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## Intranational film industries: a quantitative analysis of contemporary Belgian cinema

Bram Van Beek <sup>a</sup> and Gertjan Willems <sup>b</sup>

<sup>a</sup>Department of Literature, University of Antwerp, Antwerp, Belgium; <sup>b</sup>Department of Literature and Department of Communication Studies, University of Antwerp, Ghent University, Antwerp, Belgium

### ABSTRACT

This article presents a quantitative analysis of Belgian fiction film production between 2000 and 2019. Analysing an extensive database, it explores the current state of Belgian cinema, which is characterised on the one hand by a strong international dimension, and on the other hand by two largely separate intranational industries: a Flemish and a francophone Belgian film industry. Despite the persistent gap between the two industries, a certain rapprochement seems to be manifesting recently. This industrial analysis is preceded by an exploration of the conceptual and practical difficulties and limitations that arise when trying to determine whether a film can be labelled (partly) 'Belgian', 'Flemish' and/or 'francophone Belgian'. Emanating from the complexity of the Belgian situation, these difficulties reveal some of the theoretical contradictions of the concept of national cinema. As such, departing from a quantitative study of Belgian cinema, this article also provides an original contribution to ongoing debates on the concept of national cinema.

### KEYWORDS

Belgian cinema; Flemish cinema; francophone Belgian cinema; film industry; quantitative analysis; national cinema

In 2020, the European Audiovisual Observatory (EAO) published a report on how the various member states of the European Union define what constitutes a domestic film. While each country completed a single questionnaire, Belgium submitted two separate questionnaires, one for the Dutch-speaking, Flemish community and one for the French-speaking community. This raises questions about the status of Belgian cinema as a coherent national industry, as nowhere in the report is it referred to as such. It also confirms Mosley's (2001) historical description of Belgian cinema as evolving towards a 'split screen' of two subnational industries that share a Belgian framework but barely interact with one another. Nevertheless, despite a persistent gap between Flemish cinema and francophone Belgian cinema, several recent developments, such as an informal co-production agreement established between the policy bodies of the linguistic communities in 2009, indicate a certain rapprochement between the two industries. In addition to these 'intranational' evolutions, Belgian cinema is marked by a growing transnational dynamic, as testified by, for example, the continued increase in co-productions with other countries.

**CONTACT** Bram Van Beek  [bram.vanbeek@uantwerpen.be](mailto:bram.vanbeek@uantwerpen.be)  Department of Literature, University of Antwerp, Grote Kauwenberg 18, 2000 Antwerp, Belgium

Although these observations suggest that the Belgian film industry has evolved considerably since the turn of the century, the state of contemporary Belgian cinema remains largely unexplored. The few existing studies focus mostly either on Flemish or on francophone Belgian cinema (Niessen 2020; Steele 2015; Willems 2017b; Willems, Vande Winkel, and Biltereyst 2021). Most other studies take as their point of departure a textual analysis of specific (groups of) films (Andrin 2014; Gott 2013; Hartford 2017; Mosley 2013), rarely addressing the wider production context from which these films emerge. This article aims to complement the textual and qualitative approaches to contemporary Belgian cinema by offering a quantitative industry analysis of its subnational, national and transnational dynamics. Based primarily on the construction and analysis of a database of 1379 Belgian films released between 2000 and 2019, the article offers particular insight into the structural relationships between the film industries in the Flemish and French-speaking communities of Belgium, and how they relate to other industries abroad. By doing so, this article endorses Flynn and Tracy's (2016) argument that while a quantitative research design is rarely applied to analyse national cinemas, it may in fact provide a highly valuable and even necessary complementary approach.

In order to fully comprehend what is at stake in this analysis, it is necessary to first explore some of the methodological and conceptual issues we encountered while constructing the database. Although labels such as a film's 'nationality' or 'majority' and 'minority productions' are widely used to categorise films, delineating precise definitions for these terms in relation to Belgian cinema proves to be rather challenging. This article begins by teasing out how these issues result from the specificity of the Belgian film industry and, importantly, how they reveal some of the limitations of the concept of national cinema as such. Keeping these limitations in mind, we will then go on to analyse the collected data. Thus, in addition to providing insight into contemporary Belgian cinema, this article aims to offer a conceptual contribution to ongoing debates on national cinema. In this respect, it aligns itself with Ian Christie's (2013, 26) argument that 'it seems highly desirable to question the basis of national cinema' and that 'one way of doing so is to use quantitative methods'.

## Defining Belgian, Flemish and francophone Belgian cinema

In 2003, *Verder dan de maan/Sea of Silence* (Stijn Coninx, 2003) came very close to being selected as the Dutch submission for the Academy Award for Best Foreign Language Film. The Dutch Oscar Selection Committee eventually decided to submit *De tweeling/Twin Sisters* (Ben Sombogaart, 2002) to represent the Netherlands instead. However, *Verder dan de maan* was given a second chance, by Belgium this time, as it ultimately became the Belgian submission to compete for the same award (Joris 2003). As it turns out, the same film can be eligible for submission by two (or more) different countries. To add to the confusion, the Netherlands Film Festival (Nederlands Film Festival), where the film had its premiere, categorises *Verder dan de maan* as a Dutch film only, while the Dutch Wikipedia page describes it as a 'Belgian–Dutch co-production' and the French-speaking page as a 'Belgian film'. IMDb lists the Netherlands, Belgium, Denmark and Germany as producing countries.

This goes to show that identifying the nationality of a film is not an easy task, as a single film often has various nationalities according to different sources and institutions. A recent study by the EAO (2020, 40) on the regulation and assessment of the nationality

of European audiovisual works stated that this is a consequence of the heterogeneity of assessment methods and the lack of a univocal definition of what constitutes a domestic film. Film funds, film festivals, distributors and other official institutions each have their own approach to determine the origin of a film, which leads to conflicting and incomplete determinations.

This multitude of definitions and the apparent arbitrariness in how they are applied raise questions about the value and necessity of perceiving films in terms of their nationality. The growing importance of international co-productions and other transnational evolutions adds to the impression that the 'national' has lost much of its relevance. However, as Hill (2016, 707) puts it: 'discourses of the "national" do, nevertheless, continue to structure and inform how films of various kinds are categorised, funded, promoted and made sense of'. It could even be argued that questions of nationality become all the more important in a transnational context, since it is precisely when film production goes beyond national borders that these questions arise (see Mosley 2001, 152). Christie (2013, 24) argues that, especially for smaller countries, presenting their domestic industry as a national one allows them to 'assert local specificity', and to position themselves against 'the bland global culture delivered everywhere in multiplexes'. Thus, as many authors have pointed out, the concept of national cinema appears to persist and is often even reaffirmed in a globalised context (see Hjort and Petrie 2007, 12; Kulyk 2019, 75; Willemen and Vitali 2006, 8).

