Nostradamus Report 2025

Reality/ Resistance

Johanna Koljonen

Nostradamus Report 2025

Reality/ Resistance

Johanna Koljonen

Commissioned by the Göteborg Film Festival since 2013, the annual Nostradamus Report explores the near future of the screen industries through interviews with industry experts and research.

Report author, media analyst: Johanna Koljonen,
johanna@participation.design

Head of Industry, Göteborg Film Festival: Josef Kullengård,
josef.kullengard@goteborgfilmfestival.se

Head of TV Drama Vision, Industry Relations, Göteborg Film Festival:
Cia Edström, cia.edstrom@goteborgfilmfestival.se

Editorial team: Johanna Koljonen, Josef Kullengård, Cia Edström,
Emma Caviezel

Editorial assistant: Liisa Nurmela

Graphic Design: Gustaf Normark, Carl Gustaf Grafik

Göteborg Film Festival is the leading film festival in the Nordics, celebrating its 49th edition January 23–February 1, 2026.

Artistic Director, Göteborg Film Festival: Pia Lundberg,
pia.lundberg@goteborgfilmfestival.se

CEO, Göteborg Film Festival: Mirja Wester,
mirja.wester@goteborgfilmfestival.se

Göteborg Film Festival Office:
Olof Palmes Plats 1
413 04 Göteborg, Sweden
+46 31 339 30 00
info@goteborgfilmfestival.se
www.goteborgfilmfestival.se

The Nostradamus Project is founded and run by the Göteborg Film Festival. Project partners include BoostHBG, German Films, Kulturakademin, and Lindholmen Science Park, with additional support from Creative Europe MEDIA, the Region Västra Götaland, and the Nordisk Film & TV Fond.

Project Partners

BOOST HBG · german films · Lindholmen Science Park · K | KULTUR AKADEMIN

Main Industry Funding Contributors

Creative Europe MEDIA · VÄSTRA GÖTALANDSREGIONEN · Nordisk Film & TV Fond

Table of Contents

Göteborg Film Festival

With Gratitude

As we present the 12th edition of the Göteborg Film Festival's Nostradamus Report, we begin with thanks.

This year's report, Reality/Resistance, continues to track, analyze, and forecast the near future of a rapidly transforming industry. Real-world crises affect every aspect of the film and audiovisual ecosystem; persistent challenges with business models, audience engagement, and sustainability remain unresolved. In the face of these difficulties, this work reflects an industry that is not paralyzed and resigned, but calling for resistance, resilience, and shared innovation.

Our greatest thanks are always owed to our interviewees, who give generously of their time and perspectives, but should never be faulted for any of our conclusions!

In 2025, we also began exploring new ways to share knowledge and foster collaborative innovation under the banner of the Nostradamus Collective. We are especially grateful to the 30 decision-makers who participated in an intimate fishbowl discussion during the 2025 Göteborg Film Festival. Their insights provided early impulses for this year's work; key findings are captured in an article on our website.

We are also thankful to ACE Producers, with whom we co-hosted an experimental Collective workshop in Zagreb in April. There, 100 producers tackled innovative project development using real-world challenges as creative constraints.

Two long-standing collaborations continue to enrich our work. Our annual report release event is produced in collaboration with the Marché du Film, and a special episode of the Industry Insights Podcast from the Berlinale's European Film Market will be launched shortly thereafter.

We are proud to welcome two new partners this year: German Films, whose involvement strengthens our European outlook and

valuable insight into the German industry; and Lindholmen Science Park, a Göteborg-based innovation hub with strong connections to audiovisual media and cross-industry creativity. Their participation is a significant addition to the project.

To our core partners BoostHBG and Kulturakademin, and to our long-time supporters Nordisk Film & TV Fond, Creative Europe MEDIA, and Region Västra Götaland – we are sincerely grateful for your continued trust and engagement. And to everyone who contributes to the Nostradamus initiative throughout the year – thank you. Your participation shapes this work.

Johanna Koljonen, Report Author, Participation | Design | Agency
Josef Kullengård, Head of Industry, Göteborg Film Festival
Cia Edström, Head of TV Drama Vision, Industry Relations

Special Thanks

Helge Albers, MOIN Film Fund
Simone Baumann, German Films
Sigrid Bersmann, Film i Väst
Guy Bisson, Ampere Analysis
Gunnar Eriksson, Lindholmen Science Park
Tomas Eskilsson, Film i Väst
Guillaume Esmiol, Marché du Film
Liselott Forsman, Nordisk Film & TV Fond
Manu Guddait, European Film Market
Hillevi Gustafsson, BoostHBG
Peter Hiltunen, Kulturakademin
Alyssa Lewin, BoostHBG
Gerhard Maier, Seriencamp
Petar Mitric, Københavns Universitet
Marike Muselaers, Nordisk Film
Bjarke Pedersen, BoostHBG
Ene Katrine Rasmussen, Danish Film School
Silje Riise Næss, Talent Norge
Sten-Kristian Saluveer, Storytek
Andrea Schiefer, German Films
Danna Stern, In Transit Productions
Joanna Szymanska, SHIPsBOY
Kjartan Thordarson, Sagafilm
Jacobine van der Vloed, ACE Producers
Kateryna Vyshnevska, Producer

Summary

1. From Reality-Resistant to Resilient Resistance

Film offers escape from reality, as well as bringing it into focus. To work in film we must be both reality-resistant dreamers and hard-working, agile realists. As the real world and uncertain future encroach on a challenged sector and even our art, we must lean on both strengths to build resilience, increase relevance, and to transform both professional practices and conservative institutions.

2. One World, Different Woes

The impact of complex industry troubles on local contexts varies dramatically, and the lived experiences of our colleagues starkly diverge. Meeting suffering and setbacks with empathy and respect, as we professionally navigate their impacts, requires new skills and processes. To build industry resilience we must engage with policy, and resist the artistically and financially detrimental drift towards isolationism and nation-based competition.

3. Art and the Autocratic Breakthrough

In the next 3–5 years, this industry will resist democratic backsliding or become implicated in it. We must fight restrictions on editorial and artistic freedom, including institutional self-censorship; push back against hateful narratives and populist framings of contentious issues; and proactively create policies, strategies, and tools to protect individual employees, artists and partners from harm. Telling complex stories is resisting dehumanisation.

4. Sunset Hollywood, Hello World

US content remains enormously popular, but its normative position has long been under pressure. “Hollywood” itself may be losing significance as a cultural idea. US media multinationals carefully negotiate domestic political realities, but if alignment with the national project becomes a liability, content production and brand communication in foreign markets may quietly decouple from American soft power. In the next 3-5 years, opportunities for wide-appeal storytelling by local and world filmmakers will continue to expand.

5. Advocating for Film and the Local Industry

The long-term health of both film itself and our local industries depends on the engagement of the popular audience. Taking this seriously requires challenging industry narratives, transforming perceptions in the wider culture, and learning how to talk about our work without sounding entitled or patronising. We can celebrate the love for film already shared by the public and the industry – and tell the story about what they mean to each other better.

6. Rethinking Development

Sustainable work in the sector requires an evolved development process, in which a project's content, focus, and artistry are developed in conversation with its business model and audience design. Traditional development must be better compensated, its frustrating or adversarial elements restructured, and its practices rebuilt with testing at the core. Public investment in development can be a strategy for professional up-skilling and business innovation, especially if insights are shared systematically.

7. What We Know About Getting the Work and the Word Out

We need an industry-wide conversation about how communication, promotion, and marketing actually function today. The work of creating interest or a cultural moment starts early, takes long, and leverages curatorial brands and existing communities. Online audiences should not be understood as people we sell to, but as people we invite to care enough about our work to both show up and to personally promote it in their own networks.

Epilogue: Wonderful Things that Work

The challenging realities we have described can create the impression that getting anything made and seen is impossible – but an abundance of wonderful films and TV shows are performing in the market. Lower thresholds to affordable production are empowering a diversity of voices and approaches. For the established industry this represents hope, inspiration, and a new generation of storytellers.

Interviewed Experts

Katarina Tomkova

Producer, kaleidoscope & Punkchart films

Katarina Tomkova has worked for the Slovak Film Institute during 2009–2015. Since 2015, she has worked on several films acclaimed on the festival circuit, including *Servants* (Berlinale Encounters), *107 Mothers* (Venice IFF – Best Screenplay Orizzonti), *Photophobia* (Venice IFF – Europa Cinemas Label Award at Giornate degli Autori). As a tutor, she collaborates with the MIDPOINT Institute and the Thessaloniki IFF's market Agora. She is an EAVE Producers Workshop graduate. In 2021, she was the Slovak Producer on the Move.

Marianne Furevold-Boland

Head of Drama, NRK (Norwegian Broadcasting Corporation)

Marianne Furevold-Boland is Head of Drama at NRK where she leads the development and production of a wide range of scripted content. As executive producer, she has worked on several of NRK's series, including *Dates in Real Life*, *So Long Marianne*, *Powerplay*, *Exit*, *State of Happiness*. She also played a central role in the international hit *SKAM*, producing the original series and supporting its many international adaptations. With a background in production, writing, journalism, and presenting, she trained as an actor at LIPA in the UK.

Tamara Tatishvili

Head of the Hubert Bals Fund, International Film Festival Rotterdam

Tamara Tatishvili is Head of the Hubert Bals Fund at the IFFR and leads MEDICI – The Film Funding Journey. With extensive experience as an international industry consultant, she has collaborated with IMS Denmark, BOZAR, the European Women's Audiovisual Network, Cannes' Impact Lab, and other leading industry initiatives. Formerly Director of the Georgian National Film Center, she serves on the Cannes Investors' Circle committee, moderates industry events, and was named *Chevalier de l'Ordre des Arts et des Lettres*.

Morad Koufane

Head of International and Young Adult Drama, France Télévisions

Morad Koufane, a Sciences Po Lyon and Paris-Sorbonne graduate, began at the CSA in 1994 before diplomatic roles in New York and Lisbon. He then consulted for global media groups, notably in Qatar. Joining France Télévisions in 2010, he led strategic planning and transformation. Since 2022, he oversees international and Young Adult drama, managing 30+ titles including *Zorro*, *Kabul*, *The Count of Monte Cristo*, and *Drops of God*.

Roman Paul

Producer, Razor Film

Roman Paul co-founded Razor Film in 2002, producing acclaimed art-house and crossover films, TV, and streaming content. His work has earned two Golden Globes, three Oscar nominations, and an Emmy. Previously, he worked in acquisitions for German distributors and Celluloid Dreams Paris. In 2019, he was named *Chevalier de l'Ordre des Arts et Lettres*. In 2021, he co-founded The Creatives, a global production alliance.

Samya Hafsaoui

Screenwriter and Audience Designer

Samya Hafsaoui is a Dutch (screen)writer, actress and journalist. Her work spans all the way from Eurovision to various Dutch TV productions and newspaper articles. She specializes in content for the Young Adult age demographic. Her Tiktok has 95k followers with over 5.5 million likes. Her novel, *36 Vragen* (*en heel veel koffie*), has over 40k reads on Wattpad. She has been part of various writers rooms for Dutch TV-series and is currently working on writing and directing her first feature film.

Ted Miller

Founder, Triangle Management Partners

Ted Miller founded Triangle Management Partners in 2024 after a distinguished career as a talent agent. Renowned for his expertise in television, Ted is recognised for nurturing and promoting top-tier talent. Known for his strategic vision and strong advocacy, he has guided many of the industry's top writers, producers, and storytellers. Before founding Triangle, Ted held senior roles at CAA, including Head of Global Television, where he played a key role in shaping the agency as a talent-packaging powerhouse and bringing diverse stories to the world stage.

Introduction:
The Unknown Future Rolls Toward Us

Johanna Koljonen: Are you thinking of political uncertainty as you plan projects?

Katarina Tomkova: Since it's all unpredictable there's nothing I can solve upfront, but I absolutely think of it. Even more so now that I've done a couple of projects with Ukrainian filmmakers, dear friends, very close to my heart. The funding [is gone], yet there is a significant amount of Ukrainian content, proving that the desire to communicate, to make artistic statements, persists even in the most horrific times. It cannot be silenced.

I always think about what that would be like. Let's really hope that it won't come to it in my country, or in any other country! But I try [to imagine] what I would need in that situation. What I would expect from Europe. This is why I [don't] feel the worst-impacted; filmmakers are struggling, oppressed, challenged in many different ways all around the world.

James Cameron ended his classic *Terminator 2* on a presciently relevant voiceover. "The unknown future rolls toward us. I face it for the first time with a sense of hope, because if a machine, a Terminator, can learn the value of human life, maybe we can too."

The future is particularly unknown right now, and while machine overlords may not be a top-of-mind concern in a time of wars and Trump's tariff fiasco, the reference is to the moment. Many sensible experts are very worried that AI will represent a major threat to humanity within the next 3–5 years. Other equally sensible people, who are much less worried, say the destruction will mostly be to labour markets, and wouldn't happen for 5–10 years anyway.

How do you predict the near future of anything if it requires you to debate whether Sarah Connor was right about cyborgs? You can't. Even without AI, power concentration in the hands of autocrats, oligarchs, and multinational companies is contributing to rapidly decreasing democracy, and rapidly escalating climate change. This causes wars,

famines and migration, as well as trade wars, recessions, and many kinds of every-day suffering. *Bulletin of the Atomic Scientists* has set the Doomsday Clock to 89 seconds to midnight[1].

Where authoritarians take power, violence follows one way or the other. More hot wars and increases in terrorism and cyber warfare are to be expected. The Trump government cuts to international aid are estimated to result in millions of preventable deaths, and to increase, in combination with the gutting of scientific research, the risk of another pandemic. The next one may not, like the previous one, spare our children.

Not all of these things will happen in the next few years; nor to each of us; nor in all of our countries. But some will, and even futures that can't be predicted can be prepared for. You can work on the resilience of your life and your business. Decrease your reliance on fragile systems where you can. Invest in your health; build up buffers of essential supplies that rely on international supply chains; have a plan for inflation, for recession, for stagflation. Practice new skills, build new networks. Hope none of this work will ever have been necessary, but trust that it will always have been useful.

Have an honest conversation with yourself about your job. Whether because of industry changes or an extreme weather event, the day may come where you have to choose between a pay-check and a project, or figure out how to finance and release something outside the traditional structures if you want it to be made at all. If that should happen it is good to have thought about how you rank making a living, making your film, or making it (whether in the sense of "producing" or "succeeding") within the traditional industry. There are no wrong answers.

