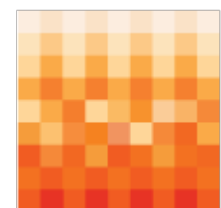


National fiction on the small screen

Study on the performance of local and international drama series in nine small televisual markets

report



Canada Media Fund
Fonds des médias du Canada

in collaboration with

*Société
de développement
des entreprises
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Executive summary

This economic study reviews the performance of drama series in the so-called “small markets” – countries or linguistic regions where the population is roughly 10 million or less.

Numerous myths have been spread about certain series where full-blown economic success, regardless of critical acclaim, was held out as the key to earning international distribution.

We have taken a close look at these factors in the course of 30 interviews with producers, broadcasters, producers’ associations, and funding agencies in nine countries.

We have come away from this study with several conclusions about the structure and dynamics of small markets, and their capacity to produce and export drama series. Two models emerge, which depend largely on how well developed and mature these markets are. The first of these, the “mixed” model, is a structure where private and public sector broadcasters coexist in the sphere of acquisitions and commissions. In our survey, only Israel and the Netherlands represent this model. They behave, in a sense, like “large” markets. By comparison, this is the model exemplified by Quebec and Canada.

The second model, which we term “primarily public,” is characterized by the dominant presence of a public broadcaster, which plays the role of originator – the third party that seeks and orders the production of a given show. This model includes the Scandinavian countries, Finland, Belgium, Switzerland, and Austria. It is interesting that the latter three countries border on major markets where they share a language (France and Germany).

This study also reveals how the success of drama series for export is organized. First, we see that local success is often a prerequisite for export – though not a guarantee. Also, there is usually a **soft power** policy behind efforts to promote and distribute drama series in small markets. This sort of cultural diplomacy by governments and their promotional and funding agencies primarily targets cultural objectives.

For example, contrary to the myths we hear about Scandinavian drama series, their export generates only very slight revenues in proportion to their production cost. Given the importance of public funding in the “primarily public” model, then, the primary export target is not economic but symbolic, diplomatic, and cultural.

Our interviews also made it possible to explore the so-called “Netflix factor.” We have particularly highlighted the successful experiments by Norway in two series, *Lillyhammer* (coproduction) and *Occupied* (co-funding and distribution). Others, like *Salamander* (Flemish Belgium) have likewise benefited greatly from the Netflix ripple effect.

Conversely, Netflix has provoked a reaction. Some opponents raise issues about “standardized” screenplays (written for the “international” rather than domestic market) as well as the political and fiscal challenges experienced in virtually every foreign market the American player has entered.

Executive summary

This study focused on seven hypotheses, from which we reached the following conclusions:

1. Investment in series development has a positive impact on domestic and international performance.
2. There is no clear evidence that adaptations of literary works have any crucial impact.
3. The mini-series format and the “detective” sub-genre perform especially well.
4. There is no clear evidence of any significant difference between exports of entire productions (dubbed or subtitled) and exported concepts.
5. The role of public sector stakeholders is seen to be essential in both the “primarily public” model and the “mixed” model.
6. A funding approach that concentrates on a small number of stakeholders does not seem to have any impact, positive or negative, on the performance of drama series.
7. There is no clear evidence that productions that are better organized or offer more generous remuneration guarantee better performance.

We conclude with a few observations:

- First, we should examine new methods of support for development, with emphasis on decentralization of the initiating agencies.
- Second, we should rely more on collaborative approaches to scriptwriting, as this is now the common practice everywhere.
- Third, in general, we should encourage every stakeholder in the chain to take more creative risks.
- Lastly, we should promote agencies that share best practices as possible sources for international coproductions that may benefit Canada and Quebec.

Introducing our research team



Francis Gosselin

Francis Gosselin, who holds a PhD in economics from the Université de Strasbourg, is a well-known author, lecturer, blogger, and teacher. Since 2008, he has been associated with professional training programs in North America and Europe, and also in Asia. He has taught for over 10 years in university undergraduate and graduate studies programs, as well as teaching courses for senior managers and executives. He contributes regularly to various programs on marketing, economics, creativity management, and business process analysis. As president of the FG8 Conseils consulting firm, he has a special interest in questions related to the transformation of the financial sector, the media economy, and strategic creative content marketing. He is a member of the MUTEK festival board of directors. He divides his time between Quebec and France.



Frédéric Guarino

As a presence at the intersections of media and technology since 2000, Frédéric Guarino has had a hand in business development, product management, and corporate strategy. Frédéric spent five years at Mediabiz as executive producer of audiovisual works that included international coproductions such as *Outcast* (China-Canada-France, budget \$25 million) and *The Journey Home* (Canada-Italy, budget \$17 million). He has also worked for major media groups (Lagardère – New York), advertising and communication marketing agencies (Hemisphere Group – Paris and New York), as well as startups (Isentium – Montreal, Rixxo – Zurich-London-Paris). As an associate with the MUTEK festival, Frédéric organized two virtual reality trade shows in Montreal in 2015 and 2016, with hundreds of participants exhibiting at the Phi Centre. A devoted champion of Montreal's rightful place in new virtual reality media, Frédéric is the founder of the Virtual Reality (VR) Valley network, a forum where talents in every economic sector, from aerospace to the health sciences, can contribute toward the creation of new business opportunities. Since graduating from the Institut d'études politiques in Paris, the common thread running through his career has been the evolutionary transformation of cultural industries in the digital era.

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Introduction

The number of locally produced drama series and the scale of investment in their production varies enormously from one country to the next, depending especially on the size of the local market that must accommodate the final product. In many cases, issues involving promotion and protection of national culture militate in favour of forceful intervention by public stakeholders. This is especially true in the national “small markets” where total audience numbers are not large enough to support self-financing productions that rely on income from broadcasting.

For the purposes of this economic study, we have chosen nine non-English-speaking countries with populations in the neighbourhood of 10 million. Throughout a series of 30 interviews with producers, investors, and distributors, our goal was to understand the dynamics of drama series productions in these small markets and the emergence of a number of challenges specific to them, including funding, modes of writing and creative, issues of development, and the dynamics of the audiovisual industry, as well as the ongoing changes brought about by the increasingly important role of digital technologies.

The objective of this study is to provide reference points for Canadian television industry stakeholders on the realities of small foreign markets. This benchmarking exercise will make it possible to work with Canadian participants who are considering possible consultative or collaborative relationships with local drama series productions in small Canadian or international markets, and to identify approaches and practices that may benefit producers in the Canadian French-language market.

Methodology

In this study, we have examined the economic and audience performance of drama series in their national and export markets. Wherever possible, we have sought to be rigorous in collecting the essential quantitative data to complete an analysis that accurately reflects the specific production factors, their size, and marginal contribution to the success of these drama series, both in their original markets and when exported.

We must admit here that at present there are no aggregated statistics by country to allow an *econometric* analysis. Generating a database of this sort might have been possible had this project been conducted on a larger scale. The presence of so many stakeholders, including both the public and private sectors, makes it practically impossible to generate comparable figures for audience ratings, total funding, and international performance in a multi-country project.

We therefore started with a thorough review of the literature highlighting this problem and the alternative methods employed by the researchers. This review led us to focus our efforts on nine selected countries: the Scandinavian countries, Finland, Belgium, the Netherlands, Austria, Switzerland, and Israel.

A significant proportion of those we approached welcomed our request. Some 30 interviews, lasting 30 to 45 minutes each, were conducted, using a standard questionnaire. This phase was supplemented by an analysis of secondary statistics, either suggested by our informants, or forwarded directly to our team by our correspondents.

Countries and series in the study

During the study, the following countries and regions were examined:

- Austria
- Belgium (Wallonia) Belgium (Flanders)
- Denmark
- Finland
- Israel
- Norway
- Sweden
- Francophone Switzerland
- German Switzerland

See annex 4 for countries fact sheets and detailed case studies

The following drama series were analysed for the countries in this study:

- **Schnell Ermittelt** (Austria)
- **Ennemi Public** (Wallonia)
- **La Trêve** (Wallonia)
- **Salamander** (Flanders)
- **Borgen** (Denmark)
- **Nurses** (Finland)
- **Hatifum/Prisonniers de Guerre** (Israel)
- **Kfulim/False Flag** (Israel)
- **Nobel, la Paix à Tout Prix** (Norway)
- **Trio** (Norway)
- **Unge Lovende/Young & Promising** (Norway)
- **Nieuwe Buren/The New Neighbours** (The Netherlands)
- **Penoza/Red Widow** (The Netherlands)
- **Ettor & Nollor/The Fat and The Angry** (Sweden)
- **Anomalia** (Francophone Switzerland)
- **Station Horizon** (Francophone Switzerland)
- **Der Bestatter/Le Croque-Mort** (German Switzerland)
- **Gothard** (German Switzerland)



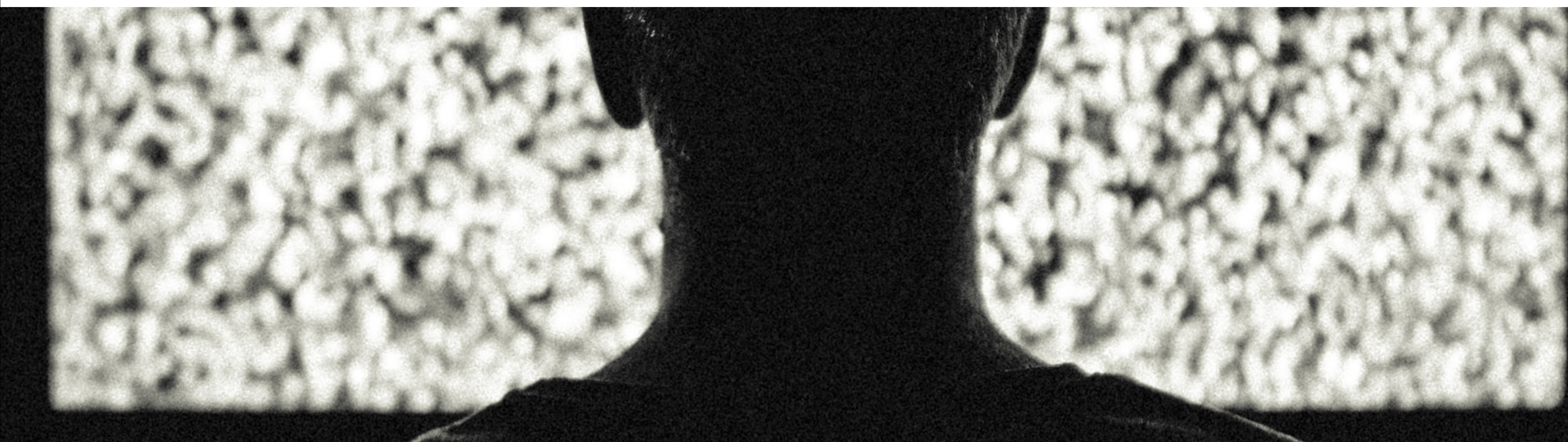
Analysis & observations

Based on the interviews conducted (see Appendices 1 and 4), we arrive at a typology consisting of two business models. From these we draw conclusions on three aspects of the performance of drama series: local success as a prerequisite for export, the symbolic but economically marginal nature of exports, and the disruptive role played by digital distribution platforms in general and Netflix in particular.

