

**Thinking Outside the Box, Coloring Inside the Lines: Challenges and Growth of the Dutch Film Industry**

*How do filmmakers in the Netherlands perceive the growth potential of the Dutch film industry?*

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## ABSTRACT

*This thesis explores how filmmakers in the Netherlands, defined as directors, producers and writers, perceive the growth potential of the Dutch film industry. Using qualitative interviews with ten filmmakers and supported by a theoretical framework that includes national cinema, risks and resilience of small-nation filmmaking, funding and co-productions. The study shows a complex film industry marked by both ambition and challenges. While participants express a desire for innovation, inclusivity and international relevance, they also point to challenges that persist, such as underfunding and bureaucratic rigidity. The findings align with the Olsberg SPI (2023) report and affirm the importance of the Dutch Film Fund's new policy (2025), which focuses on quality over quantity, talent development and innovation. Growth opportunities are identified in international co-productions, alternative appliance funding models, and audience engagement. Ultimately, this research shows that understanding industry growth requires measuring quantitative output, as well as listening to experiences and opinions of filmmakers in the Dutch film industry.*

**KEYWORDS:** *Dutch film industry, national cinema, policy reform, industry growth*

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# 1. Introduction

The Netherlands is a small market within the global film industry. The film production, distribution, and exhibition sectors in the Netherlands account for only a small part of business undertaken internationally. Hollywood is a leader in the global film industry, and also in the Netherlands, they dominate distribution and exhibition due to Hollywood occupying the majority of screen time in cinemas and setting the standard for commercial success, often overshadowing local productions in terms of visibility and audience reach. As for the Dutch market itself, there are major challenges to strengthening the local production sector, protecting Dutch cultural identity and heritage, and ensuring distinct Dutch productions continue to be developed, financed, and viewed by both national as well as international audiences.

## 1.1 Problem statement

The Dutch film industry has been struggling. From almost everywhere in the Netherlands the same complaints echo: there seems to be no trust in the filmmakers, no money, and above all: no risks. According to Van der Heijden, a writer for the Dutch magazine “De Groene Amsterdammer”, Dutch cinema tends to follow a safe style with clear narratives, and little room for imagination (Van der Heijden, 2025). This style seems to be perpetuated by the funding systems, which favor safe storytelling (Van der Heijden, 2025). Other complaints include fragmented subsidies, lack of private investment, and lack of ambition, according to the Dutch paper “FD” (Bouma, 2025). Moreover, filmmakers are earning insufficiently, leaving filmmakers with too little money to live off or be able to afford to keep putting out work, according to the Dutch paper “Filmkrant” (Dijksterhuis, 2025). Repeated research, surveys, and discussions all come to the same conclusion: it is time for change. According to makers in the industry, change is something that is mentioned a lot but never seems to happen (Van der Heijden, 2025).

The Dutch Film Fund is the flagship public support institution for films in the Netherlands. They commissioned the British consultancy company Olsberg SPI in 2023, to evaluate how the market for Dutch feature films compares to other European countries (Olsberg SPI, 2023, p.4). Their report shows that the Dutch film industry is in a growth phase, but that there is still much progress to make.

In 2023, the International Benchmark Study for the Netherlands Film Fund was

released, a report in which the Dutch film industry was compared to four other European countries, written by the English consultancy Olsberg SPI, commissioned by the Dutch Film Fund (Olsberg SPI, 2023, p.7). The Dutch Film Fund is the flagship public financial support institution for films in the Netherlands. The report shows that although the Netherlands produced 487 feature films between 2010 and 2022, none classified as "high excellence" in Europe, whereas the other countries in the report, Denmark, Sweden, Belgium, and Austria, achieved multiple such films, and Dutch films have never won awards at major film festivals (Olsberg SPI, 2023, p.7).

Comparing the reports of the Dutch Film Fund of 2022, 2023, and 2024 shows that the Dutch film industry is in a growth phase, recovering from disruptions. The total revenue increased by 16% in 2023 (Dutch Film Fund, 2024), having risen to 17,6% in 2024 (Dutch Film Fund, 2025c, p.2). Especially in cinema attendance and high-end series production is in an upward trend, with the production volume increasing by 29% in 2023, although it should be noted it declined by 7% in 2024 (Dutch Film Fund, 2024, p.3; 2025c, p.2), and Dutch films attracted 19% more viewers in 2024 (Dutch Film Fund, 2025c, p.2).

## 1.2 The Research Question

While these challenges call for change, it is important to note that there are also positive developments. The Dutch film industry is becoming more globally interconnected, through co-productions and other collaborations, while also aiming for better-quality local productions and increased funding. Diversifying and localizing foreign content as well as enhancing the appeal of Dutch films to local and global audiences might be priorities. This research will focus on the possible growth opportunities in the Dutch film industry utilizing the research question: *How do filmmakers in the Netherlands perceive the growth potential of the Dutch film industry?* The focus of the question is growth potential, referring not only to economic expansion but also artistic development, international visibility, and the ability to connect with the audience, conceptualized as national cinema, risks of small nation filmmaking, examples of resilience, and international co-productions.

The theoretical framework of this thesis focuses on exploring academic discourse and frameworks related to national cinema, particularly on the dynamics of small-nation filmmaking in a globalized media landscape. A national cinema is defined as a combination of factors such as history, politics, and economics (Vitali & Willemen, 2006, p.9), as well as a tool for cultural expression (Bergfelder, 2005, p.316), leading to unique cinematic

identities, which are important in the broader context of globalized European cinema (Lewis & Canning, 2020, p.208). There is a lack of academic research exploring these topics about the Dutch film industry specifically, as well as qualitative insights from the makers within this industry. By researching these topics, the academic gap will be filled.

Focusing on small-nation filmmaking, such as the Netherlands and Denmark, reveals that although small nations often struggle with a lack of visibility and resources, they also have recognizable cinematic identities that can resonate on an international level (Hjort & Petrie, 2007, p.8). Risks for small-nation filmmaking can be sorted into individual and systemic risks (Hjort, 2015, p.50). Systemic risks include mono-personalism, wasted talent, risk of exit, and film-ecological imbalance (Hjort, 2015, pp.53-54). Individual risks come down to how and with what tools individual filmmakers deal with systemic risks (Hjort, 2015, p.52). Additionally, it will be shown that small nation film industries can be resilient, as small nations can still have considerable success domestically (Higson, 2021a, p.199), even when faced with a local audience's strong preference for Hollywood productions (Higson, 2021a, p.217). Tactics used to recapture the interest of local audiences include reinvigoration, national distinctiveness, and the argument that national cinema should include domestic production and local audience preferences, as well as transnational elements that appeal to international audiences (Higson, 2021b, p.229).

One of the most important solutions for small nations is international co-production. Bergfelder (2005, p. 321), globalization can lead to homogenization in cinema, but also to a transnational production experience with a globalized economic drive. Additionally, co-productions often perform better in Europe than national productions, due to larger available budgets and distribution links (Jones, 2016, p.8). Subsequently, the rise of streaming platforms has an impact on co-productions (Mitric, 2024, p.63). Although streaming platform collaborations and co-productions can offer new opportunities for independent producers, they can also threaten cultural diversity and independence (Mitric, 2024, p.77).

Lastly, this theoretical framework is supported with an overview of how smaller national film industries like the Netherlands navigate structural limitations, international co-productions, and shifting audience demands. The overview draws on comparative examples from other small European countries including Denmark, Ireland, and Iceland, to contextualize the case within broader theoretical and practical frameworks. Noonan (2024, p.23) shows by comparing Ireland to similar organizations, that the Irish national screen agency's strategies enhance the small nations' visibility and competitiveness in an

international market. Additionally, with the revenue of co-productions, the Icelandic government has succeeded in setting up the Icelandic Film Center, which contributes half of the funding for national film projects (Njordförd, 2007, p.47). The last example shows that Denmark has managed to stay flexible and adaptable, constantly reinventing itself to stay ahead (Hjort, 2007, p.27). Denmark has had a small bout of reinvigoration, meaning they have national pride and success as well as international successes and increased revenue due to international co-productions (Hjort, 2007, p.24). Denmark's success is also reflected in the Olsberg SPI (2023, p.8) report.

### 1.3 Relevance

There is a significant societal relevance for this topic, as it touches on multiple dimensions of the Dutch film industry. The Netherlands has the potential to become a hub for domestic, international, and possibly co-productions, but structural challenges, such as language, a small market, low budgets, and the quality of talent hinder this. By identifying how these challenges are perceived, this research will help shed light on how the Dutch film industry could live up to its potential. With the recent developments, the future of the Dutch film industry has been a topic of much debate. Organizing, categorizing, and combining recent and older discourse will create a clear overview of the challenges and solutions. The findings of this research could inform future policy and funding strategies. The Dutch Film Fund invested €85.5 million in 2023, but understanding which areas have the most potential to grow could help ensure that resources are allocated effectively. Evident by the commissioned report of the Dutch Film Fund (Olsberg SPI, 2023), it is clear something has to change in the near future. This research will be exploratory and will focus on investigating concepts in the Dutch context, discovering new findings, and generating possibilities for future research.

Academically, this research will contribute to the discourse around Dutch national cinema, small-nation filmmaking, and the impact of co-productions on the local Dutch industry. While there have been numerous studies about the theoretical implications of national cinema and it includes, there remains a lack of qualitative research exploring how Dutch local experts perceive and experience these dynamics in practice. This research aims to fill that gap by examining the real-life experiences of Dutch filmmakers within their national context in the Netherlands.

## 1.4 Research outline

The remainder of this thesis is spaced out in four more chapters. The second chapter will form the theoretical framework of the research, incorporating and explaining the concepts of national cinema, small-nation filmmaking, risk, and resilience and comparing case studies from other European countries with similar challenges and successes, linking it to the Dutch industry. It will show how the Dutch film industry fits within the broader discourse. In order to analyze how Dutch filmmakers, defined as directors, producers, and writers, perceive this growth potential, a thorough discussion of relevant concepts will precede the analysis. The Dutch filmmakers' insights will help create an overview of the challenges and solutions in the Netherlands. Their opinions are relevant as the Dutch Film Fund has released a new strategic policy aimed at improving several aspects of the industry, and the filmmakers will be directly affected.

Chapter three will outline the methodology of this research. To help answer the research question, a qualitative method using ten semi-structured interviews (Appendix A) with Dutch filmmakers was used. This method was chosen to show the nuance in opinions and experiences. The interviews were analyzed using a thematic analysis through Atlas.TI (Appendix B). The interview guide was based on the earlier mentioned concepts such as national cinema, small nation risks, and co-production uses (Appendix C). Interview transcripts form the primary source, and secondary sources include academic literature, trade press, and industry reports, such as the Olsberg SPI (2023) report and Facts and Figures reports from the Dutch Film Fund (2024, p.3; 2025, p.2). This chapter will also explain how the data was collected, coded, and interpreted.

Chapter four will present the findings from the interviews, organized into the themes of challenges, funding systems, co-productions, and possible solutions for a sustainable future. These results will be connected to the theoretical framework to make meaningful conclusions.

Finally, the fifth chapter will aim to answer the research question through a final discussion and conclusion. It will reflect on the limitations of this thesis, and the implications of the findings as well as offer recommendations for future research and practical industry change.

## 2. Theoretical Framework

The concept of national cinema has been a topic of discussion since the 1980s, during which scholars have attempted to understand how cinema reflects and shapes national identities. This discussion has evolved to include the complexities of globalization and the impact of transnationalism on the traditional concepts of national cinema, challenging the belief that national cinema is only a product of a nation (Hjort & Mackenzie, 2000, p.6). Vitali and Willemen (2006, p.9) agree, adding that national cinema should be viewed as a complex combination of historical, political, and economic factors that shape film production and reception. The historical narratives surrounding national cinemas often fail to consider the complexities of how these identities are formed, indicating that cinema serves as both a product as well as a tool of national identity construction (Vitali & Willemen, 2006, p.5).

Furthermore, it is important to consider the historical context when trying to understand national cinema, as these cinemas are often “multiple, proliferating, contested, and overlapping” (Vitali & Willemen, 2006, p.9), which complicates the traditional view of national identity. Subsequently, Bergfelder (2005, p.315) notes that small national cinemas often want to reflect cultural specificity and national identity as a way to contrast the larger supranational ideals of Europe. This need can lead to a focus on national cinema as a means of cultural expression and preservation (Bergfelder, 2005, p.316). All authors agree that the historical context and geopolitical changes in the second half of the 20<sup>th</sup> century are important to consider when analyzing their interactions with transnational influences. Ultimately, the combination of these discourses shows how small-nation filmmaking serves as an important way of expressing and preserving cultural identity while dealing with the pressure of globalization and transnational influences.

Zooming in further shows us not only national cinema but also small nation filmmaking, such as the Netherlands and Denmark. Hjort and Petrie (2007, p.8) emphasize that while small nations often struggle for visibility and resources, they also have distinct cultural narratives that can resonate on an international level. In light of this research, it is important to understand how small nations navigate the challenges of film production, distribution, and reception in a globalized context. Small nations can offer insights into the workings of cinema, mainly in terms of identity, culture, and the impact of globalization (Hjort & Petrie, 2007, p.13). By comparing and analyzing the cinema of several small nations such as Denmark, Iceland, and Ireland, it can be examined how they navigate

themselves in a larger cinematic landscape, which can then be applied to the case of the Netherlands. Despite their structural challenges, Denmark, Iceland, and Ireland share strategies to overcome the limitations of their small national market. All three nations effectively use international co-productions to access funding and reach wider audiences (Njordförd, 2007, p.43; Hjort, 2007, p.25; Noonan, 2024, p.24). Moreover, they all have strong national public funding institutions that play an important role as key intermediaries that manage the industry, such as Screen Ireland, the Danish Film Institute, and the Icelandic Film Center (Njordförd, 2007, p.47; Hjort, 2007, p.26; Noonan, 2024, p.23), comparable to the Dutch Film Fund. Additionally, all these countries show a committed effort to nurturing their local identity while also being internationally relevant.

Co-productions often offer financial and creative opportunities, but they also raise concerns about cultural homogenization and the dilution of national identity (Bergfelder, 2005, p.323). Co-productions are now central to sustaining small national cinemas, although they are often more financial than culturally driven (Jones, 2016, p.8). Recent developments such as streaming platforms have further complicated the industry by challenging traditional models and threatening producer independence (Mitric, 2024, p.64).

In short, all these dynamics, discussions, and concepts set the stage for a more in-depth debate about how small nations like the Netherlands can navigate and sustain their film industries while dealing with global, cultural, and economic challenges.

