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Beyond Netflix and Amazon: MUBI and the curation of on-demand film

Roderik Smits & E. W. Nikdel

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Diversity, access and choice in the era of online film

The emergence of on-demand technology has revived discussions around cultural diversity, democratisation of access and consumer choice across the vast terrain of Film and Media Studies (Tryon 2013; Crisp 2015; Lobato and Thomas 2015; Hagener 2017; Lotz 2017). Central to these discussions is a belief that on-demand technology has resulted in a more diverse range of content across a spectrum of Video-on-Demand (VOD) players, such as Amazon, Netflix and MUBI.

This newfound emphasis on choice and consumer empowerment dovetails with a number of influential and utopian assumptions regarding the changing nature of the media and content industries in the digital age. For instance, writing in 2006, Chris Anderson argued that the new online economy is defined by open and unfiltered access to an abundance of choice (Anderson, 2006). As a result, he declared that niche and specialised content with otherwise limited distribution opportunities would experience a new lease of life online. Indeed, no longer hindered by the spatial constraints of the physical market, Anderson presented a portrait of boundless optimism where newfound opportunities to distribute and access specialised content would result in a more diverse media landscape. In response, this widening of choice is seen to have an enriching effect on the dynamics of audience taste as consumers venture beyond their comfort zone in the pursuit of new cultural experiences. Anderson is by no means alone in presenting this optimistic portrait of a new media landscape, although he does best encapsulate the utopian sentiment and disruptive rhetoric that has come to define the broader perception of on-demand technology.

Despite the dominant nature of this utopian discourse, various commentators have argued against the notion of open access. For some, despite the obvious potential for VOD technology to disrupt the restrictions of the physical market, many of those problems are seen to persist online in one form or another. For instance, Tryon (2013) in *On-Demand Culture* highlights how a number of discreet industry practices, such as data-capping, geo-

blocking and digital rights management can limit the freedom of media circulation. Lobato (2009, 169) also challenges the utopian rhetoric of change and disruption by providing a critical discussion that engages with the 'structural constraints of online content and issues of audience access and equity'. In a similar fashion, Knight and Thomas (2011) highlight how a number of issues, such as content rights, membership schemes and audience awareness severely limit the range of content available for consumers. These and other such issues result in Crisp's (2015, 56) assessment that despite the utopian narrative of change and disruption, 'this veritable smörgåsbord of content is not universally available, nor is it presented in an unmediated form where audiences are free to pick and choose the content that interest them'. In contrast, then, to the dominant theme of disruption, these such arguments reflect a growing wave of scepticism across Film and Media Studies. Indeed, through a critical engagement with online distribution, a number of scholars have shown how the digital landscape is perhaps less disruptive than often suggested (Caldwell 2003; Dhoest and Simons 2013; Van Esler 2016; Nikdel 2017). Whilst acknowledging some of the disruptive potential and impact of on-demand technology, these scholars largely demonstrate how a number of entrenched patterns and practices which have long defined the physical media market have been relocated – rather than subverted – in somewhat new and interesting ways. This paper contributes to this growing voice.

Our focus is on the online market for specialised film. We adopt the definition of specialised film as proposed by the British Film Institute, involving 'those films that do not sit easily within a mainstream and highly commercial genre', such as independent, world cinema, documentary, vintage and festival films (British Film Institute 2016). The online market for specialised film has yet to be analysed in depth (Smits et al. 2018). Perhaps understandably, the likes of Netflix and Amazon have tended to dominate specific discussions of VOD platforms reflecting their growing influence at the forefront of the evolving subscription-VOD (SVOD) market. What these various operators have in common, however, is an emphasis on contemporary mainstream content at the centre of their catalogues. In keeping with the theme of continuity, this has led some to argue that the catalogues of leading operators like Netflix and Amazon resemble the orientation of Hollywood studios and popular television channels (McDonald and Smith-Rowsey 2016; Hagener 2017; Lotz 2017).

Alongside the development of those powerful players, a range of smaller, boutique operators have emerged to champion specialised content. Some, like the horrorplatform Shudder, focus on particular genres, while others like MUBI and the BFI Player present a broader portfolio of 'classic' and specialised films

which are seen to have historical and cultural importance. These players differentiate themselves from the likes of Netflix and Amazon by establishing a distinctive identity where refinement of choice, the expertise of taste judgements and, certainly in the case of MUBI and the BFI Player, the appeal to a discerning and highbrow clientele take precedence. Whilst this specific approach to the delivery of specialised content has developed in recent years, it was preceded by a longer period of trial and error. In various ways, the historical development of the specialised SVOD platform, MUBI, which constitutes our focus for the remainder of this paper, is characteristic of the way the specialised VOD market has evolved.