Two ecosystem models

The countries chosen for our study – the three Scandinavian countries, Finland, Belgium, the Netherlands, Switzerland, Austria, and Israel — have for the most part met the challenge of establishing their presence in the globalized world of visual content by creating or enhancing their own national production of drama series. In these countries, the days when American series dominated program schedules seem to be over. Several of our informants pointed out that these series nowadays are used as “filler,” and enjoy only marginal success with audiences.

National audiences have a real sense of pride when they can watch series that are locally produced. Success stories like the Norwegian series *Heavy Water War* (1.8 million viewers in a population of 5 million), the German series *Der Bestatter* (40% market share), or *Hatufim* in Israel (an audience of 2 million) are outstanding examples. Whether the countries in our study are relatively neat, compact cultural pools (Scandinavia, Finland, Israel, the Netherlands) or live next door to “big brothers” with hegemonic cultural tendencies (Belgium, Switzerland, Austria), it is nonetheless significant that these various success stories are quite different in context and clearly reflect the individuality of each country.



There are accordingly two principal models of ecosystems:

1- The primarily public model (Scandinavia, Finland, Belgium Switzerland, Austria) with a public broadcasting corporation as the dominant presence in the funding of drama series

2- The mixed model (Israel, the Netherlands) where private and public sector broadcasters coexist in the sphere of drama series acquisitions and commissions

Two ecosystem models

Primarily public: Scandinavia, Finland, Belgium, Switzerland, Austria

In the course of this study and our 30 interviews with producers, producers' associations, public sector investment funds, and broadcasters, similarities appeared between the Scandinavian countries and Finland, all four already highly networked, and the Swiss, Austrian, and Belgian ecosystems.

In the four Nordic countries studied here, the media landscape is conspicuously dominated by their public broadcasting corporations. These broadcasters – DR in Denmark, NRK in Norway, SVT in Sweden, and YLF in Finland – are considered as being national versions of the BBC. Tone Rønning of NRK told us that part of the Norwegian broadcaster's official mandate was to “strengthen Norwegian democracy.” For the most part, the public broadcasters are the only ones with sufficient funding and budgets to produce drama series. Some private sector broadcasters have also tried, but in a relatively timid fashion.

There is therefore an oligopolistic situation where drama series are concerned, reinforced by the fact that the public broadcasters produce a good many series themselves. For example, the Danish series *Borgen* was 100% developed and produced by the Danish broadcasting corporation DR. There are agreements contracting out all or part of some series to independent producers, but these consider themselves at a disadvantage. The public broadcasters do not let them know what the internal production budgets are, and the independents, who suspect that these budgets are higher than what the broadcasters allocate to them, have made submissions to their own national parliaments to obtain this

information, which remains confidential. The NRK told us that, on the contrary, internal production serves to control costs. The public broadcaster, even when working with independent producers, is the principal. It often tightly controls the development and writing, arguing that its editorial responsibility is involved, as a matter of public trust, and that it must make sure to behave accordingly at all times.

The Belgians, Austrians and Swiss, though “stuck” with their French, German and Italian “cultural big brothers,” have ecosystems very similar to those of the Nordic countries, with considerable weight given to their own public broadcasters. The Swiss case is interesting, because the confederation's broadcasting system, RTS, operates separate channels for each linguistic area. In 2008, based on input from the Quebec experience, Télévision suisse romande (TRS) invested in the relaunch of drama series productions. The public broadcaster's own financial input, plus some additional funding from other sources, made it possible to produce two drama series at that time. The TRS example inspired its German counterpart, Schweizer Radio und Fernsehen (SRF), which instead of drama series produced films for TV and episodes of the police crime anthology series *Tatort* (launched by the German television channel ARD in 1970).

Both Swiss markets may be considered “micro-markets.” This may seem counter-intuitive in view of their respective populations, which are larger than those of Norway or Denmark. The Swiss public broadcasting corporation works in cooperation with independent producers, but these are often

more producers of services than creators. This is the case with the German Swiss series *Der Bestatter*, where the writing team is based in the offices of SRF, which controls the rights and contracts. In terms of financing, however, current discussions may soon expand the pool of co-funders to include telecom operators and pay TV.

We observe this in Flemish-speaking Belgium, where Season 2 of *Salamander*, now in production (summer 2016), is co-funded by the operator Telenet (Liberty Global Group). The public broadcaster VRT has reduced its investment in drama series, leaving private sector stakeholders to balance the budget. In French-speaking Belgium, the launch of specifically Walloon drama series is directly due to the public broadcasting corporation. RTBF was in the same situation as the Swiss TRS, too dependent culturally on the market in France, and wanted to position itself as a strong creative centre. RTBF in the Wallonia-Brussels region then put out a call for projects on a basis similar to Switzerland. The first call for projects in 2013 resulted in two series aired in 2016 – smash hits that broke all audience records.

Sources

Interview with Pierre-Andrian Irlé, producer, Station Horizon
Interview with Françoise Mayor, RTS
Interview with Thierry Spicher, producer

Two ecosystem models

Mixed: the Netherlands, Israel

Unlike the Nordic, Belgian, Swiss, and Austrian ecosystems, the Netherlands and Israel present media landscapes where private sector operators have a major presence. The case of Israel is interesting in more ways than one, given that television arrived there very late, with a first public channel in 1966 (and colour television only in 1980). A peculiar feature of this second channel is that several privately owned operators share responsibility for programming on alternating days from year to year. Of the three companies originally selected only two, Reshet and Keshet, now remain. The public broadcasting corporation itself does not produce drama series.

We interviewed Keshet, which is a producer, broadcaster, and international distributor, not unlike the BBC. Keshet's international successes have certainly justified its approach, which is to create series with sure appeal to Israeli audiences before embarking on the conquest of international markets. Keshet's deliberate strong point is the power of its stories, conceived for series that address topics of global interest, but resonate first and foremost in their own market.

The Netherlands represents a market where private sector operators have a major presence, particularly the RTL Group, a subsidiary of the German company Bertelsmann. Dutch producers are perhaps better known internationally for their innovations in reality TV, but they remain among American broadcasting companies' go-to sources for drama series adaptations. For example, the series *Penzoa*, which aired in 2010 on the public channel NPO 1, was adapted for the American market and shown for a single season on the ABC Network under the title *Red Widow*, in 2012-2013.



Local success, the key to exporting

Source

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Local success, the key to exporting

The majority of those we interviewed, when asked about the export of drama series, explained that it is not an end in itself, but often a lucky accident, or an opportunity for showcasing. Audiences are fond of stories that depict their own lives and overwhelmingly support the series they think of as their own. It is also worth noting that in many series among our case studies the action takes place outside urban centres, in a rural or semi-rural setting (*Der Bestatter*, *Ennemi public*, or *Trio*, for example).

The economic model of the drama series in the Nordic-Swiss-Belgian-Austrian ecosystem is structured essentially around public broadcasters with a strong public service mission, and accordingly the series must be an expression of the local culture. Producers and their broadcasting partners are especially anxious, therefore, to connect with their audience in a style representative of their country and its values.

The Netherlands-Israel ecosystem has more private sector parties involved, but the concern with representing cultural values is the same. Israeli producers are very sophisticated in their use of the domestic market as a test bed for drama series concepts and frameworks, which they will then export either directly or as adaptations.

Local success, then, is quite a clear indicator of the potential for a given series to grow beyond its national market. Nordic series continue to win first place in terms of audiences and market share in their niches. With these successes, they have been able to conquer international markets and inspire adaptations, most prominently in the case of *Wallander*, which was adapted by the BBC. By the same token, Swiss and Belgian productions in French are starting to gain exports by assuming and presenting a *Suisse romande* or Walloon perspective. The series *Okkupert* (Occupied), which was not particularly successful in Norway, had massive distribution via Netflix (though this is not necessarily an indicator of success, as Netflix does not release audience figures).



Exports as a demonstration of *soft power*

Source

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Exports as a demonstration of “soft power”

The term soft power, which became current around 1990, was coined by Professor Joseph Nye. The concept refers to the structural, cultural, or ideological influence exerted by a nation in order to advance its interests. For the purposes of this study and its findings, the notion of soft power may be understood as the overall cultural diplomacy exercised by countries that are exporters of television content.

In the course of our research and interviews with producers and broadcasters, it emerged that exports of drama series, were often an exercise in cultural diplomacy and a demonstration of soft power by the countries in this study, rather than having real economic importance. First of all, the international market for subtitled (or even dubbed) series coming from the Nordic countries, Belgium, or Switzerland is actually growing, though its contribution to economic success is relatively limited. The actual impact of the exported series is measured differently.