## 2.1 Defining National Cinema

While this research focuses on the national cinema of the Netherlands, what constitutes national cinema can be complex to define. While many would consider national cinema to be local films produced in a certain country, Higson (1989, p.36) has identified other factors that have an impact on how national cinema could be perceived. However, national cinema is a complex concept that goes beyond the movies produced within a nation (Higson, 1989, p.36). According to Higson (1989, p.36), the term can be understood through economic circumstances, the text and representation of films, also known as film texts, audience preferences, and the independent art-house production sector that has been developed in a certain country (Higson, 1989, p.36).

This will be explained more in depth. First, national cinema can be economically defined in terms of the domestic film industry, focusing on who produces, owns, and

controls the films and their distribution networks (Higson, 1989, p.36). For instance, in the Netherlands, Hollywood productions account for most of the cinema's revenues (Dutch Film Fund, 2024, p.41). In the Netherlands, the film industry is supported by the Dutch Film Fund, which provides financial assistance throughout the production process (Olsberg SPI, 2023, 11). The Dutch Film Fund plays a vital part in the Dutch film industry, as it provides financial support for film production and distribution thus reinforcing the country's position in the global film market, as well as sustaining a healthy national industry (Olsberg SPI, 2023, p.11-12).

Second, in terms of the text of films, defining national cinema involves analyzing the themes, styles, and narratives that films represent, as well as how they reflect or construct notions of national identity (Higson, 1989, p.36). National cinemas often emerge from specific historical contexts, which lead to unique cinematic identities (Lewis & Canning, 2020, p.154). The concept of national cinema is also increasingly intertwined with transnational dynamics with the rise of co-productions that can blend local narratives with broader European or global influences (Lewis & Canning, 2020, p.208).

Third, it is important to understand what audiences watch in a certain country and how that affects the construction of a national cinema. Higson (1989, p.37) argues that national cinema is often defined prescriptively, focusing on what it should be rather than describing the actual cinematic experiences of popular audiences. Bergfelder (2005, p.325) indicates that in many European countries, the best performing films are often American. Hollywood's dominance in European markets is often accredited to the diversity between European countries, which creates the perception that European films are distinct due to cultural and language differences (Bergfelder, 2005, p.325). This distinction is often framed as the reason why European films struggle to achieve the same level of international success as American productions (Bergfelder, 2005, p.325).

In short, national cinema is a complex combination of production, consumption, and cultural identity. Understanding national cinema requires acknowledging the diverse and often conflicting narratives that shape a nation's cinematic landscape, as well as the role of the audiences in constructing cultural meaning (Higson, 1989, p.45). The role of audiences is an important aspect in this context, as their engagement with both local and global content shapes cultural meanings and influences the cinematic landscape (Meir & Smits, 2024, p.29). The rise of American global streaming platforms shows the tension between European filmmakers and American distribution systems such as streaming platforms, highlighting the

struggle for European independence (Meir & Smits, 2024, p.29). Additionally, given the dominance of America, European cinema must negotiate its cultural identity while dealing with the influence of American media (Meir & Smits, 2024, p.27). Defining European national cinema can be challenging due to the diverse influences and characteristics that shape it across different regions of Europe (Lewis & Canning, 2020, p.3). The transnational aspect complicates the concept of national cinema, as it often reflects an identity that incorporates elements from various cultures and cinematic traditions, especially with co-productions (Lewis & Canning, 2020, p.208).

## **2.2 National cinema: the Netherlands**

In the Netherlands, the film industry is supported by the Dutch Film Fund, which provides financial assistance throughout the production process, from development to distribution (Dutch Film Fund, 2025b). The Dutch Film Fund is the national cultural fund for the professional and independent film sector in the Netherlands (Dutch Film Fund, 2025b). Additionally, the Dutch Film Fund organizes international activities to expand the industry's global network and promote Dutch talent in international co-production markets (Dutch Film Fund, 2025b). The report shows the challenges the Dutch film industry is dealing with, such as limited financial support for creative talent, which often leads to filmmakers seeking production opportunities in other markets (Olsberg SPI, 2023, p.37). The Netherlands has a high output of feature films, but the quality as measured by the high excellence parameters, lags behind countries such as Denmark (Olsberg SPI, 2023, p.38).

There has been a long-standing debate about small-nation film industries being overly reliant on public funding. For example, on one hand, the Dutch website Afdeling Filmzaken (Redactie Filmzaken, 2017), which was created by Dutch film professionals to raise attention for the Dutch film industry, expressed concern over the policy of allocating more funds to fewer films. While acknowledging that increased budgets per film can be beneficial, they argue that this approach reduces the number of films being produced thus limiting opportunities for filmmakers to develop their skills and for audiences to experience a range of stories (Redactie Filmzaken, 2017). In addition, they advocate for a more inclusive strategy, emphasizing the importance of creative freedom and the need for the sector to trust filmmakers' abilities. Contrastingly, Ronald Rovers, writer for the Dutch film magazine Filmkrant, supports allocating more budget to fewer films with higher artistic ambition (Rovers, 2023). With this, Rovers (2023) pushes back against the idea that market

performance or widespread production is the right measure of a successful national cinema. Interestingly, in the same article, well-known Dutch filmmaker Johan Nijenhuis advocates for allocating funding based on domestic market performance, aiming for a more large-scale, commercially viable film landscape (Rovers, 2023).

In 2022, the Dutch Film Fund commissioned the International Benchmark Study report, prepared by Olsberg SPI. Olsberg SPI based its report on the facts and figures of the Dutch Film Fund of 2022 and before. 2022 is a year in which the world and the Netherlands were just recovering from the COVID-19 crisis, so increased numbers, especially in cinema and festival attendance, are to be expected. However, the figures also show that the market share of Dutch film fell from 23.1% to 16.2% in 2022 (Dutch Film Fund, 2023) but has since risen to 17.6% in 2024 (Dutch Film Fund, 2025c). Some other interesting preliminary numbers are that although total cinema attendance declined by 7%, Dutch films attracted 19% more viewers in 2024, some of which can be attributed to a slight increase in released Dutch films in 2024 (Dutch Film Fund, 2024; 2025c). Moreover, the total production budgets of films and high-end series increased by 5% in 2024, but it should be noted that the total box office revenue declined by 7% (Dutch Film Fund, 2025c).

The Olsberg SPI report released in 2023 examines the performance of Dutch feature films compared to those from other European countries, focusing on working conditions and industry dynamics (Olsberg SPI, 2023, p.4). The European countries Olsberg SPI compares the Netherlands to are Denmark, Sweden, Austria, and Belgium. To compare these countries, Olsberg SPI uses the High Excellence Data Parameters, meaning they set the parameters for films produced between 2010 and 2022 of a 100% national production or Majority co-production (Olsberg SPI, 2023, p.5). Films to be considered an artistic success must fall within the parameters: films that are selected or awarded in the main categories of the film festivals Cannes, Berlinale, Venice or Sundance (Olsberg SPI, 2023, p.5). Films that have reached or exceeded European admissions of 250,000 are considered a commercial success (Olsberg SPI, 2023, p.5). The numbers were pulled from the Lumiere database, and European admission and national admission numbers were applied for each relevant jurisdiction (Olsberg SPI, 2023, p.19). As seen in Table 1, Olsberg SPI (2023) measured multiple concepts between 2010 and 2022. First are the films that have met the High Excellence Parameters discussed previously, followed by the total amount of feature films produced by a certain country. Followed by total wins and awards which indicates artistic successes, total European admissions which indicates commercial successes, and lastly

recurring directors that have produced films in the high excellence matrix (Olsberg SPI, 2023, p.7).

Table 1

High Excellence Matrix Results					
	Denmark	Sweden	Belgium	Austria	Netherlands
Films that met High Excellence Parameters	14	10	11	5	0
Total Feature Films Produced Between 2010-2022	272	360	264	204	487
Total Selections and Nominations for Key Films and Award Events	17	12	21	8	0
Total Wins and Awards for Key Films and Award Events	7	10	3	1	0
Total European Admissions (millions) of High Excellence Films	16.5	15.6	9.6	1.9	0
Directors Recurring in the High Excellence Matrix	Thomas Vinterberg – 3 films, Lars von Trier – 4 films, Susanne Bier – 2 films	Ruben Östlund – 2 films	Luc and Jean-Pierre Dardenne – 4 films	No repeat directors	No repeat directors

Source: Olsberg SPI

As shown in Table 1, no Dutch movies met the parameters to be considered either an artistic or commercial success (Olsberg SPI, 2023, p.7). For example, the best-performing Danish film was "Druk" (Vinterberg, 2020), with two wins for key films and award events and 2.939.686 European admissions (Olsberg SPI, 2023, p.49). Notably, "Druk" is an international co-production between Denmark, Sweden and the Netherlands. Contrastingly, the Dutch film that comes closest to qualifying for the High Excellence Parameters is "Brimstone" (Koolhoven, 2016), which was in one competition and had one nomination but won no awards for Key films and Awards events and had 238.488 European admissions.

Notably, this film was an international co-production too, with seven countries (Olsberg SPI, 2023, p.22). These countries include the Netherlands, France, Denmark, Belgium, Sweden, the UK, and the US (Olsberg SPI, 2023, p.22). It is however interesting to note that with 487 in total, the Netherlands put out almost twice as many feature films, compared to the other countries in the report in the period from 2010 to 2022 (Olsberg SPI, 2023, p.8).

In addition, by gathering quantitative and qualitative data in two phases, Olsberg SPI (2023) identified five key findings regarding the Dutch film industry. The first finding identified is the divide between arthouse and commercial filmmaking in the Netherlands, with commercial productions dominating in quantity and market performance (Olsberg SPI, 2023, p.36). Arthouse films are defined in the report as projects that show the art of filmmaking while defining commercial films as the opposite and focusing on marketability (Olsberg SPI, 2023, p.36). Both sides of the division are important for a thriving national cinema with opportunities for local producers and a diverse range of productions for audiences. However, Table 1 demonstrates a lack of artistic productions in the Dutch film industry's output, which favors market-driven movies while offering low levels of artistic recognition (Olsberg SPI, 2023, p.36). Popular genres such as family films and romantic comedies contribute to this trend, as they are cost-efficient and based on formulaic production, meaning they are fast and easy to produce (Olsberg SPI, 2023, p.36). Additionally, the Netherlands has produced notable directors, but they face more challenges compared to their colleagues in the other countries mentioned in the report, such as financial barriers and limited resources (Olsberg SPI, 2023, p.37). This can limit their development in the long run. Olsberg SPI (2023, p.37) notes that financial barriers and limited resources often lead to Dutch talent seeking opportunities in other industries within the Netherlands, or trying their luck abroad. Within the national industry, the commercial scene is dominated by a small group of recurring names, which leaves little room for broader talent development (Olsberg SPI, 2023, p.37). The Dutch film industry lacks partnership and collaboration between filmmakers (Olsberg SPI, 2023, p.38).

Olsberg SPI (2023, p.38) then concludes that the Netherlands should start prioritizing quality over quantity. As mentioned before, the Netherlands produces a high number of films compared to other countries, but measuring with the high excellence parameters shows the quality is lower (Olsberg SPI, 2023, p.38). Olsberg SPI (2023, p.38) suggests that funding should be focused on a smaller selection of projects in order to enhance quality. With a larger budget, more money can be allocated to parts of the process that are usually

neglected, which can improve the overall performance of a film (Olsberg SPI, 2023, p.39). The reason for this is not the production value, but the opening up of the budget for pre-and-post-production areas that might have been previously neglected, such as marketing or the development stage (Olsberg SPI, 2023, p.39). A Dutch example of this claim is the movie “Brimstone” (Koolhoven, 2016), as its success has been attributed to its attention to the development stage (Olsberg SPI, 2023, p.39). A larger budget often results in stronger returns, showing the importance of investing in development and distribution (Olsberg SPI, 2023, p.39). Moreover, Olsberg SPI (2023, p.39) identified co-productions as a key finding that factors in the successes of high-performing films across all five countries in the report. Co-productions offer funding support, enable the contribution of creative talent, and ensure distribution to multiple countries (Olsberg SPI, 2023, p.39), as will be discussed at a later stage of this research. Finally, Olsberg SPI (2023, p.40) emphasizes the importance of supporting films beyond production, including packaging, distribution, and exhibition strategies. Dutch films often neglect this stage, limiting their potential success (Olsberg SPI, 2023, p.40). The need for promotional support and a new, all-round strategy for a film’s lifecycle is needed to achieve higher performance levels (Olsberg SPI, 2023, p.40).

Based on Olsberg SPI’s analysis, the Dutch Film Fund introduced a new policy in January 2025, for the years 2025 until 2028. the Dutch Film Fund has set five main priorities, based on the five key findings of Olsberg SPI (Dutch Film Fund, 2025, p.14). According to the Dutch Film Fund (2025, p.19), they will be focusing on quality over quantity, by allocating more money to fewer projects. Additionally, they aim to center the creative filmmaking process by providing more time and space to create films without putting pressure on the production (Dutch Film Fund, 2025, p.26). Furthermore, the Dutch Film Fund will aim to be attentive to talent, focusing on both the rise of new talent and emerging voices that were previously unheard, as well as continuing to stimulate the development of established creators (Dutch Film Fund, 2025, p.19). Moreover, the Dutch Film Fund's focus will span the entire lifecycle of a film production, with the revenue model not only based on making films but also on exhibiting them. With the help of greater insight into the audience, this new priority will help increase the appreciation and visibility of Dutch film, both nationally as well as internationally (Dutch Film Fund, 2025, p.31). Lastly, the Dutch Film Fund will create room for experimentation and new hybrid forms of filmmaking. This can range from immersive and interactive works to innovations in storytelling methods and perspectives (Dutch Film Fund, 2025, p.34).

### 2.3 Risks of small nations

According to Hjort (2015, p.49), small-nation filmmaking is both risk-diverse as well as risk-intensive, meaning the risks encountered connect to various factors as well as a high level of risk due to the limited resources and small market size. As mentioned earlier by Higson (1989, p.36), the economic definition is tied to the national film industry market. This means that national cinema can be understood in terms of who produces the films, where are they made, and who controls the industrial infrastructure, or in short: who has the power (Higson, 1989, p.36). This economic view on the industry is important as it shows the challenges small nations face when trying to establish a viable film industry that can compete with larger and more dominant markets (Higson, 1989, p.37).