Many future outcomes can also be prevented; or as it was beautifully expressed in the Terminator story, "there is no fate but what we make for ourselves." Acknowledging what is happening now allows us to offer resistance against what might come next. That quote at the top is, after all, not about evil robots: Sarah Connor's hope is that we

1 Mecklin, 2025

humans may learn the value of human life. When suffering is plentiful, empathy is harder. How do we not shut down? How do we – as humans and filmmakers – resist dehumanisation?

This report has always been political in the sense that macro trends and the health of national democracies matter very practically to the film and TV industry. We like copyright enforcement and need cultural funding, of course, but no sector can be stable without a functioning world economy or the rule of law. When those are at risk, the conversation must change.

It is uncomfortable, like reading this report might be. On every page, the state of the world is either too present, or not present enough. Discussing release strategies for indie film can feel like a complete loss of perspective when filmmakers are being beat up and abducted from their homes. But reflection on the big issues also reminds us that film is necessary, and if you truly believe that storytelling matters, you need to get serious about reaching an audience.

This year's report offers film industry perspectives both personal and professional on what is happening in the world, and what that means for us as filmmakers, colleagues, and people. It also discusses what we know at this point about economic and artistic sustainability in the emerging version of our old industry.

The audience remains at the heart of both societal and industry perspectives. We revisit the eternal question of what constitutes wide appeal, and the urgent question of how to advocate for filmmaking – for the art form and our local industries, as well as the individual works.

We called this report *Reality/Resistance* because that is what it all comes down to. From resisting reality – the inability to see it, denying what it means, assuming everyone's reality is the same – we need to move toward resistance in the opposite sense. It is time to make active choices: to resist impacts, change directions, and stand up against powers that would otherwise decide our realities for us. There is, after all, no fate but what we make.

We hope you find it useful.

ROMAN PAUL

I have tried to learn from people who make films under much more dire political circumstances than I have ever experienced. There will always be narrative arts, regardless of how horrible the circumstances.

I'm in the Academy, and in my group [International Feature Films], 20-something short films from Gaza were submitted this year by Palestine. There were images in them I wish I had never seen, but even with just their phones, people were trying to tell stories not only of the unspeakable suffering, but also about their dreams. That will always exist, somehow.

1.

From Reality-Resistant to Resilient Resistance

Film offers escape from reality, as well as bringing it into focus. To work in film we must be both reality-resistant dreamers and hard-working, agile realists. As the real world and uncertain future encroach on a challenged sector and even our art, we must lean on both strengths to build resilience, increase relevance, and to transform both professional practices and conservative institutions.

Roman Paul: I'm concerned that a world war is looming. Not only for this industry, but in general.

Katarina Tomkova: In Central Europe we see technological innovation, but are also heavily impacted by societal and economic changes. I don't think I've ever talked so much about politics as in the last five or ten years. If you had asked me before, I would have probably said I'm apolitical, and now these subjects are at the top of the list. It really shapes our lives: the climate crisis, the wars, the inflation... And polarisation – wanting to have a dialogue, but not always finding the tools for talking to a person who is removed from your bubble and your values.

This is on my mind every day, because it streams down through everything. Not only the audiovisual industry – any industry. But it influences us a lot, not only in terms of the business, but also in the content we are making, the subjects that we are trying to tackle.

Marianne Furevold-Boland: It's really brutal out there.

In May, 2025, we are on the knife's edge. Commissioning is selective and production volumes optimised. Democratic backsliding, extreme weather, and international destabilisation add pressures to cultural funding and the global economic system. Predicting the future is not possible, even in the limited way industry analysts usually do. Trend lines are projected based on things like fundamental economic dynamics, which are relatively predictable in a rational policy environment. We are not in a rational policy environment.

There is a technical term, the "moron premium[1]", for what is currently happening to US treasury bonds. The effects of Trump's tariffs and other policies have not yet filtered through to the economy, and guessing at specific outcomes is meaningless, but some things can be

1 Mason, 2025

assumed on a general level. Economic uncertainty makes corporations cautious, which adversely affects global advertising markets, which in turn affects media companies. Uncertainty also affects interest rates, which affect everything, while tariffs affect supply chains, costs, markets, and prices. We will all be paying the moron premium before long.

At the time of writing, in early May, Donald Trump has just announced his intent to "save" Hollywood through a trade war on the global system of production incentives, and by extension on Hollywood itself. It doesn't matter that he doesn't understand how any of this works, or that what he is asking for is impossible. It doesn't even matter if he changes his mind tomorrow.

Countries, companies, and film projects need strategies and budgets, and budgeting requires a relatively specific theory of the future. We can't predict the future, because there are three and half years left of Trump's term. What we can do is to significantly increase our contingencies, have proactive conversations about specific risk scenarios with all partners, and pay real attention to what is happening in the present.

It's not like we didn't already have problems. Financing, making, and circulating films is hard enough, on top of which we struggle to remain in business, while also being asked to somehow save cinema and our local language content as we innovate our way out of unsustainable business models and transform the structures of our wider ecosystem. Those things require economic risk tolerance, mental bandwidth, and time, which everyone is short on – especially now.

On the other hand we must retain a sense of perspective. We're not exactly working in the mines, and in absolute terms our industry and its output are still enormous compared to 20 years ago. Audiences still love going to the movies, still love watching TV, and increasingly embrace quite sophisticated content.

Morad Koufane: There is less money, even though it is still plenty in absolute terms. [France Télévisions'] investment is €283 million de-

voted to fiction every year. But there is less money overall and we all need to collaborate more… Producers feel that it's super hard [right now]. But it's also hard because the producers are so numerous and have more projects than the market can absorb.

Roman Paul: Feature film budgets have not increased for us, even though costs have gone up. Here in Germany, the money available for production is stagnating – while some funds go up, the investments from the private sector go down. Public broadcasters also work with their own production companies, making it harder for true independents than in other European countries that do not follow this practice. But the market for feature films has not died, as some claimed during the pandemic. At Razor Film, we are developing extensively and producing primetime shows as well.

For reasons that can all be understood and mostly be forgiven, our industry has historically been reality-resistant. Escaping reality has been our trade, and denying reality or refusing to accept it a professional necessity. We have not always considered worldly troubles our concern, and the rapid structural transformations of our sector have kept us very busy. Besides, film industry jobs tend to focus your attention on what's in front of you, or at least not much further ahead than your next project.

On the individual level, people who flourish in film tend to be problem-solvers and optimists, who don't take no for an answer and relish proving the doubters wrong. Just like film both mirrors reality and allows us to escape it, film people must be realistic and shrewd while somehow remaining blithely in denial about their odds for success. This resilience, creativity, and flexibility, this relentless stubbornness, are the exact qualities that are needed now.

Ted Miller: This business is not always super straightforward. It requires a different kind of constitution than something more traditional.

I'm an optimist. The nice thing about being a representative is that we can be nimble; if the opportunity is slow in one area, we can move to another with my clients and the projects we are trying to build.

Roman Paul: Production means creating. To create, I need to be in a productive state of mind. That's why I try not to complain too much.

Samya Hafsaoui: I don't want to rely on anyone else. If I think we have a marketing problem in film I can complain, or I can become the marketing of my own film. It's a power play. If I want to say you are doing this wrong and don't understand our generation, then I have to prove that I myself understand my generation.

Tamara Tatishvili: There is way more awareness within the industry of a need to be self-critical. Of it being OK if things are not working sometimes. Someone needs to decrease the size of a festival, someone else needs to replace a long-existing funding scheme with another… [These] changes might seem embryonic, but are in motion. That makes me hopeful.

On the industry level, our individual refusal to succumb to overwhelming odds may have created an illusion that every crisis can be overcome by putting in more hours. But you can't hustle your way out of the climate crisis, a war, or an autocratic breakthrough – nor of macroeconomic trends, political shifts, and technological transformation. When fundamental market dynamics or physical and financial infrastructures are impacted, what needs to flex and change are the structures of the industry.

Tamara Tatishvili: Rarely do I meet an industry player who wouldn't agree that we need to recalibrate the funding, our collaborations, partnerships, public policy framework, as well as a number of other existing practices for independent players. We talk about these needs on a lot of panels. There's nothing wrong with a panel, but do we really need

them in these quantities? Our industry attracts opinionated, articulate people. Our challenge is translating those needs into actionable, professional practice. We face the reality of needing industry change, and you can't just order that in a delivery box.

Where strategic action would most naturally occur – cultural policymakers, media conglomerates, funding bodies, broadcasters, studios – conservative institutions and slow-moving legacy companies predominate. Organisations still struggling to adjust to a decades-old digital transformation are not likely to spontaneously produce the transformations the industry desperately needs. Nor are they necessarily prepared to deal with increasing real-world pressures.

In Europe, the very structures making risky creative careers and artistic experimentation possible – from affordable healthcare and low student debt to public cultural funding – have often cushioned us from the worst effects of macroeconomic turmoil. Many of us are genuinely not business people; some even take pride in a kind of financial illiteracy. We should forgive ourselves for that as well, and then change it.

Tamara Tatishvili: We come from a subsidy-driven world. We had so many years of this privilege, where the industry did not have to challenge itself with fast-paced financial realities or competitive fundraising tactics. It's been beautiful, don't misunderstand me; most essential for the preservation of cultural diversity and a plurality of artistic voices. But the world has changed, and we shall acknowledge that this model cannot work the same way forever. We need up-skilling on various professional levels. We need to deconstruct the cliché that if you are good at marketing, you cannot be a good storyteller – that if you understand how to put figures together you are just some kind of evil finance person only interested in profits.

We need to imagine what it will mean if, in the midst of a continuing commissioning crunch, the squeeze gets worse. To grasp that ad

markets are wavering, that there might be a recession, that inflation still continues, and costs are ballooning. Most challenging of all, we need to understand that our public cultural funding itself will not, on average, continue as it has.

Katarina Tomkova: I had projects [financed] before the war in Ukraine. The subsequent wave of inflation resulted in the value of the funding not adding up to what we were planning to do. Some of the national funding systems, like the Slovak Audiovisual Fund, reacted with additional financing. But some didn't. So we had to figure out a way around [the challenges]. A different type of thinking is [required] to really be adaptable. To take it as it is, figure out a new way to make the best of what you're working with.

I don't want to sound like I'm complaining – when it comes to a moment of crisis, or an issue to tackle, I think of myself more as a problem solver.

When the road you're on leads nowhere good, you need another path, and first to stop. To look around, face that things need doing, and acknowledge that unless someone does those things, neither this world, our countries, nor our industry will sustain the kinds of lives and careers we have today. The second step is realising that the responsibility to fix what needs fixing, and build what needs building, is yours. All of ours really, but we start with ourselves. The third is remembering that we collectively have the ability to do those things, even though we may not individually have the necessary skills or answers.

Tamara Tatishvili: To me change starts from inside – individual action and leadership, distinctive decisions within one organisation that gradually become collaborative efforts and unite many. Many questions are out there: where do we want to be more risk-taking? More creative? Where do we need to acknowledge that we don't have enough knowledge?

Making films is to work together inexhaustibly on complex projects in the service of moving people's hearts, lifting their spirits, or changing the world.

We need to apply the same smarts, the same creative daring, to local industry structures, our organisations, and our business models. So that they fit the reality we're actually in, and contribute to the reality we want.[2]

Katarina Tomkova: The one essential quality in my work, and perhaps in filmmakers generally, is adaptability. I really lean towards the Darwinian quote that the human species did not survive because they were the strongest, but because they were most adaptable; I believe that's the case for the film business as well.

Marianne Furevold-Boland: I'm hopeful. I believe in human beings. I believe we need stories that tell us something about who we are; that is important to us. The audience wants good storytelling, stories that are both entertaining and food for thought, and we have a responsibility to create that through listening to them. Listening to society.

I refuse to lie down.

2 A similar approach was discussed in last year's Nostradamus report in terms of *auteur business* and *collective innovation* (see Koljonen, 2024).

2.
One World, Different Woes

The impact of complex industry troubles on local contexts varies dramatically, and the lived experiences of our colleagues diverge starkly. Meeting suffering and setbacks with empathy and respect, as we professionally navigate their impacts, requires new skills and processes. To build industry resilience we must engage with policy, and resist the artistically and financially detrimental drift towards isolationism and nation-based competition.

Ted Miller: A number of things have been causing sluggishness in the media environment for years now – the [strikes], Covid, mergers, the general economic climate. This makes the community anxious. Artists are nervous, as there are fewer jobs. Studios that don't have networks are nervous, because their volume might be lowering as they have fewer opportunities to sell and set up new shows. The traditional buyers are slower in their process, [and] making fewer shows. Netflix is pretty robust but are still making fewer scripted series. Many of the other streamers are in flux – due to executive changes.

Morad Koufane: The producers sense [commissioning] will be worse next year and even worse two years from now. They're almost in survival mode after the Covid period, and are driven to think that way by the uncertainty that is their daily life now.

The transformations of the last ten or so years created a truly international industry. The shared prosperity and successes of the boom years camouflaged how different our circumstances are, even though those differences – in production costs, incentives, infrastructure – were also engines of both the internationalisation and the boom.

The political shifts and trade war are pushing even EU countries toward isolationism and narratives of national competition. This is not in the interest of European cinema or of film as a medium. International collaboration and co-production are central artistic and economic pillars of our work. Undermining co-production is particularly harmful, as it may also make attracting new funding sources harder.

This year's report interviewees, more than any in the last decade, kept returning to local specifics, comparing and contrasting cultures and working conditions in Europe and the US; Eastern and Western Europe; major production centres and low production-capacity countries; wartime and peacetime. Nuanced conversations on these topics will be important, within the industry as well as individual projects. A greater awareness of our differences protects us from judging each

other unnecessarily harshly, or at worst from contributing to narratives about other cultures and countries being somehow worse than our own.

Previous Nostradamus reports have emphasised the importance of international cooperation between industry bodies in engaging with policy and regulations on the highest possible levels about issues like copyright and AI. That remains true, but engaging with national-level decision-making and regional policy is increasingly urgent for industry bodies as well.

Roman Paul: For Germany, I would hope that this country gets its act together. We lag far behind in digitisation and suffer from far too much bureaucracy – that is not digitised either! It's crazy. The state is going into more debt now, and I hope this is not only invested in rearmament but also in infrastructure and strengthening certain sectors of the economy, including culture. Germany's brand abroad is still strong; my hope for the industry is to fill it with more joy and less struggle.

