagram of power dynamics in the production processes



Source: Author

## 6. Discussion

Creative industries are receiving more and more attention from scholars. There has been a call for more research about them in literature, considering the large number of fields these industries encompass. However, the film industry is still understudied compared to the economic importance it has around the world (Wang et al., 2020).

While most previous research about the film industry in management was oriented towards the factors for commercial success (Duan et al., 2011; Lehrer & Xie, 2022; Benner & Waldfogel, 2023), my findings pointed to another direction. Indeed, my findings showed how power dynamics between the actors of the film industry were influenced by the globalisation of the production processes. I was here focusing on the relationships of power at work in this industry, and the positions of the different actors. I identified different types of power, and highlighted the forms in which they exist in the film industry. I extended the previous research about power dynamics to a different industry (Sgourev, 2013; Pacheco & Khoury, 2023). To any actor working in the film industry, knowledge about power dynamics is essential. Understanding how they can evolve and impact decisions in the production processes is highly relevant.

What's more, research about globalisation is still recent since the long-term effects of this phenomena are just starting to be known (Beugelsdijk et al., 2018; Chandler et al., 2022). Digitalisation, and the global interconnection it introduced in the industry is still an evolving topic (Brynjolfsson et al., 2010; Benner & Waldfogel, 2023). My work tried to include this challenge as a factor of power dynamics which is quite new in the actual state of research. Although globalisation and power dynamics are intrinsically linked, the relation between them was left apart.

Through this work, I also contributed to the field of qualitative research in the film industry. Specifically, I analysed power dynamics through a qualitative lens. Previous studies analysed power dynamics with a quantitative approach, to make this intangible concept more concrete (Rossman et al., 2010; Pacheco & Khoury, 2023). My approach was different, and using qualitative research allowed me to get a more in-depth and qualified understanding of this phenomena. Conducting semi-structured interviews allowed me to raise ideas and challenges that are not identifiable in a quantitative study. Getting such a deep knowledge about the dynamics ruling the film industry was still unseen in academic research.

## 7. Conclusion

My research question was: “How are power dynamics between actors of the film industry influenced by the globalisation of production processes?”

While the film industry was thoroughly researched in relation to its economics and the reasons for commercial success, power dynamics were left apart. Processes of power have been effectively studied in non-creative industries, as they are overly present in environments involving many different actors. Thus, there is a gap in literature regarding power dynamics in creative industries, specifically the film industry. Moreover, globalisation is a topic with a lot of potential for research as it is quickly evolving and impacts many actors. The new challenges it unveils have not been studied in an extensive way, and the link between power dynamics and globalisation is still unclear in literature.

My study showed that the globalisation of the production processes is paradoxical and impacts all actors of the value chain. As established producers gain power by extending their influence on new countries and actors, globalisation is part of their strategy. In turn, independent filmmakers and emerging film industries gain power with globalisation thanks to new funds and production opportunities. This way, globalisation became a necessity for some of them to survive and is also part of their strategy to gain power. Money keeps being the key factor of power, and it is used by producers to exert their power but also by emerging industries to provide incentives to attract international partners.

This study being conducted in the context of my master’s degree, the resources and time I disposed of were limited. The timeframe I could study was also reduced, and many phenomena I highlighted are likely to evolve and mutate in the next few years. A longitudinal study to observe the evolution of power dynamics on the long run in the film industry would have been relevant. Also, I interviewed professionals mainly working in the European film industry. Their vision of the industry and knowledge about globalisation can therefore be biased.

This study being focused on the production processes, the study of power dynamics during the distribution and diffusion processes of films is also crucial for future research. Indeed, distribution and diffusion involve different actors and thus different power dynamics that should be investigated. Finally, research could focus on the reasons why emerging film industries are successful or not in getting opportunities from globalisation.