Understanding both types of risks is crucial for grasping the transition many European cinemas are undergoing right now (Hjort, 2015, p.50). There are multiple sorts of risks to take into consideration, with systemic risks having the biggest impact on the national industry. Systemic risks often arise from things such as population and economic capacity, which can influence the entire film industry of a nation (Hjort, 2015, p.52). The risk of mono-personalism is when the film industry becomes overly reliant on a single filmmaker, making all productions feel and look the same and stifling diversity (Hjort, 2015, p.53). Another systemic risk is that of wasted talent, meaning the potential loss of skilled filmmakers who could possibly take years to produce their first film after graduating (Hjort, 2015, p.53). This possible loss occurs when talent is not nurtured or given opportunities and can be combined with the risk of exit, which is when filmmakers may leave their nation due to too few opportunities or pursue careers abroad (Hjort, 2015, p.54). and the last risk, the one of film-ecological imbalance, arises when policies designed to combat systematic risks unintentionally create new challenges, such as funding to increase viewership leads to the production of only one certain kind of commercial film, leading to a homogenized market (Hjort, 2015, p.54).

On the other hand, individual risks refer to how and with what tools individual filmmakers from a small nation deal with risks (Hjort, 2015, p.52). How individual filmmakers deal with the risks depends mostly on how the systemic risks are managed in the nation (Hjort, 2015). Individual risk positions show how and to what extent individuals are exposed to particular risks based on their unique situations (Hjort, 2015, p.52). The extent to which individuals within a nation are in favorable positions with regard to the risks depends

on how a nation's systemic risks are managed, particularly through policies (Hjort, 2015, p.52).

For example, Hjort (2015, p.54) notes that female filmmakers in Denmark have been noted to occupy better positions compared to their counterparts in other countries, such as the Netherlands. This shows the importance of both personal circumstances and broader institutional frameworks in shaping filmmakers' experience of risks (Hjort, 2015, p.54). Global risks can however be offered as new opportunities for small nations (Hjort, 2015). It can present significant opportunities for small-nation filmmakers by encouraging them to engage with social and environmental issues and thus validating their practices on a global scale (Hjort, 2015, p.52). For example, the emergence of these new risks can allow filmmakers to reframe threats as creative opportunities, fostering innovative storytelling that connects with today's audiences (Hjort, 2015, p.52). An example mentioned by Hjort (2015, p.59) is the collaboration between the Danish Film Institute and the Zanzibar International Film Festival, which shows how filmmakers can address social risks in East Africa through meaningful movies aimed at the youth. Additionally, the risks associated with technological advancements can also offer new ways for small-nation filmmakers to reach a bigger audience, as these innovations can alter traditional distribution models and enhance visibility (Hjort, 2015, p.59). In short, although small-nation filmmakers face some challenges, they also have the chance to turn risks into opportunities (Hjort, 2015).

These concepts are relevant for the Dutch film industry, which, as a small nation cinema, faces many of the systemic and individual risks Hjort (2015) has outlined. The Netherlands' small market size and public funding structure most likely contribute to the challenges such as talent retention, mono-personalism, and ecological imbalance, as was also highlighted in the Olsberg SPI (2023, pp.36-40) report. Moreover, Dutch filmmakers navigate a balance between fostering national cultural identity and achieving international successes and often failing when measuring with Olsberg SPI's (2023, p.7) High Excellence Matrix. As Hjort (2015) suggests, embracing systemic risks as creative opportunities could help the Dutch film industry strengthen its position within the international market.

## 2.4 Resilience of small nations

That the film industry of some small nations can be resilient is also visible in its persistence and success, despite the dominance of global cinema, and mainly Hollywood. In

a recent article, Higson (2021a, p.200) shows that many European local cinema industries in Europe may experience some domestic box-office successes and growth, despite the era of global cinema, and mainly Hollywood in an era of increased globalization. The modern-day decentralized Hollywood is a force of commercialized culture worldwide. Hollywood is such as success due to its ability to create high-quality blockbusters that appeal to mass audiences, supported by resources concentrated in one place and a wide distribution network with a global reach. According to Higson (2021a, p.199), most European countries produced a small number of successful movies that were well received locally between 2005 and 2015, showing they were committed to national cinema and achieving considerable box office revenues domestically.

For example, in 2011, the Dutch film “Gooische Vrouwen” (Koopman, 2011) outperformed any Hollywood productions at the box office in the Netherlands. Gooische Vrouwen is a Dutch comedy-drama that follows four women facing personal crises, with a theme of self-discovery (Koopman, 2011). Its success is attributed to it being a small-scale and mainstream genre film that catered to the domestic tastes of mainstream local audiences. In 2024 the best performing Dutch film in the Netherlands was “Loverboy: Emoties uit” (NVBF, 2024), again a mainstream film catered to the tastes of mainstream local audiences. Various other European countries showcased these types of films to achieve success, proving resilience against Hollywood blockbusters (Higson, 2021a, p.217).

Hollywood’s skill to maintain a hold on both domestic as well as international markets is due to its localized agglomeration economy and aggressive market strategies (Scott, 2007). Contrastingly, for national productions, it is challenging to perform beyond national borders (Higson, 2021a, p.217). Higson (2021a) indicates that national films often do well with local audiences. However, a Dutch film like “Gooische Vrouwen” is less likely to do well in international markets, because the themes are too local and will not be relatable to another national audience, and because it is in Dutch, a language not many people speak, one of the risks mentioned by Hjort (2015).

Additionally, Higson (2021a) reports that European audiences tend to have a strong preference for Hollywood films, which makes it harder for national films to compete. Higson (2021b, p.222) shows that European countries have consistent successes. According to him, these films often resonate with local audiences but rarely succeed internationally (Higson, 2021b, p.222). It is often comedies that are the most successful domestically but fail to succeed abroad due to their cultural specificity and low production values (Higson,

2021b, p.222). This is supported by Jones (2016, p.8), who found that culturally specific films struggle abroad due to their specificity. However, Higson (2021b, p.221) also points out that national frameworks are still important, even though European cinema has become more transnational. Higson (2021b, p.227) contrasts popular national cinema with nation branding efforts, a concept that aims to market cultural products globally. Nation branding is a means of making a nation matter in a 21st-century context of global integration and enhancing its competitiveness by promoting its cultural products and identity on a global stage (Higson, 2021b, p.227).

At this moment, however, national cinemas of Europe seem uninterested in this tactic, as the movies being made are primarily addressed to domestic audiences (Higson, 2021b, p.227). Moreover, the concepts of reinvigoration and national distinctiveness are mentioned within the context of globalization and nation branding. Reinvigoration shows a renewed commitment to national identity and cultural specificity as a response to the homogenizing effects of globalization (Higson, 2021b, p.227). In this case, European cinema can become a way to preserve and promote a nation's unique cultural identity (Higson, 2021b, p.227). Finally, Higson (2021b, p.228) suggests a new configuration for national cinema, that comes down to the belief that cinema should be understood as involving both domestic production sectors as well as the preferences of local audiences, which continue to include globalized aspects (Higson, 2021b, p.229). Films should thus be able to engage with transnational elements, such as co-productions or films that appeal to both local and international audiences (Higson, 2021b, p.228). Also, part of this new configuration is the concept of nation branding mentioned earlier, with nations marketing themselves (Higson, 2021b, p.228).

## 2.5 International co-productions

Globalization has led to a connection between local and global practices, and often film is the medium that affects and is affected by this process (Bergfelder, 2005, p.322). According to Bergfelder (2005), this shows how diaspora influences cinematic practices. This can already be seen in how smaller industries adopt Hollywood film practices, for example. Additionally, globalization can lead to cultural homogenization, and make all cinematic experiences feel the same (Bergfelder, 2005, p.321). On the other hand, as Bergfelder noted in 2005, a result of globalization is also transnational filmmaking and communities being able to challenge and shape national identities, allowing for a more

nuanced understanding of cultural interactions (Bergfelder, 2005, p.321). Globalization also influences the economic drives of international co-productions and international distribution networks. This is of importance for European filmmakers who want to achieve commercial success. This globalized economic drive has led to a reconsidering of what national cinema is, as filmmaking is now often an international collaboration that gives a new meaning to national identities (Bergfelder, 2011, p.323).

Co-productions and international collaborations are not a new phenomenon and have been becoming more prevalent in Europe after World War 2 (Bergfelder, 2005, p.322). The support for co-productions with the Netherlands has also been shown in the Olsberg SPI report (2023). With the cooperation and integration among countries within the European Union, co-productions facilitate a certain evolution of European cinema. This occurrence is as relevant today as it was 20 years ago, as well as 40 years ago. However, co-productions have historically been viewed with skepticism (Bergfelder, 2005, p.323). The complexity of co-productions can be overlooked: indeed, they can also be a threat to national identity and the integrity of cultural markets (Bergfelder, 2005, p.323). Additionally, international collaborations can blur the lines of national identity, as they involve diverse cultural influences and production practices.

It is however important to recognize that international collaboration and financing has and will not only support international mainstream films such as those made in Hollywood but has also contributed to the successful careers of national filmmakers of independent, art-house films (Bergfelder, 2005, p.323), which can in turn help improve the national market as mentioned by Hjort (2015). The connection between different national cinemas through co-production makes room for a more nuanced and well-rounded understanding of European cinema as a whole, and not just ‘mainstream’ and ‘art-house’, which is an important distinction to make (Bergfelder, 2005, p.324).

Jones (2016, p.1) examined the implications for UK/European co-productions, showing that the application of this tactic can indeed be useful, and even successful. Jones (2016, p.5) highlights that British filmmakers often collaborate with European partners mainly for financial reasons. Jones (2016, p.8) indicates that co-productions generally perform better in terms of box office success in comparison to UK's domestic films, with UK/European co-productions selling significantly more tickets within the EU. Additionally, UK/European co-productions perform significantly better in mainland Europe than UK domestic movies (Jones, 2016, p.8). Jones (2016, p.19) indicates there is no correlation

between the level of European creative input and a movie's success, showing that factors such as budget size and distribution links play a more significant role. A big contributing factor to the co-production successes is the larger budgets and better distribution links, as this collaboration allows filmmakers to pool resources and access foreign incentives and subsidies (Jones, 2016, p.8). According to Jones (2016, p.7), co-productions can be categorized into three sectors: creatively-, financially- and capital-driven. Most co-productions tend to be financially driven, indicating that the opportunity to pool financial resources is the primary motivation for collaboration (Jones, 2016, p.8). Additionally, Jones (2016, p.12) indicates that these collaborations are often opportunistic rather than based on shared cultural goals, and only a small part of the creative input in UK/European co-productions can be attributed to European partners. In short, Jones (2016) shows that UK/European co-productions are essentially all about the money, with cultural aspects barely contributing. Additionally, while the Netherlands and the UK are comparable in many aspects, it should be noted that UK film policy often favors US inward investment (Jones, 2016, p.23), something the Netherlands does not have. A recent example of a collaboration between the UK and the Netherlands is the series "Safe Harbor" (Williams, 2025). The series has a mixed cast and production crew of Dutch, Belgian, and British people, pooling creativity and finances (Pham, 2024). Interesting to note is that the series also has incorporated influences from the US, with an American director taking the lead (Pham, 2024).

Additionally, it is also important to note that streaming platforms have an impact on the co-productions as we know them. For example, Netflix produced over 100 original films and series in 15 European countries in 2021, which has significantly increased their investment in local productions (Mitric, 2024, p.63). This in turn challenges the traditional co-production model that previously relied on public funding and regulatory frameworks (Mitric, 2024, p.64). This can impose more challenges on small-nation filmmaking. According to Mitric (2024, p.64), there is a tension between policy-driven co-productions, which give independent producers to retain their intellectual property rights, and platform-driven collaborations such as Netflix, which prioritize market-driven content and can compromise producers' independence. Although directives are in place that mandate streaming platforms to invest in local productions and have put quotas for European content in place, challenges remain. While streaming platform collaborations can represent new opportunities for independent producers, they also threaten the cultural diversity and independence that have characterized European cinema (Mitric, 2024, p.77).

## 2.6 Small nations: Film Funds and screen agencies

Case studies of small nations show that there is a way to rise above the challenges. Noonan (2024) compared the Irish national screen agency to mainly Screen Scotland and the Danish Film Institute, the country scoring best in the Olsberg SPI's (2023) report. She aimed to examine the role of Screen Ireland in supporting film and television in Ireland. Noonan (2024, p.24) showcases how Screen Ireland has worked to collaborate with industry stakeholders and facilitate co-productions, transforming Ireland from a service provider to a more diverse production sector. Screen Ireland is the Irish national screen agency, comparable to the Dutch version: the Dutch Film Fund. Comparing Screen Ireland to the Danish film institute, Screen Scotland, and the Dutch funding bodies, Noonan (2024, p.25) found that although they are all small nations in a global market, the organizational structures vary significantly. For example, Screen Ireland focuses on development and a wide range of content types, while other agencies focus more on domestic demand (Noonan, 2024, p.27). Noonan (2024, p.23) also found that Screen Ireland plays a significant role as a navigator in the challenges that come with being a small nation in a global market, acting as an intermediary that connects local talent with international opportunities. By comparing Screen Ireland with similar organizations in Europe, Noonan (2024, p.23) shows that the strategies used by such an organization enhance a small nation's visibility and competitiveness in the international market.

Another example is the national cinema of Iceland. Iceland mainly struggles with visibility and a small national audience (Nordfjörd, 2007, p.43). After struggling with national funding and declining audiences, Iceland found its solution in co-productions, leveraging international funding as well as a bigger audience (Nordfjörd, 2007, p.46). These collaborations not only offered financial support but also opened the way for transnational filmmaking, making Icelandic films address national themes as well as appeal to global audiences at the same time (Nordfjörd, 2007, p.47). With the revenue from co-productions, the Icelandic government managed to set up the Icelandic Film Centre, which contributes half of the funding for national film projects (Nordfjörd, 2007).

Denmark is shown as the most successful country in the report written by Olsberg SPI (2023). The Danish Film Institute (DFI) plays a major role in this success, having been established to support film as an art film and cultural expression (Hjort, 2007, p.26). What laid the basis for a sustainable film industry in Denmark was the creation of a Film Fund and

a national film school in 1964 (Hjort, 2007, p.26). Over the years, the DFI has constantly adapted its policies to support filmmakers, such as redefining what a Danish film constitutes, allowing for flexibility in language and content (Hjort, 2007, p.27). Additionally, international co-productions, particularly with Hollywood, have brought significant investment into the Danish film industry (Hjort, 2007, p.25). This adaptability has enabled Danish cinema to thrive despite the challenges a small domestic market brings. Moreover, in the early 2000s, there was a renewed interest in local productions, with Danish films capturing a larger share of the national market (Hjort, 2007, p.24). This shift reflects a broader cultural pride and a commitment to artistic innovation, which has helped improve Danish cinema nationally as well as internationally (Hjort, 2007, p.26). This is still true today, as Denmark is known for its strong brand and talent (Olsberg SPI, 2023, p.43).