MUBI: the pioneering VOD platform

Since their inception in 2007, MUBI has branded itself as a pioneering and innovative platform with a global presence in international markets. In particular, their business is defined by a strong commitment to promoting specialised film and enhancing the diversity of online film culture. They received, and continue to receive, public funding from the lead support institution for film in Europe, Creative Europe, to increase the circulation of specialised and European film online. For instance, they were awarded €669,000 in 2017 and €891,000 in 2018 by the UK office of Creative Europe (Creative Europe Desk UK 2018).

In order to respond to the challenge of promoting specialised film in a crowded and somewhat volatile market, their business model has undergone radical change over the course of their brief history. Indeed, after an initial period of offering a large catalogue of specialised film (in the thousands), they refined their model and launched a new and curated SVOD service that only ever allowed access to a rotating collection of 30 films at any one time – what we would call a 30 films in 30 days paradigm. Given the novelty of this approach, it represents a valuable case study with which to trace and explore the issues of choice, empowerment and the binary of disruption and continuity which characterises the on-demand landscape.

Throughout this paper, we chart the historical development of MUBI with the purpose of analysing their business model and exploring their role as cultural gatekeeper and tastemaker. How has MUBI developed over the last 10 years? What is their current business model and how do they support specialised and niche films? What role does curation play in delivering the ‘MUBI experience’? And how do they respond to the changing nature of the film distribution business? In addressing these questions, we intend to show how MUBI has been at the forefront of developing a new market, whilst also

arguing that the platform's strategy is rooted in an underlying practice and philosophy that closely aligns with the traditions and practices of linear and physical media delivery formats. This is particularly clear when exploring how the company's emphasis on curation parallels with the traditions of repertory theatrical cinema exhibition. Our research is informed by trade press publications and newspaper articles about MUBI, as well as content analysis of their VOD platform. We draw on secondary interviews in the media with MUBI's Managing Director Efe Cakarel and Vice President Bobby Allen. They represent MUBI at film festivals and industry conventions, providing a useful insight into the philosophy and practices that shape the service. In addition, we consider Nikdel's (2017) detailed interview with the former Co-head of Marketing and Brand at MUBI to further supplement such information. While we provide details about MUBI's subscribers base, we are less attentive to their economic performance. Instead, we focus on social and cultural factors, situating their business model and curatorial practices within a wider, historical backdrop that reveals more about the shape and direction of their VOD service.

The paper starts with a brief history of MUBI's business development to analyse their commitment to specialised and niche films in the past and present. We subsequently expand on this analysis through a discussion of MUBI's role as cultural gatekeeper and its curatorial approach to film programming. In drawing parallels between MUBI's business model and repertory theatrical cinema exhibition, we will demonstrate how MUBI's online strategy is rooted in common practices associated with repertory film programming, reinforcing the theme of continuity, rather than outright disruption. We further develop our analysis by analysing MUBI's recent commitment to acquiring films directly as a distributor and relate this strategy to discussions around the evolving nature of media distribution.

A brief history of MUBI and their business activities

It was 8 years ago in 2007. I was sitting in a café in Tokyo. I wanted to watch a particular [Asian] movie, 'In the Mood for Love', by Wong Kar-wai but I could not find a [VOD] service that allowed me to watch it – and here I was in the third largest film market in the world. The consumer experience I started to observe was already shifting at the time. We were already watching long-form content TV series on YouTube. And yet in a place like Japan where the broadband speed was incredibly high, [and] people were really media savvy and device savvy, there was not a single platform that I could watch a movie [on]. So I started looking at the opportunity (Efe Cakarel quoted in Walsh 2015).

The statement above highlights a frustration towards the limited availability of films during the early development of the online market. Fuelled by new conceptions of what online media distribution could achieve and the signs of shifting audience behaviour in the digital age, creative entrepreneurs such as Cakarel responded to the utopian notion that films and media content should be readily accessible on an 'anytime, anywhere' basis. In response to this need, MUBI launched in 2007, initially under the name The Auteurs, as an information-sharing platform for a global audience of online cinephiles. The platform was developed to inform the public about the latest 'quality' auteur films from across the world. Some historical and cultural context was also supplied in order to establish how these films relate to important film traditions and influences from renowned directors and acclaimed films from the past. From the outset, MUBI acknowledged the importance of building a global film community. They created an online film database and invited their followers to contribute with ratings, reviews and self-produced lists or charts. In addition, they created an online blog to inform about films released at international festivals. Their focus on promoting film culture through user engagement and social networking was critical to establishing the company's initial growth.