Facing reality must also include acknowledging that other people's realities may not be the same as ours. In a small Swedish city, the cancellation of a long-running TV show is a significant blow. In Beirut the film industry was hard-hit by the disastrous 2020 explosion[3], and last year Israel carried out air strikes on the city as part of its war on Hezbollah. It would not be unreasonable for a Lebanese producer meeting a new Nordic colleague to assume they were at least somewhat aware of these events, but it is by no means certain that they would be.

Working in any international industry together with people of real but relative privilege can be complicated at the best of times, and the extreme nature of events now shaping our lives will only make it harder. It is difficult in general to stay informed, news is unevenly covered, and many people understandably choose to disengage from

3 Which killed 218, displaced 300.000 people, and caused damage for an estimated USD15bn.

the details not to be overwhelmed. Being able to do that is a privilege, but the need for it is very human. So is feeling pain when it seems like one's own suffering, whether an everyday difficulty or a horrific tragedy, is being dismissed or ignored.

Katarina Tomkova: I feel like a European filmmaker because of the kind of content that I make, but also because of the type of funding that exists in Europe. Even though our system has problems we still need to solve, whenever I hear stories from independent filmmaking in the US, I feel very lucky!

[That said,] more than 30 years after the fall of the wall I still feel differences between West and East. We Eastern European producers are always very aware of what it means to co-produce with a territory that can raise a different level of money. Financially, on paper, it looks like you're giving less to the project. But there is also [the time and creativity] you put into it, and a certain discrepancy [in how they are valued]. This is not necessarily something that you cannot overcome. It's just something that you have to be very communicative about.

Tamara Tatishvili: It's easier to say that you are including everyone, or that you're neutral and promote a plurality of voices, when you wake up every morning in a country with mostly uninterrupted social-political development.

It's very difficult when you wake up in Belarus, Ukraine, Palestine, Afghanistan or many other burning parts of this world. Territories where bombs are falling and civilian lives are taken away. Realities where there's almost no choice but to go out into the streets to protest autocratic regimes, to take a stand and act for one's family, the sovereignty of a country, the protection of democratic values...

Then you're on a panel at [some film] market with colleagues who question why one might feel hesitant to include the voice of a political enemy? It's because in real life that is very complicated, and extremely painful. Everything becomes politically charged when one

lives in a constantly interrupted reality. And culture is [a] favoured tool of propaganda and brainwashing.

Study after study about safety and psychological well-being in our workplaces have shown, as obviously did #metoo, that this industry's inherent power differences affect us all – and that adverse consequences are significantly worse for those with less privileged starting points. When our life experiences or other people's assumptions risk making social interactions uncomfortable, or outright hostile, we will often go out of our way to fit in and endure. This exposes us to cruelty, increases stress, and makes us miserable, which also makes us less creative and productive, and worse at problem-solving.

The work of negotiating different lived realities in our professional environments is not done, and it is increasingly urgent as crisis and economic hardship become more common everywhere. A gradual normalisation of such experiences even among people who have led quite sheltered lives may help us all remain aware that the person holding a clapperboard on set or indeed a champagne flute in Cannes can have had any kind of life before that moment. The onus is on each of us to assume nothing, to listen well without being intrusive, and never to ask a question about a difficult experience if we are not prepared to hear the answer.

Tamara Tatishvili: I'm the first head of the Hubert Bals Fund who is originally from outside the EU. When I started talking, the filmmakers from the MENA region, Southeastern Europe, South Caucasus or LATAM, many would say, even when we were really not going into details – Tamara, you really understand!

Working with people from very different contexts, I need to be extra mindful, detail-oriented and respectful. Sometimes I need to acknowledge that a team cannot deliver according to the usual, formal process, or realise that [when] an individual voice is threatened, the regulatory framework needs to become secondary. There are always

rules on the legal side one can't bend, but it is equally important to make sure professional practice is humane and respectful of everyone's context.

On the professional and institutional level, retaining empathy and respect will require new approaches. Increased flexibility towards projects and partners in troubled areas is not just an act of solidarity; climate change and political instability means every area will be unstable at one time or another, and that every production is likelier than before to be affected by some unexpected crisis.

Treating each other with empathy and respect is not about mollycoddling. People who keep making film in the face of real-world difficulties don't need special rules to protect their feelings (although they might sometimes need help to protect their physical safety). This is about protecting the industry, and the humanity of everyone in it. Pretending we are all much the same and that we are always OK is not conducive to authentic storytelling, and having the most privileged among us control which perspectives get platformed is not a recipe for cultural relevance.

Katarina Tomkova: Being empathetic doesn't mean that you agree. Many people think disagreement cannot be expressed in an empathetic way. It can [and will] actually be better received. It's not about us all having to be on the same page about everything; beautiful, creative things emerge from exchanging ideas and not always agreeing 100%. You have to be open enough, and for me that openness is actually empathy, because you're letting somebody else's thoughts and ideas come to you. You can take them or leave them, but you go through that process.

TAMARA TATISHVILI

One of my first jobs was managing director of the first-ever non-governmental association of Armenian, Azeri, and Georgian filmmakers. Two of these countries were still at war when we collaborated in the cultural sphere. As we speak, the young democracy in my homeland [Georgia] is shutting down and a Putinist agenda is taking over. I speak to filmmakers from [all over the world] where freedom of expression is threatened. This is the context I know and have lived. That is why I cannot simply play at being neutral or superior – I am wired differently. For me, the Western European neutrality blanket [is rarely] a solution. I prefer to be challenged and take a position. Neutrality is a comfort zone and being outside it is not a choice, it is a reality that many have to navigate.

3.
Art and the Autocratic Breakthrough

In the next 3–5 years, this industry will resist democratic backsliding or become implicated in it. We must fight restrictions on editorial and artistic freedom, including institutional self-censorship; push back against hateful narratives and populist framings of contentious issues; and proactively create policies, strategies, and tools to protect individual employees, artists and partners from harm. Telling complex stories is resisting dehumanisation.

Tamara Tatishvili: Film is both feared and admired by autocrats, because films cause movement, and impact the audience. Information is power and often becomes a tool of influence. In Georgia, in Belarus, and other places, it's a reason for persecution.

We operate in the realm of soft power, where influencing happens through persuasion and ideological leverage. Unsurprisingly, the personal often becomes political through cinema. And we are part of the wider information war of conspiracy theories and media control. This is why each and every film matters: films and stories that are true to their origins broaden our horizons and help us think critically.

Morad Koufane: Public broadcasters are first and foremost about information. When you ask people in the street, they don't think of France Télévisions as a name in drama series, they think about [journalism]. Fiction is important, but information is essential.

The Hungarian scholar Bálint Magyar has names for the phases of democratic backsliding now witnessed in country after country. They progress from *autocratic attempt* – still reversible by electoral means – to *autocratic breakthrough*, when governmental structures have been changed or dismantled and can no longer protect the integrity of the democratic process.[4]

The United States was considered a liberal democracy as late as last year. Depending on when you read this, and which technical definition you prefer, it is now either a weak electoral democracy or an outright electoral autocracy.[5] Expert commentators who still cling to hope base it on Donald Trump's chaotic incompetence: he is not very good at this, and his overreach may yet trigger a democratic U-turn. That is the outcome to hope and work for, but let's not for a moment imagine the

4 See for instance Gessen, 2020; Gessen, 2024.

5 Nord et al 2025, Panetta, 2025. A term currently much used in the US is "competitive authoritarianism", which is similar to electoral autocracy.

danger is over in the US even if it succeeds in re-establishing the rule of law. The risk of a younger, more effective version stepping up will be with us for a long time, and the deaths and suffering cannot be undone.

Liberal democracy is now the least common regime type in the world, with just 29 countries living up to the definition according to the V-Dem Institute, which is the score-keeper of these things. There are more autocracies (91) than democracies (88). Freedom of expression is worsening in 44 countries, up from 35 three years earlier. 45 countries are currently undergoing a process of autocratisation (compared to just 25 in 2020). Out of the current 45, 27 were democracies at the start of their respective episodes, with only nine still hanging on in 2024. Once autocratisation gets going, the fatality rate for democracies is about 67%. (The 2025 events in the US are not yet reflected in any of these numbers).[6]

The basic playbook of Orbán and Trump – the roadmap from populist victory to outright autocracy – is laid out for anyone to follow. It would be naive to assume any country is entirely safe from these tendencies. At the same time we must remember that autocratic attempts can be challenged, and even the breakthrough is not irreversible. Since 1900, about half of all autocratization episodes have been turned around to democratic outcomes.[7] Resisting much earlier makes the outcomes better, but that requires being able to imagine that democracy can end, which even people living in the US right now are clearly still struggling with.

Film and TV are intimately involved in these processes. They are sources as well as challengers of national narratives and shared identity; they reproduce as well as subvert and evolve cultural norms and symbolic imagery; they are media for the masses, and viewed in some quarters as brainwashing tools of so-called decadent elites. Culture war is an established strategy for populist demagogues of all stripes, mak-

6 Nord et al, 2025

7 ibid.

ing art and entertainment rhetorical weapons as well as easy targets.

Authoritarianism is a bad business. And although industry leaders may sometimes lose track of this fact – as we have recently seen among US tech and media companies – it is also bad for business.

In the next 3–5 years, this industry will resist democratic backsliding or become implicated in it.

Johanna Koljonen: There are signals that American media companies are becoming very careful. How will that affect our markets?

Morad Koufane: It will open more doors for European broadcasters and producers, since for instance the Brits are looking for new partnerships due to lack of US financing. We also met just recently with an official Canadian delegation, basically saying, "Hey, we would love to work more with you".

Tamara Tatishvili: For the last 20 years I've been working with regions where freedom of expression or access to health care are not a given. It is a clear reminder to me that cinema and democracy are linked. They are both about the common good, about creating something popular, about choosing what speaks to you.

I see a strong need for the essence of democracy to be retold, for people to be reminded of it widely. You need to reach out to your constituency, just like in film, you constantly need to reach out to new audiences. I don't think we can afford to talk about films made for five people anymore.

Across Europe and the world, there are attacks on the industry: political attempts at controlling, diminishing, or cutting off film funding; restrictions of artistic and editorial independence; cuts or threats to public service broadcasting.

How prepared targeted organisations have been for handling these challenges is probably in reverse proportion to how long their coun-

tries have been democratic. Playing a political game with existential stakes (when to drag our feet, when to resist but maintain plausible deniability, when to take a stand) is a skill most of us are lucky never to have learned. Should we be put on the spot unprepared we'll likely have terrible instincts, and even where the threats feel quite theoretical, it might make sense to start thinking ahead.

The mission statement and values of our organisations are a good place to begin. Discuss what you believe the words to mean, and how that would be expressed in different kinds of specific situations. Colleagues with direct or family experience of living in or fleeing from precisely these kinds of systems will have particularly useful perspectives, as well as realistic (and sometimes surprising) advice that should be taken seriously.

Figure out whether your leadership agrees about which principles are sacred, where you can compromise, and what to do when you disagree. Make the results of these conversations explicit in your organisation to create accountability. Individual employees who stand up for freedom of expression, refuse to break a law when pressured to, or push back against self-censorship need to reliably know how far you and those above you will actually have their backs.

We should all put in place specific policies, procedures, and tools for protecting individual employees, artists and partners who may be targeted by authorities or activist mobs. Artists, newsrooms, and writers' rooms must educate themselves about how populists frame contentious issues, to avoid accidentally reproducing and legitimising hateful, deceitful, or science-denying narratives. Encourage everyone to engage with difficult themes, but find a way to tell a complex story.

Roman Paul: We need to fight back against developments that could lead to more war or dictatorship. Working in mass media, with the potential to reach so many people and influence them as much as film or series can, we have a part to play. We can initiate discussions and promote the values we have always stood for. We can inspire peo-

ple to become active, feeling empowered in their – hopefully – liberal mindset, connected with others. That is our responsibility. That is where our resilience is needed.

Morad Koufane: A question [I have found] very powerful is: how, as a US broadcaster, do you address the people who voted for Trump? Even if it's by a slight margin, they won the popular vote in the last US Presidential election. What does it mean for a broadcaster, and [even more] for the writers and the producers? How do you address this population? How do you [challenge] the writers and find a subject, a series, a genre, that maybe can be a path to them, and maybe a path for them from one perspective to another? It's a very complicated question.

Marianne Furevold-Boland: It's about finding the content that doesn't create a polarised viewer. We should embrace the opportunity to inspire engagement by presenting perspectives that challenge and enlighten... that encourage meaningful reflection.

It is safe to say that our sector leans anti-fascist, but populism is more complicated than just good and evil. We shouldn't assume every person we work with disagrees with populists on every issue, or at all. Those who don't can be a kind of gift, if they are able to translate between the populist voter's worldview and our own.

Earnest and respectful interactions with individuals we disagree with is one thing; the difficulty is when their perspectives become culturally normalised, or even legal demands. We must never privilege our need to also understand these voices over the safety and integrity of people these movements try to dehumanise. The day we, personally, are pressured to limit the career opportunities, job descriptions, or bathroom access of vulnerable colleagues, we will wish we would have pushed back earlier and harder.

Our organisations are vulnerable too. If we feel the ground shifting, and if the mission really matters, we might need to figure out who

shares the same goals and values and see what capacity could be built to make sure the work continues when we can't. Having those conversations, whether quietly or in public, can also help us think of new ways to work together against the truly dangerous scenarios.

Morad Koufane: The private sector can make relevant, important work at the service of the audience. TF1 at some point decided to do a very public broadcasting-type of [drama series], and did it well. And I bow to Anne Mensah and her team at Netflix in the UK: *Black Doves*, *The Gentlemen*, *Adolescence*, *One Day*, *Heartstopper*, and *Baby Reindeer* would all have been great additions to any public broadcaster, because they're relevant, topical, often touching a nerve in society and extremely well produced, directed and acted in their respective genres.

Of course I strongly [prefer] to keep the public broadcasters strong, but if they are seriously attacked, and one channel is cut here, 20% of a budget there, the private sector has to do their [part of this work]. They need to help us. In France just this year, the public and the private broadcasters created a common lobby to protect the sector as a whole.[8]

Films, TV, and video content can reach huge audiences, inspire empathy, ignite conversations, and shift perspectives. They can also be intensely impactful on individuals. Even a film that reaches very few viewers can create life-altering transformations, or become a locus for deep communal experiences.

The next three or five or ten years really matter for how the rest of our lives play out, and in this industry that does not translate to a lot of projects; pick them well. However we decide to use our voices in this situation, remember that a work does not need to be explicitly

8 La Filière Audiovisuelle, styled LaFA, gathers France Télévisions, the M6 and TF1 audiovisual groups, the main collective management organisations ADAMI, SACD, SACEM and SCAM, and the producers' unions ANIMFRANCE, SPI and USPA

political for political uses and messaging to attach to it. We are always in this fight, one way or another.