### 3. Method

A qualitative research method of interviews was used to answer the research question: *How do filmmakers in the Netherlands perceive the growth potential of the Dutch film industry?* This method is chosen as it will give an in-depth exploration of the opinions, perspectives, and experiences of industry experts and professionals in the Dutch film industry (Craig, 2021, p.478). Gathering these insights will help move deeper into the nuances and better understand the challenges, motivations, and decision-making processes within the industry. This will help interpret the sentiments and opinions of the interviewees, and how those can be related to the Dutch film production industry. Interviewing facilitates participants expressing themselves, thus being able to gather data and get first-hand accounts directly from the participant (Holstein & Gubrium, 1999, p.120).

Ten expert, semi-structured interviews were conducted with Dutch film production industry professionals, from here on referenced as filmmakers, for in-depth insights and meaning-making. For the purpose of this study, filmmakers are defined as any professionals in the Dutch film industry who have a crucial role in the production of a film, more specifically producers, directors, and writers. By not limiting the study to film producers, it aims to capture a broader range of opinions and perspectives, as filmmaking is a collaborative process shaped by multiple points of view. Directors and writers are particularly involved in the process of creating films. These interviews focused on the perception of opportunity for growth and the obstacles that stand in the way, and their personal sentiment on this subject. This method chapter explains the details of the research design used, the operationalization, and the data analysis.

#### 3.1 Choice of method

This research uses a qualitative method because it aims to explore the opinions, experiences, and meaning-making processes of Dutch film industry professionals. These nuances cannot be captured by quantitative methods. By using a qualitative method, this research aims to provide the details needed to understand the motivation behind behavior and attitudes. Additionally, interviews allow for a better exploration of individual perspectives from filmmakers who have experience in the Dutch film production process (Craig, 2021, p.454). Unlike other methods such as content analysis, this will allow for direct contact with the participants. One-on-one interviews create a confidential space where

a participant can speak freely, which would not be possible in a focus group (Craig, 2021, p.475)

The interview focused on the insights, experiences, and opinions of the industry professionals on how the Dutch film industry could facilitate growth soon, and what has been holding it back until now. This method is the best option as it allows for a structured framework while also providing flexibility for the respondents to elaborate on themes that naturally emerge during the interview (Boeije, 2010, p.88). Semi-structured, active interviews yield a comprehensive understanding of the industry details, structural challenges, and potential growth (Craig, 2021, p.480). This is important for this research, as it will add contextual depth and perceptions that cannot be captured through data alone. By combining the secondary data mentioned in the theoretical framework, such as the Olsberg SPI report and the Dutch Film Fund reports, this research will gain a more informed and complete understanding of the current situation of the Dutch film industry.

To conduct the interviews, an interview guide was followed (Appendix C). The interviews were structured with a set and prepared guide, in which various questions were asked consequently and in the same order (Appendix C). An active interview involves both the interviewer and participant in a collaborative process of meaning-making (Holstein & Gubrium, 1999, p.124). The goal is to reveal reality constructing practices and subjective meanings that are communicated during the interviews (Holstein & Gubrium, 1999, p.126). The interviews focused on the concepts explained in the theoretical framework, namely those of the risks and challenges for small nations, possible solutions, co-productions, and examples from other small nations. The primary reason for using semi-structured interviews is to guarantee that every participant is asked the same set of questions that can be followed up on when answered within context. This generates comparable data which can then be analyzed and contrasted (Holstein & Gubrium, 1999, p.126). This is also helpful for thematic analysis.

Thematic analysis is used to analyze the generated data. Through this method, identification, analysis, and reporting of apparent key themes and patterns is made possible (Boeije, 2010, p.202). By using thematic analysis, a well-rounded understanding of the participants' experiences and opinions can be gained (Boeije, 2010, p.202). Additionally, thematic analysis can provide insights into the motivation behind the participant's processes in meaning-making behavior and opinions, related to film production in the Netherlands (Holstein & Gubrium, 1999, p.127).

### 3.2 Sampling & data sets

This research is based on purposive sampling to select industry professionals who have relevant expertise and experience. The sample consists of exactly ten experts from the Dutch film production industry, in this research referenced as filmmakers. These experts were chosen because they will represent decision-makers and influential persons within their own circles, projects, and contexts. Thus, their insights will help with understanding the industry's risks, challenges, and opportunities for growth (Craig, 2021). Purposive and convenience sampling was used due to the limited availability of experts.

The process of approaching interviewees included "cold" emailing, meaning sending emails without previous connections, social media platforms such as Instagram and LinkedIn, and through social connections. "Cold" emailing did not succeed at all, after which personal social media call-outs were posted. Through comments and recommendations of people who saw those posts, potential interviewees were approached with short personal messages, which resulted in success. With this approach, more than half the interviewees were secured, and others came out of the researcher's personal social circle.

In the emails and social media content, it was clarified that all perspectives were welcome, as long as there was some degree of professional experience in the Dutch film production industry. It was important to emphasize this, to make getting in contact as easy as possible. The professional experience was mandatory, in order to give clear insights into the workings of the Dutch film industry. All participants were of legal working age, meaning between the ages of 18 and 67. Each interview lasted around 60 minutes, with the shortest one lasting 45 minutes and the longest one lasting 75 minutes. This pool offered a wide diversity of perspectives. All participants signed or verbally agreed to the consent form, meaning all identifying aspects will be anonymized.

The interviews were conducted in various places, such as café's, head offices, and online to facilitate the participants. Three of those interviews were conducted online, and seven were conducted in person. Of the in-person interviews, approximately half were conducted in offices and the other half in cafés. The online interviews tended to feel slightly less personal and more constrained, making it harder to interpret non-verbal cues and context. On the other hand, the office interviews provided a private and comfortable space, allowing participants to speak more freely. The café interviews resulted in a middle ground,

less private than the offices, but still relaxed enough to observe body language and maintain a natural flow of conversation. All participants were given the option to select the interview time and setting that suited them best, ensuring their comfort. Each participant gave verbal consent and was made aware of their rights and the option to stop the interview at any time. All participants also approved recording, transcription, and the use of data for analysis. All interviews were conducted in Dutch for the participant's comfort and were translated into English afterward. To preserve anonymity, categorizations will replace real names in this research.

The interview opens with a welcome, followed by a few introductory questions in each section, to set a baseline and gauge each participant's prior knowledge (Appendix C). The interview subsequently consisted of four main parts, based on arguments and discussion points from the theoretical framework. The first part covered the challenges, the second part covered funding and government support, the third part covered international co-productions, and the final part covered the future and possible growth opportunities of the Dutch film industry. Follow-up questions would be asked when the participant indicates to want to go more in-depth about a certain topic or explores concepts relevant to the research that have not been mentioned before.

The structure of the interviews and the rest of the research will be directly based on Hjort's (2015) framework on small nation filmmaking risks, and Higson's (2021a; 2021b) discussion about the resilience of national cinemas. Additionally, Bergfelder's (2005) conceptualization of how globalization affects national cinema will help shape the research, as well as the analysis of small nation cinema by Nordjörd (2007) and Noonan (2024). These concepts mentioned in the theoretical framework about small nation cinema, globalization, industry risks, and possible improvements will help create a foundation for the method of this research. The interview questions are designed to go deeper into these themes in practice. The data that will come from these interviews will be analyzed through thematic coding based on these theories.

### **3.3 Operationalization**

The perception of filmmakers in the Dutch film industry was measured by asking questions based on theory. The key concepts found in the theoretical framework inform this operationalization. Hjort's (2015) concept of systemic and individual risks highlights the

challenges faced by filmmakers in small nations, such as limited resources, talent that leaves, and mono-personalism. The Olsberg SPI (2023) report reinforces these challenges in the Dutch context, showing issues like lack of artistic and commercial success, funding limitations, and underused co-productions. Bergfelder (2005) and Jones (2016) were used to discuss globalization and co-productions as both opportunities and a risk to national identity. Higson (2021) was used to introduce the notion of resilience and the tension between local identity and global influence.

These concepts are directly connected to the role of filmmakers as influencers in the industry. Through semi-structured interviews, this research explores how Dutch filmmakers perceive and experience these challenges, and how they interpret funding structures, co-production strategies, and the future potential of the industry. Thematic analysis will allow these theoretical concepts to be converted into empirical data and interpreted through the real-life experiences of the participants, and visualized in Appendix F.

Each question connects to one core concept. The concepts this research revolves around are national cinema, challenges of national cinema, funding, international co-productions, and growth potential for national cinema. The concept of national cinema is central to all research questions and is a complex concept that although based on local industry and history, is shaped and innovated by transnational collaborations (Lewis & Canning, 2020, p.154). National cinema can shortly be defined as practices associated with a nation, at the same time defined by who finances and distributes the films, as well as the storytelling style and themes that help form a national identity and the way domestic audiences interpret them (Higson, 1989, p.45; Bergfelder, 2005, p.323; Lewis & Canning, 2020, p.154). The concept of national cinema is not explicitly mentioned in the interview guide but rather used as a baseline to identify what the participant perceives and experiences. This was done by asking what they consider to be a Dutch movie, and how participants envision what a Dutch movie should look like (Appendix C). Evidence of the understanding of this concept is for example the description of Dutch cinema and examples given by the participants.

The second concept can be summarized as all the challenges that may occur for filmmakers in a small nation. These challenges are called systemic and individual risks (Hjort, 2015, p.49) but are also more specifically mentioned for the Netherlands in the Olsberg SPI report (2023). Hjort's (2015, pp.52-53) systemic risks include mono-personalism, wasted talent, exit risk, and film-ecological imbalance. The individual risks

entail each filmmaker's exposure to systemic risks, shaped by their personal circumstances and national policies (Hjort, 2015, p.52). Challenges for the Netherlands specifically were various, but the most important ones included genre and identity, meaning there is a high output of Dutch feature films but comparatively low artistic or commercial success (Olsberg SPI, 2023, p.38).

Also mentioned was the limited support for creative talent, the ongoing friction between art-house and commercial films, the underusing of international co-productions despite their proven role in successes, and insufficient support for the full production process, including packaging, distribution, and exhibition (Olsberg SPI, 2023, p.5). These concepts were measured with easily understandable questions such as "What do you think are the biggest challenges Dutch filmmakers face today?," "Are these the same challenges you are personally facing?," and "Do you feel like the offering of commercial movies in the Netherlands is monotone?". With the answers to these questions, it can be charted how Dutch filmmakers perceive and experience the challenges and what their sentiments are, effectively creating a framework that can be compared to Olsberg SPI's (2023, p.7) findings. Observable evidence for this part would be specific mentions of challenges that are experienced, mentions of artistic freedom, originality in film, or for example risk-taking.

The next concept is funding. It will measure the perspectives on the adequacy, accessibility, and direction of public funds, the Dutch Film Fund, and policy instruments. Although this concept connects to the challenges, it goes a little beyond that. The Olsberg SPI (2023, p.7) report and the Dutch Film Fund (2024, p.2; 2025, p.2) indicate that funding favors market-oriented family films and rom-coms, leaving art-house films under-supported, which in turn contributes to the low score on international excellence. Also found was a small circle of commercial producers dominating, possibly restricting other filmmakers, a weak culture of collaboration between filmmakers, and funding not covering the full production process (Olsberg SPI, 2023, p.7; the Dutch Film Fund, 2024, p.2; 2025, p.2). This concept was operationalized with questions about the participants' understanding of the funding process, for example, "Can you explain the process of getting funding for a movie?", and "Do you think current funding programs (e.g., Dutch Film Fund, European or regional funding) are effective in supporting Dutch filmmakers?" and "Would you prefer it in the Netherlands to either favor commercial viability or artistic expression?". Observable evidence of this concept would be speakers referring to money, budget size, profits, or funding access, as well as their experiences with the funding process.

The next concept is that of co-productions. This concept revolves around the attitudes of the participants towards co-production, languages and possibly streaming platforms as opportunities. The Olsberg SPI (2023, p.38) found that co-productions are underutilized in the Netherlands, Bergfelder (2005, p.323), Hjort (2015, p.59), and Jones (2016, p.8) found in this kind of collaboration a solution. Additionally, case study examples showed how this strategy has been successful in other small nations, such as Screen Ireland (Noonan, 2024, p.23), which enhanced its visibility and competitiveness in international markets, and Denmark (Hjort, 2007, p.43), which prides itself on being flexible and adaptive, enabling the Danish cinema to thrive. This concept will be measured by asking easily understandable questions such as "What are your thoughts on co-productions?", "Do you think we should focus more on the co-productions?", and "Do you think the dominance of English-speaking productions could affect the box office success of Dutch films?". Observable evidence of this concept includes sentiments about benefits such as financial advantage, skills, or reach derived from international collaboration, as well as concerns such as loss of control, cultural dilution, or bureaucratic hurdles.

The final concept is the participants' vision of the future of the Dutch film industry. It enquires about the expectations and desired changes for the industry over the next decade. This concept connects to the examples found of the resilience of small nations, showing that small nations' industries stay resilient in spite of Hollywood's dominance. Higson (2021a, p.217) showed that locally tailored genre films can outperform Hollywood releases at home. On the other hand, Higson (2021a, p.217) and Scott (2007) have shown that European audiences keep preferring Hollywood productions. National frameworks can offer a solution to this problem, creating a unique voice in an era of co-productions and globalized Hollywood productions. Higson (2021b, p.222) showed that nation branding, reinvigorating, and national distinctiveness can be part of a new configuration of national cinema, combining domestic production and audience tastes with transnational practices and globally oriented strategies. This concept will be made measurable by asking in each part of the interview to name solutions, as well as asking participants to think about solutions that are already in place. The interview will be concluded by asking "Looking ahead, what do you think the Dutch film industry will look like in 10 years if the right changes are made?" and "If you could change one major thing in the Dutch film industry today, what would it be?". Observable evidence is considered sentiments about the anticipation of decline or improvement of the film industry, as well as mentions of solutions and change.

In short, this operationalization strategy will make the theoretical framework of this research useful during fieldwork. It defines what will count as evidence for each concept and shows how the concepts are supported as well as phrased in easy language. This will help answer the research question by ensuring that abstract ideas mentioned by the participants are translated into concrete and observable concepts. This will result in that the collected data will reflect the opinions and experiences of filmmakers in a meaningful way.

### **3.4 Method of analysis**

The interview data will be processed and analyzed with thematic analysis, using Atlas.ti. The thematic analysis focuses on understanding and finding patterns in the data that comes from the interviews (Boeije, 2010, p.89), as well as measuring the process of meaning-making (Holstein & Gubrium, 1999, p.126). This type of analysis uses coding in an interpretive way, takes the researcher's subjectivity into account, and allows themes to appear inductively within the borders of the theoretical framework (Braun & Clarke, 2006).