The success of several so-called “Nordic Noir” series in the rest of Europe, particularly in major markets (Germany, France, and the UK) has helped boost international demand for these “new voices.” In fact, however, the economic performance of these exports remains weak. Also, most of the quantified statistical data is confidential. Among all the series in our study, only the producers of *Salamander* were willing to share their export figures. Our contacts confirmed that series like *Wallander*, *The Bridge*, and *Borgen* may to some extent have international buyers, and audiences in turn, accustomed to experimenting with new series. *Salamander* itself seems to have benefited from this trend.

We should also note the important role of the BBC, particularly BBC 4, as a regular buyer of foreign series. The presence of these series on the program schedules of foreign networks (and, increasingly, the catalogues of VOD and SVOD services) is more of an exercise in cultural diplomacy. The majority of drama series from countries in this study are financed by public sector funds. It is also possible to view the particular interest of the Nordic countries, Swiss, and Austrians in exporting their series more as efforts to promote their culture and values rather than generate revenue.

The public broadcasting corporations are motivated by their mission to express these values of tolerance and pride in cultural roots, and are sensitive about how they are distributed. Series like *Borgen* and *Salamander* play a part in the projection of soft power by small nations – proud of rising to the top in audiovisual content, independently of economic performance.

The question of whether to export drama series in the original or dubbed versions also appears to be a positioning exercise to soften up the market for format buys and adaptations. Several of the series in this study were first sold in the original version, with subtitles or dubbing, before being made into adaptations, including *Schnell Ermitellt*, adapted by ABC in a pilot version, *Nurses*, currently in adaptation, and of course *Hatufim*, which became *Homeland*.

In any case, the real economic potential is more likely to exist in the area of format buys or adaptations.



The Netflix factor

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The Netflix factor

In the conversations and interviews for this study, we collected a great many points of view on the so-called “Netflix factor.” In this section, we have tried to reflect the different perspectives suggested by our contacts.

Netflix, which started as a modest DVD mail order market outlet in the Los Gatos suburb of San Jose, south of Silicon Valley, very quickly became one of the pioneers in the digital distribution of televised content. Its international venture outside the American market began in 2010, notably with an entry into Canada. Today, Netflix is available in over 190 countries, and this presence, through a unique brand and entity, is now jostling the established order in an audiovisual industry that is still organised around traditional programming and distinct sales territories.

During this study, we questioned producers, broadcasters, and funders in order to understand how Netflix is perceived. What came out, to some extent, was a sort of “schizophrenia” among these stakeholders. With its assets and stable current and future revenue from its vast catalogue, Netflix is both a new buyer and source of additional income — but also a competitor owing, to its gargantuan investments in content.

Be that as it may, the American company recently announced that it plans to invest over \$6 billion US in original productions in 2016. This figure is comparable to the total investments by all the countries in this study put together. Netflix is therefore a sort of “Janus,” friend and foe alike, to the audiovisual ecosystem: a co-funder with NRK for the *Lilyhammer* series in Norway, or a formidable competitor to others, such as SVT in Sweden. Netflix is a player that’s “attractive but dangerous,” as the Swedish producer Christer Nilson put it succinctly. For Frédéric Ledoux of the Association des producteurs de Wallonie, “The Netflix factor is a window on the future, and could be a way of escape from a market that tends to be monopolistic.”

The Finnish producer Milla Bruneau also sees “a positive factor, because Netflix has Finnish audiences accustomed to high quality series, and that’s made them more demanding about quality in Finnish series.” Other producers are not so sure. Says Austria’s Andreas Kamm: “Netflix demands all rights in co-funded or coproduction arrangements for conditions only marginally better than those of the public broadcaster, ORF, so we end up as losers.”

***Lilyhammer*: a Netflix/NRK success in Norway**

The case of the Norwegian Broadcasting Corporation (NRK) and its series *Lilyhammer* deserves a closer look. Tone Rønning, the head of NRK coproductions, gave us the inside story about this partnership — almost unheard of in 2011. As commissioning editor and executive producer, Rønning wanted the series to be something different, while remaining strictly within budget. During post-production, the “teaser” was shown at MIP 2011, and after the screening Netflix expressed interest. NRK was enthusiastic, as this was the first time a series made in Norway was sold in the US. Netflix then became coproducer of Seasons 2 and 3, along with NRK.

Its investment was larger than the broadcaster’s for Season 3. However, throughout their collaboration, editorial control remained with NRK. The very positive point of the partnership remains that Netflix made it possible for a Norwegian series to be seen in 170 countries. Before this collaboration with Netflix, it was considered virtually impossible for NRK to find an international sales representative able to generate enough advance sales to help pay for the production. Red Arrow bought the series, but its minimum guarantee was very small.



The Netflix factor

Standardized scripts

The success of *Lilyhammer* finally allowed Norwegian talent, on camera or behind, to be exported. After the *Lilyhammer* experience, now that NRK had got to know the Netflix teams, coproduction would be done differently, with more regular contact.

NRK, whose mission is to strengthen social cohesion and democracy, has the trust of its Norwegian public. The Netflix customer base, on the other hand, is global, and worldwide preferences in terms of television content may eventually lead to standardization of scripts for drama series.

This is one particular issue frequently raised by financial stakeholders in Wallonia (Belgium). Public funding and its associated agencies (Wallimage, CCA, ScreenBrussels, Tax Shelter) have underwritten the birth of an authentically Walloon television ecosystem since 2012-2013. Funders want to see domestically produced drama series rooted in the realities of Wallonia, and they also want this investment to back Walloon talent and creativity – telling Walloon stories written, produced, and directed by Walloons.

This has led the originators of the current system in Wallonia to establish an entire set of constraints for maintaining control over production – putting up walls, among other things, against agreements that might (for example) induce screenwriters to create material for an audience in France, or else purely for export purposes.

Political and fiscal issues

In 2008, Jeff Zucker, then chief executive of NBC Universal, famously warned against “trading analog dollars for digital pennies.” In most countries, however, VOD and SVOD are not subject to the sort of taxation that makes dedicated content production funds, like the Canada Media Fund, possible. Not only are the revenues lower overall, but they are not redistributed in the same way.

Another point frequently made about Netflix in the small markets is its non-participation in the mechanisms for funding domestic productions. According to Jeanne Brunfault, director of the Centre du Cinéma et de l'Audiovisuel de la Fédération Wallonie Bruxelles, “We have a fundamental problem with Netflix, a political problem. We believe all operators should contribute toward funding the audiovisual sector. All operators in this territory. We have one operator piggybacked on top of another...a special “Netflix Belgium” program. Since Netflix is targeting our territory, it ought to be contributing to the funding of audiovisual production.” A point of view obviously reminiscent of statements by certain stakeholders regarding the situation in Canada.

Netflix is also perceived as a corporate citizen with a mixed record. Although it broadcasts some series that are adapted to the local markets it serves, it does not pay any of the taxes that make things like domestic telecommunications infrastructure possible, since the company is deemed to be operating in the US.

In countries where Netflix occupies 20% or 30% of domestic bandwidth, its non-contribution to the tax base may be perceived as unfair.

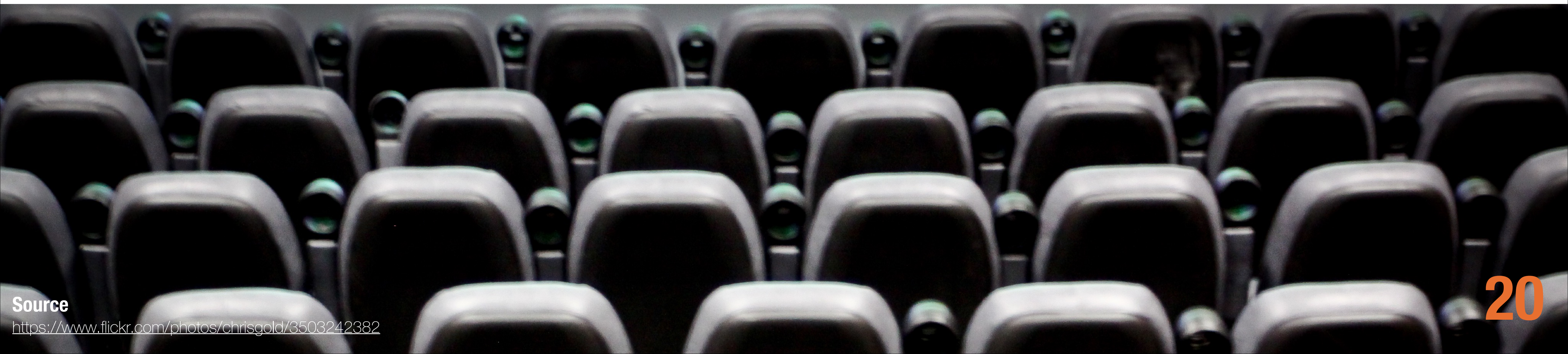
The Netflix factor

Digital fragmentation

In recent months, several public sector and private broadcasters have launched VOD and SVOD packages to compete with Netflix. All the others, or nearly all, have declared their intention to follow suit in the medium term. This is leading to a proliferation of online box offices – and growing complexity for consumers.

This fragmentation of the digital sector will do no good for the distribution of drama series in small markets, as no “skinny” bundles offering SVOD access with a few basic channels exist at the moment. By restricting access to drama series, fragmentation will also shrink commercial opportunities for these series in markets that are small already.

The transition from conventional television to SVOD is likewise a cause for concern in countries where broadcasters run their operations in groups that often are also the major Internet Service Providers (ISPs). Listeners who prefer SVOD are now being ignored not only in audience demographics but also in the revenue targets to be obtained through public funding systems – most of which are calculated on the basis of performance in traditional distribution. The sheer difficulty of telling one kind of audiovisual content from another leads some of our informants to suggest an “internet tax” system – a fatally unpopular solution just about everywhere on earth, particularly in small television markets.



