

Strategy 2026 – 2029

We elevate stories that move people

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Introduction

The Norwegian Film Institute's strategy sets out the framework for achieving Norway's film and games policy objectives for the period 2026–2029

The audiovisual sector is undergoing a period of profound transformation. Globalisation, technological advances, artificial intelligence and new platforms have reshaped how stories are created, distributed and experienced. Audiences have more choice than ever before, while competition for attention has become global, algorithm-driven and increasingly intense.

In this new media landscape, what feels familiar, authentic and rooted in our own language and culture becomes more important than ever. Norwegian films, series and games are not merely entertainment – they carry language, culture, freedom of expression and a sense of community. They offer stories that help us understand ourselves and each other across generations, backgrounds and geography.

In recent years, the Norwegian film, series and games industries have built significant international momentum. Norwegian productions, creators and companies have gained visibility through artistic quality, a distinctive creative identity and increased impact in international markets. This momentum has created new opportunities for partnerships, financing, audience reach and value creation – and carries a responsibility to manage this position strategically. Sustaining this momentum requires continued strategic development, professional positioning and strong Norwegian ownership.

At the same time, the Norwegian audiovisual sector is facing a demanding transition. Rising costs, changing business models and higher investment thresholds make production increasingly risk-exposed. New audience habits and platform structures challenge established models for distribution and promotion. For the Norwegian Film Institute, this invokes the responsibility to manage public funding in



Kjersti Mo
CEO

a way that provides both stability and flexibility, while fostering quality, diversity and long-term value creation.

The strategy for 2026–2029 outlines how the Norwegian Film Institute will respond to this reality. It is built on insight, dialogue with the industry and a clear public mandate. Our ambition is to strengthen Norwegian language and culture in a global media environment by enabling independent stories and experiences that matter, move us and bring us together.

Our main ambition is therefore: We give Norwegian language and culture a clear voice in a new global media landscape through independent stories and experiences that move, enrich and connect us.

This ambition is both a guiding principle and a commitment. It expresses the purpose of the Norwegian Film Institute and what we aim to contribute – to the industry, to audiences and to society. In essence, the strategy can be summarised in one simple idea: We elevate stories that move people.

To realise this ambition, we will pursue four strategic paths: flexible film financing; quality and audience relevance for all; visibility, impact and legitimacy; and skills and technology working together.

Through these strategic paths, the Norwegian Film Institute aims to become a more visible, effective and forward-looking actor in a rapidly changing media landscape.

Oslo, 29 January 2026



Kjersti Mo

CEO Norwegian Film Institute

We give Norwegian language and culture a clear voice in a new global media landscape through independent stories and experiences that move, enrich and connect us.

Political goals and objectives

The Norwegian Film Institute is a governmental agency subordinate to the Ministry of Culture and Equality.

We work within a framework of objectives and resources established by the Ministry with a view to achieving the goals of the Government's film and gaming policy.

The current film, series, and gaming policy goals:

- strong and sustainable industries throughout the country
- high-quality films, series, and computer games with impact
- films, series and computer games that reflect society as a whole
- an inclusive, safe and accessible gaming culture

These goals provide the framework for how we work and have informed the development of this strategy.