To achieve a systematic understanding and analysis, the findings will be organized thematically (Appendix B) First, to familiarize with the data the interviews will be transcribed and studied. Next, the transcripts will be coded in an open coding schema, to identify the themes and patterns (Boeije, 2010, p.94). After successive readings, the themes were created. The themes include 4 main concepts, namely risks & challenges, funding, co-productions, and prospects (Appendix B). The process involved open coding, axial coding, and selective coding in that order. The first stage is open coding, during which the data is broken down and examined for themes without imposing preconceived categories. After the initial coding, the codes will be grouped together in thematic categories during axial coding (Boeije, 2010, p.109). The thematic code groups and codes will then selectively be coded into three overarching main themes, as well as refined to ensure coherence and relevance to the research question (Boeije, 2010, p.115). Lastly, this final set of themes will be analyzed to structure the analysis and findings, after which the research will move on to the results. The findings will be presented in a structured format with quotations from the participants (Boeije, 2010, p.119).

All material was managed in ATLAS.ti. The software helped visualize relationships among categories and trace them back to the supporting quote, as well as create a coding scheme (Appendix B).

### **3.5 Validity, reliability & ethics**

To ensure validity the research must accurately measure what it intends to measure (Silverman, 2011, p.368). This will be done in multiple ways. Key concepts are clearly defined, so there will be no confusion. Multiple data sources will be used to triangulate the findings, such as the interviews and industry reports from for example the Dutch Film Fund. To avoid researcher bias the interviews will be based on open-ended questions so the participants do not feel pressured. To ensure reliability the research must be consistent and replicable (Silverman, 2011, p.360). To do this the interview questions will be standardized to ensure consistency across participants, and the interviews will be recorded and transcribed. Additionally, a clear coding process will be shown in the appendix (B). By ensuring validity and credibility the research will be a well-supported, rigorous analysis (Silverman, 2011, p.360).

This research keeps ethical considerations as a priority to ensure the rights and safety of all participants. All interviewees were informed about the purpose of the study, their participation was voluntary and they were aware of their right to withdraw at any time without consequence. All participants were sent a consent form with contact details for my mentor, and the Persoonsgegevens bank. All participants gave verbal informed consent. To protect the participants' privacy, all identifying information was anonymized, and roles were generalized, such as Producer 1. All data was handled securely, with interview recordings and transcripts stored on the Erasmus University-provided OneDrive. Lastly, special attention was paid to creating a respectful environment where participants could speak freely and were at ease.

## 4. Results

In this chapter, the perceptions of filmmakers in the Netherlands on the Dutch film industry will be presented. The results are organized into four sections: challenges, funding, co-production, and future prospects. Within those blocks, the results are ordered by theme based on the interview questions (Appendix C). The results will be discussed based on perceptions and opinions of each respective theme, and how this affects the participants personally. The themes are connected through the general understanding of national cinema, the Dutch Film Fund, and the Olsberg SPI report (2023).

### 4.1. The Dutch film industry: experiences and sentiments

In the first part of the interview, the personal experiences and sentiments about the Dutch film industry are discussed. When asked to describe the current state of the industry, nearly all ten participants described it as tedious and dissatisfactory, with some giving clarifications that it has its good parts. The majority of the filmmakers indicated to be frustrated with the industry and its processes, especially with lack of funding, and complex bureaucratic processes, and felt like there was a lack of risk-taking, meaning no one was trying anything new or trying to innovate. Producer 1 described it as “everything is overly regulated”, referring to the industry regulation leaving little room for risk-taking.

Documentary maker 2 explained: "They [the films] are all neatly made, all very nicely colored neatly within the lines. But not something that I get inspired by", referring to the level of risk-taking of makers within the industry. Contrastingly, the Dutch Film Fund has indicated in their new policy plan they will be making room for experimentation in filmmaking, as well as focusing on cultivating their emerging talent and providing more space and time to create films without putting pressure on the production (Dutch Film Fund, 2025a, pp.19-34). This is a symptom of one of the risks for small nations as mentioned by Hjort (2015, p.54), namely the past policies seem to have unintentionally created new challenges, known as film-ecological imbalance. One participant described it as being at the edge of a new era because all the new policies and rules gave them a sense of hope. All participants expressed being aware of the Olsberg SPI report and its findings to some degree, and the new policy plans that followed. Although eight participants were hopeful, they could not yet name what the future of the industry is going to look like. Fiction/short filmmaker 2 elaborated: “To me, it just seems like we're near some kind of.... What do you call that?

...The industry is growing. But I feel like we're at kind of a threshold". Fiction/short filmmaker 3 shared these sentiments, adding:

If you ask me, then I definitely think that it [interesting film] does get made, but that it is also very difficult to really make sort of distinctive, interesting films. So regarding the state of Dutch film, I think the kind of system very much defines what the state [of Dutch film] is (Fiction/short filmmaker 3).

These sentiments connect with the numbers of the Olsberg SPI (2023, p.7) report, as well as the Dutch Film Fund's own reports (2024, p3; 2025c, p.2), showing significant change is already happening, something the participants are clearly picking up on.

Additionally, a significant number of participants indicated the process of filmmaking does not make enough money to live on, resulting in many participants having to work a second, intersectional job. Examples of these second jobs were teaching, editing, or doing sound design. One respondent explained: "I just started this week coincidentally at a part-time job of 3 days in the week. Because from filmmaking itself I can't make a living, That's just not feasible" (Fiction/short filmmaker 1). Eight other participants expressed the same sentiments, highlighting that they cannot make a living off just filmmaking. It should be noted that the remaining two participants had their own film production company. These sentiments connect to Hjort's (2015, p.53-54) systemic risk of wasted talent or exit but can also indicate individual risk positions. How the participants deal with systemic risks can have an impact on their individual situations and can demonstrate their resilience. This can be seen in the opinion of Producer 1's opinion on industry regulation risk-taking, and Documentary maker 2's opinion on individual makers' risk-taking.

## 4.2 Challenges

A resurfacing challenge mentioned among respondents is the lack of budget. Eight out of ten respondents emphasized the inability to earn a living from just filmmaking, as mentioned before. Additionally, funding structures were described as being overly dependent on centralized funds, putting too much pressure on them, and possibly making them unable to give everyone the time and money investment they deserve. Documentary

maker 1 noted the lack of monetary support during the pre-production phase, which effectively leads to unpaid labor and indicates national funds may be spread too thin. Producer 1 further explained the Dutch Film Fund's way of allocating money, is by giving everyone a little bit:

You don't have to keep everybody happy. Keeping everybody happy is keeping nobody happy, so please go make choices and be transparent in that and be honest and tough in that. What I'm saying is, I'd rather have that 100% than the 50% you're giving me, where you're still expecting that 100% output (Producer 1).

As mentioned before, this shows the risks mentioned by Hjort (2015, p.54) in full force, illustrating how systemic risks can impact individual situations, eventually possibly leading to exit or wasted talent. Olsberg SPI (2023, p.38) also identified this problem; by pointing out too many projects were being developed with too little money.

Respondents also noted the bureaucratic and complex process of funding applications, and the framework that has an impact on creative decision-making was mentioned to be rigid by nine out of ten participants. Fiction/ short filmmaker 2 refers to a system that lacks flexibility and reinforces traditional filmmaking. Fiction/ short filmmaker 2: "It [filmmaking] has to be done in a certain way, and it's very difficult to get outside of that. You know, it's a system that doesn't really want to change". One participant referred to the industry's need for socially relevant content as creatively limiting. Overall, all participants agreed that structural rigidity and bureaucracy are not helpful at all for the growth of the industry. These concerns are reflected by Olsberg SPI's (2023, p.37) findings, describing how there is a need for a more flexible approach to filmmaking, with the creative process at the center. Producer 2 gave a more nuanced opinion, explaining they think there are many good things about the industry, however, the state of it at this moment is just not great: "I think the state of Dutch film is maybe not good, but I do believe we can make talent and good films in the Netherlands".

Eight of the participants shared their frustration about the industry's seeming aversion to risk. More than half of the participants mentioned the lack of innovation due to the institutional fear of taking risks. The challenge with risk aversion is shown by Hjort

(2015, p.53), which shows that systemic risks can lead to a lack of opportunities for filmmakers. When asked if the risk aversion has anything to do with budgets, Documentary maker 1 responded: “Absolutely, because if you don't have money... there is no more risk being taken anywhere at all. [...] You don't want to take the risk, so you don't put time into something which is a little bit daring”. This risk aversion contributes to a possible cultural stagnation where the same people have been in charge for a longer period of time, and new makers may struggle to succeed (Hjort, 2015, p.52).

All participants voiced concerns about inclusivity and access, referring to the importance of having industry connections. They reinforced their earlier experience, describing how some opportunities may be gatekept by personal networks. TV producer explained:

- . Yes, you just have to know people a little bit everywhere, so you have to put out your spider web well and actually always be on everywhere and make a good impression, so that people remember you and think, “Oh, I know someone else” and so that you then pop up in their memory (TV producer).

Just two participants expressed there is a lack of racial inclusivity in the Dutch film landscape, suggesting deeper systemic inequalities. Half of the participants perceived an imbalance of power between makers and institutional broadcasters or producers. From the interviews, it seems clear they feel the need for more maker-led projects. The participants who perceived this imbalance expressed a desire for more creative control and less external interference, especially from financial backers and public institutions. Although Producer 1 provided some nuance, explaining makers and producers should work more smoothly together: “For the makers, I would advise you to see your producer not so much as your enemy, but as your partner”. As mentioned before, this is reflected in the findings of the Olsberg SPI (2023, p.4) report, displaying the impact of personal networks in the industry.

The data shows that the challenges perceived by these filmmakers in the Netherlands are centered around financial insecurity, institutional rigidity, and complex social connections. All participants indicate it is time for change, both in funding practices and in the broader dynamics of the film industry. The participants have pointed out there needs to

be advocacy for better support for makers, more room for experimentation and risks, and a rebalancing of power distribution. The findings point to a need for policies that prioritize artistic freedom, equity, and economic sustainability in the Dutch film production industry. Hjort's (2015, pp.50-54) and Olsberg SPI's (2023, pp.36-38) exploration of various systemic risks, with individual risks as a consequence mirror these concerns, as well as showcasing there are solutions available.

Most participants agree that commercial Dutch films are monotone, mentioning institutional and creative risk aversion as the main reason. Monotony in film in this case refers to the style and themes of commercial films being put out in the Netherlands at this time. Fiction/short filmmaker 1 described this as a structural issue that could be attributed to resistance to innovation, and Fiction/short filmmaker 2 agrees, but adds that the Dutch way of storytelling is just overly literal and predictable. Furthermore, a significant number of participants made a clear distinction between mainstream and arthouse audiences. Seven of the participants mentioned similar motivations, namely mainstream film remains popular because it can offer escapism, and arthouse films target more niche, critical viewers. Three participants argued that a combination of the two could offer a broader appeal. Olsberg SPI (2023, p.36) notes that both art-house as well as commercial filmmaking are important for a thriving national cinema, offering both opportunities for local producers and a wide range of offerings for audiences.

The next theme explored how Dutch filmmakers perceive the industry's relationship with its audience, particularly regarding market or audience research. Opinions varied, but most participants suggested the Dutch film industry is not in close contact with its audience or lacks a clear understanding of what the audience needs. Fiction/short filmmaker 2 made an important distinction, mentioning that such research is much more important and prominent for mainstream productions than arthouse cinema. Five participants were also uncertain about the topic, having no insights into the actual use of market or audience research. One participant suggested the research should be conducted by people in power, or distribution. Contrastingly, a significant number of participants reflected that it was not the audience, but the maker should be central to the process of making a film. Documentary maker 3 explained: "Because it's not about what the audience wants. [...] You don't make art for the audience". Fiction/short filmmaker 3 advocated for a balance between audience consideration and artistic expression: "It's a middle way, I think. It's a kind of filtering so

that we don't put words in everyone's mouth or show them what they want to see because I don't think that's the function of art at all". However, the participant did think such research would be beneficial for the marketing or distribution of a film. Furthermore, Documentary Maker 1 felt that the lack of racial diversity in the industry shaped the stories and perspectives represented. Overall, while most participants thought there was some level of audience awareness, the sentiment was that there was either not enough research or an ineffective application of it.

Lastly, most respondents emphasized that audience preference should not take precedence over artistic vision, especially when institutional gatekeepers may not reflect the diversity of the broader viewing public. As argued by Higson (1989, p.37), the audience has a shaping role in national cinema. The prescriptive way cinema is often used, meaning industry and institutions dictating what should be made, mirrors the participants' concerns about the disconnect from the Dutch audience. Higson (1989, p.37) also argued that national cinema should reflect the cultural identity and creative diversity of a nation, and thus not be market-driven, but rather focus on the makers.

### **4.3. Funding**

The responses were divided. Four participants had a relatively positive opinion, describing how there are several funding options available, including for starting filmmakers. Documentary maker 2 said about the funding system: "It is a well-functioning financing system. [...] And at the same time it is also very limited". These four participants acknowledged the funding systems are limited, in the way that there are not many funds where you can request money, and all of those funds are under a heavy strain. They acknowledged the funds are doing everything they can but have limited options. Documentary maker 2 further explained how little money the Film Fund receives every year, to fund the entire film industry.

I think the lobby that we have in the Netherlands is not strong enough compared to other sectors. I mean, the Film Fund gets, I believe 80 million euros a year. Well, that sounds like an awful lot, but of course, considering the budget of the Netherlands, it doesn't amount to anything at all (Documentary maker 2).

Three participants had a more negative opinion. Fiction/short filmmaker 1 described how the production process mainly revolves around money and felt funding bodies can come off as impersonal and restrictive. Similarly, Documentary maker 1 felt the funding process was overly bureaucratic. They described how rigidity leaves little room for spontaneity, which, according to them, is an essential part of filmmaking. Fiction/short filmmaker 2 thought it was more complicated:

Yes, it's a bit of a game actually that you play. Because you have their vision. And you have your vision, of course, but you have to explain your vision a little bit differently when you see that it just maybe doesn't fit. [...] Or you have to connect the context of your vision with the context of their vision. And that you then explain why it would be a good fit (Fiction/short filmmaker 2).

While the participants all recognized that the funding systems provide opportunities, there are concerns about access and rigidity. The participants expressed a desire for more maker-focused support, increased flexibility, and a shift towards a system that can accommodate the unpredictable nature of creative work. These comments directly reflect the findings of the Olsberg SPI (2023, p.34) report, which highlighted issues such as limited support for creative talent and lack of flexibility. By taking the Dutch Film Fund's new policy (2025, p.19) into consideration, the recent changes will correspond to the participants' needs by creating more room for makers. To add, five participants felt like a middle ground between artistic expression and commercial viability could and should be reached, and just one preferred only artistic expression. Although the participants aiming for a middle ground preferred artistic expression, they realized this would not be practical. Documentary maker 1 pointed out that these two concepts can coexist and should not be treated as mutually exclusive. Once again, the participants highlighted the need for the industry to support creative risk-taking while also having strategies in place to make such work viable.