Hypotheses

To determine the relative performance of dramatic series in small markets, we started with seven working hypotheses based on our review of the literature, discussions with the sponsors of this study, and our team's experience in the television market.

- **H1:** Support for series development enhances performance.
- **H2:** Series adapted from literary works perform better.
- **H3:** Formats (length) and sub-genres (detective, comedy, Sci Fi, etc.) are crucial performance factors.
- **H4:** There is a significant difference between exports of entire productions (dubbed or subtitled) and exported concepts (and the costs or conditions associated with these different modes).
- **H5:** Public sector stakeholders play an essential role in the success of drama series (forms of funding, assistance with exports, production incentives, agencies promoting the television industry).
- **H6:** Concentrating funding on a limited number of stakeholders (broadcasters, producers, and institutions) reduces performance.
- **H7:** The production environment (labour costs, workforce organization, degree of unionization, operating conditions) have an impact on performance.

We'll examine each of these hypotheses in turn, using our interviews, reviews of secondary data, and analysis of economic processes.

Our hypotheses – Analysis and observations

H1: Support for series development enhances performance.

In nearly all the cases studied, the most successful drama series had upstream support by public sector development funding agencies. For the vast majority, this assistance came directly from the public broadcasting corporation that had a stake in the series as buyer.

Besides the public broadcaster's contribution, there were outside contributions in many cases from foundations, institutes, or funding agencies, most of them in the public sector as well. In Norway, all the series we studied had the benefit of combined support from NRK and the Norwegian Film Institute. In Switzerland, a collective of four institutions (RTS, Fondation Cinéforom, Fonds de production télévisuelle, Succès) plays a major funding role.

The Flemish *Salamander* series – here, as elsewhere in this study, an exception to the rule – was developed on an entirely self-financed basis. Screenwriter Ward Huselmans began working on *Salamander* in 2001-2002, while still an employee of the Skyline production company. It then took him almost seven years, as producer, to sell the series to the broadcaster. *Salamander* was finally released in 2012-2013, some 10 years after initial development.

Salamander is also our sample's top performer in terms of exports, with nearly 2 million euros in receipts internationally (bear in mind, however, that Danish DR refuses to show its figures). Largely driven by widespread international distribution on Netflix that made it available in some 70 countries, the series “ushered in a new era for Flemish drama series,” according to producer Jan Theys of Skyline.

Salamander is also in a class by itself when it comes to how the series is written. All drama series, of course, are products of a collaborative scriptwriting process involving from two to as many as eight writers. This tradition, widely popularized by the American talk show *The Writer's Room*, relies on multiple experiences and points of view, allowing a vibrant ongoing scriptwriter ecosystem in these national spaces.

It is also worth recalling that in their commissioning directives, the stakeholders in the Walloon public funding ecosystem required that script proposals should be the product of writers' collectives. In so doing, they claimed that they hope to contribute toward the creation of a new generation of Walloon writers capable of working collectively on a variety of audiovisual projects, including films, television programs, and digital formats. By assuming a substantial share of the funding, the public sector stakeholders have a legitimate right to impose constraints that will prevent these drama series from becoming the exclusive product of a small number of beneficiaries. Hypothesis H5 on public sector funding and H6 on concentration of investment also support this view.

In conclusion, it can be said that investment in the development of drama series by public and parapublic organisations has a positive impact on the domestic and international performance of those series.

H2: Series adapted from literary works perform better.

This hypothesis is based on our observations of the critical acclaim for certain drama series that have gained major international distribution, such as *Wallander* (Henning Mankell, 2008), *Millennium* (Stieg Larsson, 2010), and *Annika Bengtzon* (Liza Marklund, 2012), but also classics such as *Agatha Christie's Poirot*, *Sherlock Holmes*, *The Famous Five*, or *Anne of Green Gables* (by Canadian author Lucy Maud Montgomery).

Although this correlation seems intuitively right – a book that has done remarkably well generates brand and audience capital in the form of a sympathetic readership, which should promote its success in other media or on other platforms – we cannot conclude, on the basis of our team's case studies, that this relationship really exists.

Our hypotheses – Analysis and observations

Among the examples we selected as relevant to this study, only the Dutch series *Nieuwe buren* from the Netherlands is based on a literary work. Although several producers we interviewed said they had done such adaptations in the past (Haakon Briseld springs to mind), and that the impact had been a great boost to their reputation when developing new projects later on, it did not seem to be a significant criterion in the selection, development, or performance of drama series.

H3: Formats (length) and sub-genres (detective, comedy, Sci-Fi, etc.) are crucial performance factors.

The respective lengths of the series we observed are relatively classic, and our sample consists mainly of 42- to 58-minute formats.

However, we also observed a certain penchant for atypical formats. Mini-series have more than their share of these – *Unge lovende* (6 x 29 minutes), for instance. In youth drama series, this practice is even more common. The Norwegian *Trio* (3 x 10 x 24 minutes), with 60% market share and exports to several countries in Europe, is a good example:

Mini-series also perform well in longer formats. In the Nordic countries, where boundaries between film productions and television are sometimes hazy, a series such as *Ettor och nollor* (2 x 90 minutes) had major success on screen, and the concept has been sold to the BBC. In Switzerland, the German-language series *Gothard* (2 x 90 minutes) adopts this “event television” format.

As you may know, the original Swedish version of *Millennium* was initially developed in the form of a mini-series (6 x 90 minutes), and went on to win an International Emmy Award in the TV Movie/Mini-series category. Denmark too has won an Emmy for *Unge Andersen*, a series directed by Rumle Hammerich (2 x 90 minutes).

Along with this new wave of mini-series and original formats, we also see new distribution strategies. A notable example from Belgium was the broadcast schedule on traditional TV for two Walloon series, *La Trêve* and *Ennemi public*, which were aired two episodes at a time over five weeks (for a total of 10 episodes). This phenomenon can also be seen in the US with the event television concept, a trend that appeared around 2010, where a show's initial broadcast release is turned into a special event in certain specific niches. This is, in a sense, a “mini-binge viewing” strategy, corresponding to the habits of many present-day consumers.

With regard to sub-genres, we see major presence for detective series, with scenarios that are more readily exportable to the international market. Many series not in the detective or police sub-genre are set in closely related spheres: *Borgen* (political drama), *Hatufim* (espionage), *Kfulim* (espionage), *Nobel* (military), and *Der Bestatter* (the funeral industry), among others. Even the youth drama series that we studied, *Trio* (Norway), is actually a series of mysteries, each with a detective-style plot. According to our contacts, it seems that comedy dramas are less popular, both domestically and in export. One exception is the French Swiss series *Station Horizon*.

As for science fiction, in the opinion of our informants, the very limited size of the markets concerned makes production of this type of drama series difficult because of the major investment required for special sets and visual effects.

Our hypotheses – Analysis and observations

H4: There is a significant difference between exports of entire productions (dubbed or subtitled) and exported concepts (and the costs or conditions associated with these different modes).

This hypothesis presupposes our ability to obtain a “high-resolution image,” which unfortunately has not been possible with the data collected in our interviews.

Although we succeed in obtaining information about countries that have acquired different series – including total export sales figures, in our best case – we are not in a position to state an opinion on the difference between revenues from dubbed or subtitled series and those from sales of concepts.

Nonetheless, it is interesting to examine the various scenarios.

First of all, many series were exported with dubbing or subtitles (or both). This includes *Salamander*, *Station Horizon*, *Borgen*, *Lilyhammer*, and *Anomalia*, as well as the youth drama series *Trio*. We can see that where this distribution model works well internationally it can generate significant revenue. Among all the series we obtained export statistics on, *Salamander* is in a class by itself. The series, which was exported primarily in dubbed or subtitled formats, generated over 2 million euros in export revenue.

It's also important to point out that those series exported through sale of the concept were also sold in their entire original versions, dubbed or subtitled. Notable examples are the Israeli series *Hatufim* (adapted as *Homeland* for the Showtime network in the US), and the Norwegian *Nurses* (with an adaptation currently underway in neighbouring Sweden).

The only series in our sample to have been sold for adaptation without an advance marketing run-up to broadcast is the Swedish *Ettor och nollor* (2014), sold to the BBC.

H5: Public sector stakeholders determine the success of drama series (forms of funding, assistance with exports, production incentives, agencies promoting the television industry).

There is no direct link between the success of a drama series and the level of public sector funding or support it receives. The wording of this hypothesis, however, needs clarification. Public sector stakeholders may not “determine” the success of a given series, but they certainly make that series possible. More simply put, without essential public sector funding, there would be no drama production industry in any of these countries.

It is important here to stress unequivocally that a drama series in a small market context is not an economically viable proposition. Inevitably, the final product will show a loss, even when it enjoys phenomenal success.¹

Salamander, which generated the largest revenues on its own of any series in our sample, had receipts totalling 2 million euros (\$3 million Canadian), against a production budget of over 6 million euros (\$9 million Canadian). Season 1 of the series was financed 60% by the public broadcaster VRT, 20% by OetMediaFonds. In other words, 80% came from public sectors sources, the remaining 20% having been provided by the Tax Shelter funding mechanism, which derives its funds from investments by Belgian taxpayers who want to reduce their income tax

Although it is a well-known fact in the sector, it seems worth repeating: none of the series we studied, not even the top performers with the largest international sales, succeed in covering their costs. This conclusion does not include series that have been sold or distributed via Netflix, as the figures unfortunately, are not available (see “The Netflix factor” above).

¹ It must be borne in mind that we have no figures for DR in Demark, no detailed figures for Israeli series, and none for Netflix. These conclusions are valid only outside of these samples.

Our hypotheses – Analysis and observations

This raises the question of the remuneration that producers actually receive and the “profits” these companies manage to earn. Since this involves privatization of public funds, remuneration and revenue sharing models must be examined.

Absent substantial support from multiple public stakeholders, there simply is no economic model that makes production of drama series in small markets possible. This does not mean, obviously, that public stakeholders, in their role as financial backers, may not legitimately pursue other objectives, such as promoting the national culture or restructuring the audiovisual market. However, it must of necessity be done, in the small markets, with public sector funds.

