

# Chapter 10

## Digital Film and Television Distribution in Greece: Between Crisis and Opportunity



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### 10.1 Introduction

According to the EU's Digital Economy and Society Index (DESI 2018), which "tracks the progress of member states in terms of their digitisation," by 2018 Greece occupied the penultimate position as 27th out of 28 countries (DESI Greece 2018: 1). Digitization here is measured with reference to connectivity, digital skills, the use of Internet services and the integration of digital technology by both businesses and public services. Greece scores below the EU average on all indicators save the use of Internet services. The figures show that those who use the Internet do so mainly for information and entertainment—reading news online, participating in social networks, as well as accessing music, games and video on demand (DESI 2018: 6). This chapter focuses on the online circulation of professionally produced audiovisual content in Greece. It explores the platforms and institutions through which it is made available and situates these in the broader context of the country's film and television industries.

Given that a significant amount of the audiovisual content circulated and consumed in Greece is produced outside the country, a key question examined here is whether online distribution has opened up new opportunities for the country's production sector. The chapter maps out the stakeholders engaged in delivering audiovisual content online and highlights some of the ways in which residual and emerging screen media have intersected in creating the contemporary audiovisual media landscape in the country. It locates global disruptors, such as Netflix, within the structure of the Greek film and television industries, highlighting the transformations they have undergone during the last decade. Ultimately, the chapter assesses whether the opportunities offered by the new technologies have been and can be fully embraced in a small market such as that of Greece, and who have been the key beneficiaries.

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Before exploring the above, it is important to situate Greece as a “small market” and a “digital periphery.” A country of less than 11 million, according to the 2011 census [and diminishing in population since then due to emigration and a low birth rate (Euronews 2019)], Greece is the tenth most populous country in the EU, below Belgium and above the Czech Republic (Eurostat 2019). In terms of area, it is just under 132,000 km<sup>2</sup>, making it small to medium in the context of the EU.

Despite being at the “upper end” of the small country definition in the EU (Trappel 2014: 240), Greece is a small market and a “small media system” that shares a number of “structural peculiarities” with other similarly sized countries (Puppis 2009: 10). These include a relative shortage of resources, both in terms of capital, but also “know how, creativity and professionals in the media” (Puppis 2009: 10); a small audience and advertising market; dependence on political decisions made in larger neighboring states and a limited ability to influence global developments; and vulnerability to “foreign undertaking” (Trappel 2014: 243) with regard, especially, to the very high proportion of foreign media products in its market.

All the above help explain why small size can lead to global marginalization (unless corrective regulation or exceptional circumstances can counter this), and why, by extension, a small market can be considered as part of a “digital periphery.” Small size affects the competitiveness of a market adversely both internally—in so far as it can afford “only a small number of competitors in most of its industries” (Gal 2003: 1)—and externally—as it lacks the resources to compete globally. Large markets possess the technical knowledge, economic capacity, organizational aptitude and drive for innovation that leads to the production of new technologies, consigning small markets to the position of consumers. Conversely, small markets purchase the hardware and software that they cannot develop or produce, which is desirable as it promises participation in the gains of progress that science and technology represent. When it comes to content, however, small markets are also producers—both because they can afford to be and because there is demand for local information and entertainment. However, two key interrelated aspects that differentiate content produced in a small market from content produced in a large market are resources and visibility: products from the latter can be very well-capitalized, and, by extension, they can often achieve global visibility, while those produced in a small market are more likely to be more cheaply made and consumed locally.

Distribution is the key factor that concerns visibility, and it is here that the debates about the specific possibilities afforded by *digital* distribution take place. It has already become apparent that the initial utopian promises of the “long tail,” whereby the Internet would allow marginal material to be discovered by users simply due to its presence online, were unsubstantiated and naïve (Anderson 2006). Recent research has shown that a number of new gatekeepers are now controlling what circulates, and while the criteria for selection do not necessarily reflect the size of the producing market, it is clear that it is much harder for products from marginal origins to break through (Baschiera et al. 2017). In light of the above, the underlying broader question explored through the analysis that follows is whether and how the digital revolution, with regard to the circulation of audiovisual content online, can empower or disempower players in small markets. The case of Greece represents

one specific iteration of this question, heuristically valuable both in its own terms and for comparative purposes.

