[ES] Spain’s Audiovisual Sector in 2025: Key Findings from the Third Annual Audiovisual Hub Report

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The third annual report from the Spain Audiovisual Hub, published in October 2025, provides a comprehensive overview of the legal frameworks shaping Spain’s audiovisual industry. The Spain Audiovisual Hub is a strategic initiative launched by the Spanish Government in 2021 as part of the national Recovery, Transformation and Resilience Plan. Its objective is to position Spain as a leading European centre for audiovisual production, distribution and innovation.

As part of its mandate, the Hub publishes an annual report to track the sector’s evolution, assess the impact of public policies and provide strategic guidance to industry stakeholders. The 2025 edition is the third in this series, following reports released in 2023 and 2024. As the sector continues to grow and attract international investment, legal developments are playing a central role in ensuring regulatory compliance, promoting sustainability and supporting innovation. The key legal areas addressed in the report are: investment obligations, public funding criteria, sustainability and gender equality requirements, intellectual property management and the regulation of Over-the-top (OTT) platforms.

Investment obligations

The reform introduced by the General Law on Audiovisual Communication has led to a measurable rise in investment obligations for audiovisual service providers, including both traditional broadcasters and on-demand platforms. This legal requirement to allocate a percentage of annual revenues to the financing of European works has significantly increased investment in Spanish productions, particularly in fiction and animation, reinforcing the financial commitment to cultural diversity and strengthening the domestic production ecosystem. The clarity and enforceability of this requirement make Spain a reliable jurisdiction for international co-productions.

The report also describes efforts to improve legal certainty for foreign investors. These include streamlined administrative procedures, enhanced access to funding and reinforced guarantees for intellectual property rights. These measures are part of a broader strategy to position Spain as a competitive and secure destination for audiovisual investment.

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Public funding criteria

Public funding for audiovisual content in Spain is governed by legal conditions established by the Institute of Cinematography and Audiovisual Arts (ICAA). The report outlines how eligibility for grants and subsidies increasingly depends on compliance with sustainability, diversity and territorial impact requirements. Producers must demonstrate adherence to environmental protocols and gender equality standards to qualify for support.

This trend reflects a broader European movement towards conditional public financing.

Sustainability and gender equality requirements

The report emphasises the integration of sustainability into legal and contractual frameworks. Spain has embedded sustainability requirements into funding criteria and production contracts. Environmental impact is increasingly measured and considered in funding decisions and contractual obligations.

Gender equality is also addressed through legal mechanisms. Funding agreements and co-production contracts increasingly include clauses requiring minimum thresholds for female participation in creative and leadership roles. Legal professionals are responsible for drafting and enforcing these provisions in accordance with national and EU standards.

Intellectual property management

Spain’s growing role in international co-productions has increased the importance of intellectual property (IP) management. The report underscores the need for clear legal frameworks governing rights ownership, licensing and revenue sharing across jurisdictions. Spanish law provides a strong foundation for IP protection, but complex projects require careful legal structuring.

The report also notes the relevance of moral rights, particularly in animation and fiction. Creators seek to maintain control over character integrity and narrative development, especially in projects involving AI-generated content or cross-format adaptations.

Spain’s participation in bilateral agreements and EU initiatives supports the legal circulation of works and the harmonisation of IP standards.

Regulation of OTT platforms

The expansion of OTT platforms in Spain has introduced new legal challenges. The report identifies key areas of concern, including content quotas, protection of minors, advertising transparency and algorithmic accountability. Spain’s legal

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framework, aligned with the EU's Digital Services Act (DSA), imposes obligations on platforms to ensure responsible content dissemination and user protection.

The report also suggests that Spain may consider further legal reforms to address emerging issues such as deepfakes, AI-generated content and data privacy.

Conclusion

The 2025 Spain Audiovisual Hub report highlights the central role of legal frameworks in shaping the audiovisual sector's development. From investment obligations and public funding criteria to sustainability, gender equality, IP management and platform regulation, legal structures are essential to the sector's continued growth and internationalisation.

Informe anual del sector audiovisual en España 2025

https://spainaudiovisualhub.digital.gob.es/content/dam/seteleco-hub-audiovisual/resources/pdf/informe_2025/2025_3er_Informe_Sector_Audiovisual_Espana_Spain_Audiovisual_Hub.pdf

Annual report on the audiovisual sector in Spain 2025

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