As far as the activities of the public sector institutions are concerned, there is a second point to be made: there are no forms of financial assistance for exports in the markets studied.

Some countries do organise trade missions or commission domestic organisations to create contact lists, delegations, promotional exhibits, or other contributions in kind. The idea of direct assistance for exports, however, is nonexistent. Given the small amounts of money involved in the case of international sales, it would be interesting, in any case, to measure the potential ROI in these agreements, where appropriate. It's safe to say that such returns would be low.

However, there are some exceptions in terms of direct support for exports – all applicable in markets with the mixed model. In Israel, this support comes from the private sector through investment funds such as the TV Format Fund. In Quebec, direct support for exports is available through independent production funds such as the Quebecor Fund Export Assistance Program (EXAP), public sector agencies such as the SODEC Sodexport program, or PPPs, such as the Fonds capital culture Québec.

Third, we note the scarcity of production incentives. Unlike what we see in Quebec, where producers benefit from Quebec and Canadian federal government tax credit programs specifically for audiovisual productions, and except for Belgium and its Tax Shelter agency, the small television markets do not seem interested in the use of fiscal mechanisms. We have been told that a bill is under consideration in Finland, but were unable to obtain the preliminary text.

Lastly, it is helpful to note the crucial role played by local and regional institutions to facilitate production. Examples would include administrative offices that assist in obtaining permits or waivers for filming, or regional funds like the ones we see in Norway, Sweden, or Belgium, whose purpose is to attract production teams directly to their areas. In some cases, these agencies are themselves initiators of projects, and their own financial support serves as a cue for more substantial funding. The youth drama *Trio*, for example, started as an original series under the leadership of the Film3 regional fund, which finances projects that can be filmed in the Trøndelag, Oppland, and Hedmark regions of northern Norway.

H6: Concentrating funding on a limited number of stakeholders (broadcasters, producers, and institutions) reduces performance.

This hypothesis is confirmed by our interviews with broadcasters, agencies, and producer associations.

The majority of our contacts actually claimed, on the contrary, that they avoided concentrating their subsidies. As we mentioned in our discussion of H1, this is particularly true of development grants. Preference for writers' collectives represents a decentralized funding strategy that allows many different talents to emerge, who will then be able to contribute to other types of projects.

As we pointed out in our discussion of H5, because drama series in small markets are not an economically viable proposition, it is important to consider the potential economic impact of a “national champions” strategy. By narrowing their aim and subsidizing only a small number of players, public sector institutions in effect privatise public funds in a way that could be seen as unfair.

Our hypotheses – Analysis and observations

The Danish counter-example is interesting here. As we mentioned, production of Danish drama series has long been the near-exclusive preserve of DR, the public broadcaster. These series have been produced – from scriptwriting to broadcast – 100% in-house, with contributors engaged as service providers, or else as employees, throughout the production period. This was particularly true of *Borgen*, one of the best-known series.

Apart from the unique case of Danish production, a concentrated funding approach basically tends to favour more conventional approaches and more conservative scripting. When people are banking on a very small number of stakeholders, contributors, and television products, error is not an option, and the safest bet is to recycle the tried-and-true formulas.

As we shall see in H7, the success of drama series in small markets depends very little on production conditions or concentration of public investment on a few stakeholders.

The explanation seems to lie in how broadcasters and funders approach their series portfolios. Investing in a more diverse range of projects offers more chances that at least one will deliver better-than-ordinary performance.

H7: The production environment (labour costs, workforce organization, degree of unionization, operating conditions) has an impact on performance.

Lastly, we had assumed that the sum total of production factors might have an impact on the domestic and international performance of drama series.

The hypothesis was not borne out in this study.

That does not mean, however, that the production environment has no influence or impact on the nature, time frames, or costs of drama series productions – simply that it was not possible to establish a correlation with performance in terms of audiences or export volume.

In fact, it is possible to make excellent drama series with limited resources (as in Wallonia) or major resources (as in Israel, in the case of *Homeland*), without having any direct influence on the domestic or international performance of a series.

One of the dominant factors seems to be the role played by the public agencies that control development, production, and distribution of these series. The groundwork done by agencies in Wallonia allowed two series to be produced (*La Trêve* and *Ennemi public*) that were largely the work of young creative teams.

To maintain local control over the project in production, agreements were reached with the various stakeholders. Which explains why series like *La Trêve* or *Ennemi public* could be produced under what might be called “extreme” conditions. At 250,000 euros (\$350,000 CAD) per episode, *La Trêve* cost less than half the average production budget of the Nordic series.

These formidable constraints did not prevent *La Trêve* and *Ennemi public* from chalking up record audience ratings when aired, or collecting awards and honours at festivals – or finding buyers for export.

It is interesting to note that the producers of these two series had participated, in February 2014, in a mission in Montreal where they met and exchanged with experienced TV producers, script writers used to the workshop method, and representatives from funding and coproduction structures. They also visited studios and attended a shooting. It offered them the opportunity to apply some of some of the Québec methods to their series.

At the other end of the spectrum, the unit cost of the eight episodes in the Norwegian series *Nobel* was 9 million Norwegian kroner each (roughly \$1.4 million Canadian). Such costs were due largely to the ambitious scale of the project, which was shot in three countries (Morocco, Norway, and the Czech Republic).

In terms of workforce organization, the example of the Danish public broadcaster DR also shows that several different models make it possible to achieve similar results in domestic performance. The DR model, to repeat, keeps scripting, production, and broadcasting all in-house, with HR arrangements varying from contract workers to salaried staff. Danish production figures, unfortunately, are not available for outside circulation.

Observations and conclusion

This study has helped identify a number of key factors and parameters that may be of use to Canadian stakeholders in developing their thinking about domestic production of drama series and ways of better supporting such productions.



Observations

We have listed four observations based on our discussions, case studies, and analysis :

1 Support for development

Development is a crucial stage and could benefit from more diverse sources, on the model of the regional funds in Nordic countries.

Our study has shown that besides resorting to traditional funders, there was the possibility of generating development funds from organisations and institutions that have an interest in attracting audiovisual productions to their territory. The *Trio* series, which now totals 30 episodes, originated with a call for projects by an economic support fund in a region of Norway outside the main urban centres.

Approach worth exploring: a possible trigger role for regional funds in drama series development.

2 Collaborative scriptwriting

Collaborative scriptwriting is a formula for success and should be strongly encouraged.

Our 18 case studies make it clear that the majority of creative teams include at least three or four scriptwriters. The producers and broadcasting corporations in the countries studied have all adopted the collaborative scriptwriting method and see a number of advantages in it, including specialization and development of new talent. A team can also accelerate the pace of writing and shorten production time between seasons.

Encourage and support collaborative approaches to scriptwriting.

Observations

3

Creative risks

The role of public broadcasting corporations as risk takers should be encouraged and supported.

Pressure from the advertising market should not prevent bold creative, which is often the first step to success with domestic audiences, and all the more so internationally. In our interviews, we were able to measure the extent to which public broadcasters in the countries studied accepted creative risk-taking with drama series as part of their mission. The Danes have been doing it on DR for over 15 years, and their productions have generated major audience ratings in their own market, besides earning international distribution. Given these successes from Denmark (*Borgen*), Sweden (*Wallander*), and now Finland (*Black Widow*), the series in these countries are being singled out in advance by international buyers looking for series to distribute and adapt. The public broadcasters, with their major involvement in the development process, consider it their mission to bring out and promote new talent, and take the necessary risks. These series owe their domestic and international success to their presentations of complex characters that are deeply rooted in the reality of the territories where their stories unfold. The *Lilyhammer* series, depicting the shambolic career of an Italian American Mafioso who is hiding out in Norway, is a sterling example. Most of the public broadcasters, then, clearly accept their role and are not under the thumb of advertising sales figures.

Maintain dialogue with broadcasters (public broadcasters in particular) to raise their awareness of the benefits of taking creative risks.

4

Share best practices

The countries in this study may be brought together for a “summit” proposed by Canada and Quebec.

Our contacts say they are very interested in our plan and by the desire to extract best practices from success stories in the “small markets.” There is a real possibility for Canada and Quebec to position themselves as leaders to rally these countries and to propose an international conference where best practices could be discussed in depth – and opportunities seriously explored for coproductions with Canada and Quebec.

Best practices might best be shared at an international conference hosted by Canada and Quebec.

Conclusion

The purpose of this study was to clarify and highlight the factors that determine the performance of drama series in small markets, including both their domestic markets and exports.

It has helped bring out a number of key factors and parameters that may be of use to Canadian stakeholders in developing their ideas about domestic production of drama series and ways of better supporting such productions.

In our study, we looked primarily at nine non-English-speaking markets, each with a population of roughly 10 million or less, to identify their specific economic challenges, development and production practices, and domestic and international marketing.

We started with a review of the literature, which showed us that this study is the first of its kind in the television production sector. We analysed some 20 studies on related topics, from the growing complexity of funding modes and mechanisms to the crucial role of public sector stakeholders.

Unfortunately, these studies provided only piecemeal statistics and provisional categories that tended to group drama series together with other “creative” content such as soap operas, situation comedies, mini-series, and made-for-TV movies – even documentaries and reality TV.

This review of the literature already made apparent one of this study’s limitations – the lack of available data. Contrary to what we anticipated, the key markets for this study do not keep national statistical records on the performance of their drama series in foreign countries. This is quite surprising, especially since public sector stakeholders play such an important role.

On the basis of the literature and our discussions with the sponsors for this study, we formulated seven hypotheses regarding the economics of drama series. These hypotheses do not represent an exhaustive analysis of the factors for success, but broadly cover those that seemed most relevant to our analysis.

In our field research, we interviewed a total of 30 informants. This enabled us to set out in detail, by country, the production context and the major public sector stakeholders, and to produce 18 detailed case studies reflecting a variety of production contexts and conditions.