Katarina Tomkova: I really need to feel that projects I take on have an impact on humanity. That they're putting you in the shoes of characters that you would maybe not otherwise understand the complexity of, or even find yourself thinking about. This might sound cheesy, but anything that pushes me to understand another person's perspective, to grow, that really is what I would lean towards.

I feel this [political landscape] is affecting the content. For me films – again, this might sound naive – were always a platform for dialogue with people that we might have disagreements with. For exchange. This is important to me, because I really feel we are very polarised now. It can be very hard to meet in the middle and films can be a great tool for that.

That is basically why I'm in this business in the first place! It is true that sometimes, over Excel sheets and late-night applications, I have to remind myself of the reason, but this is where I see meaning in what I do.

Johanna Koljonen: Are you thinking differently about the world that projects you are developing now will be released into in 3–5 years?

Roman Paul: I feel even more committed to our projects. I'm stubborn. We will follow our values. What we set out to do has never been easy, and now we will try even harder. I know there are people out there willing to get involved, who have the guts, and regions in the world that will not submit to going in this direction. We are shooting a film right now, *Identitti*, that has a scandal inside the woke movement at its core – it's formally surprising, it's funny, it's colourful, and it shows you in a clever and entertaining way why it should not be dismissed just like that. Now that diversity is under fire, it's unfortunately needed more than ever.

MORAD KOUFANE

I counted 72 dystopias in the market at some point and said, OK, the pendulum will swing the other way - but I think it just swung back. I don't believe that the market needs comedy in dire times. You need to address the political situation in some way. You need to go there. In the fifties, sci-fi movies reflected the prevailing political fears of the time with many alien invasions, nuclear annihilation, space race, Communism espionage thrillers…

We receive dystopian projects too, but we do say to [the creatives], don't forget to devote the last two episodes to hope. A little bit of utopia at the end. The best thing would be to receive a completely utopian story, but we haven't yet.

JOHANNA KOLJONEN

People are talking about “solar punk” and “hope punk” as genres or aesthetics. Not utopia-as-boring, but utopia-as-resistance, as DIY, as creating things together…

MORAD KOUFANE

I love it. There are studies about climate change that say it was not very productive to warn and alert people to how we're all going to die at 4°, etc. How can you be positive in the change? “Make hope punk again!”

[The Brits] are preparing a new version of 1984. I would love to make a relevant 1984 series! People everywhere are talking about Adolescence, because it is [dunking] your head in the insanity of our society. They are not afraid. In difficult times, we need to tackle these subjects head on.

4.

Sunset Hollywood, Hello World

US content remains enormously popular, but its normative position has long been under pressure. "Hollywood" itself may be losing significance as a cultural idea. US media multinationals carefully negotiate domestic political realities, but if alignment with the national project becomes a liability, content production and brand communication in foreign markets may quietly decouple from American soft power. In the next 3–5 years, opportunities for wide-appeal storytelling by local and world filmmakers will continue to expand.

Samya Hafsaoui: Watching American things is easy. Lord knows they make 60 Christmas movies a year and the Netherlands buys them all! But it's important to see things within your own cultural context, in your own language. It's important that [our cultures] survive, individually and together.

Morad Koufane: Five years ago, the president of France Télévisions decided not to buy American TV series to broadcast in linear primetime. To enable us to buy European shows, broaden our horizons.

Many of the people who in the 1930s and 40s first contributed to Hollywood's Golden Age were fleeing authoritarian persecution or the economic hopelessness of war-torn Europe[9]. Of all the powerful stories they told, one of the most impactful has been of the American Dream, which Hollywood embodied, and Hollywood film evangelised.

The language of cinema had always been international, but at this time industrial dominance in movie-making, as in most things, tipped toward the US. Like American popular music, sports, and brands, Hollywood entertainment has since WWII spread American values and narratives, supporting its hegemonic dominance of global trade, geopolitics, and attention. The fact that the US has an oversized share of cultural influence is so obvious that spelling it out feels embarrassing. But it also feels weirdly disloyal, because soft power works.

Those of us who grew up with VCRs and cable TV, and later embraced the terminally online lifestyle, are now labelled "Gen X". But before that term was invented, we were unironically called "the MTV generation". In our youth, economic and cultural changes supercharged the globalisation of US media, and whether you were mainstream or indie; conservative or progressive; rock or hip-hop; jock, nerd, or riot

9 In addition to well-known filmmakers and actors like Billy Wilder and Peter Lorre, technical film workers fled to Hollywood as well, possibly in the thousands. See Schnapper, 2020; Rifkind, 2020.

grrrl, American culture provided much of what we admired and who we wanted to be.

We Americanised ourselves willingly, mostly without even noticing, to the degree that an end to this cultural dominance is genuinely difficult to imagine. But soft power not only creates political goodwill, it also requires it, and that currency is fast depleting.

Johanna Koljonen: The US has been on a bad trajectory for quite some time, but the last few months have been shocking. How is its image shifting for you?

Roman Paul: Personally, I'm saddened and deeply concerned. I studied in the States and owe it much of my personal development and the opening up of my cultural identity – also thanks to US scholarship programme like Fulbright. Now, all of that has stopped.

The whole development is beyond shocking; there's even a war against academic institutions. I lack words. For us in Europe it's mostly an economic and ideological war so far, although its reverberations are deadly serious for people in other parts of the world.

Some colleagues are saying to their industry friends that when this political uncertainty is over, we'll come back together. I have doubts that this will be easy or that it will be like before. The trust is gone, and a lot of damage has already been done in such a short period of time. I try to stay hopeful, somehow. I hope that Europe will come together.

US studio blockbusters are the economic backbone of European exhibition and actually also a major reason that European film receives public cultural funding – the perceived threat from *cultural* or *media imperialism* these systems were created as a bulwark against was specifically Americanisation[10]. Today such fears are discussed much less,

10 This goes for Western Europe, and further afield since the end of the Cold War, but global and regional superpowers exert similar influence wherever they can.

in part because the omnipresence of US culture became completely normalised, but also because it is increasingly challenged.

As traditional media globalised, other political and economic power centres also leaned into media exports, and the emergence of social media created public space for a great diversity of voices and parallel perspectives.[11]

Even in the US market, interest in foreign content has grown, albeit from low levels.

Ted Miller: I represent artists across Europe, the US and Australia. Some markets make incredible content that may just not connect [internationally], from a value-proposition, distribution, and co-production [perspective]. But there are real opportunities between the UK, US, Australia, maybe Canada – the English language market. People have a curiosity for other cultures. That's a huge positive. I would love to see the traditional US buyers considering more co-production opportunities.

This report has previously discussed how popular tastes and cinematic literacy are expanding. The success of international films and shows in the US are a particularly compelling example of this, because it indicates real change in a market where imported content rarely resonated before.

A related evolution can be observed in its commercial mainstream, where independent filmmakers get tapped to tell billion-dollar-sized stories in theatres. While the change has been almost too gradual to notice, even TV shows that are popular hits can now have aesthetics and ambitions that would previously only have been associated with indie and world cinema or foreign TV imports.

11 In our private lives these have always been how cultural dominance is subverted and resisted.

SAMYA HAFSAOUI

I grew up on American entertainment - Cartoon Network, Nickelodeon, Mary-Kate and Ashley Olsen, all the Disney Channel original movies. When I was little, we [all] wanted to do an American high school year. People don't want that anymore. You could be in a school shooting.

There is a de-Americanisation of Millennials and Gen Z happening. My generation only had cinema and TV; we couldn’t grab our phone and see America through an American lens. Now I have access to Americans talking about their own country all the time. I can watch High School Musical, this completely romanticised vision of America. [And then] a video from a high school girl saying, “I am terrified every single day of going to school. I don't have enough money to eat. I live with my mom in her car because she lost her job, and if I break my ankle cheerleading we will go bankrupt.” That is an American reality; not the entire country, but vastly different from the image I grew up seeing in American fiction.

SAMYA HAFSAOUI (CONT'D)

As a teen, I [felt a] need to experience these countries. I lived in England, and also in America - for a short while, but longer than a vacation. I'm so glad I did; that's why I wanted to become a Dutch filmmaker. I love my country. I know how it works. I know every single nook and cranny, the culture, the language, the jokes. I know my people.

The ambition to make another country love me because I loved it faded away [when] I realised that country did not exist. That's a really daunting reality that the American film industry needs to grapple with - the whole [idea that] everything is better across the Atlantic Ocean is fading. There is a perfect cultural window now for Europeans to fall in love with Europe, with their own language and culture.

The aesthetic reset was long overdue. As everyone entering the global content game in the last decade has had to learn, consistent international success is a difficult thing to achieve. During Hollywood's decades of entertainment dominance, it secured its positon by gradually achieving a kind of technically accomplished inoffensiveness. Mainstream film and TV adopted a polished, unchallenging aesthetic that supported the soft power message that American values are universal – and that, wherever you are, America remains slightly better and far more important than your own reality.

Since audiences had no direct experience of American life beyond what they saw on screen, its mainstream exports relied on familiarity with other American cultural products instead. These could be entertainment IP, explicitly artificial genres or formats, or just familiar storytelling conventions. People everywhere could joke about the lazy tropes, predictable formats, and unnatural aesthetics of these aspirational fictions, in which homes were sets, and uncomfortably beautiful people were always waking up in full make-up and hanging up on each other without saying goodbye.

Samya Hafsaoui: The most dangerous thing you can make is a project that's "mid". Not something people hate, but not something people love, just in the middle. People can tell your heart is not really in it. It doesn't intrinsically motivate people to keep watching it, and it'll just fade away.

Growing up on social media fundamentally rewired the way Millennials and Gen Z view authenticity, artificiality, and aspiration. In the process, 20th-century ideas of celebrity as unattainable have lost most of their power, making it very difficult to strike a good balance between looking like a Hollywood actor and still coming across as a real, live human. Arguably the whole cinematic tradition now has a similar problem because the worst thing a film or TV show can be these days is "mid" – something polished but generic; something so in line with

expectations that it leaves you entirely indifferent.

Hollywood does fantasy worlds and explicitly artificial formats very well, but struggles to portray real people and everyday situations (which may also be a clue to why theatrical comedies and commercial drama are struggling).

Competing in authenticity with a normal person who is speaking off the cuff is hard, especially when the promise of Hollywood was to always be larger than life.

Whenever mainstream storytelling has gone stale before, the solution has always been to challenge it from the margins. Those who succeeded used to be destined for Hollywood, both symbolically speaking, as well as as joining the developments and production community of Los Angeles in a physical sense.

Now that is less certain to happen. Production has dispersed across the US and the world. Distinctive voices can emerge anywhere, as can great projects, and a fresh approach is probably likelier outside the established structures. Remote work, including pitching, are making it feasible not to live in LA, which unestablished talent and unemployed crew cannot afford to do anyway.

The same kind of jobs are now available in all kinds of places. Film industries both mature and emerging have built enormous capacity in the last ten years, talent and crews have hands-on experience of Hollywood-sized production from all of its off-shored projects. Less burdened by the aesthetic norms of US mainstream storytelling, foreign filmmakers may also struggle less with relevance and credibility. At the same time they have been fluent in the conventional cinematic language since childhood, and may have just the twist or local angle to make it fresh and relevant again.

Ted Miller: The global streamers – Netflix, Amazon, Apple, etc – are essentially closed ecosystems. They make their own content in the territories that are important to their subscriber base. What I enjoy spending time doing is to help with intentional series that may make

sense for the traditional US buyers. I would love to see buyers like AMC, FX, Hulu and HBO invest in more co-productions. There are many great shows from the Australian and UK networks that are not being picked up by US buyers and so are not being seen by American audiences. Seeing how well Netflix does in the US with UK series such as *The Gentlemen* and *Adolescence*, and Australian series such as *Colin From Accounts*, it's surprising to me that the traditional buyers don't invest in more international series.

Most traditional [US] buyers develop their own content and don't have a mandate to find great content from other countries. There isn't a mechanism. It would be great if television had a lane similar to the independent and international film marketplace. If you make a great independent film, you take it to Toronto or Berlin or Sundance and buyers/distributors come and hopefully buy these films. Every May the rest of the world comes to LA for the screenings and buys the new American shows, but there is little reciprocation. When you take out a British or Finnish or Korean television show, there's no [event for] those shows to garner an audience and hopefully be selected.

Examples from *Parasite* and *Squid Game* to *Money Heist* and *Lupin*, not to mention the international impact of Bollywood epics, Telenovelas, K-drama and anime, have demonstrated that an engagingly told story can travel wherever it is made. The language itself also matters less as localisation is now more affordable.

The potential for occasional international challengers theoretically extends all the way up to blockbuster budgets, which while harder are by no means impossible to fund.

Samya Hafsaoui: I can't fathom that people underestimated *Maxton Hall* on Amazon Prime. It's a German-language show based on a German book, and as I understand the story, Amazon did not think it was going to be popular outside of Germany. I can tell you right now, it follows the successful Young Adult formula. Girls love a TV show,

especially if it's based on a book. They will eat it up. I can't believe they didn't project huge success. Why? Because it's German? People watch Korean dramas all the time. Native language is not really a thing with Gen Z and Millennials. We'll watch anything if it's good. If we like it, we'll read subtitles. It's okay.

Morad Koufane: We look for impactful international projects, and now the [producers understand what that is]. The projects are very potent – it is the same in acquisition. You have a choice between good ones, excellent ones, and wonderful ones. The main part of my job is to choose the project and the team behind it, to open the tap so to speak; when the water is on, our job is mainly done.

We chose *Le Tour de France* [trusting] the companies and the talents behind it. Federation Studios is making [it] with Louis Leterrier directing, and wonderful writers who know their drama and their cycling. It's organically international. And it will be fresh for young people, who love cycling more and more. Leterrier directed *Fast and Furious 10* and *Lupin*; it won't be shot, counter shot, shot, counter shot. It will be very modern, and the story is about a young Kylian Mbappé type of cyclist going from nowhere to the top.

Do not expect US film and drama to be overrun, but any percentage of a global market is significant when you gain it. Even a single work that travels can be hugely important for its originating culture.

In 3–5 years we will have seen many attempts at a new Mainstream Hit World Cinema strike out – and a couple of home runs too. Hollywood may have gained a new lease on life, but the likelier outcome is that its relevance will decrease: that production will only modestly return, and that the unreal dream of an unreal place that makes unreal entertainment is fading.