Recently, there have been some efforts to standardise identification methods for European films as well as to build uniform databases (e.g. the Lumière database, the Education, Audiovisual and Culture Executive Agency database, the MEDIA Film Database). However, owing to the volume of data to be processed, its scattered nature and the lack of internationally recognised definitions, none of these endeavours has yet led to an objective reference. With regard to Belgium in particular, this is further complicated by the fact that the Belgian film industry largely consists of two subnational industries that correspond to the linguistic communities. This means that, besides determining what makes a Belgian film, we also need to account for Flemish and francophone Belgian films as structural elements.

Where to look for a clear definition of what constitutes a Belgian, Flemish or francophone Belgian film? In many countries, films must be 'national' in order to be eligible for economic support (Grant and Wood 2004). Moreover, as Christie (2013, 21) explains, it is precisely in the context of the emergence of public funding that legal and political definitions of films' nationality were established in Europe during the 1920s. Indeed, several definitions can be found in policy documents of various public funding bodies in Belgium.

The framework for funding Belgian cinema is organised by the communities. Even the recognition of 'Belgian audiovisual work',<sup>1</sup> which has been a prerequisite to become eligible for the tax shelter programme (a fiscal incentive organised by the federal government), is granted by the communities. On the French-speaking side of Belgium, the Cinema and Audiovisual Centre (Centre du Cinéma et de l'Audiovisuel, CCA), which is the policy and funding body of the French-speaking community, officially recognises a film as a 'Belgian French-language film'<sup>2</sup> based on a so-called 'cultural test'. In order to be recognised, a film needs to comply with a certain number of criteria, some of which are textual, such as the language of the film or links with francophone Belgian culture,

while most, such as the nationality of the crew or the financial share of the Belgian production company, are productional in nature. To become eligible for funding, then, CCA uses another cultural test with slightly different criteria that are more oriented towards Belgian culture in general and not so much towards the culture of the French-speaking community in particular (EAO 2019, 121–122). In addition, a film can be considered ‘of francophone Belgian initiative’<sup>3</sup> based on the location of the production company that initiated the project and the nationality of certain crew members. This gives us a range of definitions and ways in which a film can be recognised by the French-speaking community.

On the Dutch-speaking side, there are three ways in which a film can be considered Flemish by the Flanders Audiovisual Fund (Vlaams Audiovisueel Fonds, VAF): based on ‘the identity of the artistic team’, the content and its connection to Flemish culture, or if the majority producer is Flemish (VAF 2020, 3).

These are only a few of the many definitions articulated by various institutions to determine what constitutes a Belgian, Flemish or francophone Belgian film. As they are all articulated with particular purposes in mind such as funding, promotion and distribution, this leads to various sets of criteria, which does not bring us any closer to generally applicable definitions.

According to Christie (2013), such heterogeneity of criteria arises from the fact that films are not just immaterial texts, but also culturally and economically defined products. This results in an underlying tension between criteria that are ‘*industrial*’ and criteria that ‘seek to guarantee the *cultural identity* of the work’ (Christie 2013, 23, emphasis in the original). This tension is present in the cultural tests that are used by almost all national funding schemes in Europe (EAO 2019) and corresponds to two different understandings of national cinema: an economic or industrial approach, concerned with such questions as ‘where are these films made, and by whom?’ (Higson 1989, 36), and a cultural approach that focuses on questions of representation and identity. While an industrial definition of national cinema considers as French, for example, all films that are (at least partly) produced within the boundaries of the French-speaking state, the cultural approach defines the ‘Frenchness’ of a film in relation to French-speaking identity and culture.

The discrepancy between an economic and a cultural definition of national cinema has led some authors to argue that certain countries, although they have a national film industry, lack a unified national cinema in the cultural sense (see Moyer-Duncan 2020). Belgium appears to be one of these countries for which the existence of a coherent national cinema is often questioned (Andrin 2014). Debates on the textual unity of Belgian cinema often led to the conclusion that its ‘Belgianness’ is impossible to define or that it simply does not exist. Less questioned, however, is the state of the Belgian film industry as a ‘national’ industry (Mosley 2001; Sojcher 2020). As Willems and Vitali (2006, 1) explain: ‘The particular ways in which an economic sector’s productive activities and a particular set of institutional networks known collectively as the state interact to mutual benefit give us the terms in which a film industry becomes a national one.’ Considering that film production, policy and distribution in Belgium is mostly centred around the communities, the Belgian film industry cannot be unequivocally perceived as ‘a national one’ according to Vitali and Willems’s definition. Does this imply that the label ‘Belgian cinema’ is but an empty signifier, or that it is ‘national’ ‘in name alone’, as Mosley (2001, 197) puts it? The

aim of our database is to shed light on precisely these questions insofar as they relate to the complex dynamics of Belgian cinema as an industry. We will therefore adopt a strictly territory-based, economic approach to the concept of national cinema.

The economic approach provides us with a relatively unambiguous criterion to demarcate the limits of Belgian cinema and to define the relationship with other countries. A film is considered, at least partially, Belgian if it is produced by a production company that is based in Belgium. Thus, Belgian cinema is determined by the territorial boundaries of the Belgian state. Also in accordance with this economic perspective, co-productions with other countries are considered minority or majority Belgian depending on the financial share of the Belgian production company (Levie 2018, 284).

Such a system, however, does not take into account the fact that Belgian cinema largely consists of two separate subnational industries, each with its own funding bodies, production companies, distribution channels, film press and audiences. Ignoring this productional reality would lead to an incomplete conception that fails to comprehend the fundamental structure of the Belgian film industry. Yet, existing conceptions of national cinema, whether economic or cultural, are often incompatible with the particularities of Belgian cinema, as they tend to approach the concept of national cinema from the perspective of the nation-state only. As such, they are unable to account for national cinemas that do not coincide with state borders. As Rosen (1996, 390) notes about the limitations of the concept of national cinema:

Not only is the political geography designated by state borders divisible into different regions and even 'nations', in the sense of extensive and intensive ethnic-cultural and diasporic groupings; but also, [...] 'national' characteristics spill across state borders both culturally and economically.

Considering that the conceptualisations developed by such authors as Higson (1989), Crofts (1993) and Hill (1992) started from the idea of a unified industry that is determined by the territorial boundaries of the nation-state, they are not easily applicable to the Belgian situation, where national and subnational dynamics are not tied to state boundaries.

The complexity of the Belgian case resides in the absence of an unambiguous territorial boundary that separates both linguistic communities and could serve as a clear separation between the two film industries. This leads to a constant ambiguity in relation to films made by production companies that are based in Brussels, Belgium's bilingual capital that is part of both the Flemish and the French-speaking communities. For those films, a strictly territorial approach based on the location of the production company does not suffice. Other criteria are needed to categorise them as Flemish, francophone Belgian or both.

The language of the film, whether it is spoken in Dutch or in French, would seem an obvious criterion to distinguish between Flemish and Belgian francophone films. However, although the vast majority of films are indeed in the language of the majority producing community, this is certainly not always the case. Several majority Flemish films are bilingual or spoken in French-speaking (e.g. *Étangs noirs/Black Ponds* [Timeau De Keyser and Pieter Dumoulin, 2018]; *Unspoken* [Fien Troch, 2008]), and other films make use of completely different languages, such as Spanish (*Lucifer* [Gust Van den Berghe, 2014]) or Mongolian (*Khadak* [Peter Brosens and Jessica Woodworth, 2006]).