## 10.2 Film and Television Industries in Greece: Structure, Policy and Debates

In order to examine whether the online circulation of audiovisual content has opened up opportunities for the production and dissemination of local/national content, it is necessary to set the scene by referring to the structure of the film and television industries in Greece, as these have traditionally controlled production and distribution. For the most part, the account below differentiates between film and television, since these two media have commanded different processes of production and distribution and have been largely represented by different public and private institutions (even though, in terms of production, there is overlap in creative and technical personnel). While digital distribution has diminished some of the conceptual distinctions between the two media, it is still widely maintained, including by Lotz (2017), who introduced the term “Internet-distributed television.” Lotz’s term refers to “video accessed via Netflix, Hulu, Amazon Video, HBO Now” and other such services, highlighting the fact that such content is accessed and consumed nonlinearly and (potentially) across many devices. Lotz, however, points out that “not all the video these services offer are television; many also offer feature films, which, per the difference in film’s industrial formations and practices of looking, make them ‘film’ not ‘television’, or some other medium because they are Internet distributed” (2017). In Lobato’s words, “Internet-distributed television” refers to “professionally produced content circulated and consumed through Web sites, online services, platforms, and applications, rather than through broadcast, cable, or satellite systems” (Lobato 2019: 5). In what follows, I examine the ways in which professionally produced audiovisual content circulates in Greece, situating recent developments within the context of the broader ecosystem of production and (online) distribution in the country.

To account for the state of the film and television industries in Greece by the year 2019, it is necessary to consider the effects of the 2009 financial crisis on the audiovisual sector. The public debt crisis and consequent austerity measures affected both the state-supported system of subsidies and the commercial system of financing production. The former depended on public funds which became scarce and largely diverted away from audiovisual production, while the latter depended largely on advertising income and/or box office revenues, both of which experienced a significant drop (Papadimitriou 2017; Iosifidis and Papathanassopoulos 2019). The effect was similar across the film and television sectors, but the ways in which it manifested itself were different.

In film production, public funding temporarily halted in the early 2010s and when it slowly but modestly resumed, the cuts had already caused significant disruption in the production flow (Papadimitriou 2017). Furthermore, a planned tax on the income

from cinema tickets aimed to secure direct funding of film production was canceled in 2015, removing key resources from the main relevant institution, the Greek Film Centre (Flix 2015). Public television was even more dramatically affected as in 2013 the then-rightwing government imposed a sudden closure of the state broadcaster (Elliniki Radiofonia kai Tileorasi: ERT/Greek Radio and Television) as a speedy means to reduce costs and streamline the organization. An interim, pared down, public broadcaster took charge, until the election of a leftwing government in 2015 reversed the decision of ERT's closure, reopened the broadcaster and resumed financing of television programs and films (Iosifidis and Papathanassopoulos 2019: 7–10).

The commercial system of film and television production was impacted by the financial crisis because the general reduction in personal disposable income led to a decline in overall consumption and a consequent dramatic drop in advertising expenditures. In film, distributors who had previously invested in production, encouraged by healthy box office returns, all but stopped when the crisis and the onset of widespread piracy undermined filmgoing habits (Papadimitriou 2018). At the same time, private television channels exclusively dependent on advertising to stay afloat were unable to produce original content for broadcast and to support film production, once their income was slashed.

While financial conditions remained very difficult in 2015, the new leftwing-led government pushed forward the broader goal of facilitating the country's digitization, in terms of both infrastructure and skills, by creating the dedicated Ministry of Digital Policy, Telecommunications and Media which soon published a National Digital Policy (2016) identifying relevant priorities. Indicative of its intentions was the subsidy offered for the cost of installing high-speed Fiber-To-The-Home (FTTH) communication networks starting in June 2018, thus encouraging the adoption of next-generation access (NGA) infrastructure. Within a month, three of the four Internet providers launched commercial fiber-optic broadband networks (Gorelik 2019: 20).

As will be detailed below, this investment opened the path for a more widespread adoption of online distributed audiovisual services. Two other initiatives also led by the Ministry affected the audiovisual industry in Greece. One was the regulation of the private free-to-air television channels through the allocation of a limited number of licenses. The other was the establishment of EKOME, the National Centre for Audiovisual Media and Communication, whose aim is to “promote and foster public and private initiatives, foreign and domestic in all sectors of the audiovisual industry” (EKOME 2018a). While neither initiative directly concerns Internet-enabled distribution, both—especially the former—were highly debated. The implementation of the resulting policies provides illuminating insights into the social, political and industrial contexts in which developments in digital distribution occur and has influenced the broader media ecology that affects, among other things, the kinds and amount of national content circulating online.