Conclusion

H1

Investment in series development promotes better domestic and international performance.

H2

There is no clear evidence that adaptations of literary works have any crucial impact on performance.

H3

The mini-series format (fewer episodes, longer show times) performs well, particularly in international distribution. “Mini-binge viewing” appears to be an emerging trend. The “detective” sub-genre is evidently the easiest to export.

H4

There is no clear evidence of any significant difference between exports of entire productions (dubbed or subtitled) and exported concepts.

H5

The role of public sector stakeholders is essential in all small markets, except where the “mixed” model prevails.

H6

A funding approach that spreads resources among a larger number of beneficiaries helps achieve many positive objectives, including development of high-performing production ecosystems.

H7

Our hypothesis regarding effects of the production environment is not supported by the data, case studies, or analysis.

Conclusion

The production environment, whether under ideal or rudimentary conditions (our case studies presented series produced with budgets ranging from 200,000 to 1.2 million euros per episode), does not seem to have any impact, either on domestic performance or on international potential.

We conclude the study by formulating observations regarding stakeholder roles in the drama series production ecosystem:

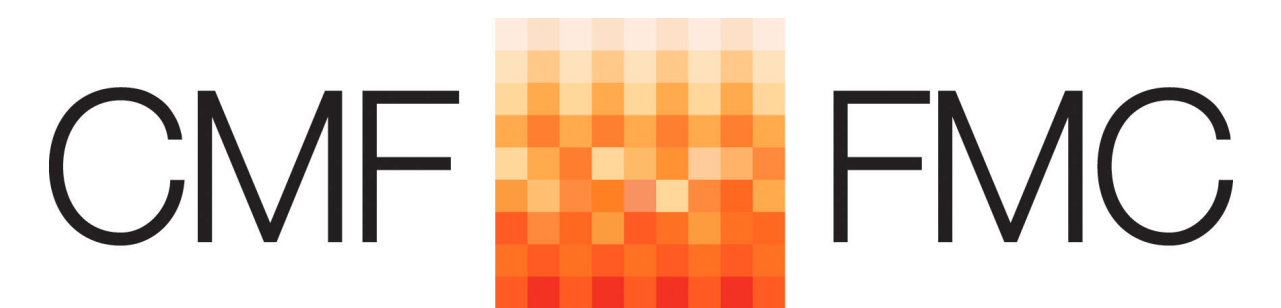
- Explore a possible role for regional funds in drama series development.
- Encourage and support collaborative approaches to scriptwriting.
- Initiate and encourage a dialogue with public broadcasters to raise their awareness of the benefits of taking creative risks.
- Consider creation of international consultative mechanisms on export issues, for producers, and other stakeholders in the ecosystem.

The extremely positive responses that came back to our team from our many international contacts and informants, during and after this study, lead us to believe that there is room for more in-depth coverage of some specific aspects that emerged:

- More detailed exploration of the “Netflix factor” – evaluate the paradoxical role of a player that is disrupting the market while at the same time presenting new business opportunities for producers and broadcasters, especially in the small markets.
- A review of the various models for training scriptwriters, producers, distributors, and broadcasters internationally, to identify, articulate, and promote the professional development best practices and related business models that will be essential for a successful and dynamic television sector.
- A study specifically on the outcomes of the systematic use of collaborative writers as a mode of scriptwriting.

Canada, with the advantages of its proximity to the large US market and its traditional role as go-between for Europe and America, is definitely in a leadership position among the small markets, and as such has a major role to play on issues regarding creation, production, distribution, and broadcast (domestic and international) of drama series.

It would certainly be appropriate to see the key players in Canada's ecosystem take this opportunity to bring together their various counterparts in the markets studied here, including producer associations, broadcasters, distributors, investment funds, and other major stakeholders.



in collaboration with



A black and white photograph showing the silhouettes of a camera operator and a subject. The operator on the left is holding a professional video camera mounted on a tripod, with a monitor attached to the top. The subject on the right is standing with their back to the camera, looking towards a bright, overexposed background. The scene is captured in high contrast, with the subjects appearing as dark shapes against the light background.

Tables

The tables in this section show organisations and associations identified, informants consulted, and drama series selected for the purposes of this study. Unfortunately we were unable to reach all the contacts we hoped to meet

Agencies — Interviews by country

	Organisation	Contact
Austria	FAMA	Werner Muller
	Union Prof. des Producteurs TV Wallonie	Frédéric Ledoux
Wallonia (Belgium)	Fédération Wallonie Bruxelles	Jeanne Brunfaut
	Wallimage	Philippe Reynaert
	ScreensBrussels	Noël Magis
	Danish Producers' Association	Klaus Hansen
Denmark		
Finland	Association of Independent Producers in Finland (SATU ry)	Stiina Laakso
	Norwegian Film Institute	Sigbjorn Sandberg
Norway	Norwegian Film Institute	Mia Lindrup

Producers and broadcasters — Interviews by country

	Organisation	Contact	Series
Austria	MR FILM GROUP	Andreas Kamm	<i>Schnell Ermittelt</i>
	ORF (public broadcaster)	Katharina Schenk	<i>Schnell Ermittelt</i>
Wallonia (Belgium)	Playtime Productions	Isabel de la Serna	<i>Ennemi Public</i>
	Playtime Productions	François Touwaide	<i>Ennemi Public</i>
	Helicotronc	Anthony Rey	<i>La Trêve</i>
Flanders (Belgium)	Skyline	Jan Theys	<i>Salamander</i>
Denmark	DR Fiktion (Danish radio broadcasting)	Lars Hermann	<i>Borgen</i>
	Miso Film	Peter Bose	<i>1864</i> (historical series)
Finland	Yellow Film & TV	Milla Bruneau	<i>Nurses</i>

Producers and broadcasters — Interviews by country

	Organisation	Contact	Series
Israel	Keshet	Limor Gott Ronen	<i>Hatufim</i>
	Monster	Haakon Briseid	<i>Young & Promising, Nobel</i>
Norway	NRK (public broadcaster)	Tone Rønning	- public broadcaster
	Gota Film	Christer Nilson	<i>Etor Nollor/The Fat and the Angry</i>
Sweden	Zodiac	Reto Schaerli	<i>Gothard</i>
	SRF	Urs Fitze	- public broadcaster
French Switzerland	Box Production	Thierry Spicher	series under development
	RTS	Francoise Mayor	- public broadcaster
	Point Prod	Jean-Marc Frohle	<i>Anomalia</i>
	Jump Cut	Pierre Adrian Irlé	<i>Station Horizon</i>
German Switzerland			

Another perspective: Small English-language markets

Although they are not within the scope of this study, numerous scientific reports, and articles analyse the situation of small markets such as New Zealand, Australia, the United Kingdom, and English Canada. In 2008, the Canadian lawyer and professor Peter S. Grant published the *Stories Under Stress: The Challenge for Indigenous Television Drama In English-Language Broadcast Markets* report, where he assesses the challenges facing these four English-language markets, focusing on distinctive features in terms of scripting, funding, and institutions in these national spaces.

He shows that the economic model clearly favours acquisitions and imports of American series to the detriment of local production, inasmuch as broadcast rights are nearly always well below the cost of an original production.

As Grant writes, the challenge is in fact greater for these small markets than for others, such as those featured in this study, since the language barrier lessens the attractiveness of American drama series for them. The issues are every bit as significant for these national spaces in their “political” and cultural dimensions: “Stories are political. Whose stories get told? What can those stories mean? Who benefits from their telling? These are political questions because they address the ways in which people’s identities – their beliefs, attitudes, and values – are created and maintained. These identities determine how we live together.”

It is worth noting that in this study the author allows a relatively broad definition of drama, including soaps, comedies, long formats, mini-series, and even made-for-TV movies. He indicates that this categorization excludes documentaries and reality TV, though conceding the existence of hybrid formats where scripting choices compromise the “purity” of the genre.

The report also has the advantage of acknowledging the economic nature of television as a commodity. It is a “public good” (a product whose cost does not vary with consumption). Television shows are “experience goods” (customers must see the show before they can decide whether or not they like it as a product), but are also non-competitive and non-exclusive (consumption by one TV viewer does not prevent another viewer from enjoying the product to the same degree, at the same time, without exhausting the supply), which gains major economies of scale (a benefit especially to broadband distributors with international capacity). A television program is an object of high cultural specificity, requiring adaptation, but even a good adaptation is never a perfect substitute for its equivalents. One drama series is not “replaceable” by another.

The *Drama Report: Production of Feature Films and TV Dramas in Australia 2014/15* covers the production of drama series and feature films in Australian territory. However, it is more interested in the topic of attracting production activities than in analysing the Australian market, given its small size. The production market, though interested in the same phenomenon, can be significantly different from the television consumer market, especially when it includes foreign productions and coproductions.

This report was preceded by another, *Foreign Film and Television Drama Production in Australia: A Research Report*, using similar data and methods. This report is interested primarily in Australia’s attractiveness as a production destination.

More relevant to our concerns, but unfortunately treating the television aspect in only very cursory manner, is *Overview of the New Zealand Screen Production Sector*, a report published in 2005 by the New Zealand Screen Council. Though only 24 pages, it covers film, TV, advertising creative, animation, and postproduction.

We learn nonetheless that New Zealand has problems that are quite consistent with those of our small markets, including a recurring shortage of funding, ambivalent political enthusiasm for domestic productions, and fluctuations in the value of international distribution rights, among other things. Though short on quantification, the report presents an interesting table showing increases in the number of hours of locally produced television content broadcast in New Zealand, which passed the 4,000-hour mark in 1990 and topped 6,000 hours in 2004.

Interview questionnaires

Questionnaire for producer associations for quantitative information feedback

The focus of our study is on drama series and their place in domestic markets, as well as how they are exported to other markets.