More in line with an economic perspective is whether the film has received financial support from one of the cultural or economic funds that were put into place by the linguistic communities. We consider the amount of support as decisive in determining the majority and minority producing community. For *La Fille inconnue/The Unknown Girl* (Jean-Pierre Dardenne and Luc Dardenne, 2016), for example, the French-speaking community of Belgium is the majority community and Flanders the minority community, as the majority of support was provided by funds from the French-speaking community (CCA and Wallimage), while the Flemish fund VAF only contributed a minor share.

But what, then, of films that received financial support from neither of the public funding mechanisms and were produced by a company based in Brussels? For some of these cases, the Belgian tax shelter application procedure can be insightful. Since the production company needs to submit the project to one of the linguistic communities for recognition, the film is automatically associated with either Flanders or the French-speaking community. Another way to make a distinction is by finding out whether the production company is affiliated with the professional association of producers in Flanders (the VOFTP, Flemish Independent Film & Television Producers) or in the French-speaking community (the UPFF, French-speaking Producers' Association).

The criteria outlined above provide us with a useful tool to identify majority and minority Belgian films and to determine whether films mainly 'belong' to Flanders or to the French-speaking community or to both. Nevertheless, despite these rather clear indicators, several films do not fit the logic of the database and thereby expose the limitations of the adopted categories. While some of these tensions are inherent in the complexity of determining a film's nationality in general, others arise from the particularity of the Belgian situation.

Over the last decade, the European film industry has been marked by an increase in co-productions (EAO 2017, 41), some of which do not seem to abide by the logic of majority/minority co-production partners. Existing research often neglects this aspect of co-production. While most authors agree that the criteria to designate majority and minority co-producers 'may vary greatly from one co-production to another' (Hammett-Jamart, Mitric, and Redvall 2018, 13), little attention is paid to the fact that, for some productions, this distinction simply does not apply or is artificially maintained. Many films are the result of collaborations between two or more countries with more or less equal shares in the production process, both creatively and financially. *Verder dan de maan* could be counted among those films, as could *La Folie Almayer/Almayer's Folly* (2011), a co-production between Belgium and France by Belgian director Chantal Akerman. The film received about the same amount of funding from France and Belgium and is labelled as a majority production by both countries. Internationally, *La Folie Almayer* is mostly promoted as a 'Franco-Belgian co-production'. While, strictly speaking, the French-speaking production company has a slightly larger financial share, the negligible difference makes the distinction between majority and minority producing countries largely lose its meaning.

We also encountered conceptual tensions that, unlike the distinction between majority and minority co-producers, are specific to the dynamics of the Belgian film industry. For some films, the previously outlined criteria used to distinguish between Flemish films and films produced by the French-speaking community lead to classifications that do not correspond to the productional reality of the film. *Wallonie 2084/Wallonia 2084* (Jean-Jacques Rousseau and Clark Hachet, 2004), an absurd comedy about the cultural struggles

between Flanders and Wallonia, seems to be one of these films. While it is almost entirely spoken in French-speaking and directed by a French-speaking filmmaker, the film was also produced by Belfilm, a company that is based in Flemish Brabant and owned by Flemish producer Paul Geens. Since the film did not receive any additional funding from the communities, it is considered majority Flemish according to the logic of the database, despite the fact that Jean-Jacques Rousseau's films are often associated with Walloon cinema (Mosley 2001, 170). In a similar vein, *Beyond the Steppes* (Vanja d'Alcantara, 2010), produced by Brussels-based Need Productions and the Flemish production company Lunanime, received about an equal amount of funding from the two communities and is labelled as a majority production by both CCA and VAF. However, since the application for recognition as a European audiovisual work was submitted to the French-speaking community, we labelled it accordingly, which, again, does not entirely reflect how the film was produced. Although it would be more adequate to simply label such films as 'Belgian', the economic criteria of the database compel us to categorise all productions as either Flemish or francophone Belgian.

These examples point out the limitations of applying the concept of national cinema to the Belgian situation. It could even be argued that, by adopting a territory-based definition of national cinema, we are artificially drawing lines between categories such as Flemish cinema and francophone Belgian cinema, while in reality there are many forms of exchange between them that remain unnoticed owing to the very nature of the epistemological framework we are using. Chris Berry (2010, 119) argues similarly in relation to statistics on Chinese cinema, which, by distinguishing between film production in Hong Kong, Taiwan and the People's Republic of China, 'obscure and confuse the transnational reality of the contemporary situation'. Indeed, the concept of co-production, which we are using to measure the interaction between Flanders and the French-speaking community, in itself already presupposes a divide between two separate industries.

Nevertheless, while some of these reflections indicate the limitations of pinning films down to their 'origin', the framework we are using still corresponds to the way the industry is largely organised. In the case of Belgium in particular, the distinction between Flemish films and francophone Belgian films is the categorical determination through which the industry is mostly structured and perceived by domestic institutions, companies, policymakers, journalists and audiences. Taking this categorisation and its limitations into account, the second part of this article provides a quantitative analysis of Belgian cinematic output between 2000 and 2019.

## **Analysing Belgian, Flemish and francophone Belgian cinema**

Next to designing the database, another challenge was the data collection and finding enough information about the films to categorise them according to the definitions developed in the first part of this article. There is no central database on Belgian cinema, and data collection and analysis are poorly organised on all policy levels (De Vinck et al. 2013).<sup>4</sup> We therefore had to gather and combine data from various sources. The Lumière database of the EAO proved to be a valuable starting point as it also adopts an economic approach to determining the nationality of a film.<sup>5</sup> The database lists the country with the majority financial share first, which gave us an indication when determining the majority

and minority producing countries. It was supplemented with data from annual reports by VAF and CCA and lists we obtained from the Flemish and French-speaking communities, as well as online databases such as Flanders Image,<sup>6</sup> Cinergie<sup>7</sup> and IMDb.<sup>8</sup>

Combining data from multiple sources into a single database often led to incompatible determinations. Moreover, names and addresses of production companies often change over time, or companies cease to exist entirely. To complicate things further, annual reports of various institutions often list films under their working title and budget breakdowns are frequently estimations that might not correspond to the film's final budget.

The lack of centralised information in combination with the sheer size of the database and the heterogeneity of definitions compelled us to adopt a pragmatic approach while combining data from these various sources. If multiple sources indicate that a film is majority produced by a particular community or country, we assume that this is indeed the case, without breaking down the production costs in detail. Since most available sources adopt the specifications used by VAF and CCA, which are based on a combination of cultural and economic criteria, there are some discrepancies between these general principles of an economic identification and the de facto categorisation. *Mon ket/Dany* (2018) by Belgian director and actor François Damiens, for example, is labelled as 'of francophone Belgian initiative' by CCA and appears in many statistics as a majority (francophone) Belgian production. In strictly economic terms, however, the French-speaking community has a smaller share compared to France. The fact that CCA labels it as a majority francophone Belgian film can thus be seen as an attempt to 'claim' the film.