The requirement that private television channels apply for, and then purchase, one of the limited numbers of licenses available (valid for ten years) is particularly relevant because it helped clarify and stabilize the landscape of legacy (terrestrial) television, which plays a significant role in the online provision of audiovisual content

domestically. The process of selecting the companies that would receive the licenses was contested (both in parliament and in the press) because it indirectly implicated political and business interests. As in many European countries, private free-to-air channels began to operate in Greece in 1989 when the deregulation of national television was introduced. Benefitting from the growth of the Greek economy in the ensuing years, as well as from collusions with the political parties in power, these channels (and the interests of their magnate owners) profited significantly, while their relationship to the state was never formalized—meaning that they gave little back to the state by way of tax or relevant contributions (Iosifidis and Papatthanassopoulos 2019). Calls for some regulation that would reduce, among other things, the number of channels allowed to operate in Greece—especially since the small size of its market cannot profitably sustain too many competitors—were repeatedly ignored until two factors changed the situation. One was the financial crisis that pushed many channels to the brink of bankruptcy and forced the state (that had often granted them loans with very favorable terms) to recoup funds. The other was television’s digital switchover, completed in 2015, and the consequent allocation (from the EU) of a particular (and therefore limited) range of frequencies for broadcasting. It should be noted that the controversy around licenses concerned the policy implementation and not the principle itself—i.e., the number of licensed channels, the price and the manner of selection. It took three years for the matter to be resolved, and the five license-holders were eventually announced in September 2018.<sup>1</sup> These were the following:

- Antenna, initially a radio station, was established in 1988 by shipowner Minos Kyriakou, and it began television broadcasts a year later. Antenna is the oldest surviving Greek private channel and still run by the Kyriakou family as part of the Antenna Group that has expanded operations beyond Greece (especially in southeastern Europe).
- Skai is also originally a radio station owned by shipowner Giannis Alafouzou since 1989, and it started operations as a television station in early 1993. It was sold and renamed Alpha (see below) in 1999, but was relaunched as Skai in 2006. Alafouzou’s parent company owns, among other things, one of the more established Greek newspapers, *Kathimerini*.
- Star is launched in December 1993, and the TV channel is owned by Giannis Vardinogiannis, descendant of one of the largest ship-owning families in Greece.
- Alpha is launched in September 1999 (after the channel Skai was bought by entrepreneur Dimitris Kontominas). In October 2018, just after the licensing process was completed, a more than 50% controlling stake of the parent company was purchased by the Vardinogiannis Group (which also owns the Star channel). The two channels continue to operate separately.

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<sup>1</sup>The matter was initiated by Nikos Pappas when he was Minister of State in 2015 and was moved into the remit of the Ministry of Digital Policy, which he also led after it was founded. The first (badly handled) attempt at allocating the licenses took place in September 2016 and was annulled three months later. Eventually, the Greek National Council for Radio and Television, an independent supervisory and regulatory body, was constituted with cross-party participants, and the first five licenses were granted in October 2018 (CNN 2018).

- Open Beyond is bought in 2017 by Greek-Russian magnate Ivan Savvidis, and the channel had been known as Epsilon TV since 2013.

A sixth license for a channel owned by the shipowner Vangelis Marinakis (previously co-owner of the financially troubled channel Mega, which closed down in October 2018) was announced in early 2019 and is currently being processed. I will return to these companies in the following section, when exploring their Web TV presence since, as noted above, they are among the main homegrown carriers of such content.

The other extensively debated and long-in-the-making policy was the introduction of a cash rebate scheme intended to encourage investment in international productions, as well as to stimulate national productions (EKOME 2018b). As elsewhere, the scheme is aimed at all formats of audiovisual production (film, television, games), irrespective of the mode of distribution.<sup>2</sup> Such lack of differentiation between film and television—a consequence of the fact that both are digital media that can be distributed variously and similarly—is novel in Greece, as well as the fact that state support for production is granted not with an assessment of quality, but through a system of points based on financial criteria (Galanis 2019). These conditions have enabled new players, some of which are major stakeholders in digital distribution (such as Pay TV companies), to access state funds previously unavailable to them for production, thus offering state support for professionally created local content intended for both established (Pay TV) and new (over-the-top, or OTT) modes of circulation.

While the granting of terrestrial television licenses and the introduction of the cash rebate scheme have dominated audiovisual policy and public debates in Greece since 2015, Pay TV made the headlines in June 2016 when the introduction of an additional 10% tax on the cost of subscriptions (as a further means of amassing funds for the indebted state) was considered the key reason for the drop in subscriptions that followed (Mandravelis 2017). Pay TV represents a significant part of the Greek audiovisual media ecosystem and is especially relevant to the discussion of the online circulation of content because these companies (which are based in Greece, but often involve transnational ownership and capitalization) have been leaders in the introduction of new technologies and applications—including OTT on-demand services.