Having developed a modest yet global film community, their business activity expanded in 2009 with the official launch of their VOD platform. In order to underline their commitment to film history and to secure access to collections of esteemed film directors, they established strategic partnerships with the US distributor The Criterion Collection and the French distributor Celluloid Dreams, both known for their investment in global art-house cinema. Such partnerships paved the way for further collaborations with international distributors, as Cakarel noted in 2009: 'For the future, we conceive [of] The Auteurs as an open platform with a broad set of partnerships globally. The vision is no less than to become a global cultural hub for cinema' (Quoted in Fileri 2009).

In an effort to expand and develop the company, MUBI soon started experimenting with both transactional-VOD (TVOD) and SVOD business models. Writing in January 2011, trade observer Barraclough (2011) noted that MUBI was offering 1,800 films spread across different countries around the world. However, because distribution rights are often sold on a territory-by-territory basis, actual numbers in individual countries were lower than this figure would suggest. Although MUBI enhanced consumer choice by widening access to a range of specialised films that were previously inaccessible, their viewing figures and revenues were too low, as Allen (cited in Pham 2017) notes.

It soon became clear that their financial model was unsustainable, not least since a SVOD catalogue requires substantial financial investment to license a large number of films, as Cakarel explains: 'In the beginning, we wanted to be like Netflix, but the unit economies of an "all-you-can-eat" site is [sic] very capital intensive' (Cakarel quoted in Kenny 2017).

In response to such economic pressures, MUBI developed a new and innovative online business model that deviates in various ways from the dominant discourse of audience empowerment, enhancement of choice and the democratisation of access that characterises the common perception of the digital landscape – and which also, rather interestingly, characterised Cakarel's experience as outlined above. This decisive shift in strategy resulted in the birth of MUBI, as he recalls: '... how do you create a compelling experience? If you can't get 10,000 titles, how about a limited selection?' (Cakarel quoted in Kenny 2017).

Given their newfound emphasis on a refined selection of films, MUBI decided to focus specifically on the SVOD market, introducing their new business model in 2012. As already established, this new and existing model only ever provides access to 30 films at any one time. Every day, a new film replaces another once it has featured on the platform for 30 days, creating a revolving catalogue of content. As Cakarel implies, this new business model was, in essence, borne out of economic necessity. Indeed, burdened with the economic pressures of maintaining a large catalogue of content, MUBI was able to alleviate those concerns by only ever having to license each and every film for a 30-day period, resulting in a maximum of 365 films a year. In addition, MUBI's 30 films in 30 days paradigm also derives from Schwartz's (2004) influential notion of the 'paradox of choice'.

Released in 2004, Schwartz's book *The Paradox of Choice* paints a portrait of conflicting human behaviour in the face of 'endless' choice. Here, the expansion of choice that characterises today's consumer culture acts like a form of paralysis as the multitude of options serves to restrict human agency. As a result, choice is seen to hinder our capacity to make an informed decision. Despite the promise of consumer autonomy and empowerment, there is evidence to suggest that the expansion of film and television content online carries the same threat as outlined by Schwartz. For instance, 'Consumer research suggests that a typical Netflix member loses interest after perhaps 60 to 90 seconds of choosing, having reviewed 10 to 20 titles (perhaps 3 in detail) on one or two screens' (Gomez-Urbe and Hunt 2015, 2). In response, Netflix has developed an algorithmic system that recommends content to its members according to their taste patterns and viewing preferences. This results in a

rather uneasy tension as ‘Netflix’s brand identity centers on notions of user choice, [yet] its algorithms work to actively negate choice’ (Arnold, 2016, 59). So, at a time when on-demand technology is supposed to subvert the need for cultural gatekeepers restricting and mediating choice, the push-oriented nature of Netflix’s model serves to reinforce the value of gatekeeping practices, albeit in slightly new and less traditional ways. Indeed, this is not to say that Netflix and other such services directly replicate the restrictive model practiced by scheduled and linear channels of content delivery. This does, however, reflect the somewhat contradictory nature of VOD as operators, such as Netflix, seek to expand the spectrum of choice whilst also suppressing such choice as a means of sustaining consumer engagement.