No one needs to worry that US studios and streamers would not survive this cultural shift; the streamers' international content strategies have even contributed to it. But whether we will still be thinking

of these companies as "American" in quite the same way is less certain.

Capital is fickle. If the soft-power multiplier of the US cultural brand turns into a toxic burden, the same executives who are now kowtowing to Donald Trump will not hesitate for a moment to quietly decouple from their positioning as American.

Roman Paul: The US has, interestingly enough, made following them on this autocratic path very difficult. It is impossible to claim that what they are doing is good and should be imitated. The alternative messaging would be to say, "You have to submit to everything we do because we are strong." That will not work. They are losing their position as role model.

TED MILLER

In the US market we never grew up with access to foreign content. As children, [or later] as young executives, it wasn't a factor in our lives. Once in a while, HBO or PBS would have a British show, but that was really it. As I started to travel for my job I quickly learned that every other market has a balance of homegrown and acquired or co-produced content. As young children that's how you're getting shows and movies. You're seeing what the world is; it's opening your eyes to language and environments.

Historically, the American market just didn't ever buy foreign content - The US perspective even impacted the kinds of scripted series that were viable! A show with a foreign setting, like The Diplomat, would have been a hard show to sell ten years ago before the streamers began originating series. It was hard to sell a show with a foreign accent, [that is why] they didn't want Hugh Laurie in House to [be] British.

TED MILLER (CONT'D)
The emergence of streamers who wanted to own and control content globally allowed the American audience to see a wide array of foreign shows, languages, and environments for the first time. It was transformative. Independent film often did this before, but now [everyone] can see the world through the variety of shows that are available on networks and streaming platforms. You saw a big boom when we were all stuck at home in the pandemic, and this was how we “travelled”… It demonstrated that the American audience is interested and capable of understanding television and movies from other countries.

The streamers still do that to an extent, but interestingly, most say what's important to them is making a good local show which will grow or maintain the local subscriber base. If a show from Italy or France or Korea happens to perform outside of [its] home market, that is a nice benefit but not the goal. I understand the philosophy, but I don't know why you wouldn't also intentionally make shows that could have a global impact - the traditional American buyers make content they hope will travel.

5.
Advocating for Film and the Local Industry

The long-term health of both film itself and our local industries depends on the engagement of the popular audience. Taking this seriously requires challenging industry narratives, transforming perceptions in the wider culture, and learning how to talk about our work without sounding entitled or patronising. We can celebrate the love for film already shared by the public and the industry – and tell the story about what they mean to each other better.

Samya Hafsaoui: I'm really scared for the future of cinema in the Netherlands. We have this award that goes to every film that has 100.000 admissions. Not a single film has received it this year. We have a good climate, good public transport; people can easily go, so what is stopping them? With young people I think it's the reputation of Dutch film. People make memes about how we only make romantic comedies, which is not true.

In the Netherlands, everyone's talking about how Scandinavian films are so much better; we are losers and make stupid stuff. Then I go to Sweden and [hear] Dutch cinema is exciting, and Swedish film sucks, and I'm like, what is happening?

We have this problem with literature as well. Kids will read in English [and] refuse to read the Dutch translation, because everything is cringe in your own language. Everything is cringe in your own country. The Netherlands does not have a big reputation for nationalism.

We all need to internalise the delusion of grandeur of some countries, [who] are convinced that if you don't want to watch their films, you are crazy! "If you don't like French film, you hate all cinema". That's a really good mindset!

The long-term health of local film industries, whether market-driven or subsidy-dependent, relies on the engagement of the popular audience. So do the survival of theatrical exhibition, of the drama budgets of local broadcasters, and of film itself as a mass medium. They all need to be embraced by many people – in fact by *the* people: not every person in every instance, but most people most of the time.

It is therefore unfortunate that the recent boom, which brought production volumes to record levels even in countries where they'd historically been low, was not driven by audience demand. It was made possible by incentives, which are available to all comers, and by streamer commissions, which at that point were often motivated more by business strategy than specific audience opportunities. The selective support schemes that are the heart of European film funding

tend to select on artistic merit or cultural importance – i.e. on giving the audience their vitamins. Between all these factors, the declining box office, and the occult nature of streaming ratings, the relationship between the audiences and project selection has for quite some time been indirect at best.

It's not that folks weren't happy about new domestic content, but arriving as it did on a flood of competition, they perhaps were not deeply invested in it either. But with the free money slowing down as the market adjusts, and with begging our governments for more unlikely to work in most places, it is our home audiences we must convince.

Marianne Furevold-Boland: The answer might be to create relevant, meaningful content showing that public broadcasters create engagement, new perspectives, and spaces for conversation. Series that make us reflect together. Like we have done with *Power Play*, *State of Happiness*, *Exit*, and now *Requiem for Selena* – these shows created a conversation in society, just like we are seeing with *Adolescence* now. By continuing to do this we show the public, who vote for the politicians, that we are necessary.

People need to feel at least some of the things we make are meaningful for them. They need to care enough to invest their money and time punctually at release; to love it enough to talk about it with others; and ideally keep returning to it again and again. Call it a democratic necessity or basic economics, but just like theatrical exhibition needs some hits, and many titles creating organic engagement, so does every other aspect of the industry.

Our film industries would obviously be more financially secure if people loved the output more, but that is not quite the point. The point is that we also need people to make an active connection between the things they love, or just enjoy watching, and the wider ecosystem that makes those experiences possible. This is a question about what stories are told about the films we are making; not just about what they mean,

but about what having a vital film culture in your own language means, and about what supporting filmmaking with public funds means.

Changing the general public's cultural narratives about their local content and specialised cinema will in many places also involve defeating harmful political narratives about cultural works and the cultural sector. This is not something we achieve by just making more or better wide-appeal films, this is the kind of thing that requires advocacy, and some kind of shared idea across the sector about the kind of relationship we are trying to build with the public. Getting anywhere on that may also require challenging some narratives about the general public within the filmmaking community itself – which ironically may just result in more and better wide-appeal filmmaking.

Katarina Tomkova: I don't think Slovak cinema should just be artistic films that go to festivals. There should also be films that have a larger audience: children's films, genre, horror, action. It doesn't have to be mindless entertainment. I can really value, for example, a meaningful commercial drama.

Film is not only for an elite, a bubble of intellectuals. It's for different audiences, and I really cherish the diversity of those audiences, even though I typically work on films that are defined as "arthouse cinema". It actually happens from time to time that a Slovak film has great numbers in cinemas, and I think it has started to happen more often.

Tamara Tatishvili: It is not easy to pitch international collaboration to governments that are becoming more and more nationalistic. At least not collaboration in the forms that made sense 20–30 years ago.

Being loved by the people – or even better, being experienced as central to national, local, or personal identity – also provides some level of political protection against funding cuts. Populists aren't eager to go after what is popularly loved; and for fiscal conservatives, the

insignificant sums culture budgets represent should not be worth a high-cost political fight.

Unfortunately the opposite is often the case. The culture sector's symbolic value is significant, making it a target for political attack. Artists can be dismissed as irrelevant, out of touch, or elitist; the work as something the base voter could never be genuinely interested in, or that was intentionally made to exclude them.

We don't agree with such descriptions on principle – but isn't it perhaps just true enough to be a plausible generalisation? Our industry does struggle with relevance in many audience groups, and people who feel no media is made for them can easily be convinced that this is intentional. That intellectuals, elites, or the dominant majority population are only making content for each other, or only for people with lives far from one's own.

Samya Hafsaoui: *Adolescence* is made to educate, to create empathy, to create understanding. It's a technical marvel, but it's made for people. Sometimes [filmmakers] make technical marvels for their colleagues. Then don't be surprised that only your colleagues like it, and the general audience does not. If you make it for your colleagues, or for the award circuit, then that is what it will be good at. There's nothing wrong with that! But don't expect a general audience if you have not thought about the general audience in your process.

Johanna Koljonen: Wouldn't some filmmakers argue most people don't like or understand quality?

Samya Hafsaoui: [They say it] because people don't like their stuff.

A recent debate about the opening weekend box office of Ryan Coogler's *Sinners* temporarily resurrected an old Hollywood narrative: that US movies on Black themes by Black filmmakers underperform overseas. According to McKinsey, this is not the case: films with Black leads are distributed in 30% fewer markets, but earn better than other films

on a per-market basis.[12] Commenting on this topic, Blacklist founder Franklin Leonard made an observation that is glaringly obvious, but only in retrospect: if global audiences of all backgrounds listen to American hip hop and wear the jerseys of Black US athletes, why would they balk at a film with Black talent? No reason at all, expect that we assume they would. As long as this assumption is treated as a fact, that overseas disinterest is a self-fulfilling prophecy.[13]

Our own narratives about the general audience and what they will or won't enjoy may similarly be based on nothing but vibes and prejudice. People's cultural habits and narratives change all the time. In our lifetimes, the average quality of the film and TV most people consume has become astronomically better, and enormously more diverse in format, country of origin, and on-screen representation.

We must be able to imagine ourselves as able to engage the popular audience – and we must be able to tell a better story than populists do about work that is exquisite, challenging, or foreign. Enjoying Brazilian World Cup football doesn't stop most people from caring for their city's football team, nor from becoming invested in miraculous Icelandic success in the Euros. Most people have a few favourite meals and restaurants, but are not offended that other dishes or eateries exist. And people who trust that both mainstream and specialised stories will regularly be told both for them and about them, usually have no problem with other kinds of stories existing too.

Marianne Furevold-Boland: Sometimes on a Sunday evening I just want to see some British detective [solve a crime].

Samya Hafsaoui: The films you see between the ages of 13 and 16 will stay with you for the rest of your life. Are they peak cinema as we snobby little film people understand it? Maybe not, but people re-

12 Dunn et al, 2021

13 Belloni, 2025

member them forever. *Shrek* or *Twilight* or my favourite Dutch films are great films because they've stuck with me. We can get really elitist [signalling they] are not worthy.

Tamara Tatishvili: I don't always need to watch a really depressing four-hour movie shot in a single room! We just closed IFFR 2025 with an Indonesian film, *This City is a Battlefield* by Mouly Surya, a female director. It is an intense and thrilling period piece. Cinema needs to be celebrated in many forms and in various storytelling manners. We need to spot, nurture and boost diverse talent to keep these art forms alive.

For an industry that is still remarkably good at creating big, societal conversations, we are remarkably terrible at talking publicly about what we value and need. We come across as entitled (demanding public money or taking it for granted), out of touch (see: women in flats on the Cannes red carpet), or patronising ("you wouldn't steal a car").

Effective advocacy for film and filmmaking might of course be happening behind closed doors, where our representatives lobby for industry causes with policymakers and potential investors. But this larger project cannot be left only to those whose task has historically been to represent our complaints and demands. What is needed now is a positive message.

Transforming local film culture, and the role and meaning of film in our culture, should involve every kind of formal organisation we have, from national film institutes to local funds; from major festivals to after-school film clubs; from national guilds and unions to your local pub quiz team. It should involve small companies, big corporations, film schools, and cinemas.

It should also involve individual filmmakers and individual fans, and most definitely the talent. We don't need some big shared vision or national campaign strategy to begin. We could start by just talking about projects we're excited about, and what we do at work; start telling people about films we love and ask about theirs. Talk about it in

interviews and on social media. In strategy meetings and at daycare pickup. Challenge everyone at the office to talk a normal person into seeing a film they might otherwise have missed.

If we change the overall conversation, our lobbyists will have an easier time of it as well. But we can also support their work specifically, using our voices to educate institutions and their publics about how what currently works is working, and why. Especially when we celebrate our successes, the role played by public support or private investment should be an explicit part of the story.

Tamara Tatishvili: We're an early-stage development financier, and I know first-hand how talent appreciates [our] support mechanisms. I've been meeting with producers and directors we have financed through the years, talking about how the fund also needs to [self-reflect] and calibrate towards the future… I started to voice quite openly with international talent that we need their support and advocacy for these schemes to continue existing. Funding cannot be a one-way road of only demands and entitlement. What they need to return is advocacy for future talent: appreciation of [these] efforts, and acknowledgment of the impacts. Those who get financed, people advancing into their careers, need to understand they are expected to contribute to building a sustainable future together.

Roman Paul: German people are more aware that the New Market was a horrible experience. They say, "Look, I pay taxes that are also used to support film production. This is what the state is for, thank you very much." Support for culture, filmmaking, and public television remains. We do not have much of a tradition of private investment in film; it's just a different system.

But even the German banks are pulling out of cash-flowing film productions. French banks are taking on some of that business. Somehow, over here, film is not seen as an economic sector worth investing in.

The precise kind of communication we need is often excellently practiced, by filmmakers as well, in one specific context: crowdfunding.

A successful crowdfunding campaign is never just about pitching a project. Asking people to part with their money for something that doesn't exist and might not even happen, you must tell them the story about what that thing will mean, about the people behind it, about how they will make it, and how that can only come true if this specific person believes in it enough to become directly invested.

Here's a thought: whether made in the commercial market or relying on public investment, almost every film and TV show is ultimately funded by the crowd. They are just cash-flowed differently.

We should tell the people who literally will be paying that it's happening, why they should care, how they are part of it; and most importantly, that all this film, this TV, this content – not just the things they will choose to see – is for them.

Samya Hafsaoui: My dad is Moroccan and my mum's Dutch. My whole life I have been told that I'm not Dutch enough, so it became a vengeance to reclaim that Dutch culture, reclaim that language. And also to reclaim the film industry.

[Dutch cinema] is worth saving. It's worth respecting, it's worth enjoying. Living in a country that does not always appreciate who I am, to say the least, made me even more motivated to make it important, to make it beautiful, to make it engaging. I want to tell the Netherlands that we are worth loving, especially our cinema and our TV series.

6.
Rethinking Development

Sustainable work in the sector requires an evolved development process, in which a project's content, focus, and artistry are developed in conversation with its business model and audience design. Traditional development must be better compensated, its frustrating or adversarial elements restructured, and its practices rebuilt with testing at the core. Public investment in development can be a strategy for professional up-skilling and business innovation, especially if insights are shared systematically.

Marianne Furevold-Boland: I worry that to maintain production, parts of the industry feel forced to compromise: not giving projects the time in development to have truly top-class scripts when production starts. Finding compromise solutions in post-production, instead of smart solutions [in development]...

Development is a huge part of the job. And creating good drama series takes time. Together, we need to establish sustainable production models and realistic budgets that align with our ambition to create outstanding content – ensuring it is competitive and selected by our shared audience.