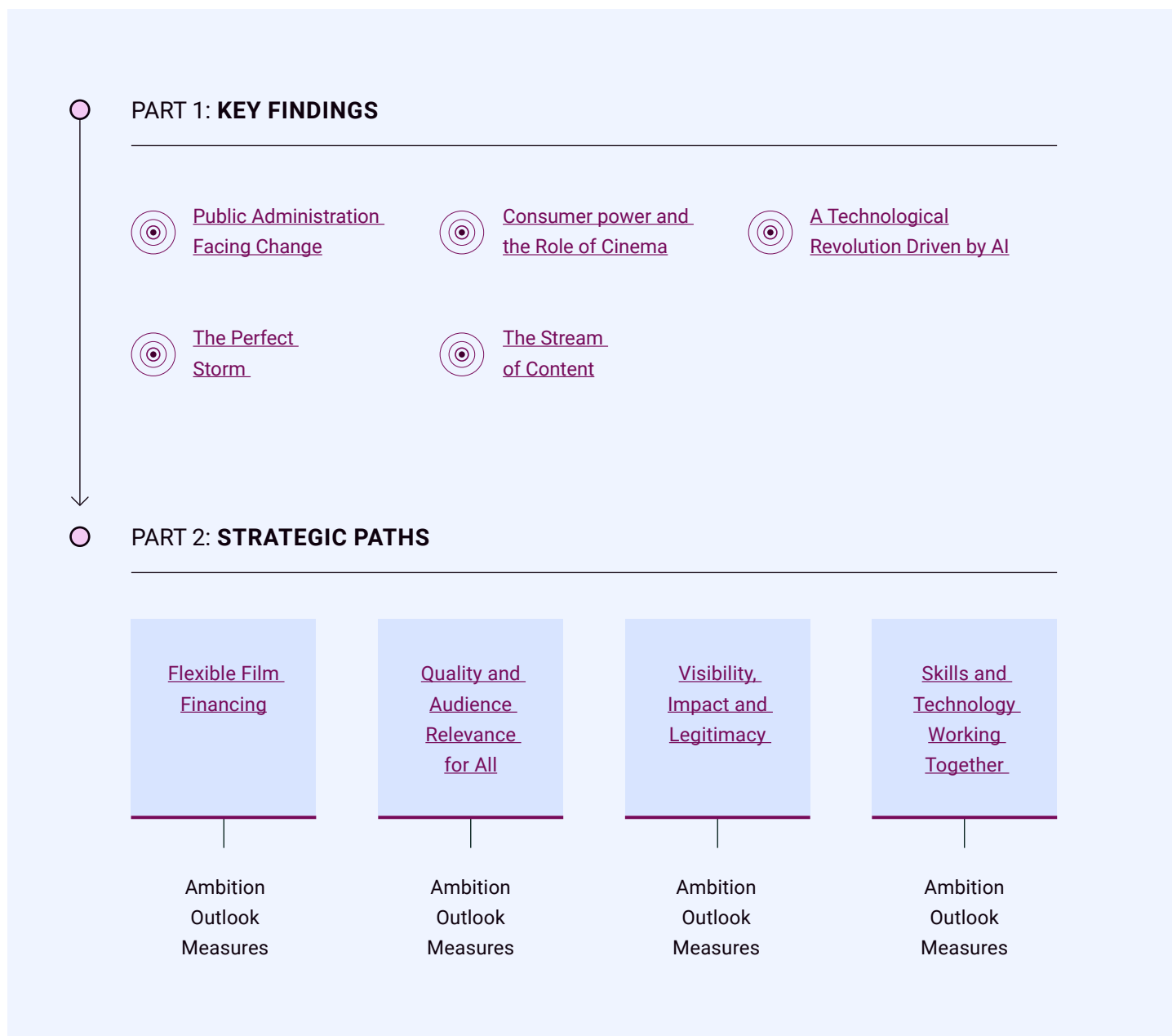
The current political goals are set out in Prop. 1 S for the Ministry of Culture and Equality.



Photo: Unsplash/Gerrit Frohlich

Structure

The strategy process started with an insight gathering phase. Based on the key findings, we have identified four strategic paths. For each path, we have outlined an ambition, an outlook, and the key strategic measures that will guide us there.



PART 1:

Key findings

01

From Insights to Findings



Public Administration Facing Change



The Perfect Storm



Consumer power and the Role of Cinema



The Stream of Content



A Technological Revolution Driven by AI



From Insights to Findings

We have collected insights about the state of the sector and market trends. Based on dialogue with the industry and our own analyses, we have identified five key findings.

A significant part of the strategy process has involved collecting insights about the current situation and key market trends in the film, series and games sector. We have maintained close dialogue with the audiovisual industry through roundtable discussions, meetings with industry associations, feedback sessions and interviews. We have collected and analysed industry data to gain a comprehensive overview of the current challenges and opportunities shaping the sector. On this basis, we have focused on areas where the Norwegian Film Institute can make a difference through our funding schemes and policy tools, within current mandates and frameworks. This has resulted in five key findings.

