



# Press conference

18 February 2026



# Online video content creation

The *Autorité de la concurrence* examines the relationship between creators, audiences, commercial partners and platforms and calls on platforms to improve transparency and vigilance in their commercial relations with content creators

Opinion 26-A-02 of 18 February 2026

# Outline



1. Context, methodology and scope
2. The online video content creation sector in France
3. The relationship between content creators and platforms
  - The substantial market power of the major platforms
  - Structural dependence of content creators on platforms
  - Rules for sharing advertising revenue unilaterally set
  - Terms of relations with creators unilaterally set by platforms



## PART 1

# Context, methodology and scope

## A RAPIDLY GROWING SECTOR

Video content creation **involves the production of video material and its distribution to the public, usually through an online platform that hosts the content and acts as an intermediary between content creators, audiences and, where relevant, advertisers.**

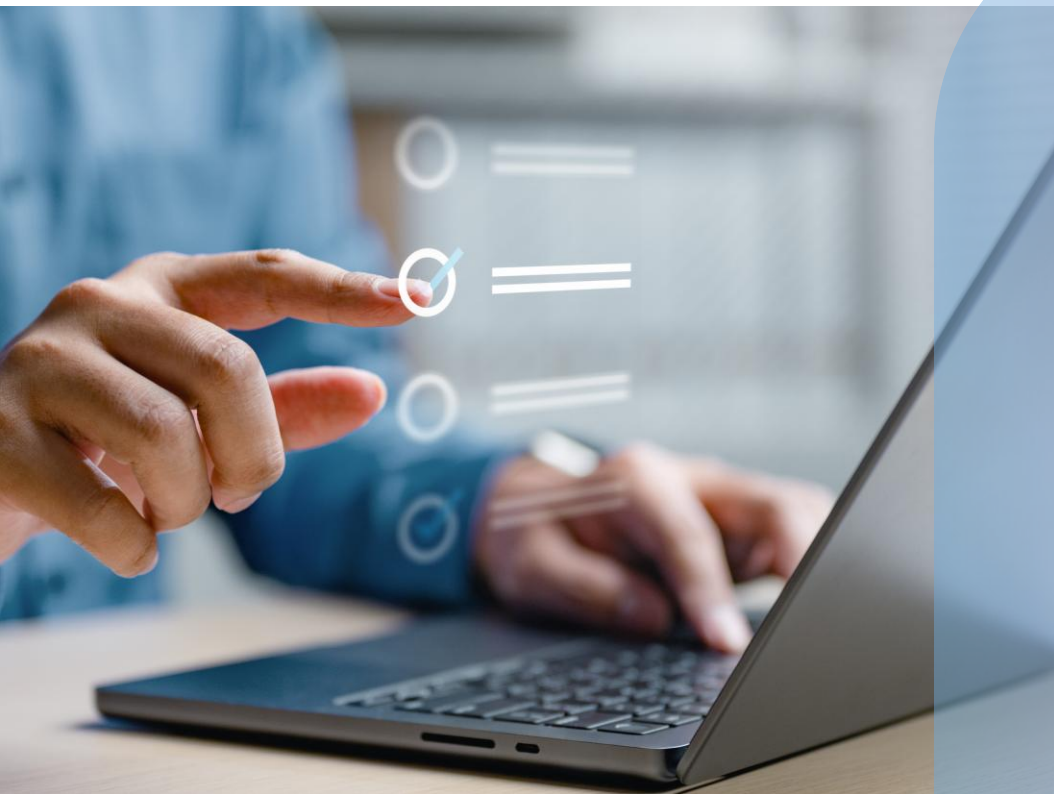
The French content creation economy:

- **€6.8 billion in 2025** (Coherent Market Insights estimation).
- **Compound annual growth rate (CAGR) of 24.2%** between 2025 and 2032 (Coherent Market Insights estimation).

The video content creation sector has grown rapidly over the past 15 years:

- **More than 150,000 professional content creators (2024).**
- **70% of French people over the age of 15 watch videos** on social media or video-sharing platforms (2024).
- **Highly diverse supply:** mostly very small-scale creators, alongside a small number of high-profile creators.