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## 9. Appendices

### 9.1 Appendix 1: Coding table

Code	Interview 1 Jessica Bethouart	Interview 2 Richard Berthollet	Interview 3 Juliette Boucheny	Interview 4 Nicole Bastin	Interview 5 Vincent Choukroun	Interview 6 Joana Gusmão
Actors losing power	"Very early he (the filmmaker) wanted to meet us, [...] he wanted it to be only one (VFX) studio but most of the time it's a lot of (VFX) studios. "	"There are so many small producers, we are a part of a squandering of talents because an organisation needs very specific skills, in terms of finance, law and not only art.."		"As entertainment freelancers we don't have a global vision of the company."	"Distributors are going to fight between them in the same country, they don't have power over the vendors."	" When the money comes from another country, the film director is limited in his creativity."
Power with		"The union helps us have more power. "		"There was a movement, that I partly created, to uniformise the salary of all editors."		"You have unions of technicians for example. [...] You have a price list of how much you should pay people. But it doesn't make much sense with the budget of a film, so you must negotiate."
Producing abroad to reduce costs	"Now there are some small studios, small studios from Poland and so on but I'm sure it's because of the tax rebates, it's not just for the pleasure of working with locals, it's about money."					"Sometimes you decide to produce abroad just because the money is there."

				<p>"All of this is part of a movement of internationalisation of production processes and making them shorter. Working conditions changed a lot between the time I started to work for Warner and 15 years later. We didn't have the same time to do the same things".</p> <p>"It (time pressure) puts us(freelancers) under a huge pressure because if we don't keep up, we won't be hired again. So clearly at one point we were in a precarious situation because of this."</p> <p>About why time pressure increased: "The more a company grows, the less you have to share."</p> <p>About time pressure and cost cuts: "At the very beginning, the internet was just starting, there was no Netflix and all of this. So of course, they (Warner) had to adapt."</p>		
Time pressure	<p>"There is a monopoly by the big VFX studios because they (filmmakers and producers) want someone who already has experience, and they want someone who can start quickly and have a big team. So, it only leaves few chances to the small ones."</p> <p>"When you are with Netflix it has to be quick, there is no affect. You have to deliver, and they give millions just like this."</p>	<p>"Once it's decided, you have to be super quick, filming, editing."</p>	<p>"I must adapt to the availability of their rooms. I did the editing in June, but in July and August they didn't have rooms available anymore, so the editing only started again in September. It took me more than 6 months to do the post-production for a 35 min movie which is a lot."</p> <p>"It's very long to write and direct a short film, because I have to manage everything. I must do things that are not supposed to be my job. "</p>			
Actors gaining power	<p>"The people who pay have the most power. So, the studios, the producers [...] In the US it's going to be the studios, Warner, Universal, MGM. "</p>				<p>"For VOD, vendors try to do a global Netflix sale or a global platform sale. They will be less likely to release VOD rights in a smaller region."</p>	
Emergence of new actors		<p>"They (the platforms) bring the money, they have a global striking force that others don't have."</p> <p>"The past 10 years what has changed is Netflix, Amazon, Apple, the platforms."</p>		<p>"The concurrence of streaming platforms is the main challenge today."</p>		

Tensions over money	<p>"For arthouse movies, they (filmmakers) need to be reassured, money is very important compared to Netflix. David Lynch, if he has 20M, every cent of these 20M need to be used properly, he will think about it, his reputation is at stake. "</p> <p>"Once we (BUF Compagnie) are in production, the producer is the second power balance with the budget by deciding what he is going to allocate."</p>	<p>"We (filmmakers) have the tendency to put everything in the movie because it's our business card. If it's cheap, if it's bad, we don't work anymore. When the producers have the tendency to put just the minimum in the movie and that's it. "</p>	<p>"A short film has a very low budget. My producers have deals with places to do the post-production. [...] We pay almost nothing, but I have to adapt to the availability of their rooms."</p>		<p>"It's about what people are willing to pay money for, that's a big problem."</p> <p>"Money makes power in this industry"</p>	<p>"To me the biggest challenge was to manage a budget with other people. There are a lot of limitations concerning the way the money is used in international co-productions."</p> <p>"The budget doesn't grow. So, you must make sacrifices. To make the conditions of the production are fair, you must grow the budget."</p>
Power over	<p>"He (the producer) puts pressure [...] on the filmmaker."</p> <p>"Upstream, it's the filmmaker (who has the most power) [...] but at the end it's the production company or the studio."</p>	<p>"If we become a producer when we are a filmmaker it's to control the money."</p> <p>"After 50 years, I would feel more ready to discuss money with a producer, but I would still be depending on his decision."</p> <p>" We are the only profession without a fixed salary, and we are getting exploited. That's why people become producers."</p>	<p>"After writing I'm looking for a prod, when you sign, you sign a contract with the producer who buys your rights on the scenario."</p> <p>"He (the producer) asks you to rewrite certain things."</p>			<p>"If you have a big production structure, you have the guarantee that the contract is respected by your co-production partner."</p>