KEY FINDINGS

Key developments in society and the sector that will shape the sector in the years ahead



[Public Administration
Facing Change](#)



[Consumer power and
the Role of Cinema](#)



[A Technological
Revolution Driven by AI](#)



[The Perfect
Storm](#)



[The Stream
of Content](#)

KEY FINDING 1:

Public Administration Facing Change

Developments over recent years point toward a gradual but significant shift in conditions shaping the public sector, both nationally and internationally. Growing global polarisation, weakened democratic institutions across several countries, and an increasingly unpredictable world order – all highlight the importance of trust, transparency and democratic infrastructures, also from a Norwegian perspective. In light of these conditions, cultural policy and particularly audiovisual media have gained increased relevance as arenas for expression, reflection and public discourse. There is increased attention to the role of culture in democratic resilience and societal preparedness.

At the same time, the public sector faces greater requirements for best practice. The current field of public administration is characterised by efficiency measures, digital transformation and more user-oriented ways of working. Public services are expected to not only comply with regulations, but also to be accessible, flexible and continuously improve according to evolving needs.

Diversity and environmental sustainability have gained increased importance as criteria for culture and media politics, both through policy tools and expectations facing the Norwegian audiovisual sector. Also, public funding and the role of culture in society is increasingly up for discussion in an increasingly polarised public discourse.

In a time of rapid change, rising expectations and political tension, it is of greater importance that the public sector works on a basis of factual insight, in order to set the right priorities and design efficient policies. Insight and knowledge provide a solid foundation for budget decisions, enabling more targeted measures and strengthening legitimacy.

KEY FINDING 2:

The Perfect Storm

Many producers describe being caught in a perfect storm, where rising costs, less risk taking in the market, and unpredictable conditions, make the landscape more difficult to navigate.

Films and games production is perceived as more financially high-risk than before. High interest rates, a weakened Norwegian krone, and the limited access to private capital make financing productions more challenging. Some producers have pointed to a decline in available investment capital after streaming services shifted from growth strategies to cost reduction. This uncertainty results in more cautious investment strategies, with financiers preferring to enter projects at a later stage.

Many film producers describe the overall financing system as challenging, perceiving public funding processes as rigid, with limited opportunities for dialogue. They experience the uncertainty surrounding grant applications and disbursement as a substantial strain. There is a desire for greater flexibility and trust from public bodies, especially for production companies with proven track records. Some question whether the current system sufficiently stimulates strategic development and long-term portfolio building.

Several producers experience difficulties in accessing the Norwegian Film Production Incentive scheme, partly because it cannot be combined with production grants from the Norwegian Film Institute.

Some Norwegian producers find it paradoxical that they can make use of incentive schemes abroad, but not the Norwegian incentive scheme. Some feel forced to move

shooting or post-production abroad, despite wanting to make the film in Norway.

In today's uncertain market, it is increasingly challenging to reach audiences. This requires a fundamentally different approach to film distribution and promotion, beginning at much earlier stages. In order to secure financing, distribution rights are often sold at early stages, which limits revenue potential after release. Some producers see opportunities in new formats and distribution channels, but there is a lack of resources and tools to stimulate innovation and develop new revenue strategies.



Photo: Unsplash/Jakob Owens

KEY FINDING 3:

Consumer Power and the Role of Cinema

The audiovisual landscape has undergone major changes following the rise of global streaming and distribution platforms. This has made films, series and games far more accessible and affordable for consumers. Audiences today have access to a vast universe of content, available across multiple devices, at all times. This shift has given audiences increased choice and influence. The fragmentation of audiences has unfolded in parallel with the concentration of power among distributors. A small number of global actors now control large parts of both production and distribution. This means that the same platforms that own the content also determine how it is presented and prioritised. At the same time, we see the emergence of niche content and individual creators capable of building subscriber bases exceeding major streaming services.