Below is a questionnaire to be followed by a Skype call at your earliest convenience:

1. Drama series production landscape

- a. Total invested sums per year:
From private sources
From public financing
- b. Production environment:
Number of hours of drama series produced per year
Average cost for one hour of production
Labour costs: key crew average wages (to be expanded)
- c. Average broadcast licence paid out to producers
- d. Drama series' relative share in the local TV market
Share of nationally produced series vs imports

2. Drama series broadcast landscape

- a. Number of nationally produced series broadcast on air
Number of hours broadcast per week
- b. Drama series ratings:
During prime-time slots
Outside of prime-time slots
Average audience ratings per min.

3. Drama series economic impact

- a. Total domestic revenues generated by drama series broadcasts
- b. Drama series exports
Number of series exported (territories if possible)
Total revenues generated by exports
Breakdown between licences for original series exports vs format/adaptation exports

Interview questionnaires

Questionnaire for individual producers for the case study

The focus of our study is drama series and their place in domestic markets, as well as how they are exported to other markets. We're combining overall sector data with more qualitative data and specific case studies. We've selected your series as a case study to illustrate your market.

Below is a questionnaire to be followed by a Skype call at your earliest convenience:

1. Series production landscape

- a. Development
 - History of development: original script, adaptation from source material
 - Development financing:
 - From private sources
 - From public financing
 - Development process from script to greenlight
- b. Production financing
 - From private sources: international sales advances, etc.
 - From public financing (if applicable): public broadcaster, public funds
 - If it's a co-production, percentage of co-production splits
 - Potential tax incentive: % of the budget, nature of the tax credit base
- c. Production
 - Number of episodes produced per year
 - Average cost for one hour of production
 - Labour costs: key crew average wages (to be expanded)
 - Budget split between talent and key crew

2. Drama series broadcast landscape

- a. Series broadcast slots
 - Day/time of broadcast: initial slot, subsequent
 - Is the series available via domestic broadcasters' streaming services? What is the audience average?
 - Is the series also simulcast on Netflix? Is there a positive/negative Netflix factor?
- b. Series ratings
 - During prime-time slots
 - Outside of prime-time slots (for potential 2nd window)
 - Average audience ratings per min.

3. Drama series economic impact

- What are the total domestic revenues generated by this series?
- What are the total export revenues generated by this series?
 - Breakdown between licences for original series exports vs format/adaptation exports
- Which foreign/non-domestic broadcasters have bought the series?
- Have you experienced any negative exports? Is there an export risk that you take into account?

Context

The following section presents, in alphabetical order, the nine territories selected for the study. We conducted an in-depth examination of one to three case studies for each territory and documented our findings. In most cases, we were able to speak directly with the producer to check secondary public data obtained elsewhere.


All the data in this report is published with the express permission of the participants.

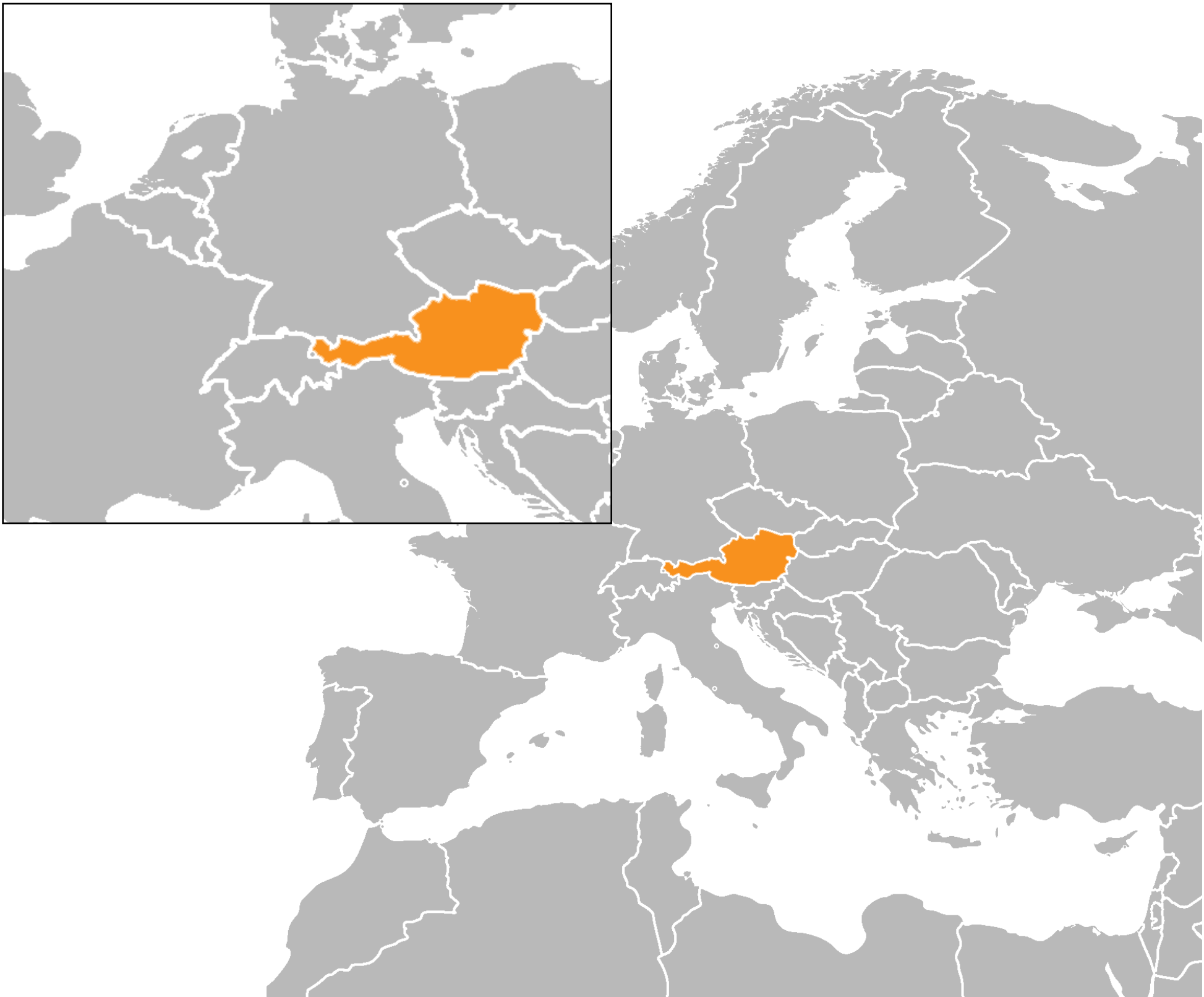
In the vast majority of cases, data related to items such as remuneration is available to the public and published as part of conventions and agreements.

In this section, we sought to trace a factual portrait of the nine territories and 18 series studied. Any subjective perspectives and the views and opinions expressed by the participating stakeholders are presented in the sections that make up the body of the report.

Austria

Country fact sheet

Official name	Republic of Austria
Official language	German
Total population	8 665 550
Flag	
Popular series	<i>Schnell Ermittelt</i> <i>The Team</i> <i>Inspector Rex</i> <i>Anatomy of Evil</i> <i>Tatort</i> <i>Stockinger</i> <i>SOKO Kitzbuhel</i>
Major broadcasters	ORF Okto TV K TV RTI
Major funders	ORF RTR Fernsehfonds



Austria

Country fact sheet

Austria is a relatively small German-speaking country compared to its neighbour Germany, a market of over 80 million people, that shares its main border.

Funds allocated by the Fernsehfonds, which range up to 120,000 euros per episode, can be awarded to cover a maximum of 20% of the TV series production costs. These funds are intended to contribute to strengthening the quality of Austrian audiovisual productions in Europe.

According to Werner Müller, of Film & Music Austria, the coproduction component of RTR Fernsehfonds injects 50 to 100 million euros per year.

A striking feature of Austrian drama series production is an anthology series – a collection of stories featuring different actors in different locations produced under one title or label. One such TV banner series is *Landkrimi*, which receives 57% of its funding from ORF, 30% from Fernsehfonds and 10% from the Vienna Regional Fund.

The Austrian Regulatory Authority for Broadcasting and Telecommunications (RTR Fernsehfonds) invests 13.5 million euros to promote television productions.



Austria

Case study: *Schnell Ermittelt*, 40 x 42 mins. (4 seasons)

Creative team	Producers: Michael Riebl and Andreas Kopriva Scriptwriters: team of nine, including Verena Kurth
Broadcaster	ORF (public broadcaster)
Budget	600,000 euros per episode. Season 1: 10 x 42 mins., Season 2: 8 x 42 mins., Season 3: 10 x 42 mins., Season 4: 12 x 42 mins.
Development budget	350,000 euros
Ratings	27% market share (750,000 viewers)
Sales	Germany, Italy, France, Switzerland, Denmark, the Netherlands, Russia, Bulgaria, Albania, Bosnia, Croatia, Kosovo, Macedonia, Serbia, Slovenia, Vietnam, Lithuania

Anjelica Schnell is a young unconventional police woman on the Vienna police force.

Sources

Interviews with producer, Andreas Kamm (MR Film), and Katharina Schenk (ORF)
http://www.mr-film.com/produktionen/schnell_ermittelt_einsamkeit.html

MR Film proposed the series to public broadcaster ORF, which accepted the basic concept and committed to its development. The producer believes that development costs amounted to 350,000 euros (\$500,000 CAD) over three years.

As ORF provided all funding for the production of this series, it retains exclusive control of the exploitation rights. In this sense, the producers answer to the broadcaster. The series budget is 600,000 euros (\$879,000 CAD) per episode. There is no set number of episodes per season. Season 1 consisted of 10 episodes, with eight and 12 episodes in Seasons 2 and 3, respectively. With regard to labour costs, the cinematographer/chief cameraman for the series is paid between 4,200 and 4,500 euros per week (\$6,152 to \$6,592 CAD).

In terms of ratings, *Fast Forward* drew 750,000 viewers from a population of 8 million (27% market share).