There are currently four Pay TV companies in Greece. The market leader is Cosmote, a subsidiary of Deutsche Telekom founded in 2009, with a 45% market share in 2018 (over 500,000 subscribers) (Gorelik 2019: 24). Cosmote is also the largest Internet provider by number of subscriptions (48% of the mobile and 47% of the fixed markets) (Gorelik 2019: 3). The oldest subscription TV service is Nova TV,

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<sup>2</sup>The belated introduction of such a widely adopted policy across Europe was partly due to precrisis complacency, and partly to the inability to do so during the crisis since it involved public spending. While generally applauded, the generous amount set aside by the government for this scheme (€75 million over three years) has raised questions with regard to the overall direction of the government's audiovisual policy, when compared to the paltry amounts granted to the Greek Film Centre (€3.5 million annually, of which about €1.5 million can be invested in production).

currently available only via satellite, and owned by ISP Forthnet, with a 42% market share in 2018 (Gorelik 2019: 24). In 2018, with the advent of FTTH, both these companies launched separate OTT services. Two other ISPs, originating in mobile phone companies, Vodafone and Wind, entered the Pay TV market in 2017. In April 2018, Wind Hellas launched an IPTV subscription video service, Wind Vision, which also marked the introduction of the Android TV box in the Greek market, and made 60 channels, including Netflix, available to subscribers.

Pay TV in Greece (as elsewhere) is usually sold as part of a bundle that includes fixed line and broadband service, and sometimes mobile phone, too (Gorelik 2019: 19). By definition, OTT services are not dependent on line rental or a Pay TV subscription; but in one case (Cosmote Go), it is also offered for free to Pay TV subscribers, thus blurring the boundaries between the two services. By the end of 2017, Pay TV penetration in Greece was 22%—a drop of 2% from 2015 largely due to an increase in prices caused by the introduction of the 10% tax on Pay TV mentioned above. By 2018, 86% of Pay TV was via satellite (DTH) while Internet-based subscriptions (IPTV) were 14% (Gorelik 2019: 10, 24). These numbers reflect the stability of satellite technology in comparison with the low-speed broadband that was the standard until recently. With the increased adoption of faster broadband and especially FTTH, satellite connections are predicted to fall to 78% and broadband-based connections to rise to 18% by the end of 2023 (Gorelik 2019: 24).

Pay TV film and series content consists mostly of foreign fare, reflecting the overall landscape of film distribution in Greece (Papadimitriou 2018). Pay TV companies have supported Greek cinema by contributing to co-productions (in return for screening rights), but this is a very small percentage of what they show. It is mostly access to prestige (foreign) film or television series not available on Free TV (as Pay TV precedes Free TV in the value chain), and/or exclusive sports channels (depending on the package on offer) that make subscriptions attractive, rather than exclusive Greek content—although this may be about to change, as I will show below. Examples of the foreign prestige content available on Pay TV include Disney's *Star Wars* franchise (Cosmote TV) and HBO's *Game of Thrones* (Nova). Of Cosmote TV's six channels dedicated to cinema, only one shows Greek films—and these are mostly old films from the 1950s and 1960s rather than recent productions. Of its 14 documentary channels, one—Cosmote History—is dedicated to Greek history and culture and offers a mix of foreign and Greek productions (including some in-house co-productions). Nova has no dedicated channel for Greek cinema, but does promote its cinematic co-productions on its Web site.

Signs of change, in terms of the inclusion of exclusively Greek content on the Pay TV channels, emerged in 2019, as both Cosmote TV and Nova produced television series. Nova produced the low-budget but well-received comedy *Mamades sto Pagaki* (*Mothers of the Bench*), which was launched on one of its Pay TV channels in February 2019 (and was already in its second season by May 2019). Cosmote TV's series (released in summer 2019) is an eight-episode crime thriller entitled *Eteros Ego-Hamenes Psyches* (*Alter Ego-Lost Souls*), a spin-off from a controversial popular



film.<sup>3</sup> While Nova has not announced plans to make the series available on its OTT service, Cosmote will premiere the series on its Pay TV and make it available on its OTT service the next day (Vima 2019).

As opposed to Nova's comedy series, Cosmote TV's thriller is an expensive project (by Greek standards), costing almost €100,000 per episode—35% of which is from the cash rebate scheme (Galanos 2019; Vima 2019). While these first-ever investments in the production of television series by Pay TV channels are the result of a combination of factors, including expanded state support and increased competition (partly as a result of the launch of their new OTT services), they are signs that the Greek screen media ecology is becoming more diverse and OTT digital distribution is playing a part in this.