Despite this conscious move towards the narrowing of choice, Cakarel has been openly critical of the Netflix model: ‘Think about your Netflix experience and how frustrating it is – how long it takes you to find a film that you want to watch’ (Cakarel quoted in Barraclough 2016). For Cakarel, this sense of frustration is symptomatic of the broader on-demand landscape, arguing that the current culture of on-demand access means ‘we are drowning under a deluge of content [. . .]’ (Cakarel quoted in Sawers 2014). He further notes that the volume of content online is resulting in a ‘paradox of choice’ (Cakarel quoted in Barraclough 2016). It is within this context that MUBI’s emphasis on curation and refined choice emerges as a marked form of resistance to the model of choice and supposed autonomy.

As already suggested, the on-demand landscape has seen a revival of gatekeeping practices in an attempt to counter the threat of frustration that comes with the expansion of choice – what Ellis (2000, 171) labels ‘choice fatigue’. In particular, there has been a renewed emphasis on the value of curation as a means of mediating choice, although Robinson’s (2017, 22) term, ‘choosetorial’, more accurately defines the type of automated and algorithmic service practiced by Netflix and others. This renewed emphasis on curation is epitomised by the practice and philosophy of MUBI. What marks MUBI as such an interesting source of study is how the platform has managed to secure its position in the competitive online market whilst consciously deviating from the narrative of disruption that has come to define the popular perception of on-demand culture. Indeed, MUBI can be better defined by its relationship with past modes and traditions of moving-image exhibition than by any sort of effort to radically redefine the present and future of content delivery. This is not to say that MUBI displays no signs of disruptive practice. For instance, their subscribers are granted access to a greater range of choice when compared with scheduled linear models of media delivery, whilst they are also given the

relative freedom to consume such content on a range of media devices at a time and place most convenient to them. Even so, MUBI's curatorial practice provides a compelling case for the persistence of older models and practices in a supposedly disruptive digital environment of audience empowerment. In particular, this sense of historical continuity, rather than outright disruption, is most evident when comparing MUBI's curatorial approach to content delivery with the long-standing traditions of theatrical repertory cinema exhibition, as we will explain further below.

Curating the online film experience

Despite popular claims of consumer autonomy, we have already seen how the algorithmic service of Netflix performs a gatekeeping function by narrowing the breadth of content and mediating choice for the consumer. MUBI strengthens this trend by imposing a more restrictive model of cultural gatekeeping where subscribers are only ever granted access to a maximum of 30 different films at any given time. Their conscious move towards the restriction of choice appears more in keeping with the nature of theatrical cinema exhibition and scheduled television broadcasting, as opposed to offering excessive choice and encouraging audiences to arrange their own programming choices. This parallel with theatrical cinema exhibition is further strengthened when considering MUBI's emphasis on thematic programming.

MUBI regularly arranges their content around certain social trends or cultural themes, such as retrospectives of filmmakers, screenwriters or actors, curated seasons of relevant works to coincide with prestigious international festivals like Cannes or Venice, and diverse collections to mark world events or international holidays, like the 7 Women season to celebrate International Women's Day. It is this emphasis on thematic programming that supports Hagener's (2017) claim that MUBI mimics the curatorial traditions of 'cinemathèques and film museums'. Cakarel even makes direct reference to the influence of repertory cinema exhibition when discussing the platform's approach to programming,

We programme in a fairly classical manner; like a traditional independent cinema we might run a Fellini retrospective over a month or when a director wins Cannes, we'll celebrate by screening their previous work. But we're also incredibly nimble with our programming so we can be reactive to current events, [such as] when an icon passes on or if it's Stanley Kubrick's birthday we [can] screen a film that makes sense. For us, the programming is really about creating context and backing up our choices; why is this film interesting? (Cakarel quoted in Cortvriend 2014)

As implied in the closing part of this statement, MUBI's programming strategy not only mirrors the long-standing tradition of repertory or 'independent' cinemas to arrange their content thematically. Importantly, MUBI also emphasises the need to support their programming choices through the cultivation of context. For this reason, MUBI's catalogue is accompanied by a number of curatorial features designed to supplement the content.

Every film is accompanied by the 'Our Take' feature (see Figure 1). Eschewing any sort of expository synopsis, this feature provides an intellectual statement on the film, offering a brief but evocative interpretation of its artistic, social, historical or topical significance. It might make reference to a film's renewed topicality in light of certain social or cultural events, or to its stylistic approach and significance in the history of 'film art'. Whatever the angle, 'Our Take' serves two crucial functions. Firstly, in keeping with the traditions of specialised and independent film culture, it reinforces MUBI's role as a trusted tastemaker and cultural advisor. We might say that it represents MUBI's very own seal of approval, imposing the platform's own notion of 'good taste' by canonising those films and filmmakers deemed worthy of inclusion in the pantheon of 'great film art'. Secondly, it serves an educational purpose, providing MUBI members with a contextual frame of reference to better understand and appreciate the film – a lens through which to view and interpret the work.

