



Home > TV > Festivals

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Berlin's Series: 7 Takes, From Buzz Titles to Market Trends

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Credit: Henrik Ohsten

The Berlinale was the world's first big festival to embrace drama series, launching Berlinale Series in 2015 and adding a year later an industry component, known from 2019 as the [Berlinale Series Market](#). It has grown into

one of continental Europe's biggest TV events. Following, seven takes on this year's edition.

TV Tail Wags Film Dog

The Berlinale Series Market used to be a burgeoning sidebar. Now, added to the Festival's Berlinale Series section, it's the biggest industry event at the Berlin Festival. That's of course a sign of the times. In 2017, almost 70% of the U.K.'s film/high-end TV production spend went to film. In 2021, the ratio was reversed, with the HETV sector accounting for a massive \$5.6 billion – 73% – of a total \$7.6 billion spend, according to a BFI report. Money talks. Many Berlin competition movies are produced and sold by companies whose revenues might not reach \$1 million a year. Such is the consolidation in the TV sector, that most of the Berlinale Series titles are backed by companies whose turnover is calculated in billions.

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Berlinale Standouts

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So of this year's Berlinale Series titles potential standouts often twinned name auteurs and big, big backers: Lone Sherfig's lyrical maternity ward drama "The Shift," sold by Beta Film; repped by All3Media International, Baldvin Z.'s post-Nordic Noir "Black Sands," shot at and around Iceland's Reynisfjara Beach, which looks like Paramount Valley by an icy sea; and "Lust," with "The Bridge's" Sofia Hellin, produced by Fremantle's Miso Film for HBO Max. There's also good word-of-mouth on Daniel Burman's section opener, "Yosi, the Regretful Spy," a double agent thriller unspooling in Argentina's Jewish community, the setting for Burman's best movies, produced by The Mediapro Studio for Amazon Prime Video.

The New Frontier

But Europe's TV scene now never stands still, Jens Richter, Fremantle CEO International, commented on Monday on a Berlinale Series Market panel, "Mission: Europe. How Local Markets Muscle Up." One instance: In 2021, new scripted TV commissions levels edged down in Germany (to 119) and Spain (64) and edged up in the U.K. (188), Ampere Analysis' Guy Bisson suggested at the same panel. The continent's new growth drivers, by a large head, however, are in

Eastern Europe, he added. Doubling its commissions in 2021, Russia roared past the U.K. to become the single biggest TV production power in Europe, with 234 new orders. Ukraine's 101 new scripted orders makes it the fifth biggest European powerhouse, at least in volume of commissions, only bested by Russia, the U.K., France (137) and Germany (119). A new Eastern order is emerging in Europe.

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Further Buzz Titles

Some of these new energies were felt in the more commercial lineup of Berlinale Series Market Selects. Buzz titles took in Keshet/Fox's absorbing political thriller "False Flag 3," "Harmonica," a NENT Viaplay title and tour de force from writer-director-star Josephine Bornebusch; and Sky's fast-paced A.I. parable "The Fear Index," with Josh Hartnett playing a petrified computer genius. Yet "The Silence," a chilling teen prostitution crime drama procedural, also had fans, as did "Black Wedding," a crazed occult thriller, produced respectively by Croatia's Drugi Plan and Serbia's Firefly Productions, two production movers and shakers in the Balkans.

False Flag 3

A New Classicism?

“The fundamental driver has changed: Genuinely global platforms now drive the content business,” Bisson said at Monday’s panel. Nobody disagreed with him.

But their dominance cut several ways at Berlin. “Crazy narrative experiments are going to have a hard time getting made,” Berlinale Series head Julia Fidel told *Variety*. “Instead creators are working with known genres and frameworks and then trying to reinvent them.” Experiments remain, however. “Lust” pushes the envelope in the degree of candor it brings to over-40 women’s struggle to have sex lives. “Black Sands” begins as classic Nordic Noir – a woman’s body on a beach – but builds ever more as family tragedy. Cases come and go, with convincing chaos, in the looser structured “The Shift.”

Local Deals: The Key to New Growth

As global streamers battle to build market share in key markets overseas, the business is becoming ever more big local market focused, in production focus and distribution. “We’re a European studio,” Amazon’s Georgina Brown said at

the Monday panel, protesting about being called a U.S. company. “Three, four years ago, the expectation was that if an Amazon goes for a show, it needs to be a local American show and all rights only. Now the world has opened quite a bit,” Richter said on the same panel. “Now we produced a factual show ‘Ghislaine,’ for the U.K.’s ITV and co-produced with Paramount Plus, but only for the U.S. ‘We Children From Bahnhof Zoo’ was an Amazon Germany commission and we took the rest of the world.”

U.S. Loses Market Share in Europe

Consumer interest in content is shifting away from the U.S, said Bisson, comparing consumption in the big five Euro markets. Part of that change can be put down to U.S. streamers themselves. Original productions in local markets drive market share. So the more U.S. streamers produce abroad, the less popular U.S. programming becomes. The change is not drastic. Accounting for some 37% of consumption Q3 2019, U.S. shows’ share fell three percentage points over the next two years. So this is a swelling sea change, not a radical revolution. But Europe’s market muscle is definitely growing.

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