The market shifts have had a significant impact on the Norwegian cinema business. Cinema attendance has been declining since the pandemic, with a slight increase in 2025. More films are now released directly on streaming platforms, and exclusive theatrical windows are no longer guaranteed. This challenges both the economic sustainability of cinemas and the role of the cinema as the key distribution arena for Norwegian films. Lower attendance has also reduced revenue potential for producers and distributors. This calls for a change in our policy tools and funding schemes, including supporting alternative release strategies, strengthening marketing competence, and enhancing visibility in digital channels where the competition for attention is intense.

Together, these changes highlight the need for integrated approaches across all phases of audiovisual production – from development and production to distribution, promotion and visibility – in an increasingly platform-dominated media landscape.

KEY FINDING 4:

The Stream of Content

In recent years, the audiovisual sector has experienced an explosive increase in the volume of content being produced and promoted. Streaming services have competed for audiences by investing heavily in new films and TV series, leading to a historic peak in global production levels. The years following the pandemic have seen intense production activity, driven by the competition for subscribers and the constant demand for new content. Meanwhile, research indicates that this growth has reached a saturation point, and that we may be entering a period of consolidation and a moderate decline in the number of productions. Streaming services have shifted their strategic focus from growth and volume to profitability and cost control, emphasising fewer productions, more reliable commercial impact, and greater use of advertising-based and hybrid payment models.



Photo: Pexels/Karola G

While established platforms have expanded their catalogues of what is often termed ‘premium content’, audience media habits have changed. New forms of content – such as short form video, social media formats and microdramas – get an increased share of audience attention, particularly among younger users. Global platforms offer quick, engaging storytelling that challenges traditional formats and reduces the time audiences spend on long-form films and series. These new formats do not share the artistic ambition or production quality of traditional films and series. In the games sector, hundreds of new titles are added daily to the major mobile platforms.

Prior to and during the pandemic, investments in the games industry greatly increased, leading to a large volume of new titles driven by high demand and easy access to capital. The amount of new releases has made it more difficult for individual titles to gain visibility in an increasingly crowded marketplace, which makes it harder for studios to ensure a financially sound operation.

These changes have contributed to a fragmented media landscape, where competition for audience attention is greater than ever. Consumers have gained more power, yet visibility and success are increasingly determined by algorithms and a small number of global actors. The sheer volume of content has therefore both democratised access and created new market concentration – where quality, visibility and sustainable production models become decisive factors for the future.

KEY FINDING 5:

A Technological Revolution Driven by AI

We are experiencing a technological transformation driven by artificial intelligence (AI). This is no longer a future scenario, but an ongoing revolution reshaping practices, expectations and opportunities across both public and private sectors. Major global actors are investing heavily in infrastructure and AI innovation in order to achieve market domination. This creates opportunities as well as challenges.

AI-based solutions are expected to reduce manual processes, streamline case processing and improve decision-making. The users – the applicants, in our case – are the focus of attention. They expect more efficient, accessible and personalised public services. This requires new digital interfaces, improved baseline insight, and a culture of continuous improvement. At the same time, advances in AI raise questions regarding due process, quality assurance and accountability in automated assessments.

AI is also creating profound change in the audiovisual sector. Tools for text generation, image and video production, translation, subtitling and editing are transforming workflows, roles and responsibilities within the production process. Innovative products and service providers may challenge traditional sector practices, presenting both opportunities and threats to standards of artistic and professional quality.

We are seeing a greater concentration of data value and market power among distribution platforms and AI developers, which increases the need for developing skills, ethics and transparency in the use of AI. Especially in matters of copyright, crediting and consent, AI is challenging established technological practises.

PART 2:

Strategic paths

02

Ambitions and Strategic Paths



Flexible Film Financing



Quality and Audience Relevance for All



Visibility, Impact and Legitimacy



Skills and Technology Working Together



Ambitions and Strategic Paths

Based on the key findings, we have identified four strategic paths. For each path, we have outlined an ambition, an outlook, and the key strategic measures that will guide us there.

MAIN AMBITION

We give Norwegian language and culture a clear voice in a new global media landscape through independent stories and experiences that move, enrich and connect us.