MUBI's binary role as tastemaker and educator is further strengthened by their digital publication, Notebook, which comprises a range of features, reviews, interviews, festival reports, video essays and analytical commentaries. It provides a sweeping review of international film culture with a binary focus on reviving film history and surveying the course of contemporary film. Through such an engagement with film-related discourse, their commitment to serious film commentary can be seen to mirror the type of critical rigour long practiced by established publications and mainstays of specialised film culture, such as *Cahiers Du Cinéma* and the BFI's *Sight and Sound*. In fact, their efforts to reform the critical perception of a number of much derided contemporary action filmmakers back in 2013 – a movement dubbed 'vulgar auteurism' – clearly, and consciously no doubt, evokes the revisionist spirit of *Cahiers'* pioneering critics (Sayad 2015).

Notebook also plays an important role in delivering the curated service that distinguishes the MUBI brand. For instance, a number of features often coincide with

Figure 1. Screenshot of Red Lights (2012) on the MUBI platform, including the Our Take feature. Taken 30 October 2018.

MUBI's programming choices, such as the 'Close-Up' strand which offers a detailed analysis of the films screening on MUBI. The following extract from a piece on Abel Ferrera's *King of New York* (1990), which screened on the platform back in June to July of 2017, reveals the intellectual tone and analytical nature of the writing,

A reverse shot reveals the scope of the prison, as the guards are dwarfed by the huge amount of negative space off-balancing the composition. The barred windows throw shards of natural light onto the ground as in a painting by Vermeer. This use of expressionistic techniques to subtly mythologize his protagonist brings to mind the master German filmmaker F.W. Murnau (one of Ferrera's claimed heroes) a debt made clear when a character is later seen watching *Nosferatu* in an empty theatre. As Tag Gallagher notes, this sequence implicitly references and reworks the opening scenes of Murnau's film, with the prison standing as the tomb from which *Nosferatu* awakes, and Frank similarly finds himself as a nocturnal creature thrust into a strange new world from which he is fundamentally alienated. (Slaymaker 2017)

As evidenced here by this short extract, Notebook serves the same binary purpose as the 'Our Take' feature. Firstly, the use of technical language ('reverse shot' and 'composition') along with the reference to Murnau (and the artist Vermeer), displays a certain level of cultural capital needed to command the role of tastemaker and cultural gatekeeper. This evident display of knowledge serves to strengthen the trust and sense of loyalty that MUBI members invest in the platform. In effect, this plays a crucial role in the cultivation of MUBI's cultural brand – its reputation as a trusted source of 'good taste' and a refined destination for both budding and seasoned cinephiles. Secondly, Notebook serves an educational purpose by placing the film within a particular context for its members. In the case above, MUBI members are encouraged to scrutinise Ferrera's expressionist style – through the lens of Murnau – and how this speaks to the lead character's internal development. In creating this contextual frame of reference, MUBI not only informs the viewing experience, but also articulates the reasons behind the programming choices by speaking to the film's social, cultural or historical significance. With this in mind, both the Notebook and the 'Our Take' feature can be seen to mirror the function of programme notes that accompany curated seasons of film at repertory exhibition venues like the BFI Southbank in the UK.

What emerges from this analysis is that MUBI's emphasis on curation not only serves to guide consumers through an 'endless' sea of content, but also reflects a sort of cultural mission to refine the standards of online content delivery. For instance, during Nikdel's (2017) discussion with MUBI's former Co-head of Marketing and Brand, it became clear that the Latin source of curation, meaning 'to care', plays an integral role in shaping the platform's philosophy. In a climate where convenience and excessive choice can breed a culture of apathy, MUBI conversely strives to build a 'house for cinema' where films are nurtured and a sense of pride and passion for the medium is restored. With this in mind, curation and the practice of gatekeeping become the channels through which MUBI defines its resistance to the disruptive principles of excessive choice and so-called consumer autonomy.