The discussion so far has illustrated the current structure of the audiovisual industries in Greece by pointing to the key sources of funding, policies and major players that shape the field. OTT provision remains a very new phenomenon in Greece, which is still far from being able to create an autonomous virtuous cycle of production and distribution. The absence of a public debate on matters of digital distribution in Greece arguably reflects the fact that it is as yet unclear how online distribution could be monetized in the Greek context, and who would benefit from this process. While the launch of Netflix in the country in January 2016 triggered a number of press reports that presented its services and/or assessed its value for Greek audiences (Netflix 2017; Goranitis 2017), other reports on global developments in the streaming market (e.g., the upcoming launch of the Disney + streaming service), rarely if ever make references to local developments. The question of whether online distribution will help stimulate local production (and how) is almost never directly asked—with the exception of the possible investment of Netflix in the country, which I will return to below.

Furthermore, as Greek films and television series have not generally been exportable (aside from very few exceptions, including to diasporic audiences), online distribution is mostly considered just a different way for reaching the same (i.e., national) audiences, rather than reaching out to transnational markets that could bring more returns. This may partly explain why the EU's policy on the Digital Single Market (DSM) has not been widely debated. In other European contexts, such as the Czech Republic, the DSM has met with opposition from local distributors who see it as undermining their export business (especially to neighboring Slovakia) while also potentially disrupting import opportunities (e.g., by increasing the prices of premium Hollywood content) (Szczepanik 2017)—which could also affect Greek distributors. Against the background of the overall invisibility of digital distribution in Greek audiovisual policy and public discourse, in the section that follows I will examine four of Ramon Lobato's eight "elements" (2019: 8) of Internet-distributed

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<sup>3</sup>Sotiris Tzafoulias' original film *Eteros Ego (Alter Ego)* (2016) raised controversy and was withdrawn early from cinemas due to its similarity to a real-life crime. Prior to this, it was well received by audiences and critics alike and garnered a number of festival awards in Greece. After being withdrawn from formal circulation, it was uploaded by the director for free access on YouTube. To date, it has reached almost 1.9 million viewings, a very high number for a contemporary Greek film.



television (those that relate to professionally produced content) and thus map out the OTT options currently available to Greek consumers. In doing so, I will “disaggregate the ecology of services, platforms, set-top boxes and apps” that constitute Internet-distributed television in Greece as of summer 2019 (Lobato 2019: 7), while highlighting the challenges and opportunities for the development of a globally connected and digitally enabled local ecosystem of production–distribution–consumption.

### **10.3 The Distribution Ecology of Over-The-Top (OTT) Video on Demand (VOD) Provision in Greece**

According to a recent marketing report, by the end of 2018, 8.66% of households (380,000 subscribers) accessed OTT content, reflecting a “quite underdeveloped” market—implicitly in comparison with other European markets (Gorelik 2019: 25). The report does not specify exactly which services this figure refers to and how the information is sourced, but given that it mentions OTT “subscribers” the figure seems to refer to SVOD services. The introduction of Netflix, the largest globally available SVOD company, in Greece in January 2016 was a major milestone for the familiarization of Greek audiences with OTT services. It was the first non-Greece-based multinational company offering an extensive catalogue of foreign films and television series at an affordable price and across different devices. Initially, Netflix provided very little content subtitled (or dubbed) into Greek and therefore targeted only fluent English language speakers, thus having limited appeal. The company, however, rapidly invested in localization, and by December 2017, 70% of the then-available content was subtitled or (less often) dubbed, and a Greek menu made navigation much easier for Greek audiences. During the launch of the localized services in December 2017 in Athens, the company’s representatives made the rather exaggerated claim that “subscription levels are [proportionately] on a par to those of the American market” and publicized their goal to reach one in three broadband-enabled households by 2023 (Goranitis 2017). Netflix does not release territorialized subscriber information, but estimates about the number of subscribers to the end of 2017 have varied from 20,000–25,000 subscribers (or fewer) to over 60,000. While specific data are unavailable, it is fair to assume that localization and the increased visibility of the company will help Netflix further expand its base.

As a widely recognizable brand with a new business model for Greek audiences, Netflix is in many ways the flag-bearer in terms of OTT provision in Greece. At the time of writing, its catalogue did not include any Greek produced content (although it has included a few Greek films in the past), while the prospects for local investment by Netflix have not as yet materialized. Netflix notwithstanding the ecology of digital distribution in Greece is becoming more complex as an increasing number of players have started circulating locally produced content, with various attempts to monetize their services. The following discussion explores the way in which Lobato’s first four (out of eight) elements manifest themselves in Greece.