STRATEGIC PATHS



STRATEGIC PATH 1:

Flexible Film Financing



AMBITION

Targeted funding schemes and flexible financing enable economically sustainable production of films, series and games, and ensures negotiation leverage for rights holders. Norwegian films, series and games gain increased access to international financing through their strong global position.



OUTLOOK

Norwegian films, series and games are developed and produced within a dynamic and sustainable ecosystem, where funding from the Norwegian Film Institute provides a stable part and unlocks further financing. Our funding grants limit risk, provide security, and unlock financing from European public funding schemes, international streaming services, co-producers, private investors and other sources of capital. The Norwegian Film Institute offers funding opportunities for early-stage development, enabling rights holders to develop projects with clearly defined IP ownership. This provides stronger market visibility and more effective project realization, both in choosing partners and in engaging with national and international audiences. The Norwegian VOD investment obligation scheme ensures stable funding from major international streaming services, increasing predictability and confidence across the industry.

Production volumes are sufficient to maintain a stable and strong market share in cinemas, and high-quality content ensures international impact. Norwegian films, series and

games increasingly generate revenue across multiple platforms and markets worldwide, spanning different formats. International streaming services remain active partners in Norwegian production, with investments and broad distribution contributing to increased audience reach for Norwegian films, series and games. The Norwegian Film Institute also provides mechanisms that enable independent producers to safeguard rights in ways that strengthen Norwegian ownership and value creation.

The Norwegian Film Institute's financing has become more efficient and flexible. Our funding systems respond to the need for more sustainable and adaptable financing, suitable for the economics of film production, investment conditions and market realities. Creative freedom and national ownership remain strong, as the funding structure supports both culturally significant and commercially viable projects, regardless of format or target group.



MEASURES

Measure 1: Future film financing

- **We will** contribute to more flexible, predictable and effective financing processes by developing systems and workflows that provide clearer frameworks and stronger coherence through our funding schemes and policies.
- **We will** strengthen baseline liquidity and financial resilience in production companies and projects by developing our funding schemes and policy tools to support economically sustainable production environments and improve conditions for gap funding.
- **We will** provide the framework for a broad and diverse range of films and series by supporting projects that combine artistic ambition with audience appeal, at a scale that can sustain a vibrant Norwegian production community.

- **We will** further develop funding schemes to ensure greater predictability and operational flexibility for experienced production companies.
- **We will** stimulate more effective utilisation of Norwegian content by examining incentives for exploring alternative revenue streams and new models for value creation.

Measure 2: International positioning for films, series and games

- **We will** strengthen access to international financing in the Norwegian film and games sectors by supporting skills development programmes, building strategic partnerships and enabling international positioning of projects from initial stages.
- **We will** promote international positioning of Norwegian films, series and games from early stages by integrating export perspectives into the development phase through advisory services, grants and competence-building measures.
- **We will** increase the international impact of Norwegian films, series and games by strengthening strategic ownership in co-productions and by the selective positioning of projects with export potential.
- **We will** enhance international visibility by developing a shared international profile and establishing partnerships in priority markets.
- **We will** strengthen the competitive ability of the Norwegian audiovisual sector by building competence in IP rights management, business models and platform development.
- **We will** enable knowledge-based international investment initiatives by developing indicators and insights that measure export impact and identify new market opportunities.

STRATEGIC PATH 2:

Quality and audience relevance for all



AMBITION

The Norwegian Film Institute will promote films, series and games that engage and reflect the general public by prioritising quality content from strong talents, developed with cultural relevance and audience insight, made available across platforms.



OUTLOOK

Norwegian audiences have access to a diverse and relevant range of films, series and games of high artistic quality. Norwegian audiovisual productions reflect the complexity of society and convey stories with thematic depth, nuanced characters and strong narrative power. Audiences of all ages, backgrounds and circumstances have access to content made for them and they know where to find it. Cinemas remain important meeting places and key partners for local culture.

Artistic innovation is driven by strong development spaces, and funding schemes have been revitalised to provide greater flexibility for creators. Audience insight is used as a source of inspiration, where both established and emerging talent can develop their personal artistic visions. A diverse and inclusive production environment brings forward a wide range of stories and perspectives through the interplay between commercial and artistic ambitions.