**Public consultation** (industry stakeholders)

**Questionnaire** (content creators; more than 200 responses)

**Questionnaires and hearings** (stakeholders)

**Hearings before the Board** of the *Autorité de la concurrence*:

- Platforms: Instagram, TikTok, Twitch and YouTube
- High-profile content creators: Dr Nozman, EnjoyPhoenix, Gaspard G, HugoDécrypte, Inoxtag, Maghla, McFly & Carlito, Squeezie and ZeratoR
- OpenAI
- French Union of Influencers and Content Creators (UMICC)

## CONTENT OF THE OPINION

The *Autorité* **examined competition between content creators**, in terms of both audience and commercial advertisers.

It also analysed the development of **generative artificial intelligence (AI)** and its impact on the sector.

Lastly, the *Autorité* **examined, from a competition law perspective, the relationship between video content creators and the other players in the sector, including commercial partners, talent agencies and platforms.**





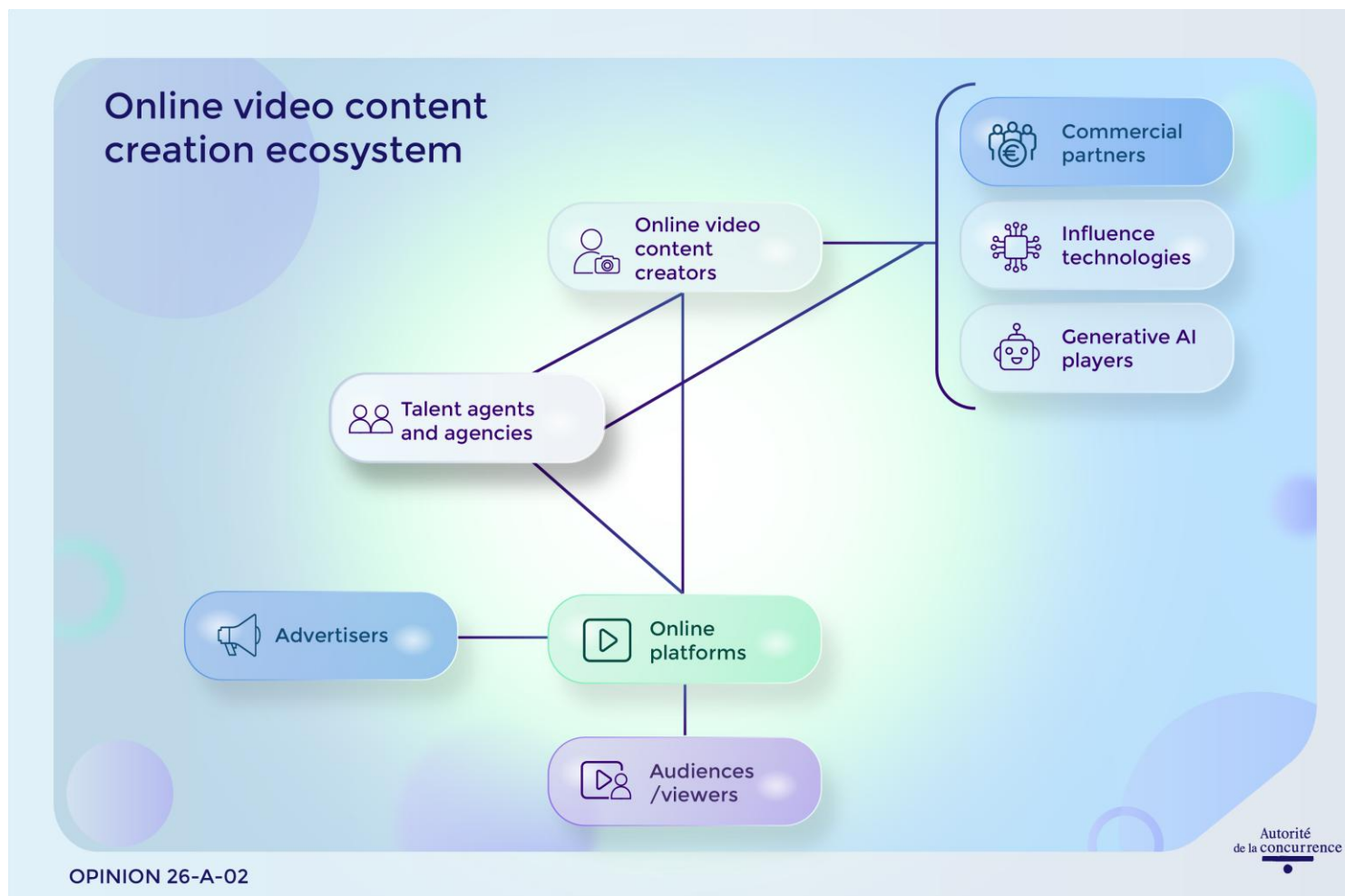
## PART 2

# The online video content creation sector in France



### STRUCTURE OF THE SECTOR

Online video content creation involves the **production of video material and its distribution to the public**, usually **through an online platform** that hosts the content and acts as an intermediary between content creators, audiences and, where relevant, advertisers.



## THE ONLINE VIDEO CONTENT CREATION SECTOR IN FRANCE

### A MULTI-SIDED MARKET

The sector brings together, via platforms, several groups of economic agents, each with an interest in engaging with one another.

This structure has significant implications for the sector, in particular due to the **existence of direct – and especially, indirect – network effects, which can be substantial.**

### INTERDEPENDENT SIDES

To maximise revenue, a platform must maximise its audience by attracting the most engaging content. To do so, it needs to offer creators the largest possible audience and the best monetisation for their content. Consequently, analysing one side of the sector also requires considering the other two sides.