At the top of Lobato's list is "online TV portals such as BBC iPlayer (UK), ABC iView (Australia) [...] provided by major broadcast networks and cable/satellite providers through websites and apps" that "typically include combination of new-release content, library content, and live channel feeds" (Lobato 2019: 8). All Greek television channels—public and private—have Web sites with a layout very similar to the description above. The content available is free-to-access and consists of a mix of information and entertainment programs produced in-house. There are also many trailers, as a key function of the Web sites is promotional, aiming to attract prospective viewers toward television viewings, which is the main source of the companies' income (via advertising returns, which are in turn dependent on ratings). These Web sites carry mainly information and light entertainment content (e.g., news programs and chat shows) rather than television series, but the exact proportion of these kinds of content depends on the profile of each company.

The Greek state broadcaster ERT's Web site includes live streaming of the copyright-owned sections of its three terrestrial channels, as well a select catch up service featuring recently aired programs (under the "Web TV" tab). It also provides free access to an extended digitized archive of the broadcaster's content dating back to 1974. In December 2017, the company launched ERT Hybrid, a service that enables users to access ERT's Web site on their Smart TV screens; **to-date ERT Hybrid does not provide additional content.**

ERT and most Greek terrestrial channels provide their online content for free (with some advertisements) in Greece and across Europe. The only channel that attempts to monetize access to its content outside Greece through a SVOD model is Antenna, which requires international (or rather diasporic) audiences to pay for content via local Pay TV providers in different countries. Otherwise, the content of Antenna's Web site is similar to that of the other channels (news programs, catch up and archival services) and includes a number of television series produced by Antenna. Two additional tabs, however, reveal the channel's attempts to branch out to a younger audience. The first is a portal called Netwix (a play on "Netflix"), an "autonomous" free Web channel launched in 2014 that is nonetheless part of the Antenna Group's operations (Netwix 2019). Addressed to young audiences with "exclusive content," Netwix consists of five channels/tabs (comedy, series, life, entertainment, tech and games) and claims to have streamed 40 Web series with more than 2500 episodes. The content is free but often has an advertising dimension. For example, the Web series *Kanto Fantastika (Do It Fantastically)*, which consists of five-minute-long episodes, is an extended product placement for the soft drink Fanta. Production values of this content are generally very low, with the style often emulating amateur videos by YouTubers (from which the channel's content can also be accessed). In 2014, Antenna also launched a "strategic partnership with VICE Media, the global youth media brand and digital content studio" (Antenna Group 2019). Antenna co-produces Greek Vice content, which is then distributed via the channel's Web site (under the "Vice" tab), Vice's own portal, as well as more widely on YouTube.

Of the remaining four channels' Web sites, Skai is mostly geared toward information, while Alpha offers the largest catalogue of television series available for free. The offerings reflect the profiles of the terrestrial channels, as Skai has traditionally

had high ratings for news and information programs (and for long-running reality TV shows such as *Survivor* and *Power of Love*), while Alpha has consistently invested in television series. Star and Open Beyond are roughly similar in terms of their balance between information and magazine videos, and television series. The extent to which any of these Web sites are actually used by audiences is not known, and given their lack of exclusive content, occasional difficulty in navigating, and the frustration of not knowing in advance whether something is fully available or just a trailer, it is fair to speculate that they may not be as attractive propositions as they could be. However, as will be discussed below, all these companies also have dedicated channels on YouTube that show both the number of subscribers and viewings, giving us an indication of popularity.

Lobato's second category, subscription VOD—a curated library of content for a monthly subscription—is an emerging market in Greece with only a few recent start-ups. In terms of global players, the domination of Netflix has been already noted. A number of other global companies, such as Filmbox Live and Mubi, are also accessible from Greece, but their presence is marginal. Amazon Prime is widely known, but has a smaller catalogue and much less subtitled content than Netflix and is therefore less favored. Furthermore, as Greece scores low in terms of e-shopping, the appeal of Prime as a means for speedy delivery of physical items is lost on Greek customers. Two other services listed on the European Audiovisual Observatory's Mavise database as SVOD available in Greece—Fox and National Geographic—are accessible via Pay TV subscriptions and not via standalone OTT services (European Audiovisual Observatory 2019).

Aside from these global offerings, both the private terrestrial channel Antenna and the two leading Pay TV companies, Cosmote and Nova, have launched OTT SVOD portals. Antenna launched the first such service in Greece, Ant1Next, in March 2017. Priced at €2.99 a month, it offers access only to Antenna-produced content, with the main attractions being that subscribers can watch episodes before they air on Free TV and without advertisements. Catch up of recent programs and an archive tab providing older content are also included. Self-styled as the Greek Netflix, Ant1Next is available on any Internet-enabled device and targets younger viewers. Like all of Antenna's on-demand content, it is available only in Greece via the Web site and requires a subscription via a different Pay TV company for international access.