As already established, there is also an economic reality behind MUBI's curatorial approach, since films are licensed for a period of 30 days only. At the same time, MUBI's commitment to showing a maximum of 30 films at any given time poses a particular challenge to the retention of subscribers. Whilst this restrictive model is promoted as a competitive advantage in a market of excessive and overwhelming choice, it puts particular pressure on the platform to programme an appealing range of content. Here, MUBI's emphasis on curation takes on renewed significance. Whilst the range and quality of programming remains important, the real value resides in the way the content is curated. Features like 'Our Take' and the Notebook drive MUBI's cultural mission to refine the standards of online content delivery, but they also support the sustainability of MUBI's economic model by stimulating excitement and interest towards the content which, in turn, increases the platform's chances of retaining subscriber engagement. Reinforcing the theme of continuity, rather than outright disruption, we could say that the sense of consumer loyalty that MUBI fosters can be seen to mirror the type of trust that consumers have long placed in broadcasting channels, such as the BBC, and in local repertory or 'independent' cinemas as gatekeepers and curators of 'good taste'. More than simply a cultural mission, then, MUBI's curatorial practice underpins the structural and economic integrity of the platform.

MUBI's acquisition and distribution strategies

Having analysed MUBI's curatorial approach in some depth, it is worth reflecting further on their acquisition and distribution strategies. They perform an important gatekeeper role by exerting control over the process of enabling or disabling access for films (Smits 2016). Although films on MUBI are shown for a short period of 30 days, their rotating offer still always amounts to 365 films every year. Table 1 demonstrates that their specialised offer of 30 films

on 25 October 2018 involved vintage and contemporary titles that were part of a repertoire of world cinema and themed programmes. Whilst the catalogue shows a diverse selection of films from around the world, 50% of their films on that day were US productions. Themed programmes pay homage to filmmakers such as Kevin Jerome Everson and Alfred Hitchcock. MUBI also engaged with thematic programming to coincide with the London Film Festival and Halloween, reinforcing the topicality and seasonal nature of their film selection.

In order to explain how the search and acquisition process for such films is organised, we draw on information extracted from an interview conducted by the Nordisk Film & TV Fond with MUBI’s Vice President, Bobby Allen (Pham 2017). As with any SVOD platform, the organisation of the film acquisition process is complicated by the fact that online distribution rights for some films are available for specific territories rather than the global market. For this reason, MUBI’s SVOD offer is inevitably tailored to individual distribution territories.

Allen notes that they have over time developed multi-year distribution deals with Hollywood studio distributors, such as Sony Pictures and Paramount Pictures, and minimajors, such as StudioCanal and Icon Productions, allowing their programmers to select films from large collections. In addition, their acquisition team attends international film festivals and sales markets to negotiate deals with more specialised players, like sales agents and independent distributors, or sometimes directly with producers. For instance, Allen notes that they work with European sales agents, such as Gaumont, MK2 Films and The Match Factory, to acquire global distribution rights of films to show on their online platform. According to Allen, their distribution deals are usually based on revenuesharing agreements, whereby financial rewards are reliant on the performance of films

Table 1. The MUBI catalogue in the UK market (25 October 2018).

Film	Year	Country	Themed programmes
1. Spicebush	2005	United States	Made in America: The cinema of Kevin Jerome Everson
2. The Curse of Frankenstein	1957	United Kingdom	We are what we fear: A Halloween Series
3. Trees Down Here	2018	United Kingdom	Direct from the London Film Festival

4. Episode of the Sea	2014	Netherlands	None
5. Yours in Sisterhood	2018	United States	Direct from the London Film Festival
6. It Follows	2014	United States	We are what we fear: A Halloween Series
7. The Wolf House	2018	Chile	Special Discovery
8. Three Quarters	2015	United States	Made in America: The cinema of Kevin Jerome Everson
9. Ears, Nose and Throat	2016	United States	Made in America: The cinema of Kevin Jerome Everson
10. The Glorious Acceptance of Nicolas Chauvin	2018	France	Direct from the London Film Festival
11. Theatre of War	2018	Argentina	Direct from the London Film Festival
12. Gomorrah	2008	Italy	None
13. Red Lights	2012	Spain	Double Bill: Rodrigo Cortes
14. Buried	2010	United States	Double Bill: Rodrigo Cortes
15. Cinnamon	2006	United States	Made in America: The cinema of Kevin Jerome Everson
16. Winchester '73	1950	United States	None
17. Crimes of Passion	1984	United States	None
18. In the City of Sylvia	2007	Spain	None
19. Frenzy	1972	United Kingdom	Alfred Hitchcock: A Ticking Bomb
20. We Own the Night	2007	United States	None
21. Have a Nice Day	2017	China	None
22. Quality Control	2011	United States	Made in America: The cinema of Kevin Jerome Everson