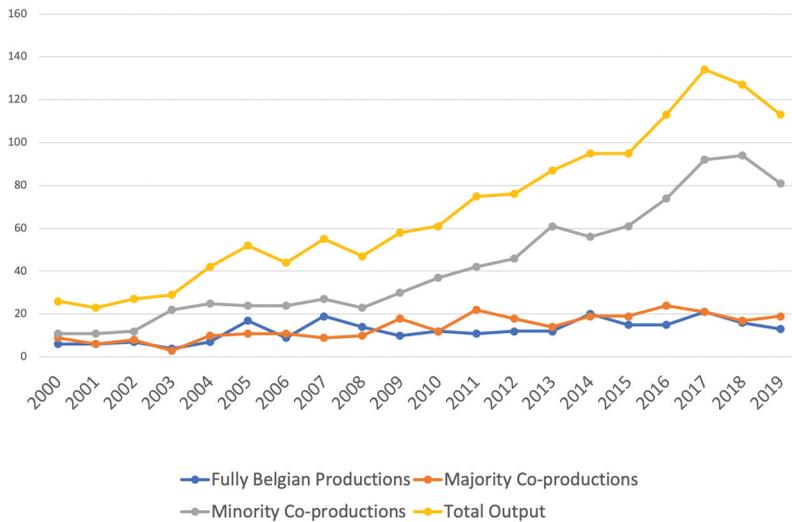
The data collection eventually resulted in a body of 1379 fiction films with a runtime of 60 minutes or more that had a theatrical release between 2000 and 2019.<sup>9</sup> The remaining part of this paper, which consists of a quantitative analysis of the database, will begin with a general analysis of contemporary Belgian film production. It will then focus on the interactions between the Flemish and francophone Belgian film industries and examine how these interactions relate to public funding by the cultural funds VAF and CCA.

The overall production volume of Belgian fiction feature films increased dramatically throughout the research period, with more than four times as many films produced in 2019 (113 films) compared with 2000 (26 films). Belgium thereby largely exceeds the general growth of European productions. Between 2007 and 2016, the production of European fiction films rose by 33% (EAO 2017, 15), while the growth of Belgian fiction film production for that same period was 104%.<sup>10</sup>

The overall production output can be broken down into fully Belgian films, majority Belgian co-productions and minority Belgian co-productions (see Table 1). For all three categories, an acceleration is discernible from 2004 on (see Figure 1), which can be explained by the tax shelter programme put into operation by the federal government the same year, in order to encourage companies to invest in the Belgian film industry. However, with a growth of 636%, the rise in minority co-productions is far more spectacular than the increase in the production of fully Belgian films (116%) and majority Belgian co-productions (111%). Moreover, given that the database does not include all minority co-productions, the actual growth is undoubtedly even more significant than observed in our analysis.

**Table 1.** Belgian, Flemish and francophone Belgian film productions (2000–2019).

	Belgian productions				Flemish productions				Francophone Belgian productions			
	Fully Belgian productions		Total Belgian productions		Fully Flemish productions		Total Flemish productions		Fully francophone Belgian productions		Total francophone Belgian productions	
	Majority productions	Minority co-productions	Majority co-productions	Minority co-productions	Majority productions	Minority co-productions	Majority co-productions	Minority co-productions	Majority productions	Minority co-productions	Majority co-productions	Minority co-productions
2000	6	9	11	26	5	4	4	13	1	5	11	17
2001	6	6	11	23	4	2	2	8	1	5	11	17
2002	7	8	12	27	6	3	2	11	1	5	15	21
2003	4	3	22	29	2	2	3	7	2	1	21	24
2004	7	10	25	42	4	5	5	14	1	7	26	34
2005	17	11	24	52	9	1	14	24	6	12	17	35
2006	9	11	24	44	6	2	4	12	3	9	23	35
2007	19	9	27	55	12	5	10	27	5	6	21	32
2008	14	10	23	47	10	3	5	18	4	7	21	32
2009	10	18	30	58	4	11	11	26	5	8	30	43
2010	12	12	37	61	7	6	9	22	2	9	39	50
2011	11	22	42	75	7	10	14	31	1	15	36	52
2012	12	18	46	76	6	8	12	26	3	13	45	61
2013	12	14	61	87	8	7	17	32	2	9	52	63
2014	20	19	56	95	11	10	17	38	6	12	53	71
2015	15	19	61	95	9	10	25	44	4	11	50	65
2016	15	24	74	113	9	10	19	38	4	16	67	87
2017	21	21	92	134	13	11	22	46	5	13	83	101
2018	16	17	94	127	9	6	24	39	4	14	80	98
2019	13	19	81	113	9	10	18	37	3	10	71	84
Total	246	280	853	1379	150	126	240	516	63	187	772	1022

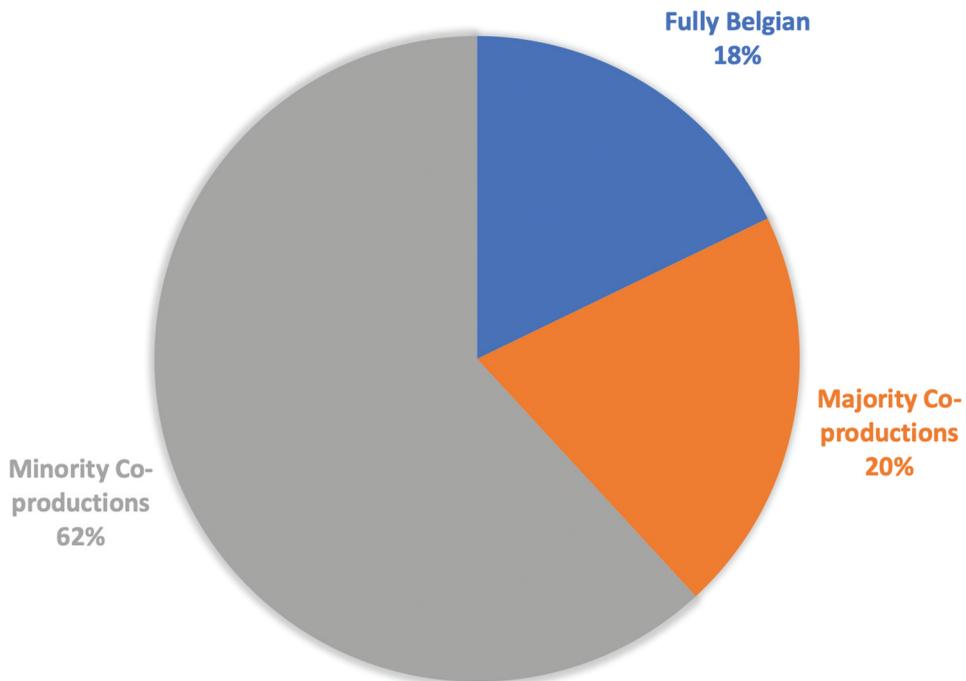


**Figure 1.** Number of Belgian films released annually.

It may be clear that co-production plays an increasingly important role in the Belgian film industry. Minority and majority co-productions combined represent 82% of the total output, while only 246 or 18% of all productions are fully Belgian (see [Figure 2](#)). Although the growing number of Belgian co-productions can be seen as part of a general transnational tendency in a globalised world (Morawetz et al. 2007), the Belgian figures far exceed the European average. Along with Luxembourg, Belgium is the only European country that produced more films as majority co-producer than as fully national producer over the period 2006–2017 (EAO 2018, 5). In the words of Philippe Reynaert, the former director of the subnational funding body Wallimage: ‘We [Belgians] have become world champions of coproduction’ (Reynaert and Bredael 2016, 75).