Additionally, responses show that some participants see potential benefits with more government involvement, while others express concern about the impact such involvement could have on creative freedom. Two participants argued there should be a balance, on one

hand, increased involvement could provide resources, and on the other hand, it could bring increased oversight, creating the risk the government could impose its own perspectives on the creative process. According to Fiction/short filmmaker 1, with clear limitations, this involvement could help encourage funding for riskier projects. However, TV producer sees little benefit in additional government involvement. Fiction/short filmmaker 3 explains: "Yes, I would find that difficult if they said what it had to be about. Because then you really take away freedom from filmmakers and I think that that is exactly the kind of thing that makes film valuable". Producer 2 has a similar opinion: "I don't think the government should interfere with the content of art. Art may be about politics, but politics is not about art".

Contrastingly, Documentary maker 1 supports greater involvement, saying it could benefit the industry overall. In short, the ideal balance would be increased public investment without compromising artistic autonomy, but overall, the government should be kept out of the creative industries. The key risk with government involvement is film-ecological imbalance, which can lead to creative homogeneity and might threaten creative freedom (Hjort, 2015, p.54). At the same time, a higher level of government involvement can create room for more diverse and riskier productions and new talent (Hjort, 2015, p.53). It is thus a fragile balance.

When asked what they would change in the industry's funding structures, the participants shared suggestions such as efficiency, inclusivity, and creative autonomy. While each participant had their own priorities for change, all responses had the need for structural change to better support filmmakers and diversify the landscape in common. For example, multiple participants expressed the need for a more inclusive and risk-taking industry. This includes new voices in decision-making positions and a more open-minded industry that experiments, but "it's not necessarily the structure of the system that's the problem" (Fiction/short filmmaker 2). Additionally, Fiction/short filmmaker 3 indicated they agree with the Film Fund's new policy focusing on "more money to fewer projects", as it reflects a step in the right direction. However, they feel like the industry still centers too much on the producers. They would like to see greater trust in a maker's artistic vision and clearer goals from the funding institutions and put the creative makers in the middle instead of the producers. Producer 2 mentioned an example to make the funding process more transparent, so new makers can learn more easily, and Documentary maker 1 had a similar opinion,

wanting a more unified and accessible funding system, where potential is not measured only by previous experience. Documentary maker 1 said: “If I want to apply for, say, a 50-minute film or something, I first have to prove that I made 30 minutes of something”. Additionally, two participants mentioned the need for better collaboration between people and regions. Fiction/short filmmaker 1 mentioned a smoother collaboration between provinces and the Randstad for more even distribution support.

And also involve the provinces in the Randstad. There are a lot of makers here [in Amsterdam] because it's set up that way. And If a production is from the province now, it is labeled as provincial, but they could also work together, because people go to the North from time to time, and people from the North come here (Fiction/short filmmaker 1).

In short, all participants envision a future for the funding of the Dutch film industry that is more trusted of makers, more creatively open, and in turn possibly more equitable. Participants mentioned reformations that should reduce bureaucracy, decentralize power, encourage collaboration, and support artistic freedom. The suggestions of the participants are in line with the key findings of the Olsberg SPI (2023) report, and thus also with the new Dutch Film Fund policy (2025). With the new policy's focus on quality over quantity, creating space for experimentation, and creating better access for talent development, all priorities seem to be comparable. The structural imbalance of the industry and call for stronger collaboration found in the Olsberg SPI (2023, pp.37-38) report relate directly to the participants' concerns.

#### **4.4. Co-productions**

The analysis of this theme explores the filmmakers' perspectives on international co-productions, with a focus on both their experiences as well as an emphasis on whether co-productions could be beneficial for the Dutch film production industry. Overall, all participants perceived co-productions as positive and full potential. Just three of the participants had no hands-on experience with the concept but were familiar with it. For example, TV producer, having real-life experience, valued the cultural exchange and learning opportunities international co-productions offer, although language barriers can be a challenge. Similarly, Fiction/short filmmaker 2 pointed out the same opportunities but noted

it can be difficult to navigate cultural differences. The three participants lacking experience still saw benefits in international co-productions, naming it a strategic way to access international funds and create larger budgets, as well as reach broader audiences.

Documentary maker 1 explained: “I think [it could be a solution], because you reach a much larger audience, and you have more money”, and Producer 1 explained that co-productions are refreshing, as they give you a new way of looking at projects. According to Jones (2016, p.8), co-productions often achieve greater box office success than domestic films due to larger budgets and better distribution links, meaning it can and should be a solution.

Regarding the question if international co-productions could help the Dutch film industry facilitate international success, all participants agreed it could. All participants named reasons such as that co-productions offer a way for growth, innovation, and visibility. Fiction/short filmmaker 1 supports co-productions as a way to learn from other industries, and similarly, Documentary maker 1 mentions it as a way to increase global visibility. Additionally, Production assistant named it as a way to create a balance between artistic expression and financing a project. According to Jones (2016, p.12), co-productions can offer strategic benefits, which match the pragmatic comments of the participants. Fiction/short filmmaker 3 argues that the Netherlands should use these collaborations to develop a distinct national identity in international cinema, to be more recognizable. Fiction/short filmmaker 3 nuanced:

I always find it very difficult, because, for example, look at a lot of Scandinavian films. When watching those, you really have an image of, hey, these are Scandinavian films, [...]. But then what is that with the Netherlands? That is also a kind of identity thing of the Dutch film of which I don't know myself either; What does that look like? (Fiction/short filmmaker 3).

Producer 1 had a similar opinion, describing how international co-productions could contribute to the international visibility of Dutch cinema, and help create a more distinctive voice. Bergfelder (2005, p.323-324) explains how international co-productions can challenge and reshape national identity, meaning that co-productions could help define a clear Dutch film identity. In short, the participants all had a positive attitude toward international co-productions, recognizing both the creative and strategic benefits. Despite some concerns about complexity and cultural coordination, co-productions are mostly

viewed as a solution for gaining access to international resources as well as making Dutch cinema more internationally relevant and recognizable. Case studies of Ireland (Noonan, 2024, p.46) and Denmark (Hjort, 2007, p.26; Olsberg SPI, 2023, p.43) show that co-productions are often considered solutions for small national markets, something that is clearly reflected by the answers of the respondents.

Furthermore, the participants acknowledged some challenges, but most believed the benefits of international co-productions outweigh the disadvantages. These benefits were particularly noted in terms of creativity, financial support, and global visibility. While some mentioned concerns about losing creative control, these concerns were manageable. All participants agreed that international co-productions could have major advantages. For example, Producer 1 mentioned international co-productions as opportunities to create stronger projects, mentioning that such collaborations do not reduce creative control any more than domestic regulations already do. Producer 1 explained: “if you just stay in your own bubble, stay in your own boundaries, and your own way of making and or judging films, then yes, you won’t get much wiser either”. Documentary maker 1 and 2 had similar opinions, as well as arguing that international co-productions can be enriching for technical collaborations as well as for stylistic ones. Similarly, a significant number of participants noted that something can be learned from international collaborations, seeing an opportunity for growth. The findings of Hjort (2015, p.59) show these benefits in theory, highlighting the connection between different national cinemas through international collaboration can lead to a well-rounded understanding of European cinema as a whole. Producer 1 further mentioned that streaming platforms such as Netflix now have to invest in local film industries, like in the Netherlands. As mentioned by Mitric (2024, p.77), streaming platform collaborations with local industries can bring new opportunities, something Producer 1 clearly picked up on. Documentary maker 2 explained how you can make your production more internationally adaptable as well:

I think it can be very inspirational. It breaks your perspective anyway on the film you're making at the time. Through influence from other people, from other cultures, So with that, you have the chance actually just to make your film a little bit more universal as well (Documentary maker 2).

TV producer noted that experiences can vary per project and country but doesn’t believe creative loss will be an issue. When managed correctly, international co-productions can

enhance the production process, instead of restricting it, which is in line with Jones' (2016, p.19) findings. The participants also acknowledged that international collaboration is a solution for wider international reach, as it opens up tools and visibility from collaboration countries. Lastly and most importantly, multiple participants noted that the first and most important reason for international co-productions is money. By collaborating, it makes a production eligible for the funds of each participating country, the more participating countries, the more money. Similarly, Jones (2016, p.8), indicated that co-productions allow for the pooling of resources and access to foreign subsidies, as the participants illustrate. Producer 2 mentioned the Dutch Film Fund's production incentive as an example, and Producer 1 illustrated: "The only reason collaboration almost always happens is that you have access to more money". In short, the participants support international co-productions and recognize them as a valuable tool for growth, innovation, and increased international visibility.

#### **4.5 Future prospects**

The final theme analyzes the future of the Dutch film industry, including predictions and opinions on policy. Overall, all participants acknowledged the future of the Dutch film industry is at a turning point, and it is vital to implement changes and improvements now.

The first theme explored how the participants perceive the position of emerging filmmakers or young talent. The findings show that all participants recognize the structural challenges of the industry, but the opinions on how effective and sufficient the industry support is vary. Seven out of ten participants acknowledged the current state of the industry makes it difficult for starting filmmakers, and the job market is often described as oversaturated and underfunded. This was also identified by the Olsberg SPI (2023, p.40) report, which mentioned there should be paid more attention to the full development process of filmmaking and talent development. Documentary maker 1 refers to the example of feeling like falling into a black hole after the first years after graduation when support falls away. Three other participants referred to something similar. With this, they refer to the struggle to stay afloat, and they describe how hard it is to sustain a career in a small and competitive market. Fiction/short filmmaker 1 described it: "Everyone knows the term: the black hole. And I don't think it's just in this industry". Contrastingly, three participants point out the high amount of graduates entering the field each year, arguing that not everyone can

or should make it. Producer 1 explained the industry is just really harsh: "Rejection is part of life. Sorry, but it is. I think a lot of "talent" isn't yet ready to actually be considered a talent. It's harsh, but not everyone makes it to the Champions League either". The participants pointed out that success in the industry requires a certain initiative, and a will to keep improving yourself.

Furthermore, all participants pointed out the opportunities for improvement regarding the cultivation of talent. For example, Fiction/short filmmaker 1 pointed out the need for schools to start teaching modern forms of filmmaking, including social media shorts, AI use, and vertical content for social media. Five participants explicitly stated the need for schools to prepare their talent for the real world, and help them build social connections to sustain their careers. Additionally, Production assistant pointed out that schools in the Netherlands often produce students who are trained to conform to the industry, rather than innovate. Production assistant explained his view on this:

I think schools shape students into what the school wants them to be. So often with admissions, people are selected based on whether the school thinks, "Hey, can we work with you?" instead of "Can we learn something from you?". And I think that already puts young filmmakers into the same rut that everyone else ends up in. Because it's all the same, there's no room for something different" (Production assistant).

However, overall, the participants acknowledged there are plenty of opportunities and initiatives for graduates and new talent, all focused on helping them get started. All participants also acknowledged that although there is room for improvement, the schools are doing what they can. TV producer described that while the industry is competitive, they believe it should work out fine for new filmmakers, if they put the effort in.

In short, the participants agree in general that starting and working in the Dutch film industry can be tough, and there are initiatives in place to help new talent along. The market is seen as overcrowded, and career support seems to drop after the initial years. These consequences could be considered a film-ecological imbalance, a risk that arises when policies that are designed to combat systemic risk unintentionally lead to new challenges (Hjort, 2015, p.54). Suggested improvements include better funding, stronger collaboration between industry and the schools, an emphasis on networking and portfolio building, and an openness to innovation. This connects to the Dutch Film Fund (2025a, p.19), which

mentioned they will be focusing in the coming years on being attentive and stimulating development from emerging talent and established makers. Subsequently, the importance of realism and resilience are mentioned, arguing that not every new talent will succeed and that the industry should be honest about that from the beginning.

Finally, and concluding, the participants reflected on their visions for the future of the Dutch film industry, and what would be needed to achieve this vision. All participants agreed that change over the next decade will depend on mainly increased funding. Other topics of change included a reformation of the industry, better racial inclusivity, and stronger creative support. If these changes are implemented, all participants were moderately optimistic the industry will improve and grow.

All ten participants pointed out the need for more funding and better financial structures. Six of the participants argued that greater investment is important to enable creative risk, as well as sustaining careers and improving working conditions. They pointed out the need for fair pay, especially during pre-production, and more realistic production budgets. Documentary maker 2 mentioned how it would be good to shorten the financing process and replace rigid funding systems with more flexible and tailored ones. These findings were also mentioned in the Olsberg SPI (2023, p. 37), describing financial barriers and limited resources. These barriers could lead to risk of exit (Hjort, 2015, p.54), and to prevent that, the Dutch Film Fund (2025a, p.19) will focus on nurturing their filmmakers. Another tactic for change that was mentioned by four participants was the need for creativity and individuality. The participants imagined a future for the industry in which there would be room for unique visions, stable support for both mainstream and art-house cinema, and fewer compromises. They mentioned the need to prioritize originality and to keep the story and the creative maker at the center of film-making. The Dutch Film Fund (2025a, p. 34) will be creating room for innovation to help facilitate this. Additionally, Producer 2 explained his vision of a distinct national cinematic identity for the Netherlands, which would be a recognizable Dutch film culture that would blend local storytelling with international appeal.

I hope cautiously that we can define Dutch cinema a little more together. Not just the commercial hits. It's usually a mix of personal drama with a gritty edge, blunt

humor, and sometimes a bit of action. [...] It doesn't all have to be one genre, but something where we can point and say, That's Dutch cinema. [...] More of our intellectual culture, blended with popular entertainment elements. That should be possible in Dutch cinema too (Producer 2).

These sentiments line up with Higson's (2021b, p.227) concepts of reinvigoration and national distinctiveness. This is clear from the commitment to renewing the national identity and cultural specificity of the Dutch cinema. This way, films should be able to appeal to both local and international audiences while engaging with international aspects (Higson, 2021b, p.228). Two participants mentioned explicitly they would rather see the power in the industry be decentralized. Fiction/short filmmaker 1 proposed spreading funding responsibilities beyond a single central institution, giving filmmakers more options to get funding. Producer 1 added that although they are working on it, there is not yet a collective labor agreement (CAO) for the Dutch film industry, something that would formalize workers' rights. The Dutch Film Fund (2025a, p.19) described to be aiming to center the filmmaking process, relieving pressure on the makers. Moreover, they will focus on funding the entire cycle of film production, thus including pre-and-post production (Dutch Film Fund, 2025a, p.31). There has been no actual mention of a CAO. Producer 1 also described how the industry should make clearer and sometimes harsher decisions to become fairer and more transparent. Three participants also anticipated a shift toward innovation. TV producer believed AI-driven tools will become more prevalent, according to the Dutch Film Fund (2025a, p.34), there will be enough room for experimentation. Also, Production assistant noted that private investment may take a larger role, reducing the dependency on public funding.