23. I Love You Phillip Morris	2009	France	None
24. In the House	2012	France	None
25. Cottonpickin' Chickenpickers	1967	United States	byNWR (restored films)
26. Marnie	1964	United States	Alfred Hitchcock: A Ticking Bomb
27. 10.000 KM	2014	Spain	None
28. Antiviral	2012	Canada	None
29. The Island of St. Matthews	2013	United States	Made in America: The cinema of Kevin Jerome Everson
30. Automatic at Sea	2017	United States	None

Source: MUBI website

on MUBI, rather than upfront licensing fees: 'We bear the costs of encoding and bringing the films out to the audience, report quarterly and send a cheque' (Allen cited in Pham 2017). However, they are prepared to pay an upfront fee for some contemporary films: 'Sometimes we do license fee deals whereby we pay local distributors a set license fee for a 30-day transmission' (Allen cited in Pham 2017).

The MUBI team operates from their head office in London, but some key representatives are also based in New York, Berlin, Vienna and Melbourne to support their presence in international markets. Allen reveals that their subscriber base has grown to 100,000 over a period of 5 years, while their community of (non-paid) registered members has grown to eight million globally by May 2017. He also reveals that the UK and the US stand out as markets where most of their subscribers are based. Given the importance of these markets, MUBI works with programmers focussing on three geographical areas: 'we have three programmers, one for the UK, one for the US – our biggest territories – and one for the international/rest of the world' (Allen cited in Pham 2017). These programmers are confronted with the reality that online distribution rights are not always available for global markets. They navigate a course around such complexities by maintaining relationships with a great many companies, large and small, in the marketplace. Such relationships

enable them to select from a broad and diverse range of films, while at the same time protecting the quality of their programming.

MUBI has also developed strategies to establish further growth and enhance their SVOD catalogue. Writing in 2014, Nelson (2014) already argued that abundance of choice in the online market imposes intense pressure on SVOD providers to deliver a range of good content in the fear that consumers could easily migrate between platforms. Like Netflix and Amazon Studios, MUBI has therefore decided to move into the wider business of distribution. They operate as an 'all-rights' distributor for some films to be able to supplement their SVOD catalogue with new and exclusive content which has not yet been released elsewhere. Such integrated distributor-exhibitor operations are critical to exercise more control over distribution (Smits 2017). In the case of MUBI, it allows them to release films in independent cinemas and on their own SVOD service at the same time.

Rather than acquiring rights for distribution in markets globally, like Netflix, they are more selective and typically acquire films for the UK market or the US market only. As such, they work in a similar way to how Amazon operates as a distributor. The Portuguese trilogy *Arabian Nights* (2015) was the first film MUBI acquired as a distributor. Trade observer Radford (2016) notes that the UK distribution rights were acquired together with the UK distributor New Wave Films. They released the first volume of the trilogy in April 2016. After this collaboration with New Wave Films, MUBI acquired a select number of films as a stand-alone distributor. They particularly focused on films shown at leading international festivals, such as Cannes and Berlin, to demonstrate a strong affiliation with their carefully curated festival line-ups. This includes the Cannes festival films *The Blue Room* (2014), *The Park* (2016), *The Happiest Day in the Life of Olli Mäki* (2016) and *Lover for a Day* (2017), as well as the Berlin festival films *Baden Baden* (2016), *I, Olga* (2016), and *The Son of Joseph* (2016). It is worth noting that those films have not been selected for the most prestigious and competitive 'Main Competition' programmes of Cannes and Berlin, but for special programmes such as *Un Certain Regard* or *Directors' Fortnight* in Cannes, and *Forum* or *Panorama* in Berlin. Such films are less likely to be picked up by international distributors than Main Competition films. More recently, however, MUBI acquired the UK distribution rights of *On Body and Soul* (2017) and *Félicité* (2017), which were both selected for the Main Competition at Berlin. More importantly, *On Body and Soul* was awarded the prize for Best Film, 'the Golden Bear', and *Félicité* the Silver Bear Grand Jury Prize.

It is precisely this focus on critically acclaimed festival films that aligns with MUBI's broader objective to support films with distinctive cultural values. MUBI usually supports those films by organising a modest theatrical cinema release and an exclusive 30 days release on their platform before opening up wider. Their expansion to distribution requires a financial investment in terms of film acquisition and releasing, but it is clear that those films add cultural and promotional values to MUBI's viewing platform, while the films themselves are introduced to a broader film audience.