The dependence of the Belgian film industry on international co-productions can be explained by the economic reality of what Hjort and Petrie (2007, 15) call ‘the cinema of small nations’. As they point out, ‘Limited size has arguably rendered the impact of these processes of globalisation and internationalisation even more intense in the case of small nations than in large nations.’ Owing to limited domestic markets and resources, small film industries are forced into dependency on inward investments through co-productions. As Mosley (2001, 143) explains, co-production ‘was no longer considered merely desirable but absolutely essential’ by the end of the 1980s in Belgium. The role of co-production in the Belgian film industry has since only become more important.

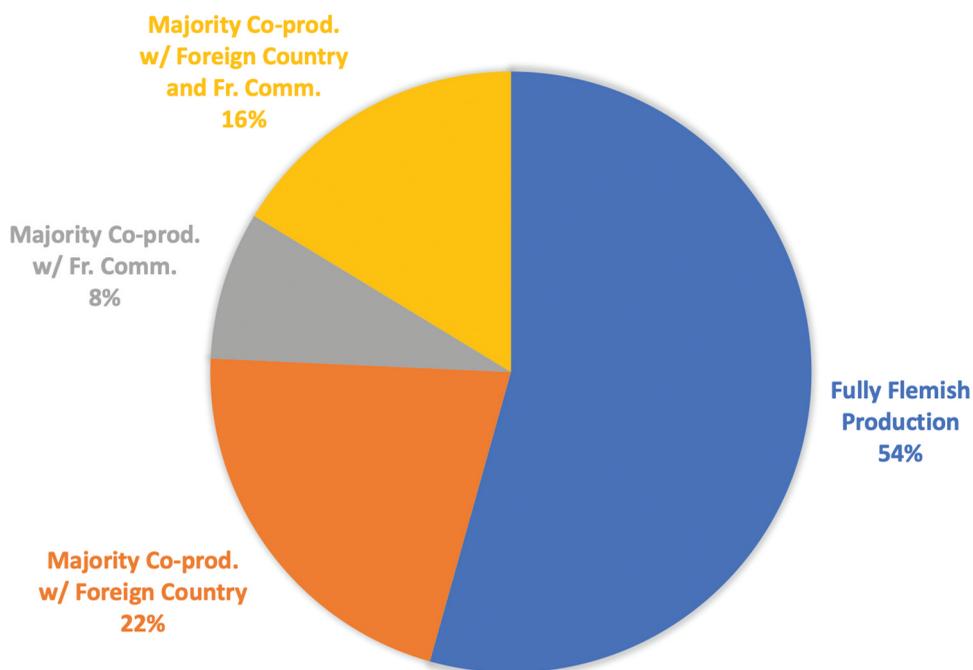
With 853 films or 62% of the overall production volume (see [Figure 2](#)), the level of minority co-productions is exceptionally high compared with other European countries. Even in absolute terms, Belgium is the fourth most frequent minority co-production partner in European co-productions (EAO 2017, 30). The EAO names subsidies and fiscal incentives as the most important reason for Belgium’s ‘specialisation in minority co-production’. Indeed, as Sojcher (2020) explains, the structure of the Belgian tax shelter does not particularly favour Belgian projects over foreign films and therefore attracts many foreign productions that look for additional funding in Belgium. In many cases,



**Figure 2.** Belgian film production breakdown (2000–2019).

the Belgian production company is ‘named as a co-producer simply to meet the criteria to access the tax incentive’ (Hammett-Jamart, Mitric, and Redvall 2018, 12). Moreover, the way funding is organised in Belgium makes it possible for foreign production companies to accumulate funding from different subnational and national funds for the same expenses, hence the expression ‘Belgian double dip’ (Reynaert and Bredael 2016, 51).

From this point onwards, we focus on Belgium’s ‘majority productions’, including both fully Belgian productions and majority Belgian co-productions. Looking at Belgium’s intranational film industry dynamics, we can see that the two communities produced a comparable number of majority productions: 276 Flemish films and 250 francophone Belgian films. Moreover, the two communities show a similar growth rate. Flanders went from 100 films during the first decade of the research period (2000–2009) to 176 films during the second decade (2010–2019), while film production in the French-speaking community grew from 94 to 156 productions. There are some important differences, however, as to how many of these films are co-productions. Whereas 150 or 54% of all majority Flemish films are fully Flemish productions, 22% (59 films) are majority co-productions with at least one foreign country, 8% (22 films) with the French-speaking community and 16% (45 films) with both the French-speaking community and at least one foreign country (see Figure 3). For the French-speaking community, the share of fully francophone Belgian productions is much lower with only 25% or 63 productions. Of the remainder, 48% (121 films) are majority productions with at least one foreign country, 5%

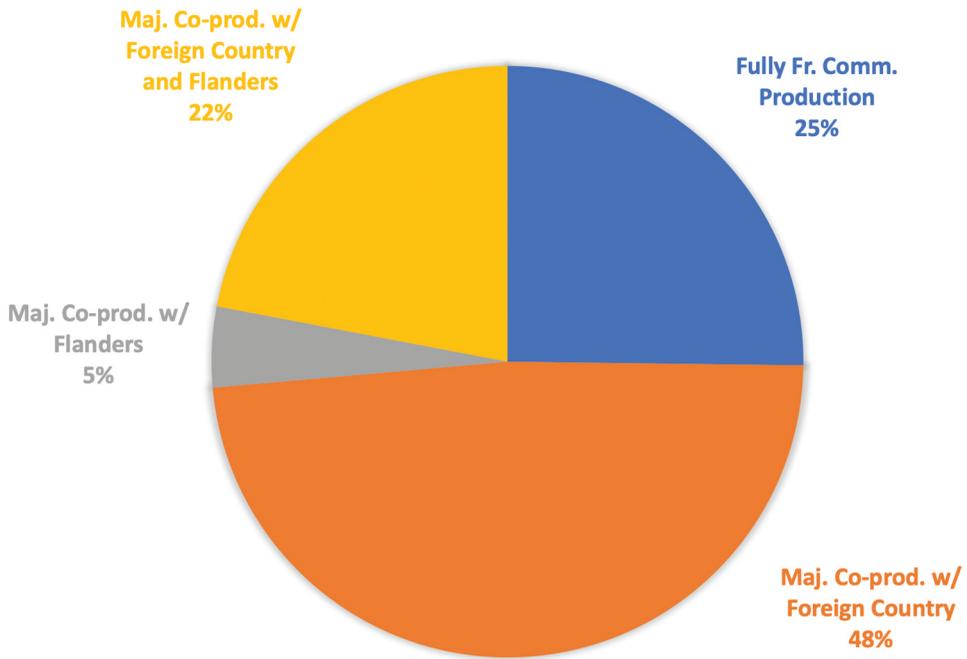


**Figure 3.** Flemish film production breakdown (2000–2019).

(11 films) with Flanders and 22% (55 films) with both Flanders and one or more foreign countries (see [Figure 4](#)). Such a degree of dependence on inward financing raises the question to what extent one can speak of an autonomous industry.