<p>Managing national differences</p>	<p>"The filmmaker has an artisanal approach in the French industry. In the US, it's clearly not the case. For example, my colleagues are doing a movie with George Clooney, they have never seen the face of George Clooney. [...] They never had meetings with George Clooney. He has his team intervening." "It's more complicated (in France), it's less processed, it's a lot more uncertain, peregrinations, shootings are postponed, they (filmmakers and producers) will ask 15000 questions, they need to be reassured. [...] Money is very important [...] When you are with Netflix it's not the case, it must be quick and there is no affect. The French want to control everything"</p>	<p>"The French market is very specific because it's French. As we always thought we were the best in the world, and that's a huge mistake, we are a bit isolated on the international market."</p>	<p>"We adapted because it was a Togolese team, they really don't work the same way as we do." "I spent weeks with them doing location scouting but when I arrived on the set on the first day nothing was ready." "There is no cinema in Togo, everything has to be developed."</p>	<p>"At my level, processes are uniformed (between France and Africa). It was not the case at the very beginning when they got the African market, there was a sort of discredit of the work made for Africa, but it quickly changed. "</p>	
<p>Power from within</p>	<p>"He (the CEO of BUF Compagnie) had lunch with Gaspard Noé last week and is going to parties with David Fincher in Los Angeles, he has his small network, and he doesn't want to sell his company. And it can be an advantage sometimes. Because there are people who want this artisanal side, independence."</p>	<p>"For a long time, we were protecting ourselves by a French speaking market."</p>		<p>About software solutions: "Americans consume a lot of American. Asians are way more open to technology. But it's usually closed markets, countries will buy national products."</p>	<p>" When the money comes from another country, the film director is limited in his creativity. Some film directors just think it's not worth it." "More and more filmmakers want to be involved in the production process and budget from the beginning." "When you have nothing, it may create a certain freedom in the way you film." "Some directors were tired of the way films were produced in big structures and they took a step back. They started thinking</p>

						of filming another way."
Changing internal organisations in companies	"There are some complicated projects. [...] We went from a team of 20 people to a team of 40 at some point. All those who had finished their other productions, we put them on this complicated prod".			"Things were put in place quickly and they told us we had to make sacrifices and that things would be put in order with time." "Working conditions changed a lot between the time I started to work for Warner and 15 years later. We didn't have the same time to do the same things, we changed our software, we even changed location. Before everybody was in a room and we were all gathered in open spaces. We were moved billions of times. At one point I thought it was going too far in the cost cuts."		
Complexity of the processes			"I have to manage all the post-production, and it's exhausting, there are a lot of things I'm discovering." "If you're lucky it's the CNC (that puts the most money in the film), but it's very hard to have the CNC. There are several steps, you must rewrite, it can take like 1 year and a half to get it."			"There are a lot of limitations concerning the way the money is used in international co-productions."

Power to	"Today there are more and more movies in need of VFX. VFX is having a huge success. There are so many projects we had to refuse because we didn't have the time."				"It's difficult to make a place for ourselves on a very artisanal market, especially in France. There is still an aversion for digital tools, even if it's getting better. It's less the case for new generations." "It's getting better over the years, we see it at the Cannes film market, with the interest our clients are getting in our solutions."	" You cannot do a big budget film alone in Portugal. You need to establish an international co-production."
Role of governments to promote international production	" It (public funds) weighs a lot in the balance. The reason why in France we have a lot of American productions is that they have the right to a tax rebate. So, it's more interesting financially when you are American and you come to France to film, to do your post-production than being French and doing your post-production in France."	"Canada helped us (France) to enlarge a lot, with a financial striking force we didn't have alone." "For a motion picture, its cost is assumed by a certain number of agents. You have state agents, region aids, institutions dedicated to documentary films."	"For me it was complicated because if it was a documentary I was filming, I would have access to more funds but since it's a fiction I'm filming in Togo, I can't have access to the funds."			

Source: Author