In short, all respondents shared the opinion is currently stagnating and in need of change. The upcoming few years are viewed as an important period during which the Dutch film industry can and should become more dynamic, fair, diverse, and internationally visible. This is only possible if the most important changes are made, which were mentioned to revolve around funding, creative freedom, mentorship, and cinematic identity.

## 5. Conclusion

This thesis research set out to explore how filmmakers such as directors, producers, and writers perceive the Dutch film industry and its growth potential, challenges, and solutions with the following research question: *How do filmmakers in the Netherlands perceive the growth potential of the Dutch film industry?* By combining academic concepts and theories with qualitative interviews, this research shows that while there is awareness among Dutch filmmakers of the need for change, it is hindered by persistent structural barriers. The findings show that the Dutch film industry is often complex and contradictory, in which growth is both desired and hindered by inflexible systems. On one hand, the participants expressed a desire for innovation and creative freedom. They recognized that the industry should evolve to remain relevant, culturally as well as internationally. However, this ambition is hindered by systemic issues such as rigid funding, and a low level of risk-taking. The industry tends to lean toward safe and formulaic productions, leaving little room for new or underrepresented voices.

Despite these identified challenges, the interviews revealed some clear growth opportunities. The participants recognized the potential of international co-productions to access larger budgets, reach a wider audience, and learn from new perspectives. Many of the participants also viewed the new Dutch Film Fund (2025a, p.8) new policy as an opportunity for change. The new policy will focus on shifting from quantity to quality, nurturing talent, supporting innovation, and taking the audience more into consideration (Dutch Film Fund, 2025a, p.8). These opportunities for change, as perceived by the filmmakers in this research, will help facilitate growth toward a more dynamic, risk-taking, internationally connected industry, while at the same time building on a strong national distinct cinema.

The previous chapters provide all the aspects needed to answer the research question. The theoretical framework introduced vital concepts and theories, such as national cinema, small-nation filmmaking, risks, resilience, and co-productions. These concepts form a framework that can be used to analyze the interviews that were conducted and the thematic findings. Together these chapters show that understanding the potential for growth needs more than evaluating commercial or artistic successes, but should also involve interpreting how makers perceive, experience, and navigate the industry and its aspects. These perceptions provide insights into the informal systems that influence who gets to create,

what stories get told, and how sustainable a career in filmmaking can be.

From these perceptions, the industry's growth opportunities are linked to its capacity to become more inclusive, flexible, and centered on the creative maker. Growth opportunities identified from the interviews include the implementations that are also mentioned in the Dutch Film Fund's new policies (2025a, p.8), which prioritize quality over quantity, support new and established talent, make space for innovation, and support the production process better. The participants also recognized the potential of international co-productions, as a way to increase and diversify funding, expand audience reach, and diversify creative input.

By centering the opinions of filmmakers in the Dutch film industry, this research shows that the growth potential lies in the commercial or artistic successes, as well as in restructuring the industry's power dynamics, investing in long-term development and

## 5.1 Overview of research

By connecting Dutch filmmakers' perceptions to the theoretical framework, this research shows the relevance of national cinema in a transnational context. The importance of transnational cinema in a time of globalization is shown by exploring how cultural identity, economic viability, and global interconnectedness are negotiated. The findings show that Dutch filmmakers do realize national cinema is not just a local concept, but can and should be connected to international relevance, for a small national cinema to succeed (Appendix F). These perceptions align with the notion of national cinema defined as a combination of factors such as history, politics, and economics (Vitali & Willemen, 2006, p.9), as well as a tool for cultural expression (Bergfelder, 2005, p.316), leading to unique cinematic identities, which are important in the broader context of globalized European cinema (Lewis & Canning, 2020, p.208).

The interviews revealed that filmmakers in the Netherlands are aware of their structural limitations, which were named as underfunding, rising production costs, creative risk aversion, overly bureaucratic funding procedures, and a lack of inclusivity in both storytelling as well as access to resources (Hjort, 2015, pp.53-54). All participants expressed that the current system discourages innovation, indicated by rigid industry structures, risk-averse funding and production practices, and complex bureaucratic procedures, and favors formulaic productions. Formulaic productions are formulas that have been proven to be

successful, leading to productions being adapted to this formula, in the hopes of repeating its success. This means that the system favors productions that are low risk, and from which they know they will make a profit. These opinions strongly support Hjort's (2015, p.50) concepts of systemic risks, especially those of mono-personalism and film-ecological imbalance, as past policies have created a level of stagnation. Waste of talent was observed to be true as well as not, as there are many programs in the Netherlands to help beginning filmmakers get started, but there are also many beginning filmmakers that are struggling to get a foot on the ground, which was attributed to an oversaturation of the market: there are too many filmmakers in the Netherlands. According to half of the participants, risk of exit is also already happening, with the recent example of Halina Reijn mentioned. This means that emerging or established talent is failing to thrive in the Netherlands, leading to them crossing the borders to try to find work there. This can lead to talent thriving and being successful elsewhere, although they would and could not have in the Netherlands.

The interviews also offered clear indications of resilience and adaptive strategies within the Dutch film industry, which can be connected to Higson's (2021b, p.229) concepts of reinvigoration and national distinctiveness. Despite structural barriers and funding constraints, most of the participants expressed to favor an active approach to navigating the system by leveraging their social circles, continuing to develop their skills, and experimenting with new filmmaking formats. These strategies reflect creative resilience, in which the participants seek to be autonomous and sustain their careers in an inflexible industry. Additionally, the participants recognized the effort to renew the Dutch cinematic identity, which will embrace originality and distinctiveness, will blend commercial filmmaking with art-house filmmaking, and will appeal both locally and internationally. These findings align with the concept of reinvigoration (Higson, 2021b, p.229), where the Dutch cinema identity will become more distinct and popular. Resilience, as found in this research, is not about survival, but rather about redefining Dutch national cinema in a way that is inclusive, experimental, and relevant locally and across borders.

These perceptions and conclusions align with the findings of the Olsberg SPI (2023, p.7) report, which identified similar challenges. All participants had read or heard of the report and its findings before the interview. Olsberg SPI (2023, p.8) noted that the Netherlands produces a high quantity of films but falls short of international excellence benchmarks for commercial and artistic success, something that was reflected by the participants' frustrations with the previous quantity over quality policies, and the limited

resources available for the production process due to the resources being spread too thin. The Olsberg SPI (2023) report has provided both a diagnostic foundation for this thesis, as well as a point of reference for the participants. Growth opportunities for this topic are identified as mentioned before: focusing on quality over quantity. By focusing on a quality-focused funding model as the Dutch Film Fund (2025a, p.8) proposes, resources will be concentrated on fewer projects but will be able to put more money towards these projects, thus making them of higher quality. This will also open up the potential for international artistic recognition. By using these recommendations, the Dutch film industry has the potential to improve its international relevance while also supporting its creative talent.

Additionally, in the theoretical framework, co-productions were mentioned as a viable strategy for small-nation cinema (Jones, 2016, p.8; Noonan, 2024, p.23). The participants expressed it can be a good solution, seeing the potential for funding and distribution. The downsides, such as losing creative autonomy and navigating complex international bureaucracies were not considered to weigh up against the benefits. However, international co-productions seem to be considered as a project for more experienced filmmakers later in their careers. This suggests that the examples provided by Njordförd (2007, p.47) and Hjort (2007, p.24) also translate well to the case of the Netherlands.

## 5.2 Theoretical implications

This thesis has shown the usefulness of Hjort's (2015) small nation risks as easy-to-understand concepts for understanding the Dutch case in today's society. This was shown by applying the risks of Additionally, it also suggests that this framework may benefit from including the role of maker agency and the use of informal networks, which emerged as themes from the interviews.

Furthermore, the concept of national cinema remains theoretically relevant and must be understood as fluid and open to international collaboration in production.

This thesis contributes to the literature by offering a real-life exploration of how these concepts manifest in the perceptions and experiences of filmmakers in a small national film industry: the Netherlands.

### 5.3 Societal implications

From a societal perspective, the findings of this thesis show that the Dutch film industry has reached a turning point. With the new policy from the Dutch Film Fund (2025a) aiming to prioritize quality over quantity, meaning-making fewer but better films, supporting talent development, and promoting diversity and innovation, the chance to act is now.

However, the success of these policies depends on sustained support, open communication with and between makers, and a willingness to rethink long-standing practices such as rigid procedures, centralized decision making, and reliance on closed professional networks. More attention should be given to the pre-production phase, where filmmakers often work unpaid due to lack of funding, or because it is not considered part of the production process.

Improved support here would lead to better-prepared and faster productions and more room for creators. Additionally, the marketing of film needs more attention to increase visibility and audience reach, especially for art-house projects. Finally, exploring alternative funding mechanisms such as private investment from commercial corporations and crowdfunding would reduce pressure on public funds and give filmmakers greater flexibility.

Moreover, the insights regarding audiences and digital formats indicate a need for the industry to adapt to changing consumption habits. Ignoring this shift may risk further alienating younger audiences and losing cultural relevance. If the Netherlands can live up to these prospects of growth in the coming years, the Dutch film industry will become more dynamic, inclusive, and internationally relevant. For the industry, this would mean stronger support for talent development and an increased visibility of Dutch films both nationally and abroad, much like Denmark now. It could also lead to more sustainable careers for filmmakers in the Netherlands, erasing the need to work side jobs. Other improvements would be clearer funding structures and a distinct national cinematic identity that will be recognized.

For audiences, this growth will offer a wider variety of content across platforms based on their own cultural identity and language. By implementing these changes, the Dutch film industry could foster national pride in national cinema and ensure that Dutch stories remain present and influential in today's global media landscape.

### 5.4 Limitations

This thesis research also has its limitations. Firstly, while the ten participants allowed

for thematic analysis, the sample cannot capture the full diversity of experiences across all sectors of the Dutch film industry. Second, not all aspects of what affects the Dutch film industry have been discussed. For example, the socio-economic state of the Netherlands has not been taken into consideration, something that can heavily influence artist expression, spending habits, and audience behavior. Furthermore, the Fair pay discussion, which is an ongoing debate that has recently had some developments, has not been discussed fully. Fair pay plays a significant role in the making of films and has a considerable effect on the livelihood of filmmakers.

## **5.5 Suggestions for future research**

Future research should continue to analyze the perceptions and experiences of filmmakers in the Netherlands and should focus on more specific groups as well. For example, emerging and established female filmmakers, non-Dutch filmmakers working in the Netherlands, and talent that has moved to another nation's film industry. Focusing future research on these specific groups is important, as it will reveal how different identities and backgrounds shape access, opportunity, and experiences within the Dutch film industry. These groups probably face different barriers that would not be visible in general findings. Understanding their perspectives would provide deeper insight into issues such as inclusivity and representation. We need more knowledge about how these filmmakers navigate the industry and its challenges, such as funding systems, social networks, and career sustainability. This would help policymakers and institutions develop more specific support strategies that may help reduce inequality and ensure the industry lives up to its earlier mentioned growth potential.

Furthermore, measuring the effectiveness of the Dutch Film Fund's new policy over time would reveal insights into diversity, innovation, and international positioning. Measuring this effectiveness over time is important in understanding whether its goals are actually being achieved. It will allow for accountability and will help identify which interventions are working and which need adjustment. Without this data being seriously considered, future policy stands the risk of repeating past mistakes or failing to support the industry's needs.

Subsequently, comparative research of other small European nations could provide insights into alternative strategies for resilience and success. This is important as it can

reveal alternative models of resilience and success for nations in similar situations. By studying and attempting to replicate how countries like Denmark, Ireland, or Iceland overcome challenges related to scale, funding, and global influences, the Dutch film industry can learn from proven strategies or avoid their mistakes. We need more up-to-date knowledge about how different national film policies balance artistic and commercial goals, while also supporting their talent and positioning their national cinema internationally.

Additionally, a qualitative study of interviews, focus groups, and experiments should be conducted on the Dutch audience, to map their preferences and expectations of the Dutch film industry. While much of this research's focus has been on production, less is known about how Dutch audiences perceive Dutch national films, how they engage with them, and what drives their choices, especially in the modern era of digital consumption. We need more knowledge about Dutch audience preferences across different demographics, regions, and platforms, as well as their perceptions of cultural relevance, quality, and representation in Dutch films. This knowledge will help filmmakers and institutions tailor content and marketing more effectively and also help build stronger audience relationships. This will help ensure that Dutch films will remain culturally relevant and meaningful.

Finally, further research could also investigate how concepts mentioned by the participants, such as informal power structures, gatekeeping, and personal networks affect the industry and its makers. This is important because these dynamics often have an impact on who gets access to funding and opportunities, yet they are rarely documented or addressed in Dutch policy. Participants' references to these issues suggest that merit alone does not determine success, which can disadvantage emerging filmmakers. We need more knowledge of how these informal systems function. Understanding these mechanisms can help identify barriers to entry, promote transparency, and support the development of better institutional practices.

## **5.6 Concluding**

In conclusion, this thesis aims to illustrate the challenges and solutions that will lead to growth in the Dutch film industry, based on the perceptions and experiences of Dutch filmmakers. The research question can be answered as Dutch filmmakers perceive the industry's growth potential as something complex but not impossible. Filmmakers in the Netherlands perceive the growth potential of the Dutch film industry as real but dependent

on significant structural change, which includes improved funding structures, more creative freedom, and a distinct national cinema. While they acknowledge persistent barriers, they see opportunities in international co-productions, digital innovation, and the application of the recently introduced policies. Using the tactics mentioned in the Olsberg SPI (2023) report and the Dutch Film Fund's (2025a) new policy should help the Dutch film industry grow commercially and artistically and help improve the perception of the Dutch filmmakers to something a little more hopeful and positive. For the Dutch industry to realize its growth potential, it should embrace structural change, encourage creativity, and continuously build its national identity through a globally connected, resilient, and inclusive lens.

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## **Appendix**

### **Appendix A: Overview of participants**

Names:

1. Documentary maker 1
2. Documentary maker 2
3. Documentary maker 3
4. Production assistant
5. Producer 1
6. Producer 2
7. TV producer
8. Fiction/short filmmaker 1
9. Fiction/short filmmaker 2
10. Fiction/short filmmaker 3

\*. All identifying aspects of the participants have been anonymized. Only an indication of their job description has been left for validity.