For the French-speaking community of Belgium, France is by far the most frequent co-production partner, as 146 productions or 78% of all majority co-productions involved France as a minority co-producing country, which is 58% of all majority francophone Belgian films. Co-productions with France appear to be the rule rather than the exception. This high level of co-production stems from a historical proximity with France that dates back to the birth of cinema (Mosley 2001, 29). Sojcher (1999b, 40) describes this relationship as 'logical' from both a cultural and an economic perspective. Not only is there a shared language and culture between the French-speaking community of Belgium and France, co-production with France is also economically advantageous in terms of funding and distribution. The close entanglement of the francophone Belgian and French-speaking film industries is further evidenced by a report from the EAO (2017, 29), which found that, on a European level, co-production between France and Belgium is 'topping the ranking of most frequent bi-national co-production tie-ups'.<sup>11</sup> In contrast to the relationship between Flanders and the Netherlands, which can be seen as one of cooperation between two 'independent' industries, the closeness of the alliance between the French-speaking community and France points to the existence of a larger transnational francophone cinema (see Steele 2019, 34).

However, despite France still being the most important co-production partner, co-production between France and Belgium is coming under pressure. In reaction to the Belgian tax shelter established in 2004, France introduced its own fiscal incentive in order



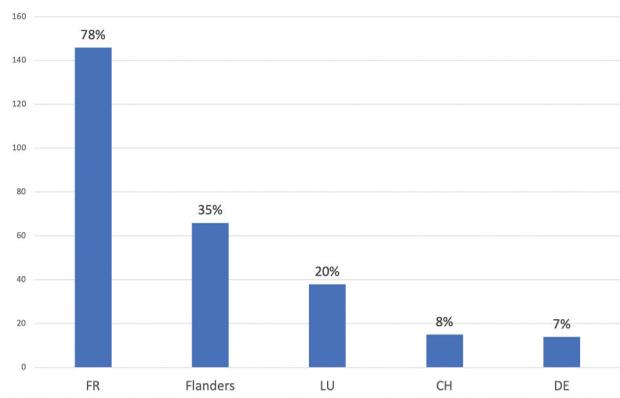
**Figure 4.** Francophone Belgian film production breakdown (2000–2019).

to discourage French-speaking production companies from partly moving their production abroad. It appears that this ‘funding war’,<sup>12</sup> as Sojcher (2020) calls it, slightly affected how the relationship between the French-speaking community of Belgium and France evolved over the last two decades. While the absolute number of co-productions between France and the French-speaking community of Belgium increases throughout the research period, the share of co-productions with France in relation to all majority Belgian francophone co-productions drops from 84% between 2000 and 2009 to 76% between 2010 and 2019.

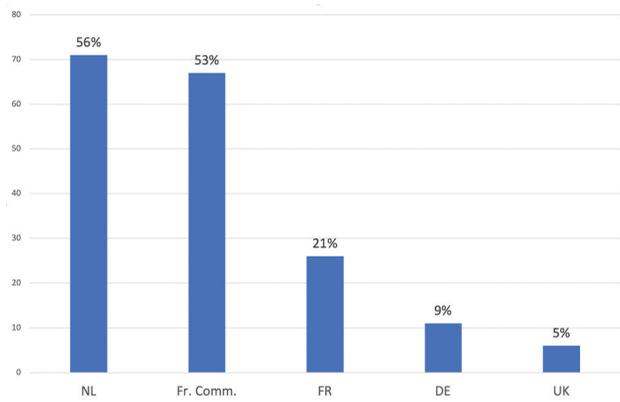
As shown by Figure 5, France is followed by Flanders (66 productions), Luxembourg (38 productions), Switzerland (15 productions) and Germany (14 productions). While the linguistic (Switzerland and Luxembourg) and geographical (Germany and Luxembourg) proximity are important explanatory factors in this respect, the strong relationship with Luxembourg is further economically encouraged by the Grand Duchy’s competitive fiscal incentives (Reynaert and Bredael 2016, 76; Steele 2019, 38).

Regarding Flanders, the Netherlands is the preferred co-production partner (see Figure 6). It acted as a minority co-producer for 71 films, which is 56% of all majority Flemish co-productions and 26% of all majority Flemish films. The Netherlands is closely followed by the French-speaking community (67 films) and subsequently by Flanders’s other neighbouring countries, France (26 films) and Germany (11 films). Lastly, the UK participated in six majority Flemish films as a minority co-producer.

Similar to the relationship between the French-speaking community and France, the frequency of co-production between Flanders and the Netherlands can be traced back to a long-standing tradition of cooperation that is both economically and culturally motivated (Willems 2017b, 94).



**Figure 5.** Minority co-production partners with the French-speaking community of Belgium (2000–2019).



**Figure 6.** Minority co-production partners with Flanders (2000–2019).

In addition to establishing increasingly close ties with the Netherlands and France, co-production partners became more diverse throughout the research period. Between 2000 and 2009, Belgium cooperated with minority co-production partners from 22 different countries. This number goes up to 42 different countries for the period 2010–2019. Moreover, some recurring constellations can be identified. Of the majority Flemish co-productions with Germany, 82% involve the Netherlands as well. With regard to the French-speaking community, 79% of majority co-productions with Luxembourg are also co-productions with France. Interestingly, there are very few majority Belgian co-productions that involve the privileged co-production partners of both communities: just seven majority francophone Belgian films and 13 majority Flemish productions.

Belgian film production after 2000 relies heavily on international co-production, which can be viewed as a confirmation and intensification of a transnational tendency that goes back to the beginnings of cinema but started to accelerate from the 1980s on. However, differences can be noted between the communities as to how this general tendency takes form,

particularly with regard to the choice of co-production partners and the level of dependency on these partners. We observed a strong alliance between the French-speaking community of Belgium and France on the one hand and Flanders and the Netherlands on the other hand.

The fact that co-production trends continue to be structured along community borders suggests that the 'split screen' described by Philip Mosley (2001) persists in a contemporary context. Rather than navigating the transnational context as a coherent industry, Flanders and the French-speaking community of Belgium operate separately. Yet, in order to make substantiated claims about the state of the 'split screen' in contemporary Belgian cinema, it is necessary to supplement these findings about international co-production with an analysis of the interaction between the communities.