Incentivized not only by Netflix's presence in the Greek market, but also by the expansion of FTTH networks, the two leading Pay TV providers launched the OTT services Cosmote Go (August 2018) and NovaFlix (April 2019) that do not require a Pay TV subscription. The profile of the two services is rather different: Cosmote Go offers a number of packages with 45 channels that can be variously combined, while NovaFlix attempts to emulate the Netflix model both in name and approach. Both companies offer preferential access to their OTT services for their Pay TV subscribers: Cosmote Go is provided for free to them, in addition to the services they pay for, while access to NovaFlix can be purchased at a reduced price by Nova's Pay TV subscribers. Cosmote Go's packages are organized by genre (documentaries, films, sports), each with a different monthly price, while Greek and children's films are only available to OTT subscribers who buy at least two other packages. NovaFlix's

model is much simpler, offering access to a curated selection of films and television series, as well as content from US Fox TV channels, for a flat fee. As opposed to Ant1Next, which sells in-house produced (and therefore Greek) content, Cosmote and Nova's OTT services offer predominantly foreign content (reflecting the profile of their Pay TV services). While it is too early to assess their success, market forecasts project that the number of overall OTT SVOD subscribers in Greece will double by the end of 2022, reaching 13.39%, or over 650,000 households (Gorelik 2019: 25), a growth rate that presumably takes into account such local initiatives.

Transactional VOD, or "pay-per-view," Lobato's third element, refers to services that offer purchase or rental per item, with iTunes and Google Play being the top global players. While it is not possible to measure national access, all major global firms are available from Greece (including Google Play, iTunes, the Microsoft Store, and the Vodafone Video Club). Japanese global giant Rakuten became available in Greece in 2019, while UK-based FilmDoo, a service that specializes in independent and world cinema, has the most extensive catalogue of Greek films available on a non-Greek TVOD service. Pame Odeon, a portal for Greek films provided by one of Greece's largest film distribution companies, mainly provides access to its own content, but has arguably failed to make a big impact on the market.

Lobato's fourth and last element discussed here refers to hybrid TVOD/SVOD/free portals (e.g., YouTube, Youku, Tencent) that offer both free content (user uploaded and professional) and premium content (via subscription or direct purchase). Of these, YouTube is widely used in Greece for free streaming—both for amateur uploads and professional content. As noted above, all terrestrial and Pay TV channels available in Greece have YouTube channels, which provide a significantly greater amount of content than that available on their Web sites and/or via broadcast.<sup>4</sup> For example, public broadcaster ERT's 16-episode television adaptation of Stratis Myrivilis' anti-war novel *I Zoi en Tafo* (*Life in the Tomb*), which was first aired on the terrestrial channel in January and February 2019, is freely available on YouTube but not on ERT's Web site. The series is the first production by the public broadcaster since the 2009 crisis, and—at €100,000 per episode—one of its most expensive ever. While its critical reception was overall positive and the series was hailed as a rare example of quality Greek TV, ratings were disappointing. This is also reflected in its YouTube viewings: four months after being uploaded on the platform its viewings ranged from 106,000 (for the first episode) to 11,000 (for the last), a respectable but certainly non-blockbusting number. The fact that this prestige series is available on YouTube for free and with very few if any advertisements (and if there are, they are easy to bypass) indicates the public broadcaster's difficulty in marketizing its content and suggests a significant problem in creating a virtuous cycle between distribution and production, especially when involving quality content. It also reflects the fact that as the public broadcaster's main source of funding is state subsidy (provided mainly by a levy on electricity bills), additional monetization of content is not a high priority.

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<sup>4</sup>Film distribution companies (such as Feelgood, Tanweer and Odeon) also have YouTube channels, but these consist only of trailers of released or soon-to-be-released films in cinemas and have no additional content (nor a large following).

In contrast, Cosmote (which runs three YouTube channels: Cosmote, Cosmote TV and Cosmote What's Up) produces original content that also serves as (self) advertising. One example is the mini-Web series *S'agapo, M'agapas (I Love You, You Love Me)* available on Cosmote's main YouTube channel, which consists of eight three- to four-minute-long episodes uploaded between February and March 2019 that clearly function as advertisements for Cosmote services. The Web series is a spin-off of the 2000–2002 television series of the same name (and with the same actors), which was then produced by private channel Mega, which had, in turn, been a remake of the late 1990s French Canadian original *Un Gars et une Fille*. In a period of just over three months, the number of viewings of the Web series ranged from over 1.6 million viewings (for the first couple of episodes) to over 250,000 (for the last two).