Johanna Koljonen: Are we ready to put our money where our mouth is on this?

Marianne Furevold-Boland: We have to be smart about structuring development processes. We need to know what we're asking for, and make sure that the writers and the producer are... well, that they are realistic – but that goes both ways! So yes, I'm ready to put the money where the mouth is, but it has to be aligned with the ambition [for the project].

The whole point of development is that a project might not happen, which means no one is clamoring to pay for it. For writers and producers, this obvious problem has historically also represented an opportunity. If you can afford it, investing time and money in the viability and value of a property is a risk worth taking – assuming you retain ownership, will participate in profits, or are fairly compensated for the work. With both financial margins and mental bandwidth currently quite exhausted, the appetite for risk is low. At the same time most people also don't get paid enough for their time, nor at all in success.

Traditional development is broken, making the professions involved in the work less financially sustainable. The impact of this

situation on US screenwriters was a focus of the 2023 strike[14], as LA living costs make the issue urgent there, but the tendency is universal. People relying on income from development phase work may at worst be forced to quit the business (or in the case of unestablished talent, never succeed in breaking in). Producers increasingly pushed toward making their living in production are incentivised and sometimes forced to compromise on development time. Decreases in quality and creative risk-taking impact individual projects, and by extension audience trust and engagement. This situation serves nobody.

Development needs more resources, but it also needs to be re-imagined to become more productive and less frustrating. The business model of each project should be developed with the same care as its artistic aspects, and both processes should be structured around clear goals and qualitative testing. We can't afford to let institutional traditions get in the way of transparent processes, clear communication, and systematic, self-aware decision-making.

Katarina Tomkova: Financially the development stage is often very risky, very fragile – for the writer-director as well. [Everyone] puts so much time and energy into something that eventually might not happen; they deserve a better funding structure [for that work].

The development stage has always included a phase we might call "film project design", even though for a long time, most of that step could often be skipped. Once the format was chosen – film or TV, long or short – there was no reason to question it again, and many decisions about funding and distribution were determined by it as well. Given a format, type of funding, genre, and aesthetics, even budgets were so predictable that the price tag could be used as shorthand for what a

14 Their producer colleagues also report pressures, ranging from not qualifying for healthcare during years-long development, to the gradual disappearance of in-house studio producer jobs.

film or TV episode would look and feel like on screen.

None of those answers are automatic now, and getting into the traditional development funnels is harder too. Projects that don't either won't happen at all, or will be funded, made, and distributed in untraditional ways on a case-by-case basis. This will make the design of the project itself a significant focus of development work: figuring out (and iteratively adjusting) its format, funding types, business model, budget, production practices, and distribution. As will feel obvious and familiar to underground filmmakers, content creators, and transmedia storytellers, this work is not in opposition to the artistic process, but frames and supports it. Many independent production companies all around the world also already work this way.

Only once the project's artistic core and real-world audience have been identified, and we have figured out the best way of connecting them in an artistically powerful and financially feasible way, does it make sense to approach a funder or commissioner. The most established voices can still just show up, but it is always in your interest to first have reflected realistically and deeply on the project's overall design. You might realise another kind of funding partner would be a better fit, or that getting someone else on board first (e.g. an audience anthropologist, a sales company, a celebrity with a specific platform who might want to executive produce) will significantly improve your negotiating position.

If your project is very strong and its path quite traditional, consider what it would take for it to become irresistible in a contracted market where budget and format innovation really matter. A recent example is *The Pitt*, admired for its craftsmanship and storytelling innovation, but also publicly described by HBO's Casey Bloys as specifically attractive for its affordable production, longer season, and repeatable format.[15]

Where public funding is available, especially if it's regional or local, serious investment in development can be an active strategy for

15 Belloni, 2025b

professional up-skilling and business innovation. In exchange for such investment, recipients of development funds should be required to share what they learned on each project, in detail, with local colleagues. This will accelerate innovation, and is almost guaranteed to give some of those projects new life in new constellations, or to inspire others.

Marianne Furevold-Boland: I don't think "commercial" is the right word. What I see is some producers hesitating to challenge their writers enough when it comes to shaping the story with the audience in mind. Sometimes a series doesn't need a long prologue or epilogue – we should dare to question those choices and engage in deeper conversations. That said, this is not about distrusting writers. On the contrary, I believe deeply in giving them both trust and creative freedom.

In both Europe and the US, for locally differing reasons, the traditional system has paradoxically resulted in both too much and too little development. Europe has a strong cultural norm that art and commerce are binary opposites. Filmmaking is therefore not conceptualised as an industry competing to secure, make, and release hits, but as enabling important expressions of singular artistic vision.

Even when the project is not auteur cinema, feedback from anyone with economic power over it can be experienced as "commercial demands". Producers often position themselves as defenders of the talent's creative integrity, even at the cost of business opportunities. This respect for the artistic process obviously enables great work. But combined with our selective support schemes, it can also result in unfocused or unfeasible projects repeatedly being granted small amounts of development funding, even though the work is not actually developing in the right direction for its context.

In Hollywood's competitive market system, development has been a way to call dibs on projects and talent before anyone else can: not just panning for gold, but staking claims by the river. One expression of this is paying for ideas someone might have in the future, for instance by

commissioning treatments from several writers on the same concept, or overpaying for overall deals with individual creators. If European development can be unfocused on the project level, this is unfocused excess across entire slates.

On the other hand, once a project is really going, the focus on its viability is intense. To European sensibilities some aspects of development at US studios, like cavalierly switching out writers and directors, can be very jarring. As a result US filmmaking practices have often been entirely dismissed, even when we would have much to learn. For instance about systematic iterative testing, which is common throughout the project especially on US commercial titles, or about audience testing, which is normalised overall.

Ted Miller: The buyers that are confident let their projects evolve until they feel like they're ready. I think the places that are less confident are slow because they're not sure. One of the issues is the sheer scale of some of these companies. In many cases, there are more layers [of] decision-making. That can be hard because there is a filter as you go up these ladders: can a new writer get through that filter? A new actor? A new concept? Sometimes I feel [what gets] through are the things with more pedigree – an important book, an important actor, an important writer. Creatives always have a great place in this community, but the emerging voices, the new stars, have a very important place too. It feels harder to get those projects made.

When you try to do the detective work of how the process on a project is going, you'll sometimes hear things like ”we're reading internally”, [rather than] ”I'm going to make this happen” or ”I'm going to be the champion on the inside”... I'm not suggesting they make things they don't want to make, but I miss that energy of willing it to happen.

Samya Hafsaoui: [The “mid” project] comes back to the studio/producer/writer dynamic. Someone has to really stand for a decision,

because if everybody compromises – a producer with a studio, the writer with the producer – you get the middle of the road.

In the last decade, US development has changed both for better and worse. The disappearance of the broadcast TV pilot season was a great blow for everyone who would have worked on the nearly 100 annual productions of its peak. But in the longer perspective it is healthy to have rationalised a process that no longer served its purpose.

The corporatisation and consolidation of the major entertainment companies has accelerated and systematised data use, an area where the sector had been lagging behind. Algorithms and AI tools for decision support are increasingly common, but even at the world's biggest companies, final decisions are still made by humans – with mixed results. If these humans rely on data measuring what was successful in the past, and are tasked to minimise financial risk, the inherent bias will be caution, projects will be blander, and decisions slow.

Our industry has always much preferred the opposite kind of executive, defined by their intuition and personal taste – an ability to predict artistic outcomes and audience resonance. Computer systems are nowhere near mastering this subtle, human skillset, but we should be careful not to draw the wrong conclusions: most of us would still benefit from better data and more structure to support what can come across as a vibes-based system.

It actually isn't as subjective as it seems, because experience, knowledge and craftsmanship are real. But they can be illegible to people with other specialisations, even in the same industry. Getting better at making explicit what we experientially know to be true will make our artistic collaborations stronger.

Morad Koufane: At each stage of the development, mainly writing and editing, our way to [give notes] is to ask creative people open questions and let them figure it out. The beginning is not strong enough? Find something. Three scenes in a 30-second opening teaser? That's

not possible, figure it out. Yes, all TVs are HD4K, but the more night scenes you have, the harder it is to follow the plot... We sound like a drunk uncle at a wedding, repeating our stupid [reminders]: "Don't forget about the night." "Don't forget the viewers are mainly seniors." "Don't forget a propulsive opener".

My team and I always refrain from suggesting anything ourselves, we're just framing the series. It's difficult, I know! But our hope is that by doing that, by not imposing our views, we will earn the respect of the writers. That at the end of the day, more and more people will want to work with us. The writers talk to each other.

Katarina Tomkova: Substantial funding for development makes the productions more effective and the investments more efficient. When you can do tests, try out different approaches, [everything] is less risky. Even with a debut director, you can give them that important time to figure out their voice, their skills, have them experiment within that playground, then see what happens next.

Iterative testing is already standard practice later in the filmmaking process – chemistry reads, animatics, audience-testing jump scares – and should be just as normalised in creative development. Getting to the green-light will always require the producer to demonstrate that the project is relevant and viable, and that the idea, team, and creative approach are a good fit. It might be helpful to think of creative development not as making gradual changes to make a thing better, but as *testing* the changes we think will make it better.

Devising a meaningful test requires us to get explicit and specific about what needs proving or improving, and to honestly discuss how we would know whether that goal was achieved. Through testing we can challenge or confirm our own assumptions, gather exploratory data to catalyse new approaches, and later demonstrate – to ourselves, the talent, and our funders – that our innovations and artistic vision are viable. A test can show that a DP is the right choice, what it would

cost to reach a specific kind of person in a specific market with advertising, and whether our artistic innovations make the audience feel intelligent or dumb.

Always keeping track of what we are trying to find out, and being explicit about what parameters the project is being judged on, can also be a guiding principle in interactions between creatives and a studio or commissioner.Some notes must always be more instructions than requests, for instance because a partner has specific rules or priorities, but almost every other kind of feedback is fundamentally information about how audiences will receive the work. If someone doesn't get it, that's annoying and uncomfortable, but also valuable and addressable.

Real disagreements about specific criticisms or their underlying assumptions do happen. Some kind of simple audience test could often resolve who is right. If you also can't agree on an appropriate test – how would we determine whether the dialogue is now "punchier"? – a deeper conversation is probably needed about what problem, specifically, the note was trying to address.

Testing is even more important where no funding or investment is yet on board, or where that is likely to happen much later. Traditional choices like making a short film on the way to the feature have been strengthened by online distribution as a complement to festival competition,[16] and creator-driven artistic and audience testing can happen at every stage of a process.

Samya Hafsaoui: [My current movie is] based on my ADHD. I have a lot of hobbies that I don't finish – ADHD people tend to spend hundreds of euros on a sewing machine and materials, then never touch it again! In my script the character wanted to make a shop with all kinds of hobby things, and whatever you make in the shop you can take home. But building that just for one scene would be expensive for the art depart-

16 For example, *The Crossing Over Express*, made for USD5000, went viral last year and is now being developed as a series.

ment. I told the production company it [might not be] worth spending that money and took it out, but I still thought it was a good idea.

[When] I saw a video of a Dutch girl saying she has ADHD and too many hobbies, I commented that idea. "It would be really great if we had a shop where you could use all the things..." It got 3,000 likes. That is data! Based on that tiny comment, on everyone saying "oh, my God, someone should start that" I could go back to the production company and say I tested it on TikTok, and maybe it is worth it. Maybe, when people with ADHD sit in the cinema and see that scene, they will go *brilliant*. [In the end we realised] that we have enough crew members with ADHD to fill the shop – it wasn't that expensive, after all!

If you only consider traditional development and production "real" filmmaking, hearing scrappy indies talk about podcasts, Webtoons, Chinese hundred-episode one-minute dramas, viability testing on TikTok, audience design, brand-funding, or the box office successes of community-funded film studios must be absolutely maddening. But the fact remains that every kind of film project does need the products of this evolved development: proofs of viability, a grounding in real people's experiences, and audience engagement.

The stories we tell about the filmmaking process have always centred on the shoot and the cinema, which is romantic, but also outdated. Filmmaking will increasingly be a constant development cycle of figuring out, funding, and making the next proof of concept, the next step on a path of creative development that will sometimes – among other things – result in films and TV drama.

Marianne Furevold-Boland: Sometimes projects fall apart, or our strategy changes. It is a narrowing funnel [and having a project stopped] is sad. If you've had many, it can feel brutal. [We need] an understanding between the producers and commissioners that we're always going into it together, but also realistically. It might happen, it might not happen, they are still OK.

Katarina Tomkova: There is a certain stigma to letting a project go. A feeling of failure [in the words] "they didn't continue into production". I don't think that's the right approach. We should be free to try things in development, to play around, and trust that the producer as well as the creative team is able to assess at the end of the development period whether the project is worth producing or not.

Transforming development is about getting better at making projects better, and about picking the right ones to move forward with – but also about letting the other ones go. The whole point of testing something is that you might not be right about your assumptions.

Perhaps we need some new ritual to mark the end of a project's development with a funder, broadcaster, or studio to reflect together on the shared work, on what has been learned, and what the project should become next, even when that is just a memory.

Morad Koufane: Maybe the producers need to curate their development slates a little more – some producers will send four projects to the same broadcaster in a two month period.

I love a TV producer who has something to say, the old way. The cinema way. This type of producer will not get back to you with six projects! They will come to you every three years, with a single project – their passion project. I would love to meet more of this type of old-school, auteur-oriented producer, who [also] understands the needs of the audience. Kabul was something like that: both of that necessity level, and romanesque in its structure and ambition.

KATARINA TOMKOVA

The example of Flow is amazing. That it won an Oscar makes me so happy! [Latvia is] a small Baltic territory, a country that many people in America perhaps did not even know existed. It proves that it's not about [our films] not being as good as the ones that get seen, it's just that there is very little funding for promotion, and most of the other films have no proper channels and resources to get to a point where they could be properly highlighted. If you're from a low production-capacity country, you will have a very limited amount of money to support an Oscar campaign. And even beyond the viewers, or a potential award or nomination, there is so much further value there. A Slovak film that wins or gets recognised in any way, will pave the way for any future Slovak film.

We always talk about production, and put so much money into it. Yet the two bookends, development and distribution, tend to be disastrously underfunded. They are so important! The development sets you on that path toward an efficient production, and the distribution will get you the results. We should significantly increase the financing systems of development and distribution, including promotion - as of now the funding just is not there.

7.

