

Abstract title: Measuring sustainability of audiovisual and film ecosystems: Beyond firm-centric impact assessments

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Abstract

With the increased competition from global OTT players and the rise of gatekeeping by platforms, traditional hierarchies such as 'industry' have become an inappropriate unit of strategic analysis. Thus, researchers and practitioners have picked up the concept of 'ecosystem' as an attractive metaphor that shows that collaboration, interdependence, and joint value creation between media players have become characteristics associated with the current complex, competitive challenges.

In that context, the 'media ecosystem' concept is helpful to understand the interplay between audiovisual 'frenemies' who are engaged in partnerships and bidding wars, often at the same time. The lens of a media ecosystem provides a helping hand, for instance, to better analyse how Netflix could act simultaneously as a "friend and foe" to public service broadcasters. In addition, the "media ecosystem" concept is increasingly used by policymakers to point out the need for policies that can effectively safeguard the cultural and economic sustainability of audiovisual production. For example, the public broadcaster of Flanders (the Dutch-speaking part of Belgium), VRT, has set the 'strengthening media ecosystem' as one of its strategic priorities in the current Management contract. Likewise, over the past decades, film agencies and creative industry support mechanisms have increasingly adopted sustainability of domestic ecosystems as their core objective.

From an academic standpoint, however, little attention has been paid to assessing media ecosystem health. If sustainability becomes a core driver for policymakers to support their domestic industries, then when are media ecosystems sustainable? Moreover, what exactly needs to be sustained, the companies in the ecosystem or the services and content they produce? And, even more importantly, how to enhance media ecosystems' robustness? Building on the conceptualisation of 'media ecosystem' by Kostovska, Raats, Donders and Ballon (2020), this paper analyses and elucidates the key determinants of audiovisual and film media ecosystem health. Like with natural ecosystems, the health of an audiovisual and film ecosystem tells us something about the system's productivity, stability, effectiveness, and ability to be maintained in the long-term and growth potential (see also Wauters and Raats, 2018). Contributing to the argument of Iansiti and Levien (2002), who have introduced the "health" as an overall performance indicator of business ecosystems, this research develops and presents a toolkit with indicators for assessing sustainability of audiovisual media ecosystems in Europe.

Building on the conceptualisation of 'media ecosystem' by Kostovska, Raats, Donders and Ballon (2020) and theoretical underpinnings from strategic and innovation management (e.g. Adner and Kapoor, 2010), this article develops a model based on indicators for assessing audiovisual and film ecosystem sustainability. The main research question is: "How to evaluate the effectiveness of public support measures to create sustainable audiovisual and film ecosystems?"

As a first step of the empirical data collection, a meta-analytic review of media economics and media management literature and policy document analysis from film agencies reports and industry organisations was conducted to identify indicators. Secondly, pilot qualitative expert interviews were carried out. Finally, semi-structured expert interviews were conducted to analyse methodological aspects and the relevance of the indicators for measuring the sustainability of audiovisual media ecosystems. The preliminary results indicate how to assess ecosystem sustainability holistically on different ecosystem levels based on the value creation processes and the ecosystem value proposition.

The model for assessing audiovisual ecosystem sustainability contributes both to media management and economics theory and practice. Departing from the increased interest in 'ecosystem' in business research, this article aims to contribute towards a new theory on media ecosystem and show the advantages of ecosystem-based analysis. The developed model can be used by media economics and management scholars, and practitioners to measure the qualitative and quantitative impact of support on the sustainability of audiovisual ecosystems. It helps policymakers to answer how to align different measures within coherent and future-proof policies.