With a similar promotional aim combined with the ambition to inspire young people (especially girls) to become involved with new technologies, Cosmote produced the 50 min-long Web movie *Robogirl*. The story focuses on a young girl who crash-learns robotics in order to fix her brother's homemade prize-winning robot that she broke accidentally. During a period of five months, the film received over four million views on YouTube and rave reviews. Both these examples show that Cosmote's investment in online-only production is seen as a direct means for company promotion. While limiting the scope of what content could be thus supported, the number of viewings indicates significant audience engagement—although it is not clear whether this leads in practice to viewers choosing Cosmote products over their competitors, and whether, therefore, it directly benefits the company. It certainly helps raise its profile as a producer of innovative audiovisual content in the Greek context, however.

While the other four elements suggested by Lobato (2019) as constitutive of Internet-distributed television will not be discussed here since they refer predominantly to the informal economy, I will briefly introduce them as they are widely used in Greece, especially since the informal online economy is deemed to be particularly active in Greece (Papadimitriou 2018). These are (1) video-sharing platforms, such as Daily Motion, “which offer a range of free, ad-supported amateur and professional content, often informally uploaded” (Lobato 2019: 8); (2) informal on-demand and download services, such as BitTorrent or Popcorn Time; (3) unlicensed live, linear channel feeds; and (4) recommender and aggregator applications, such as JustWatch.

The above analysis of the four formal ways in which professionally produced audiovisual content could reach Greek audiences online (without a Pay TV subscription) by the middle of 2019 shows that, until now, there were no successful direct ways of monetizing such online services. Terrestrial channels use their Web sites mainly as hooks for attracting audiences to their main broadcast free-to-air programs, which are funded via advertising. The three SVOD services recently launched are all offshoots of larger companies, suggesting that their financial viability relies on ownership of the copyright for content (Greek for Ant1Next, and mostly foreign for Cosmote Go and Novaflix), while their success remains to be seen. The recent investment in original content by the parent companies of the latter two suggests that the commercial viability of online distribution is gaining ground, but, as discussed

earlier, the new productions were funded from other sources (the companies' more established activities and from state funds via the cash rebate scheme) rather than directly from OTT revenues. TVOD provided by Greek distributors is extremely limited, while, for professional television (and film) companies, YouTube functions mainly as a means for promotion rather than direct monetization (with the exception of a few advertisements) and therefore does not drive growth.

## 10.4 Conclusion

In considering whether online distribution has opened up opportunities that can help stimulate audiovisual production in Greece, it has become clear that online distribution alone, and specifically OTT services, is too new and undeveloped to generate enough financial returns to trigger a virtuous circle of demand leading to more local production. The question is whether the small size of the market and, in particular, the fact that Greek content has limited scope for exportability, restricts its prospects (as has been the case with traditional film and television distribution), or whether the ease of global access that digital distribution affords opens up new opportunities for wider visibility and for healthy financial returns.

Considered as part of the broader ecology of policies, players and practices at both the local and national levels, it is very likely that online distribution will gradually play an increasingly significant role in the cycle of supply and demand for audiovisual content in Greece. It is unlikely, however, that the cycle will become sustainable and lead to high enough returns from subscriptions to OTT platforms to fund production in the way in which this has become possible (and the only means for further growth) for global services such as Netflix. The small size of the Greek market, the lack of exports and the very strong competition from global companies that make available very well capitalized and promoted content make it nearly impossible for Greek audiovisual media to liberate themselves from their position in the digital periphery. The vulnerabilities of a "small media system," including limited resources, a small audience and advertising market, and the pervasive presence of foreign media products, point to the need for regulatory intervention, without which it is difficult to sustain a healthy media ecology balancing global imports with locally produced content. But regulation has its limits too, as it functions within a globally competitive system, which, as pointed out by Puppis (2009) and Trappel (2014), depends on decisions made and practices originating elsewhere, and which serve supranational interests. The Digital Single Market and the cash rebate schemes are two such examples—the first being European in scope and not necessarily serving small markets' interests, and the latter involving different countries competing to attract foreign production (and therefore cash).

To the extent that regulators can act autonomously, their challenge is to create the conditions for a diverse and quality-oriented local production that can circulate online (although not necessarily only online) and—ideally—be relevant and popular enough to break through national boundaries and reach transnational audiences. The

current mix of policy and practices suggests that more such opportunities may open up—whether or not Netflix, after all, invests in Greek-language productions. So far, only a few exceptional films from Greece have had global visibility. The Greek audiovisual industry will reposition itself outside the global digital periphery only if and when the technological, narrative and financial possibilities afforded by digital media allow it to create content and reach audiences beyond the country.

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