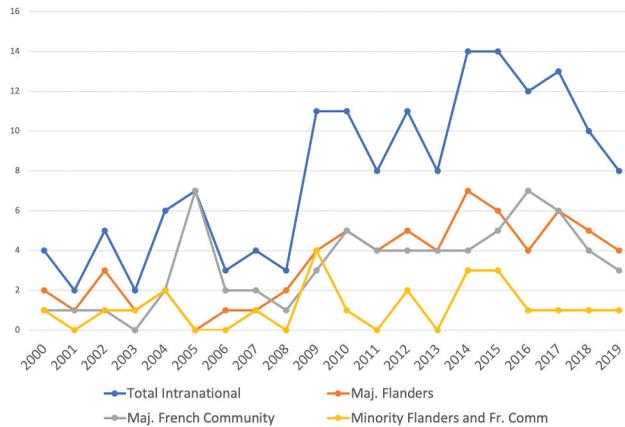
Before the 1980s, collaborations between Flanders and the French-speaking community of Belgium were virtually non-existent. Mosley (2001) names 'biculturalism' and the political tensions that arose from it as the most important reasons for the lack of interaction. Furthermore, the 'cultural autonomy reflex' of the Flemish film policy actors promoted a certain 'ideological resistance' towards co-production with the French-speaking community (Willems 2017a, 101). In the 1980s, however, the changing Belgian community relations, internationalisation tendencies in the European film industry and the economic opportunities of co-production between the communities started to outweigh the culturally induced refusal to cooperate and occasionally led to productions that were financed by both communities. As Mosley (2001, 140) writes:

Though ever more independent of one another politically and economically, the two linguistic communities reluctantly acknowledged that if Belgian films of artistic stature and commercial viability were to continue to be made, they would have to learn to collaborate with one another to a certain extent.

Sojcher (1999a, 337) similarly describes the first double-funded productions that were made during the 1980s as 'tactical alliances'.<sup>13</sup> Although these alliances between the communities became more frequent because less politically charged by the end of the twentieth century, they still represented only a minor part of all co-production activity. There was still no co-production agreement between Flanders and the French-speaking community, and the communities continued to focus on international co-production with the Netherlands and France instead.

Between 2000 and 2019, Belgium produced 156 films that involved production companies from both communities (133 majority Belgian and 23 minority Belgian productions). Representing 25% of all majority Belgian films, co-productions between the communities are clearly no exception anymore.

Interestingly, intranational co-production is marked by a strong international dimension, as only 33 films or 25% of all majority Belgian intranational co-productions are exclusively Belgian. It thereby reflects the transnational inclination of Belgian cinema as a whole. When comparing the communities, this dimension is slightly more pronounced for the French-speaking community. As much as 83% (55 films) of majority francophone Belgian and 67% (45 films) of majority Flemish intranational co-productions involved an international co-producer in addition to the other community.



**Figure 7.** Intranational co-production (2000–2019).

A more detailed analysis of the yearly evolution of intranational co-productions further confirms the idea of a growing emphasis on Belgian cooperation. A clear shift can be observed between the periods before and after 2009 (see [Figure 7](#)). Between 2000 and 2008, Belgium produced an average of three intranational co-productions per year. Between 2009 and 2019, the yearly average tripled to nine productions per year.

Sojcher (1999b, 39) describes Belgian cinema at the end of the twentieth century as being marked by a ‘double logic’ that is ‘antagonistic in nature’,<sup>14</sup> in the sense that the growing cultural and economic separation inside the country coincided with an increasing desire for European cooperation. Indeed, Flanders and the French-speaking community were moving away from each other, while at the same time growing closer to neighbouring countries. Yet, it seems that this idea of a ‘double logic’ cannot be unequivocally transposed to the contemporary situation. Although Flemish cinema and francophone Belgian cinema are still largely operating as two separate industries, the growing number of interactions between them indicates a rapprochement that runs parallel to their transnational orientation. Thus, moving beyond national borders no longer seems to imply moving away from each other, as the internationalisation of the Belgian film industry is accompanied by an emerging intranationalisation.

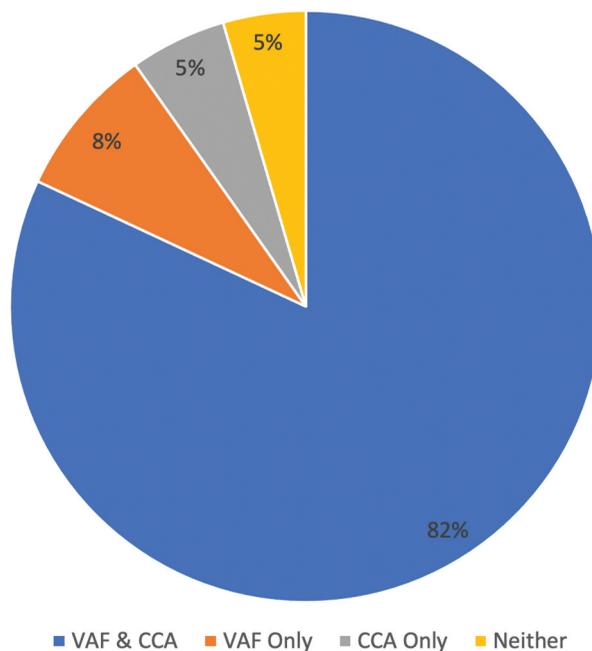
## **Funding**

Shifts in national film production can often be linked to changes in public funding. This is no different for Belgium, where government funding has been crucial to Belgian film production since the 1960s. During that period, the emergence of cultural film production support coincided with the regionalisation of the country. Despite initial attempts to set up a national film fund, selective aid systems were eventually organised separately in the Dutch- and French-speaking parts of Belgium. This subdivision of public funding played an important role in the distinction between ‘Flemish’ and ‘francophone Belgian’ films (Willems 2017b). If the development of Belgian cinema into two separate industries can

be partly attributed to the birth of public funding as regionalised from the beginning, could the contemporary signs of rapprochement also be related to recent changes in funding strategies?

Interestingly, almost all co-productions between Flanders and the French-speaking community received production support from at least one of the cultural film funds, as only 5% was realised without support from either VAF or CCA (see Figure 8). A significant number (82%) received development and/or production support from both funds, while 13% was funded by only one of the two funds: VAF (8%) and CCA (5%). This indicates that public funding plays an important role in intranational co-production. Certainly, the same can be said for Belgian film production in general. Yet, 160 majority Belgian films, or almost 30% of all majority Belgian productions, were funded by neither of the cultural funds, which is still significantly more. Thus, it may be clear that intranational co-productions are particularly dependent on the cultural funds.