What We Know About Getting the Work and the Word Out

We need an industry-wide conversation about how communication, promotion, and marketing actually function today. The work of creating interest or a cultural moment starts early, takes long, and leverages curatorial brands and existing communities. Online audiences should not be understood as people we sell to, but as people we invite to care enough about our work to both show up and to personally promote it in their own networks.

Samya Hafsaoui: What is the best relationship advice a therapist can give you? That you can only love someone else if you love yourself. Somebody can only love your project if you love your project. If you are not going to tell anybody that your project is great, how do you expect other people to see [that] greatness?

Maybe you have a gem – maybe you have *Adolescence*. The second people put it on, they see it is important, amazing, and a technical marvel. Then yes, they will feel intrinsically motivated to make content about it and you didn't have to do anything. Maybe you don't have *Adolescence*, and people have more difficulty finding it. But once you have convinced them to go, maybe they fall in love with it. Then the hype train takes off.

Marianne Furevold-Boland: We invest significant time and resources into creating content we're proud of – but there [is] often not enough left for promotion and a release strategy that builds curiosity and engagement in the audience. I don't feel at the moment that we are taking this seriously enough, and I hear the same from all my other broadcaster colleagues.

If we don't have the capacity or money for [traditional marketing], what else can we do? We have to work within our means. We have something to learn from documentary film, which is good at creating that [moment]. I believe publishing, marketing and release strategies must be treated with the utmost seriousness – especially now that we are competing more than ever for the audience's attention.

For a film to succeed in theatres, it must stay on screens, which usually means it has to perform in its first two weekends. A TV drama released weekly can theoretically build an audience over time, but in practice breaking out still tends to require a cultural moment – many people discovering it more or less at once.

From a marketing perspective, making people aware a new thing exists and getting them to buy it are two separate tasks, neither of

them trivial. Compelling them to act within a very specific time frame is harder still. The task this industry sets itself with almost every new release is to achieve all three things at once, and very rapidly.

Audiences have no problem planning ahead for a concert or sporting event, but cinemas schedule late and therefore release tickets late. Intending to see something at release is not the same as showing up, as is also demonstrated by how rarely we seem to succeed in making "appointment television". And even as you sit down to watch, you are being enticed by the TV itself to pick something else.

That the difficulty level is harder than before feels pretty obvious, but if you listen to how our industry tends to talk, or observe how communication of films and shows is organised in practice, it is evident that we still think of it in old-world terms. About 20 years ago information could be pushed to almost all audiences via relatively few channels, and people helpfully went looking for what we wanted to tell them. They were genuinely interested in film reviews and TV guides – and even in hearing movie stars plug for new releases, because access to celebrities was otherwise limited.

Somehow we have failed to update our mental model, even though new premiers are released into the world each day, and a pretty good picture of how it now works is emerging. In the next 3–5 years, we will need an industry-wide conversation about how communication, promotion, and marketing must be shaped by our distribution and business models, which is to say by our specific audience. We also need to talk about who actually does this work – or rather about how much it has come back up the value chain.

Marianne Furevold-Boland: A system that measures success only by short-term global ratings – without considering long-term value or cultural impact – is unsustainable from an organizational perspective.

Internally, we often hear things like: 'No one watched that, so there's no interest in this kind of content. But [sometimes] the reality is, many people didn't even know the show existed.

Samya Hafsaoui: The way we market things now, with a poster at a bus stop or a bit in a talk show whose average audience is 60 years old, is far from your target audience. You have to come towards them, and if you only come towards them when you have something to sell, that's a very cold relationship. Take them with you!

For me that's a personal creative philosophy, but it can also be your production philosophy. Why don't you invite them to your set? Why don't you ask them what the title of your project should be, reward them when they make a fan edit, or interact with them when they make a video essay about your series? At its core, this generation wants to be seen and recognised for the time and effort they put into your stuff. The access to music artists is unprecedented, but for film and TV, it's still very much a screen divide.

Very broadly speaking there are three ways to compel the audience to show up for your good and relevant release. You can market your way into a cultural moment; you can build engagement over time; or engage an existing community.

The first is incredibly expensive to achieve in this media landscape, and it is worth noting that the greatest recent successes may actually have been attributable to underlying relationships as well. Barbie dolls, and Marvel comics for that matter, have been consumed – dreamed with – since the 1960s. And as of 2023, at least 65 million people worldwide had already seen the musical *Wicked* live on stage[17] – at a significantly higher ticket price than visiting a cinema. Better starting points for movie marketing campaigns are difficult to imagine, and their results cannot be evaluated solely on the strength of the film or the size of the promotional investment.

Given the astronomical production cost of *Barbie* and *Wicked*, erring on the safe side with marketing and promotion spend was probably wise. But if you do the other two things well, traditional marketing

17 Rubin, 2023

activities can sometimes even be entirely omitted – although they may still be useful for that final nudge to act at the right time, if you are certain the channels really reach the right people.

Katarina Tomkova: For me and some other arthouse producers across Central and Eastern Europe, the number of admissions from our national theatrical release will hardly be a match for the admissions during a film's festival career. As an example, a film that I cooperated on had the same number of admissions in Slovak theatres for its entire run as at its festival world premiere. At an A festival, you can sometimes get up to four screenings in gigantic halls. Then the film goes on to a hundred festivals.

The tricky thing is that these numbers are never reported, even though it's essential for films like mine. We all believe theatrical releases are important, but we have to rethink [how they work]. I wonder if this might not be one of the directions? The festival is a curator, a facilitator. Many festivals travel city to city, and even if a film is never technically bought for theatrical release in that country, it still manages to have a pretty decent life [in cinemas].

In a time when the first window provided the bulk of the income, it made some sense for the bulk of the communication to be handled by distributors, movie theatres, or the first broadcaster. But as building engagement "over time" implies, communicating a title will begin much earlier, and continue through the lifecycle of the work.

Without a clear understanding of what the project is, who it's for, and how it will reach that audience, building a viable business model is impossible anyway. The communication strategy will evolve with the project, but will be operational B2B long before pre-production begins: it is necessary for market positioning and to proactively ensure the right assets will be created and deployed effectively.

All these efforts need to be aligned, because there is no clear separation between communicating with the industry and with later

audiences. A promotional image for a competition title in festival catalogue, for instance, is also marketing the film to the festival audience. Getting the right people in that room will affect the film's buzz, its later festival career, and its reception on Letterboxd, which is influential on tastemakers. Should the film win an award, that same image will travel with the news and be seen by people who a year or two later might notice it again on a poster in a cinema or a thumbnail on a streaming service.[18]

Samya Hafsaoui: People were saying, "we really need to put an influencer in your film, we need influencers to talk about your film, and that's going to cost a lot of money". I [thought], we don't have that money. I will become the influencer myself.

I wanted to make something different and that is already difficult. But it's really difficult if you don't have data. When I am the brand of the movie, all of a sudden I have a bigger voice in the room. I get to be on the same level as a producer, going, I know you are the producer and have the money, but I have this audience behind me. I am lucky to be working with a production company that understands the value of the audience that I've built, that really believes in my vision.

Who should be communicating a project at any given time depends on what the project is and where it's headed. Sales or distribution might be involved from script; but there are also examples even of production companies with fewer than ten employees hiring a person to coordinate this work across their slate. As building engagement with an original property from scratch is very difficult, we are also seeing more examples of for instance distributors or cinemas branding their selections. In such cases the audience engagement is with their curatorial voice, a relationship that may ultimately turn their audience into a "pre-existing

18 I owe this observation to Tom Grievson of Hanway films, who made it on an EFM panel this year.

community", opening additional opportunities. The exact same thing is happening with talent, who build engagement with their creative brands by making themselves available for a two-way conversation rather than just admiration from afar.

The third and probably most economically efficient way of communicating a project is to laser focus on an existing community. This can take an infinite number of shapes, ranging from international partnerships with interest groups or brands to hosting DIY pop-up event screenings at a local community center.

Communities are groups of people that exist and interact independently of your project. They might be subject-matter experts, live in a specific neighbourhood, or be recurring visitors of the same festival. They might be fans of an artist or IP, or of a genre or type of content. Or they might be fans of your curatorial voice – the community you have built up over time.

The important thing to understand about interacting with communities is that you are not targeting consumers with a marketing message. These are not people you are selling content to; they are people you are hoping will vouch for it to others, in that community and beyond. Their social relationships are how the commitment to experience your work is created.

This requires credibility and trust. It will only work if the community members feel you respect them, their time, and their engagement – the labour and social capital they choose to invest with you. Your relationship cannot be one-way, and that any promises you make about the work, it has to live up to.

Especially if you are launching something new, your project will not have a "fan base". The goal is to build or identify a network of people who will trust you and be interested in you, so that when the time comes, if the content earns it, they can create that necessary push. In a marketplace where word of mouth is the most valuable commodity, long-term relationships and existing communities are how break-out-hits happen.

Samya Hafsaoui: Most people are scared. They just want to be writing in their house, or they just want to direct. They don't want to be the face of their project, contractually obliged to sit all day in interviews... It's really hard, really difficult. But then don't complain that nobody is watching your film.

You don't have to [be] perfect on social media. Dare to be cringe, please, for the love of God, be cringe! Just film yourself in your kitchen talking about your favourite story on set. As long as you really like talking about it.

Ted Miller: Netflix has done a really great job with shows that I think would be hard to sell to another buyer, *Adolescence* now, and *Baby Reindeer*. They're uniquely able to get eyeballs on shows where there's a deep engagement, and then the conversation around it will fuel it [further]. If those shows had been on a more traditional path – say on Channel 4 in the UK and then with a US network as a partner, and then launched at different times in each [consecutive] market – there would not be the same consistency, and therefore potentially not the same global resonance.

If the BBC and HBO, who have collaborated in the past, made a show, launched it on the same day and shared a marketing plan, I think they could do it. If there's true collaboration, I think you can have an impact.

The dynamics in TV are mostly similar to those of the film examples above. One might for instance be forgiven for not remembering that *Game of Thrones* once seemed like a gamble. A violent and salacious sword-and-sorcery show with a huge cast of unknowns didn't sound widely appealing, and certainly not like prestige TV. The unusual "sociological storytelling" style of the show meant that you could only get what it really was once you had seen a couple of episodes[19]. Marketing

19 Tufekci, 2019

certainly supported the show, but its original engines were relationship and community, which is to say trust. The trust of HBO subscribers in its curatorial taste; but also the three or four million readers of George R.R. Martin's books, who kept telling their friends to trust them and keep watching.

Just like with film, the work of launching a TV series should start early, and relies on relationship-building and community engagement. Only on that foundation is a significant marketing investment worth making. The challenge platforms and broadcasters face is that their content volume is far too big to do this consistently project by project, especially as every series will speak to a slightly different audience. Broadcaster marketing departments may still be organised according to an old-world logic, and limited by their budgets, by the jealously guarded trailer real estate in linear TV, and their often underwhelming social media reach.

The irony is that because these are mass media, more of the traditional communication style may actually still be available to them. Some platforms, most obviously Netflix, have the internal capability to put a show with legs in front of enough people to create a cultural moment. In markets where traditional brands like public broadcasters still meaningfully compete for audience attention, this same power could be leveraged more efficiently than is happening today.

A bigger marketing spend is nice, but creating that event moment may be better served by efficiently utilising existing resources, for instance by putting trailers on the in-house streaming platforms, and coordinating release schedules and communication assets between international partners.

Samya Hafsaoui: The essence of art should be to be of service to people. Someone needs to understand who you are making this for, and someone needs to enjoy it. Otherwise I don't know why we do this job. It's a fundamental flaw in our entire system. The most basic understanding of what our job should be is, talk to your people. Talk with your audience.

Epilogue:
Wonderful Things that Work

The challenging realities we have described can create the impression that getting anything made and seen is impossible – but an abundance of wonderful films and TV shows are performing in the market. Lower thresholds to affordable production are empowering a diversity of voices and approaches. For the established industry this represents hope, inspiration, and a new generation of storytellers.

Marianne Furevold-Boland: At the hopeful end of the spectrum, I see writers and production companies really finding those distinctive, entertaining stories, and telling them in a way that is realistic in terms of budget and finances. Creating a sustainable environment.

Morad Koufane: Do you remember the shift when everyone said "movies are dead, [long live] HBO"? Well, since the pandemic all the absolutely great artistic gestures have been in movies. There have been very few TV series at that level. *The Substance*, *Titane*, *Anatomy of a Fall*, *Emilia Perez*, *Tár*, *Anora*, *Poor Things*, *The Zone of Interest*, *Past Lives* – to name a few – many of them directed by women... things that will blow your mind and make you say, what did I just see? That and the beauty, just beauty at the core. Very rarely has there been beauty on TV.

Johanna Koljonen: Are you seeing it shifting again now?

Morad Koufane: [This year at Séries Mania] I said to Fréderic Lavigne, who curates the selection, "WTF?! Not a single show that I would not buy!" Such high quality, so impactful, so well-written and well-acted. I returned to work with a heart full of hope. All the shows were wonderful, but they were all sad. You cry and cry. It was wonderful.

The winner of the audience award had the best title: *Empathy*. We do need empathy. We need hugs from our series. [*Empathy*] is raw, but they had three standing ovations, because it opens your arms and heart to others. Difficult to take in, but it's a beautiful show.

There has been much talk in the industry of a return toward safe bets, but when our interviewees reflected on what is working right now, they painted a more nuanced picture. *Adolescence* came up in almost every conversation as an example of the audience's openness to powerful storytelling and difficult themes, as well as of the kind of show an audience wouldn't know to ask for, and an algorithm would probably never commission. There is a sense that cinema's moment of flourishing

continues, and that much original TV reaching our screens in the next year will be of outstanding quality.

When it comes to familiar formats, the old is indeed new again – but only when it is also actually new. As an example, the weekly procedural is back, but looking closer at a show like US broadcast hit *Fire Country*, its fire-of-the-week structure supports continuing storylines about a local community's struggles with the big social issues of today. And while *The Pitt* on HBO hearkens back to *ER* as well as *24*, it finds a new way to tell a different kind of story.

Ted Miller: I have to feel something for scripts I read, things I'm developing. There has to be a visceral reaction. I've tended to gravitate towards an interesting point of view, or a surprising element. It might be a story twist or a familiar show with a tonal shift.

The Pitt is a medical show. The entire season is the exploration of one incident. I found that compelling. *24* did a version of that, but we haven't seen it in the emergency room before. You catch yourself feeling, wait, we're still on this storyline six episodes later? Yes, of course – that is the real experience of time. When there's innovation in storytelling, even if it's just a modest shift, it can be really impactful.