Norwegian production companies create and retain ownership of strong intellectual properties that engage audiences

both nationally and internationally. In an algorithm-driven media landscape, Norwegian films, series and games succeed in breaking through and reaching audiences with content perceived as culturally relevant and relatable.

The Norwegian audiovisual sector is applying audience insight across development, programming and distribution. Public funding supports experimenting with new technology, audience engagement, and platforms for promotion and distribution. Norwegian content reaches new target audiences, not by coincidence, but through strategic development.



MEASURES

Measure 1: Supporting audiovisual creators

- **We will** strengthen the development of screenwriting and directing talent by placing artistic practice at the centre and by offering flexible opportunities throughout professional careers.
- **We will** support Norwegian filmmakers through balancing the needs of first-time filmmakers and more experienced professionals, through differentiated grants and strategic skills building measures.
- **We will** promote long-term recruitment and increased diversity in the audiovisual sector by supporting new voices and establishing inclusive structures.
- **We will** support the professional development and international reach of emerging talents through profiling, mentoring schemes and strategic partnerships.
- **We will** stimulate stronger collaboration between established and emerging industry actors in order to build bridges between experienced and upcoming talents.

Measure 2: From idea to audience

- **We will** safeguard cinema as the primary arena for films by funding projects with clear theatrical potential, and through development initiatives and competence-building within the cinema sector.
- **We will** strengthen audience orientation in film, series and games production by introducing requirements for target audience work and positioning from development through to release.
- **We will** support applicants in developing and documenting audience engagement by target group concept testing and creative development, ensuring that funding decisions are supported by documented audience interest.
- **We will** promote the use of insight and skills development to stimulate innovation in film promotion and audience engagement.
- **We will** create and share knowledge about audiences by advancing new methods for target group insight, organising professional forums and offering skills development programmes to grant recipients.
- **We will** ensure that content acquired through public financing schemes reaches broad audiences through strategic partnerships.



Photo: Unsplash/Sam Io

STRATEGIC PATH 3:

Visibility, impact and legitimacy



AMBITION

Norwegian films, series and games are strong brands both nationally and internationally, and acknowledged for their value to culture, freedom of expression, accessibility and public engagement. Children, young people and parents choose Norwegian films, series and games that reflect their language and ways of expression.



OUTLOOK

Norwegian films, series and games are established as strong, recognisable cultural brands both in Norway and internationally. There is broad public awareness of their importance not merely as entertainment, but as culture, freedom of expression, accessibility and cultural exports. Audiences take pride in and identify with Norwegian content, and there is strong confidence in the Norwegian Film Institute's mandate and priorities.

Successful productions and creators are celebrated through collaborative efforts with the industry, ensuring that individual success contributes to strengthening the sector collectively. Across media, festivals and public discourse, Norwegian content is widely considered to be succeeding both artistically, commercially and socially. The Norwegian Film Institute's grants and activities are considered efficient, relevant, and beneficial societally.

Children and young people have a strong connection with films, series and games that reflect their experience,

language and ways of expression. This makes young audiences feel seen and understood and builds an enduring relationship with Norwegian audiovisual content.

Enhanced visibility unlocks new financing, through increased interest from private sector actors and international co-financing partners, and strengthens the legitimacy of public funding. The Norwegian Film Institute is a prominent and trusted public voice, securing the mandate of the Institute and the position of government audiovisual policies with audiences, policy makers and civil society through strategic communication.



MEASURES

Measure 1: Public trust and recognition

- **We will** strengthen the reputation of Norwegian films, series and games by highlighting their value as arenas for expression and as carriers of culture, democratic values and civic resilience.
- **We will** enhance the position of Norwegian films, series and games by promoting individual titles and talents internationally, and developing tools and initiatives that strengthen recognition, trust and confidence.
- **We will** increase the visibility and public understanding of the value of government funding for films, series and games.
- **We will** act as a prominent and knowledgeable public voice by highlighting our spokespersons and strengthening our channels of communication, and by actively participating in public debate on the role of culture in society.

Measure 2: Children and young audiences

- **We will** encourage engagement with film for children and young audiences through funding grants and

joint initiatives with schools, libraries, festivals and cinematheques.