## **Appendix B: Thematic analysis**

### Code book

#### Code groups

1. Co production benefits
2. Co-production opinions
3. Funding effectiveness
4. Funding evaluation
5. Future
6. Growth
7. Personal challenges
8. Industry challenges
9. Solutions
10. Support evaluation

#### Themes

1. Risks and challenges
  - a. Personal challenges
  - b. Industry challenges
  - c. Support evaluation
2. Funding
  - a. Funding effectiveness
  - b. Funding evolution
3. Co-productions
  - a. Co-production benefits
  - b. Co-production opinions
4. Prospects
  - a. Future
  - b. Growth

## Appendix C: Coding tree

Themes	Code groups	Codes
Risks & challenges	Personal challenges	<ol style="list-style-type: none"> <li>1. Financial constraints</li> <li>2. Demands</li> <li>3. Unpaid work</li> <li>4. Oversaturation</li> <li>5. Funding difficulty</li> <li>6. Financial instability</li> <li>7. Burnout</li> <li>8. Creativity</li> <li>9. Time constraints</li> <li>10. Aspirations</li> <li>11. Cultural balance</li> <li>12. Storytelling tension</li> <li>13. Engagement</li> <li>14. Social relevance</li> <li>15. Audience expectations</li> <li>16. Artistic expression</li> <li>17. Content direction</li> <li>18. Access barriers</li> <li>19. Producer reliance</li> <li>20. Cultural recognition</li> <li>21. Market limitations</li> <li>22. High competition</li> <li>23. Quality distinction</li> <li>24. Stakeholder convincing</li> <li>25. Funding delays</li> <li>26. Lack of experimentation/risk</li> </ol>

		<ul style="list-style-type: none"> <li>27. Conventional formats</li> <li>28. Written requirements</li> <li>29. Creative limitations</li> <li>30. Spontaneity</li> <li>31. Cultural shifts</li> <li>32. Autonomy</li> <li>33. Racial bias</li> <li>34. Diversity</li> <li>35. Inequality</li> <li>36. Advocacy</li> <li>37. Repetitive themes</li> <li>38. Production speed</li> <li>39. Growth hinderance</li> <li>40. Management issues</li> </ul>
	Industry challenges	<ul style="list-style-type: none"> <li>1. Funding issues</li> <li>2. Creative control</li> <li>3. Audience appeal</li> <li>4. Representation</li> <li>5. Risk aversion</li> <li>6. Job insecurity</li> <li>7. Networking</li> <li>8. Oversupply of creators</li> <li>9. Pressure for perfection</li> <li>10. Career uncertainty</li> <li>11. Producer engagement</li> <li>12. Film monotony</li> <li>13. Opportunity limitations</li> <li>14. Audience research</li> </ul>

		<ul style="list-style-type: none"> <li>15. Lack of research</li> <li>16. Distribution</li> <li>17. Agreement strategies</li> <li>18. Financial risks</li> <li>19. Budget cuts</li> <li>20. Rising costs</li> <li>21. Competition</li> <li>22. Government intervention</li> <li>23. Unpaid work</li> <li>24. Oversaturation</li> <li>25. Creative freedom</li> <li>26. Creative challenges</li> <li>27. Cultural narrative</li> <li>28. Engagement</li> <li>29. Gatekeeping</li> <li>30. Recognition pressure</li> <li>31. Self-reliance</li> <li>32. Producer dominance</li> <li>33. Alternative employment</li> <li>34. International recognition</li> <li>35. Self-reliance</li> <li>36. Grant reliance</li> <li>37. Authenticity issues</li> <li>38. Budget constraints</li> <li>39. Employment restrictions</li> <li>40. Personal initiative</li> </ul>
	Support evaluation	<ul style="list-style-type: none"> <li>1. Government support</li> <li>2. Beneficiaries</li> <li>3. Quality of support</li> </ul>

		<ol style="list-style-type: none"> <li>4. Funding management</li> <li>5. Distinctiveness in filmplans</li> <li>6. Financial support</li> <li>7. Creator disadvantage</li> <li>8. Lack of opportunities</li> <li>9. Support needs</li> <li>10. Filmplan scheme</li> <li>11. Flexibility issues</li> <li>12. Funding</li> <li>13. The dutch Film Fund</li> <li>14. Taxpayer support</li> <li>15. Government involvement</li> <li>16. Diversity</li> <li>17. Political influence</li> <li>18. Initiatives such as de Ontmoeting</li> <li>19. Starting out</li> <li>20. Peer support</li> <li>21. Informal assistance</li> <li>22. Mentor program</li> </ol>
Funding	Funding effectiveness	<ol style="list-style-type: none"> <li>1. Ineffective funding</li> <li>2. Budget impact</li> <li>3. Government involvement</li> <li>4. Competition</li> <li>5. Limited resources</li> <li>6. Quantity of funding initiatives</li> <li>7. Amount of funding</li> <li>8. Artistic support</li> <li>9. Commercial support</li> <li>10. Creator focus</li> </ol>

		<ul style="list-style-type: none"> <li>11. High demand</li> <li>12. Creative hindrance</li> <li>13. Complex process</li> <li>14. Limitations</li> <li>15. Positive experience</li> <li>16. Perception</li> <li>17. Spontaneity</li> <li>18. Public fun funding</li> <li>19. Dutch Film Fund</li> <li>20. NPO fund</li> <li>21. Regional funds</li> <li>22. Crowdfunding</li> <li>23. Uncertainty</li> <li>24. Lack of insight</li> <li>25. Marketing needs</li> </ul>
	Funding evaluation	<ul style="list-style-type: none"> <li>1. Government support</li> <li>2. Funding management</li> <li>3. Distinctiveness</li> <li>4. Creator disadvantage</li> <li>5. Lack of opportunities</li> <li>6. Support needs</li> <li>7. Flexibility issues</li> <li>8. Taxpayer support</li> <li>9. Diversity</li> <li>10. Political influence</li> <li>11. Initiatives</li> <li>12. Networking</li> <li>13. Peer support</li> <li>14. Informal assistance</li> </ul>

Co-productions	Co-production benefits	<ol style="list-style-type: none"> <li>1. Audience reach</li> <li>2. Visibility</li> <li>3. Diversity</li> <li>4. Resource sharing</li> <li>5. Compromise</li> <li>6. Learning opportunities</li> <li>7. Advantages</li> <li>8. Expertise sharing</li> <li>9. Shared formats</li> <li>10. Profit</li> <li>11. Local expertise</li> <li>12. Internationalization</li> <li>13. Funding solution</li> <li>14. Risk taking</li> <li>15. Unique insights</li> <li>16. Diversification in film</li> <li>17. Funding access</li> <li>18. New enthusiasm</li> <li>19. Cross-pollination</li> <li>20. Talent attraction</li> <li>21. Peer support</li> <li>22. Context</li> <li>23. Acceptance</li> <li>24.</li> </ol>
	Co-production opinions	<ol style="list-style-type: none"> <li>1. Collaboration</li> <li>2. Optimism</li> <li>3. Positive outlook</li> <li>4. Industry solution</li> <li>5. Cultural exchange</li> </ol>

		<ul style="list-style-type: none"><li>6. Film interest</li><li>7. Focus</li><li>8. Learning</li><li>9. International collaboration</li><li>10. Positive perception</li><li>11. Success</li><li>12. Authenticity</li><li>13. Language barriers</li><li>14. Creative control</li><li>15. Balance</li><li>16. Risk</li><li>17. Artistic integrity</li><li>18. Stakeholder influence</li><li>19. Commercialization</li><li>20. Film quality</li><li>21. Creativity concerns</li><li>22. Commercial viability</li><li>23. Creative expression</li><li>24. Acceptance</li><li>25. Cultural exploration</li><li>26. Scepticism</li><li>27. International influence</li><li>28. Creative freedom</li><li>29. Decision making</li><li>30. Funding opportunities</li><li>31. Investment</li><li>32. Strategic collaboration</li><li>33. Project suitability</li><li>34. Growth potential</li></ul>
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		<ul style="list-style-type: none"> <li>35. Financial benefits</li> <li>36. Positive attitude</li> <li>37. Resource pooling</li> <li>38. Talent attraction</li> <li>39. Recognition</li> </ul>
Prospects	Future	<ul style="list-style-type: none"> <li>1. Pro activity</li> <li>2. Project development</li> <li>3. Prospects</li> <li>4. Bleak prospects</li> <li>5. Funding changes</li> <li>6. Unpromising future</li> <li>7. Bleak</li> <li>8. Burnout</li> <li>9. Optimism</li> <li>10. Positive outlook</li> <li>11. Openness</li> <li>12. Innovation</li> <li>13. Uncertainty</li> <li>14. Change</li> <li>15. Skill development</li> <li>16. Potential</li> <li>17. Social issues</li> <li>18. Industry perspective</li> <li>19. Improvements</li> <li>20. Young talent</li> <li>21. Pessimism</li> <li>22. Budget cuts</li> <li>23. Stagnation</li> <li>24. Ambition</li> </ul>

		<ul style="list-style-type: none"> <li>25. Hope</li> <li>26. Independence</li> <li>27. Streaming</li> <li>28. Viewership decline</li> <li>29. Teamwork</li> </ul>
	Growth	<ul style="list-style-type: none"> <li>1. Limited innovation</li> <li>2. Repetitive content</li> <li>3. Market saturation</li> <li>4. Competition</li> <li>5. Arthouse film</li> <li>6. Audience limitations</li> <li>7. Challenges</li> <li>8. Mainstream</li> <li>9. Combination film</li> <li>10. Potential</li> <li>11. Audience appeal</li> <li>12. Awareness</li> <li>13. Market understanding</li> <li>14. Slow progress</li> <li>15. Time investment</li> <li>16. Underestimation</li> <li>17. Entertainment value</li> <li>18. Commercial demand</li> <li>19. Industry risk</li> <li>20. Theater exposure</li> <li>21. Market share</li> <li>22. Success</li> <li>23. Quality concerns</li> <li>24. Vicious cycle</li> </ul>

		<ul style="list-style-type: none"><li>25. Idealism</li><li>26. Sustainability</li><li>27. Fair pay</li><li>28. Hollywood dominance</li><li>29. English language impact</li><li>30. Innovation</li><li>31. Craftsmanship</li><li>32. Growth barriers</li></ul>
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## Appendix D: Interview guide

1. Please introduce yourself.
2. Please describe your role within the Dutch film industry.
3. How long have you been active in this industry?
4. Can you describe what you're working on now/what is your latest work?
5. How would you describe your view on the dutch film industry today?

### Challenges in the Dutch Film Industry

*The Dutch film industry faces a range of challenges, from financial constraints to competition with international productions. I am looking to find out what the major obstacles that Dutch filmmakers face are and how they impact both creators and audiences.*

6. What do you think are the biggest challenges Dutch filmmakers face today?
  1. Are these the same challenges you are personally facing?
  2. What makes these challenges worse/harder to solve?
  3. Was there a moment in your career when you really felt the impact of this challenge?
7. Something many consumers of dutch movies mention, is that all movies currently being made are the same. Do you feel like the offering of commercial movies in the Netherlands is monotonous?
  4. If yes: why do you think that these commercial, monotone films continue to appeal to audiences? Is that what audiences still want? Doesn't Generation Z want something else?
  2. Can you think of an example of a film that embodies what you think Dutch cinema should be?
8. Do you feel like the Dutch film industry is in close contact with its audience?
  1. In your opinion, what could be the reason for this?
  2. And in your opinion, what could be the solution?
9. You've been working in this industry for a while, what do people not realize about Dutch filmmaking?

### Funding & Government Support

*Funding and government policies shape the Dutch film industry in significant ways. Financial structures have a big impact on filmmakers, producers. Changes are underway and currently being made.*

10. What do you know about the Dutch funding programmes?
11. Can you explain the process of getting funding for a movie?
12. Do you think current funding programmes (e.g., Dutch Film Fund, european or regional funding) are effective in supporting Dutch filmmakers?
13. If Dutch films received higher budgets, do you think they would be more commercially successful, or does success depend on something else?
14. Do you know How the Netherlands compares to other countries in terms of funding?

15. In France they work with a quota system, where French cinema's are required to reserve a certain percentage for French or European works. Would a quota system for Dutch films (like in France) improve the industry, or would it create artificial demand?
16. How do you feel about government intervention in the film industry?
17. Would you prefer it in the Netherlands to either favor commercial viability or artistic expression?
18. If you could redesign the Dutch funding system, what would you change?
19. What would you like to see in the future?

### **Streaming & International Collaboration**

*With the rise of streaming services and international collaborations, Dutch filmmakers have new opportunities to reach wider audiences. Reports such as SPI or the yearly filmfund report show that these kind of collaborations are very successful, but there's also downsides.*

20. What are your thoughts on co-productions?
21. Some small film industries (such as Ireland) have grown through international collaborations. The Netherlands also has some co-productions.
  1. Do you think we should focus more on the co-productions, or do you think there is a different solution for scoring better internationally?
  2. Is scoring better internationally even a priority?
22. In international co-productions, do you feel that Dutch filmmakers lose creative control, or do they only benefit from international collaboration?
  1. Do the advantages of co-productions outweigh the disadvantages?
23. English speaking productions often have a wider reach and are better known internationally. Do you think the dominance of English speaking productions could affect the boxoffice success of Dutch films?

### **Future of the Dutch Film Industry**

*Looking ahead, I am wondering what the future holds for Dutch cinema. Think about for example, potential changes, the role of young filmmakers, and predictions for the next decade.*

24. How are new/young/emerging Dutch filmmakers doing in your opinion?
25. What kind of support or initiatives do new/young/emerging Dutch filmmakers need to succeed?
26. Can you name some that are already in place?
27. Looking ahead, what do you think the Dutch film industry will look like in 10 years if the right changes are made?
28. What if we keep going like this?
29. If you could change one major thing in the Dutch film industry today, what would it be?
30. If you had an unlimited budget, what's the dream Dutch film you'd make?
31. Is there anything else you would like to add that we haven't discussed

## Appendix E: Example of Atlas.TI output

### Fiction/short filmmaker 1

Because there are two types of audiences. And that's something they look at a lot at the HKU. They look down on mainstream film, because it's an art academy. So, the big films, the ones in Pathé cinemas, and so on. Those films are very much the same. Yeah, it's a form of escapism for regular people, I get that too. I can still enjoy watching a bad film every now and then, just because it's so wonderfully brain-dead. Whereas arthouse films, I find them much more beautiful, there's much more value in them. But yeah, you need to have the energy for that. And be open to learning new things and being confronted with things you maybe don't want to see. But those are the important films. And those are the kinds of films that I, and almost everyone around me, aspire to make. But there's just quite a limited audience for that.

Arthouse Films < Growth Perception 2  
 Audience Limitati... < Growth Percep... 1  
 Growth Challen... < Growth Percepti... 1  
 Arthouse < Growth Perception 3  
 Audience Engage... < Industry Chall... 2  
 Mainstream < Growth Perception 2

## Appendix F: Conceptual model