It is noteworthy that VAF and CCA are the driving forces behind intranational co-production, considering that both funds were established with the aim of promoting the cinema and cultural identity of their own community. This goes to show that the existence of two separate industries does not necessarily exclude the possibility of a 'Belgian' film production. That both VAF and CCA are actively trying to stimulate such a Belgian film production is confirmed by an analysis of how both institutions allocate their budgets. Between 2000 and 2019, intranational co-productions represented 37% of all films that were granted production support by VAF. Similarly, 30% of all productions selected for funding by CCA were intranational co-productions. Moreover, the share of intranational co-productions increased for both funds throughout the research period. In this respect,



**Figure 8.** Public funding for majority Belgian intranational co-productions (2000–2019)].

the year 2009 marks a sudden boost. Comparing the periods before and after 2009, the share of funded intranational co-productions grew from 28% to 41% for VAF and from 20% to 36% for CCA. This can be linked to the fact that VAF and CCA mutually decided in 2009 to allocate a larger part of their budget to co-productions with the other community. Although it is an informal agreement that, unlike international co-production treaties with foreign countries, was never officialised, its effects can be observed statistically. Not only does the previous analysis testify that both funds acted upon the agreement, [Figure 7](#) clearly outlines the impact of this decision on the Belgian industry.

Yet, some caution is appropriate in attributing the rapprochement between the Flemish and francophone Belgian film industries to top-down decision-making only. Considering that most films take more than three years to be released after obtaining funding, it is more likely that the agreement between VAF and CCA in 2009 was a catalysing response to an already changing industry and funding policy, rather than the instigator of a tendency. The current state of the Belgian film industry should therefore be seen as the result of a dynamic between policymakers and the industry, with institutions such as VAF and CCA reacting to shifts in production, and vice versa.<sup>15</sup>

\* \* \*

With the aim of providing a quantitative industry analysis of the productional dynamics of contemporary Belgian cinema, we built a database on Belgian film production in the period 2000–2019. However, our first steps in designing the database were instantly met with certain conceptual difficulties that arose from the fact that Belgian cinema is characterised by a ‘split screen’ between two separate industries. A seemingly simple question such as ‘what is a Belgian film?’ evoked a set of theoretical issues related to the complexity of ‘the national’ in a Belgian context. Existing conceptualisations of national cinema often prove inadequate when attempting to account for industries that are not entirely structured according to official state borders. Belgian cinema thereby exposes some of the limitations of the concept of national cinema as a structuring category and shows how nationality is often artificially attributed by various institutions in an attempt to ‘claim’ a film. Even a strictly economic territory-based approach, which would supposedly circumvent some of the problems that come with the arbitrariness of cultural definitions, does not provide a clear demarcation between Flemish and francophone Belgian cinema, owing to the ambiguity that comes with the bilingual city of Brussels. Despite these limitations, and notwithstanding the importance of transnational dynamics, national and subnational distinctions still structure how Belgian cinema is produced, funded, distributed and perceived. For this reason, these categories constitute an adequate framework for a mapping of contemporary Belgian film production, as long as the porosity between these categories is taken into account.

Our analysis demonstrates that the internationalisation of Belgian cinema, which had started to accelerate in the 1980s, persists in a contemporary context. Yet, there are some important differences between Flemish and francophone Belgian cinema as to how this internationalisation tendency has taken shape. While the vast majority of francophone Belgian co-productions are with France, Flanders is clearly oriented towards the Netherlands. The observation that both communities would rather co-produce with their privileged international co-production partner than with each other indicates that linguistic and cultural affinity with these foreign countries still outweighs the economic

and cultural motivations for intranational co-production, confirming the 'split screen' in Belgian cinema. Yet, a closer look at the annual number of co-productions between the communities reveals a gradual increase that is most evident from 2009 onwards. This coincides with the establishment of an informal agreement between the communities' public funding bodies, VAF and CCA, to allocate a larger part of their budget to Belgian intranational co-productions. The importance of public film policies for the rapprochement between the two industries is confirmed by our observation that almost all co-productions between Flanders and the French-speaking community are realised with support by VAF, CCA, or both. However, the rising number of intranational co-productions cannot be solely ascribed to policy decisions and is more likely the result of the dynamic between industry and policymakers.

An openness towards 'Belgian' film production, in the sense of cooperation between the communities, gradually became more salient during the first two decades of the twenty-first century. The productional dynamics between the communities attest to a changing attitude and nuance the idea that, as an industry, 'Belgian cinema' is nothing but an empty signifier. The question, then, remains whether the industry dynamics described in this article also have film textual implications. To what extent do these films also articulate a 'Belgian identity' in the stories and representations they offer? Moreover, owing to its focus on productional dynamics, the database does not account for the distribution and reception of Belgian films. Further research is needed to determine whether the rapprochement on an industry level also implies a rapprochement between Flemish and Belgian francophone audiences. Such questions could form the starting point for future research, thereby demonstrating the complementarity of this quantitative study of Belgian cinema to qualitative approaches.

## Notes

1. In 2014, this title was changed to 'European', as the criteria are based on the Audiovisual Media Service Directive issued by the European Union.
2. 'film belge d'expression française.'
3. 'd'initiative belge francophone.'
4. The Royal Belgian Film Archive CINEMATEK published a filmography of Belgian films until 1996 (Thys 1999) as well as annual reports on Belgian cinema until 2001. Thus far, these inventory efforts have not been updated. Cinema Belgica, an extensive online database on Belgian cinema, was launched in 2021. While this database mostly focuses on cinema culture and the circulation of films in Belgium, it also partly incorporates the data collected for the present study. See [www.cinemabelgica.be](http://www.cinemabelgica.be)
5. <https://lumiere.obs.coe.int/web/sources/astuces.html>
6. <https://www.flandersimage.com/titles>
7. <https://www.cinergie.be/film>
8. <https://www.imdb.com/>
9. While this body of films is more or less complete regarding majority Belgian productions, it is far from exhaustive when it comes to minority productions as they are much more difficult to track, especially if they have not received financial support from VAF and CCA. Many minority productions either do not appear as 'Belgian' in databases such as the Lumière database or are simply not included. The database can be obtained by contacting the authors.

10. This percentage was calculated by contrasting the average for the years 2007 and 2008 with the average for the years 2015 and 2016, which is the same method used by the EAO (2017, 14).
11. The EAO made this observation about Belgian cinema as a whole. However, considering that France acted as a minority producer for only 26 majority Flemish films, compared with 146 majority francophone Belgian films, it mostly applies to the French-speaking community.
12. 'guerre des guichets.'
13. 'alliance tactique.'
14. 'une double logique, à caractère antagoniste.'
15. The idea that the rise of intranational co-production is the result of a dynamic between industry and policymakers is confirmed by the fact that only 4 out of 11 majority Flemish submissions were selected for funding by CCA in 2020. This suggests that, although CCA is allocating a larger part of its budget to collaborations with VAF, there is an even higher demand for intranational co-production coming from the industry itself (CCA 2021, 26).

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## Notes on contributors

**Bram Van Beek** is a PhD student at the University of Antwerp. In his doctoral research he investigates the relationship between (trans)national identities and contemporary Belgian cinema.

**Gertjan Willems** is Assistant Professor at the University of Antwerp and Guest Professor at Ghent University. His research focuses on cinema in Belgium, film adaptations and the relationship between media and nation-building.

## ORCID

Bram Van Beek  <http://orcid.org/0000-0003-4999-1960>

Gertjan Willems  <http://orcid.org/0000-0001-7125-4161>

## Filmography

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