MUBI and the evolving digital landscape

In less than a decade, MUBI has evolved into a global on-demand platform for specialised and niche films. Whilst they are operating in the shadows of powerful market leaders Netflix and Amazon with increasingly integrated distribution and exhibition operations, we have demonstrated that MUBI is, in certain respects, developing similar business strategies to exert more control over distribution. Integrated distribution and exhibition operations allow MUBI to determine which specialised (festival) films reach the marketplace and how they circulate to particular audiences via VOD platforms and traditional means of exhibition via cinemas and ancillary markets. This need for more control over distribution by MUBI and other VOD operators is also a direct response to traditional staggered release patterns, in which the VOD release window is subordinate to the theatrical cinema release window rather than equal and attributive. Indeed, releasing films simultaneously in cinemas and online on MUBI is important to draw attention and stimulate audience interest in the MUBI platform, but this strategy is not necessarily disrupting the business of cinema exhibitors or other VOD platforms since they typically invest in festival films with otherwise limited distribution opportunities. In other words, their objective is enabling distribution for films across various windows and platforms, rather than disabling such access. Bobby Allen reinforces this point, arguing that there is a degree of flexibility since they 'negotiate windows and exclusives on a film by film basis', whereby they are attentive to the fact that cinema exhibitors and other VOD platforms might have specific preferences (Allen cited in Pham 2017). He mentions the distribution of *The Happiest Day in the Life of Olli Mäki* (2017) as an example. In the UK, they worked together with specialised company Curzon to release the film in 10 of their cinemas and at the same time on their online TVOD platform, Curzon Home Cinema. They negotiated an exclusive release via these Curzon exhibition outlets for a period of 4 weeks, with the release on MUBI following thereafter. Such flexibility in release strategies is important to create opportunities to work together with independent cinemas and other VOD operators in order to reach audiences

beyond MUBI, while at the same time showing films on their own platform in quick succession. MUBI's distribution operations are thus supportive to a specific category of festival films, underlining their objective to bring critically acclaimed films to the attention of specialised audiences.

Beyond the importance of participating in the wider business of distribution, we have also argued that MUBI's rise to relative prominence is best understood as a reflection of the broader duality between disruption and continuity that is currently driving and defining the on-demand landscape. In terms of disruption, the very story behind the inception of MUBI – as told in the words of Cakarel in this paper – epitomises the way in which changing audience behaviours have unsettled entrenched patterns of media delivery and consumption. Indeed, Cakarel's frustration at not being able to access and either stream or download a particular film on-demand is symptomatic of the way consumer expectations have steered towards a model of user empowerment. In response, VOD players like MUBI have tailored their service towards an instantaneous model of delivery where consumers can access content with unprecedented speed, convenience and mobility.

In terms of continuity, however, MUBI also serves to remind us that the dominant themes of choice and open access are not radically and profoundly altered with the move online. For instance, we have seen how their SVOD model actively restricts the diversity of choice in order to counter the very real threat of 'choice fatigue' (Ellis 2000, 171). Whilst this level of restriction is somewhat unique in the online market, it nonetheless embodies the growing need for gatekeeping practices in a digital landscape. As discussed earlier, this is also apparent with the algorithmic approach taken by Netflix and Amazon where choice is tamed and the apparent burden of autonomy is alleviated. This sense of continuity is reinforced by the way MUBI curates their content, consciously replicating the long-standing practices of repertory theatrical exhibitors. Through an emphasis on education, context and the imposition of 'good taste', MUBI endorses the view that media consumers remain reliant on entrenched gatekeeping practices to help them navigate the media landscape.

As mentioned from the outset, the narrative of change and outright disruption has come to dominate the discourse on VOD technology. This utopian mindset, however, paints a rather distorted portrait of the on-demand landscape. The reality, as discussed here in specific relation to MUBI, is much more complex. As we continue to research how VOD technology is shaping the present and the future of content delivery and media consumption, we must be mindful of the complex ways in which the on-demand landscape disrupts certain traditions, whilst also adopting particular practices and trends

associated with classic models of linear media delivery. Whilst MUBI is only one player in a crowded market, this discussion has attempted to demonstrate how a more complex analysis of the digital landscape can enrich our understanding of on-demand technology. More research is needed in order to deepen public knowledge around VOD and the burgeoning market of content delivery. Indeed, there remain a number of issues which warrant further attention, such as content rights, consumer behaviour and the evolving relationship between theatrical exhibition and on-demand distribution. Whilst such research might vary in scale and approach, particular scrutiny should be given to the ways in which the binary theme of disruption and continuity are closely interwoven in the ongoing development of on-demand technology.

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