- **We will** serve as a resource centre for the use of film in education.
- **We will** encourage the participation of children and young people in planning and carrying out events and productions across the sector.
- **We will** pursue strategic partnerships that strengthen our young audience initiatives.
- **We will** use our funding schemes and policy tools to support the annual production of at least two Norwegian children's films and one Norwegian game for children.
- **We will** ensure that films, series and games reach young audiences through targeted distribution strategies.

Measure 3: Gaming culture

- **We will** contribute to an inclusive, safe and accessible gaming culture by strengthening meeting places, outreach initiatives, and public access to Norwegian games.
- **We will** promote games as artistic and cultural expression by strengthening our tools for outreach, language, universal design, and nationwide audience engagement initiatives.
- **We will** develop and share knowledge of gaming culture in our capacity as a resource centre for sharing insight and building knowledge in public and private sectors.
- **We will** strengthen the position of gaming in culture and society through initiatives that further understanding and highlight the contribution of games in democracy, freedom of expression and community.
- **We will** increase access to Norwegian gaming culture for children and young audiences through strategic collaborations with libraries, youth clubs and relevant public agencies.

STRATEGIC PATH 4:

Skills and technology working together



AMBITION

Our public administration will be efficient and data-driven, drawing on interdisciplinary expertise in our casework. We use new technology across all our work processes. Our digitalisation and IT department is the main driver of innovation at the Norwegian Film Institute. Skills building in the organisation is guided by strategic needs.



OUTLOOK

The Norwegian Film Institute's organisational culture is informed by our commitment to providing a high-quality service. Through our annual governance processes, we prioritise measures that ensure continuous improvement. Improvement initiatives are based on analysis and insight. The Norwegian Film Institute maintains a systematic understanding of our professional fields, with a strategic and long-term approach to developing expertise within the organisation.

Our digitalisation and IT department is the main driver of innovation and a strategic partner to the organisation, developing digital services for staff, users and partners in close cooperation with relevant professional communities. Digital tools and artificial intelligence are integrated into our workflows, freeing up capacity for public value creation in work processes that require professional assessment.

Our grant scheme system has evolved from a case management approach to a user-oriented flexible model.

Consequently, projects that receive grants from the Norwegian Film Institute are offered tailored support according to specific needs. Our applicants get dependable, positive support and guidance throughout the application process. Applicants who are not awarded funding also have a positive user experience. Our casework processes are efficient and consistent, maintaining high professional standards and strong technological support.

When we uncover errors or breaches of procedure, we use this as opportunities for learning and improvement. Giving and receiving feedback is an integral part of our learning culture and everyday workflow. We have become an organisation that simultaneously delivers results and pursues improvements.



MEASURES

Measure 1: Digital transformation

- **We will** provide more user-oriented and comprehensive project support by transforming our grant administration from case processing towards interdisciplinary service models.
- **We will** increase public administration efficiency by integrating artificial intelligence and automated solutions in registering applications, case processing and internal support systems.
- **We will** improve the quality of professional assessment and advice by freeing up capacity from routine tasks through efficient use of technology.
- **We will** work as a data-driven and learning organisation using insight, analysis and feedback as the basis for continuous improvement and prioritisation.
- **We will** build a forward-looking work culture by enhancing digital skills throughout the organisation and encouraging interdisciplinary collaborations bridging technology and knowledge.

Measure 2: A learning organisation

- **We will** develop a learning driven organisational culture by placing skills building at the centre and strengthening the interaction between leadership, autonomy and collective responsibility.
- **We will** ensure that our collective skills meet the demands of our public mandate and future needs through strategic skills mapping and targeted development.
- **We will** build a culture for professional development, ensuring that skills building remains a collective responsibility.
- **We will** support systematic development through digital solutions that provide both management and staff with an overview of skills development needs, learning resources and development opportunities.
- **We will** establish a comprehensive skills building infrastructure, from recruitment and onboarding to continuous development, enabling us to realise our ambitions for digital transformation.



Photo: Pexels/Mikhail Nilov



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