## PART 3

# The relationship between content creators and platforms

### THE SUBSTANTIAL MARKET POWER OF THE MAJOR PLATFORMS

#### PLATFORMS ARE ESSENTIAL FOR CREATORS

**Platforms are essential to content creators' activity.** Conversely, **a given content creator represents only a marginal share of a platform's revenue**, in particular if the creator has a moderate-sized audience.

#### A CONCENTRATED SECTOR WITH HIGH PLATFORM-SIDE ENTRY BARRIERS

The sector is **highly concentrated around a few key platforms** (YouTube, TikTok, Instagram and Twitch), reinforced by **high platform-side barriers to entry**. Platforms have significant market power over content creators.

#### LIMITED SUBSTITUTABILITY BETWEEN PLATFORMS FROM CREATORS' PERSPECTIVE

From content creators' perspective, there is **limited substitutability between platforms** (formats, preferred themes, specific cultures and expertise and imperfect overlap of audiences).

**Platforms are more complementary than competing.**



## THE RELATIONSHIP BETWEEN CONTENT CREATORS AND PLATFORMS

### STRUCTURAL DEPENDENCE OF CONTENT CREATORS ON PLATFORMS

The asymmetry between content creators and platforms enables platforms to **unilaterally determine the contractual terms governing their relationship with each creator**. In a survey conducted by the *Autorité*, **80% of content creators confirmed their bargaining power with platforms is weak or very weak**.

In particular, the *Autorité* noted that platforms can:

- unilaterally set rules for advertising revenue-sharing
- unilaterally set the terms governing content visibility



### ADVERTISING REVENUE-SHARING RULES UNILATERALLY SET

#### The existence of revenue-sharing mechanisms at platforms' discretion:

- **No obligation for platforms to have a revenue-sharing mechanism**
- Instagram does not have an advertising revenue-sharing mechanism

#### Revenue-sharing rules imposed, with no possibility to negotiate individual terms:

- **Remuneration subject to certain audience** (number of subscribers and/or views) or **activity** (volume of content) **thresholds**
- **Limited, or inexistant, individual bargaining power for creators**

#### Opaque implementation procedures:

- **Platforms have sole control over the implementation of revenue-sharing rules** (e.g. how content views are counted, definition of the advertising revenue base)
- **Lack of visibility regarding future revenues** for creators

The *Autorité* urges platforms to ensure their commercial relations with content creators comply with **competition law**, in particular Articles 102 TFEU and L. 420-2 of the French Commercial Code prohibiting abuse of dominant position and abuse of economic dependence.