Roman Paul: Projects have to be entertaining – I don't believe in boredom. They should always be aesthetically interesting and socially relevant. Our friends and colleagues at Warp just scored a surprise hit with *Adolescence*, and people are discussing it all around the globe.

Johanna Koljonen: *Adolescence* really doesn't appeal to the lowest common denominator. People have sophisticated tastes.

Roman Paul: And they're not afraid of tragedy – as long as it resonates with them, [is] about something they deeply care about. And it's important to make it unexpected: something that surprises even yourself.

Marianne Furevold-Boland: This is going to sound like a paradox,

but [we need] to keep two thoughts in our minds at the same time. Copypasting what everyone else is doing will make you irrelevant in the long run. But the audience also wants huge, shared experiences. They want to have somewhere to go where there's hope, with characters that feel relevant and relatable. It's about being able to do both. Like we've seen in Norway just recently with *Requiem for Selina*, which became a huge success in all demographics, a must-see drama. We need to strive to create what they don't [yet] understand they want and are going to love.

IP adaptations are another kind of "safe bet" that the industry has a troubled relationship with, in part because we have struggled to understand whether an IP adaptation will work. The potential should be viewed not as a function of the success of the original, but of the size and passion of its existing community of fans. Thinking of IP as community, and treating that community with respect, will determine your success.

What that means can take very different forms. Sometimes an audience community, as that of the Japanese manga *Drops of God*, will allow you to produce a beautiful and poetic TV drama about human existence and the cultural importance of French wine. Sometimes, as with that of the game *Minecraft*, your adaptation can reaffirm the engagement of a whole generation with the theatrical experience.

Johanna Koljonen: Are green-lights and acquisitions right now driven by nerves or quality? And the deeper question – does the content we truly yearn for get made?

Ted Miller: It's harder. Amazon had success with *Jack Ryan*, they wanted that sort of male energy. Then *Reacher* came along, then *Fallout*... They've captured an audience that works for them, big shows, big IP. That's one type of show. But I was surprised by *Drops of God* on Apple. It is based on a Japanese manga; it's a story about two charac-

ters from very different upbringings being brought together: a French character, and a Japanese character, and a storyline that connects them. You think, how did that get made? That must have been hard. You must have had a champion in there, or several champions. It's a great and beautiful television show, very unique.

Johanna Koljonen: The industry under-estimated *Minecraft*. If a film is very relevant, maybe it doesn't need to be as good?

Samya Hafsaoui: *Minecraft* is a community of people; never underestimate a good community... My generation can and will stick with media for a very long time. People in their 30s, 40s, 50s spend their disposable income on lightsabers and Pokémon cards. They will go [see] something that is based on an IP they grew up with.

Here's the thing: *A Minecraft Movie* is really good at what it wants to be. It wanted to be popular with Minecraft adults and Minecraft children, and thus it was. I don't think *A Minecraft Movie* wanted 100% on Rotten Tomatoes.

Thinking about what successful things have in common proved a useful exercise. Across mainstream hits and auteur work, work that engages is often about almost existential issues: what is a good life? What is worth striving for? What does it mean to be a good parent? Shows engaging with social issues can create a cultural moment, but they can also be a way of personally grappling with questions our lives may not otherwise have space for. When they are entertaining and gripping as well as relevant, the audience will make that space for themselves.

Johanna Koljonen: NRK has succeeded in making show after show that hits across tastes and demographics. How would you describe your approach?

Marianne Furevold-Boland: The projects that have succeeded have had an authentic, relevant core. Saying something about who we humans are, who we have been, and who we might become. At the same

time, they have been truly entertaining, demonstrating strong creative craftsmanship. Told in some way that feels a bit unique, that doesn't leave you indifferent. *State of Happiness*, *Lykkeland*, is great soap opera, but it's also a historic drama about why things were like that, and why we are here now. As for *Exit*, part of me wants to be at that party – but just for five minutes! The series taps into a wide range of emotions in the audience – it's a rollercoaster. You laugh, you cry, you get angry, and it sparks conversation and reflection.

Johanna Koljonen: We live in a society that's so marinated in greed. Might shows like *Yellowstone* and *Succession* be how we process that? I always think, what's wrong with me that I want to watch these horrible people? But that is a question about our whole society.

Marianne Furevold-Boland: *White Lotus* too! Peeping into a world that I will never, ever have the money to be part of, and am not sure I'd want to be in either... The characters in *Succession* and *White Lotus* are a bit smarter than me, a bit more beautiful, a bit skinnier; it can speak to a part of us that strives.

The concern often voiced within the industry (including, sometimes, this report) about Gen Z's declining interest for traditional film and TV is not shared by our interviewees. Reaching this audience with something innovative and specifically resonant is not easy, but certainly not impossible, and the next generation of creatives will figure out their own approaches to films and series. Meanwhile, we can lean into what we know: never underestimate a banger of a TV moment.

Marianne Furevold-Boland: Young adults want good storytelling, something resonant. *SKAM* has its 10-year anniversary this year. It still has very high viewership in that segment; we see new groups of 16-year-olds embracing it, which is just amazing. But young people are still watching *Breaking Bad* too, and that's about an old American man with cancer. I think they want something that feels extremely distinct.

Morad Koufane: I always try to keep as much as I can of my base, which is female, 50+. But our goal is to reach the 25–55. We already know genre series can reach male audiences; *Kabul* did very well with men over 50. *The Swarm* did great with the 25–55 demo. We never make sci-fi, and all of a sudden that genre worked super well. *Zorro* with Jean Dujardin got the best [youth] audience since 2009.

We didn't expect many very young people in front of the TV for *Zorro*, but [there was buzz] and the first night was huge. They all wanted to see Jean Dujardin in that role. We hope it will be exactly the same for *Lucky Luke*, our next comics adaptation.

Roman Paul: I can't sing the Gen Z swan song many others do. I see hardworking, super-dedicated, passionate young people. I am also a professor at the postgraduate production program Atelier Ludwigsburg-Paris. The participants are between 25 and 30 years old, all with work experience and degrees, trying to get on their own feet in terms of production. Of course they sometimes tell stories about how their friends don't go to theatres much anymore; there I hope for a revival. I hope we can offer things that are more in sync with the times – and make cinema-going a more affordable experience. It's definitely a medium that attracts young people and speaks to them. They will use it themselves to tell their stories.

Morad Koufane: We are partnering with a lot of schools for young writers. There's plenty of them, everybody is excited to write! It's a catch-22: by providing these beautiful, emotional, or very funny stories, we have sown seeds into the heads of all these young writers who dream to be part of the industry.

Johanna Koljonen: Are they promising?

Morad Koufane: Promising, and overwhelming because they are so many. When you do what I do, which is run the boutique side of France Télévisions, I will go to the Jack Thornes of this world for our inter-

national co-productions, I will not go to the emerging [voices]. For six years we actually did, with our young adult corner Slash, making around 20 YA series with emerging talents, writers, directors, actors, and companies. We are [still] interested in young writers, but now with a little bit of experience, for our young adult slate.

As digital natives enter the industry, an understanding of the possibilities of the technical transformations is finally landing too. Production volumes in feature film and TV are finding their new normal after the peak, a contraction inevitably benefiting established artists and hitmakers. On the other hand no one needs to wait for permission to make something anymore.

Ted Miller: In the traditional [system], for an actor to act, ultimately someone had to hire them to give them an opportunity. Today, a performer can perform. Fewer barriers to entry means there's a lot more content, but if you develop your craft and get attention, your things can ultimately rise to the top.

Katarina Tomkova: The Hungarian film *Explanation for Everything* was made on a true micro-budget and won Orizzonti best film in Venice. It had a huge impact and the film travelled worldwide. Of course, the decision to go micro-budget wasn't made out of their own wishes – it was heavily influenced by the situation in Hungary and the funding reality. But it's an incredible team; their amazing energy, their deep desire to tell an important story made it possible for this film to happen, against all odds.

I like to use that example when talking to junior producers [even though it's] a different context. Guys, you can start small. Pulling off the financing for debut films is very hard, both for directors and producers, so thinking smaller scope but strong ideas can be very viable for young filmmakers. I won't mind that a film was made for little money, if I really enjoy the story, connect with the characters, and it's really

captivating. Not that I would wish for them to make 100k films for eternity – that would not be healthy or sustainable. But from time to time, it can set our mindset in a different way, inspire us to come up with innovative solutions.

The ability to produce something affordable but powerful opens every door, as the work is appealing for traditional platforms but also creates a wider range of business opportunities for oneself. This choice between reach and ownership is not binary, and building an audience strengthens your negotiation position over time.

Johanna Koljonen: The European industry is struggling to keep budgets high enough to compete, visually.

Samya Hafsaoui: According to whom does it need to look more expensive?

Johanna Koljonen: It's believed to be what the audience wants, based on how expensive films perform... But then those are probably also marketed in a different way?

Samya Hafsaoui: Exactly. I don't know where this idea comes from. People in the cinema will have no idea you shot this on a RED camera or what kind of softbox you used. Yes, people can recognise really bad editing or VFX, and you should stay away from Uncanny Valley. They'll know if something looks really shit. But everything starts and ends with a screenplay, doesn't it? This obsession with making a movie look expensive, but [shooting] a script that 20 people had an opinion on is crazy to me. What are you doing?

Morad Koufane: The third episode of *Adolescence* is great, great TV. It's one table, two chairs, two actors. You don't need €20 million for that. If you want to make *Kabul* or *The Count of Monte Christo*, you need money of course, but the most powerful things are not necessar-

ily the ones that cost the most. The most potent VFX is still a close-up on the face of your main actress or actor.

You can make a tiny TV series on an iPhone 16 Pro Max. You can make a big movie. Sean Baker, who directed *Anora*, made [his 2015 film] *Tangerine* on three phones. If you really want to say something, you don't need me. You don't need a broadcaster, you need your imagination. The technology now provides you with all the tools to achieve your goal: to tell your story.

Katarina Tomkova: There are theorists that say the genius quality of the films from the Communist era [that were suppressed at the time] came from the limitations they were up against. I admire the artistic persistence of these filmmakers – and how these limitations creatively stimulated their voices [even though they were used as a] tactic of oppression. Perhaps examining that resilience could be a good exercise and open up conversations about new approaches?

Johanna Koljonen: Do you view new platforms and formats as being in competition or in conversation with the traditional industry?

Marianne Furevold-Boland: Without sounding too anarchy-punk here, if we are not curious, the establishment will become the past. If the young talent, the new talent, don't want to come to NRK with their stuff, we are doomed!

We, the establishment, have an obligation to be curious about new content providers and formats. But it has to be a dialogue. We must not view innovation, curiosity, as marginalising ourselves.

The meaning of the phrase "storytelling is more important than ever" is difficult to convey, because it is a cliché: our brains will glide over the words without registering them, or notice and dismiss them as trite. But words get worn out when they feel true, and some variant of the same observation came up in almost every conversation we had this year.

Storytelling is more important than ever. Storytelling is always most important in the current moment, because it carries our memories and culture and norms, and who we are, and how we want everything to be better. When we tell those stories well, not from a calculating place but because we feel those things too, our industry also prospers.

These things are very difficult to put in words, but you can trust a writer to find a better way of saying it.

Samya Hafsaoui: I'm not a producer, but I'm also not stupid; I understand what it takes for my movies to get made. But I will fight tooth and nail for people to understand that how you make money is to find things a big group of people love. I don't think making a commercial film is about making something [lazy or] vapid for mass consumption. It's about finding something a large group of people love.

People go to the *Minecraft* movie because they love *Minecraft*. People watch *Adolescence* because they love their children, because they love their daughter, because they love their sister, and it specifically scares them to lose the people they love to hatred. People [see the theatrical re-release of] *Pride and Prejudice* because they love love.

Sources

Belloni, Matt (2025a): "How did 'Sinners' Really Do This Weekend?', *The Town*, April 4

Belloni, Matt (2025b): "What Is the HBO Brand in 2025? Part 1 With CEO Casey Bloys", *The Town*, April 30

Cullins, Ashley (2025): "Originals, Indies & 'Sinners' Impact: 2025 Q1 Deals Report", *The Ankler*, May 1

Dunn, Jonathan, Sheldon Lyn , Nony Onyeador, and Ammanuel Zegeye (2025): "Black representation in film and TV: The challenges and impact of increasing diversity", *McKinsey.com*, March 11

Ene, Laura, Manuel Fioroni, Gilles Fontaine, Christian Grece, Martin Kanzler, Amélie Lacourt, Éric Munch, Justine Radel-Cormann, and Agnes Schneeberger (2025): *Key Trends 2025. Television, Cinema, Video and On-Demand Audiovisual Services: the Pan-European Picture.*

Gessen, Masha (2020): "By Declaring Victory, Donald Trump Is Attempting an Autocratic Breakthrough", *The New Yorker*, Nov 5

Gessen, Masha (2024): "This Is the Dark, Unspoken Promise of Trump's Return", *New York Times*, Nov 15

Koljonen, Johanna (2024): *Nostradamus 2024: Paradox of Hope*

Mason, Paul (2025): "Trump Brings Britain's 'Moron Premium' to the U.S. Economy", *The Atlantic*, April 12

Mecklin, John (2025): "Closer than ever: It is now 89 seconds to midnight. 2025 Doomsday Clock Statement", *Bulletin of the Atomic Scientists*, Jan 28

Nord, Marina, David Altman, Fabio Angiolillo, Tiago Fernandes, Ana Good God, and Staffan I. Lindberg (2025): Democracy Report 2025: 25 Years of Autocratization – Democracy Trumped?

Panetta, Alexander (2025): "U.S. could lose democracy status, says global watchdog", *CBC News*, March 18

Rifkind, Donna (2020): "Refugees Fleeing Nazi Germany Reshaped Hollywood. This Forgotten Woman Helped Make It Possible". *Time*, Jan 2

Rubin, Rebecca (2023): "'Wicked' to Become Fourth-Longest Running Show in Broadway History", *Variety*, April 6

Schnapper, Laure (2020): "Filmmakers from Berlin and Vienna exiled in Hollywood", *Encyclopédie d'histoire numérique de l'Europe*, June 22

Tufekci, Zeynep (2019): "The Real Reason Fans Hate the Last Season of Game of Thrones", *Scientific American*, May 17

Göteborg
Film Festival

BOOST HBG

german films

Lindholmen
Science Park

KULTUR
AKADEMIN

Creative
Europe
MEDIA

VÄSTRA
GÖTALANDSREGIONEN

Nordisk
Film & TV Fond