## THE RELATIONSHIP BETWEEN CONTENT CREATORS AND PLATFORMS

### CONTENT VISIBILITY TERMS UNILATERALLY SET (1/3)

#### OPAQUE RECOMMENDATION ALGORITHMS AND MODERATION MEASURES

The visibility of content on platforms is a **crucial parameter in content creators' activity**, determining their ability to reach and retain audiences and thus generate revenue.

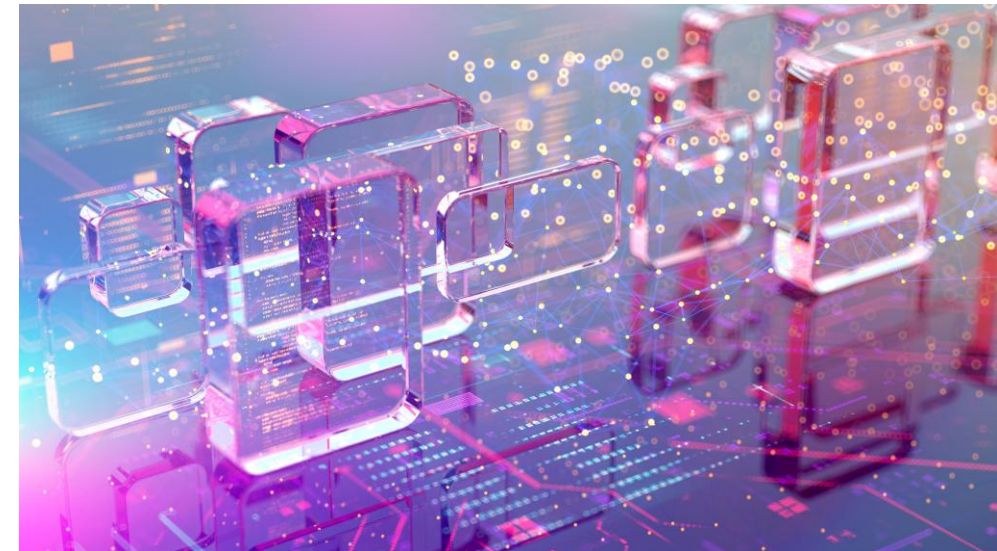
This visibility is determined by **recommendation algorithms and moderation measures**, both of which are fully under platforms' control.

As a result, creators have no real control over how their content is distributed or promoted.



#### COMPETITION RISKS ASSOCIATED WITH RECOMMENDATION ALGORITHMS

- **Promotion of certain content with high potential to generate revenue** through the sale of online ad space.
- **Promotion of content produced with the help of creative tools integrated into the platform environment** and, potentially in the longer term, content fully created by generative AI.
- **Widening of the visibility gap** between promoted content and other content.
- **Giving less prominence to content featuring a commercial partnership between a creator and an advertiser**, in order to encourage the advertiser to maximise its spending on online ad space to the detriment of commercial partnerships.





## THE RELATIONSHIP BETWEEN CONTENT CREATORS AND PLATFORMS

### CONTENT VISIBILITY TERMS UNILATERALLY SET (3/3)

In the absence of negotiations on the terms of content visibility, **the *Autorité* reminds platforms that unfair implementation of algorithmic recommendation rules or moderation measures may raise serious competition concerns** under Articles 102 TFEU and L. 420-2 of the French Commercial Code.

- On the one hand, the *Autorité* recommends that platforms **demonstrate greater transparency in the implementation of their recommendation algorithms**. This transparency should also extend to changes and updates in the functioning of algorithms. On the other hand, the *Autorité* calls for platforms to exercise **vigilance in ensuring transparency in the moderation of hosted content**.
- For the same reason, the *Autorité* urges platforms to mobilise **sufficient human and material resources** so that creators, whatever their profile, can reach platform representatives capable of explaining the reasons for a drop in content visibility or a moderation action sanctioning their content.