Austria

Observations

Public broadcaster ORF carries significant weight with respect to funding and broadcasting drama series. Local private channels lack adequate resources to fully fund heavy fiction. Other than ORF, and federal and regional funds, Austria finances series for its local market. ORF produced two coproductions with Germany's ZDF, and two 100% Austrian productions.

Wallonia (Belgium)

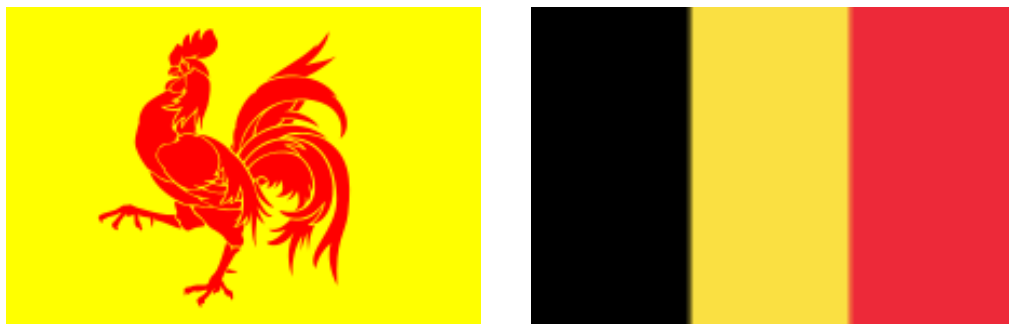
Regional fact sheet

Official name Walloon Region

Official language French

Total population 3 598 058

Flag



Popular series *Ennemi Public*
La Trêve
Esprits de famille
À tort ou à raison

Major broadcasters RTBF
RTL Groupe
BeTV (Be Séries)

Major funders Fonds FWB-RTBF
Private producers
Proximus



Wallonia (Belgium)

Regional fact sheet

Of Belgium's 11.2 million people, 3.5 million live in the mainly French-speaking Walloon Region. Given the very specific make-up of each linguistic community, we studied them separately. Wallonia shares an important border with France, whose television productions are omnipresent in the Walloon media landscape.

In 2013, the Centre du Cinéma et de l'Audiovisuel (Film and Audiovisual Centre) and RTBF decided to make a significant investment in the production of 'cultural proximity' series produced in Wallonia by Walloons to reach the Belgian French-speaking audience. This bet paid off and led to the creation of two series that are popular in both the local and international markets. The goal is to produce four dramatic series of 10 episodes per year aimed at the local market.

The drama series funding is distributed as follows: a Tax Shelter that specifically targets investors from outside the audiovisual sector to generate 'an injection of fresh money into the system' that can be awarded to cover a maximum of 40% of the production costs of so-called 'approved' works for a total of 79 million euros (all media combined). We were unable to determine the specific share earmarked for drama series production, but our respondents believe that the Tax Shelter accounted for "between 2 million and 3 million euros."

In Wallonia, a fund of 5.5 million euros for regional or 'economic' aid is managed by Wallimage, with a breakdown of: 1 million euros for TV, 1 million euros for animation, and 3.5 million euros earmarked as the administrators' discretionary budget. Added to this is the Screen Brussels contribution, which also approximates 1 million euros. The public broadcaster has set aside an additional 5 million euros over three years for the production of cultural proximity drama series.

As the production of drama series is relatively recent, a mechanism was implemented to restrict investments to local funding sources in order to maintain creative control. It also means that producers must be competitively inventive to successfully produce high-quality series on a low budget of approximately 250,000 euros per episode.



In Belgium, the television production ecosystem is funded by three levels of government: federal, regional (Flanders, Wallonia, the Brussels-Capital), and two linguistic communities (Dutch-speaking and French-speaking).

Wallonia (Belgium)

Case study: *La Trêve* - 10 x 52 mins. (1 season)

Creative team	Producer: Matthieu Donck Scriptwriters: Benjamin d'Aoust, Stéphane Bergmans, Matthieu Donck
Broadcaster	La Une (RTBF)
Budget	2.5 million euros, or roughly 250,000 euros per episode
Development budget	40,000 euros to develop the first episode + 200,000 euros for the following nine episodes + 30,000 euros to produce the pilot (30 minutes)
Ratings	Conventional broadcast: between 17% and 22% market share for 10 episodes
Sales	At the time we conducted the interviews, some 10 foreign television channels had expressed interest in broadcasting the series. Agreements have been signed with VRT (Flemish Belgium), France 2 (France) and RTS (Switzerland).

The series was created and produced by Matthieu Donck.

50% of the funding was provided by RTBF and the Wallimage Fund, and 50% by the Tax Shelter mechanism.

Two episodes of the series aired each week on Sundays at prime time and garnered an average market share in the range of 21%.



Driss, a young footballer of African descent, is found dead in the Semois River at Heiderfeld. After a cursory analysis, local police in the quiet, secluded town quickly conclude that it's suicide. However, Yoann Peeters, a police officer recently transferred from Brussels, gathers clues that point to homicide. His findings, methods, and reputation create waves and in an attempt to quickly close the case a local social misfit, Jeff Lequais, is arrested and confesses to the murder.

Sources

Interviews with Anthony Rey, Helicotronc (producer), Philippe Reynaert (Wallimage), and Jeanne Brunfaut (Centre du Cinéma et de l'Audiovisuel).

Wallonia (Belgium)

Case study: *Ennemi Public* - 30 x 58 mins. (3 seasons)

Creative team	Producers: Matthieu Frances & Gary Seghers Scriptwriters: Antoine Bours, Fred Castadot, Gilles de Voghel, Matthieu Frances, and Christopher Yates
Broadcasters	La Une (RTBF) and Movies & Series Pass (Proximus VOD)
Budget	3.1 million euros (310,000 euros per episode)
Development budget	RTBF Special Fund, 175,000 euros for 10 written episodes
Ratings	Conventional broadcast: between 15% and 27% market share. The series was first offered as an exclusive preview to the approximately 30,000 Proximus Movies & Series Pass subscribers. Conventional broadcast viewership varies between 1.45 million and 1.85 million.
Sales	A Séries Mania award winner, the series has aired in Belgium since May 1, 2016. At the time of our interviews, no formal agreement had yet been signed regarding the export of the series.

After being released on parole, child murderer Guy Beranger moves into the Vielsart Abbey, a monastery in a small peaceful village in Ardennes. He is placed under the protection of Chloé Muller, a young federal police inspector convinced that sooner or later the ex-convict will re-offend. While the population rages over the presence of public enemy No. 1 in their neighbourhood, the police discover the troubling disappearance of a young girl from the village.

Sources

Interviews with producers Isabel de la Serna and François Touwaide, Philippe Reynaert (Wallimage), and Jeanne Brunfaut (Centre du Cinéma et de l'Audiovisuel).

The series was created and produced by Matthieu Frances.

Funding was provided by RTBF, the Tax Shelter and Wallimage. Additional funding was made available through Proximus (150,000 euros) and product placement (80,000 euros).

The series was first broadcast by Proximus in VOD, followed by two episodes a week on Sundays in prime time and held down audience market share of 15% to 28%.



Flanders (Belgium)

Regional fact sheet

Official name	Flemish Region
Official language	Dutch
Total population	6 471 996
Flag	 
Popular series	<i>Salamander</i> <i>Code 37</i> <i>Clan</i> <i>Van Vlees En Bloed</i>
Major broadcasters	VRT (Eén) Medialaan (VTM) ProSiebenSat. 1 Media (Vijf)
Major funders	Vlaams Audiovisueel Fonds Vlaams Radio en Televisieomroep VRT Medialaan Vier/Vijf Media Fund Oet Media Fonds



Flanders (Belgium)

Regional fact sheet

Belgium is a country of approximately 11.2 million people, 6.25 million of them Flemish, or roughly 60% of the Belgian population. Given the very specific make-up of each linguistic community, we studied them separately. Dutch-speaking Belgium shares an important border with the Netherlands, whose television productions are omnipresent on the media landscape.

Flanders has a number of television channels, the main ones being VRT, a public broadcaster whose mission includes providing objective, unbiased, high-quality information to the general public, and VTM, a private company with two channels. Lastly, the 'Vier and the Vijf' belong to the Woestijnvis production company.

The main funding sources of drama series in Dutch-speaking Belgium include public broadcaster VRT, regional funds, such as the OetMediaFonds, and the Tax Shelter, established to encourage Belgian companies subject to income tax to invest in audiovisual and film projects.

Very few drama series are produced in Flanders. The most popular series to date is *Salamander*, a drama fiction inspired by the American series *24*. Now

broadcast in 75 countries around the world, *Salamander* was in development for 10 years before the first episode aired in Belgium.

As in the case of Wallonia, Dutch-speaking Belgian producers must produce very high-quality series on low budgets, in the range of 500,000 euros per episode.



In Belgium, the television production ecosystem is funded by three levels of government: federal, regional (Flanders, Wallonia and the Brussels-Capital), and two linguistic communities (Dutch-speaking and French-speaking).

Flanders (Belgium)

Case study: *Salamander* - 22 x 50 mins. (2 seasons)

Creative team	Producer: Frank van Mechelen Scriptwriters: Ward Huselmans, Bavo Dhooge
Broadcasters	VRT and VRT OTT
Budget	6 million euros for 12 episodes in Season 1, 6 million euros for 10 episodes in Season 2
Development budget	Entirely self-funded
Ratings	An average of 1.8 million viewers per episode, with 1.4 million during conventional broadcasts and 400,000 on catch-up TV
Sales	28 agreements covering 75 territories led to the series' international distribution

A burglary takes place in a Brussels bank. Well-informed thieves crack 66 safety deposit boxes belonging to noted Belgian government officials. Police officer Paul Gerardi decides to investigate, but without the authorization of his superiors. It appears that the burglary targeted a secret organization named Salamander. The mastermind of the robbery pressures the victims to resign or commit suicide, compromising national stability.

The series is an original creation penned by 'Belgium's top screenwriter,' Ward Huselmans, who came up with the idea in 2000, after being inspired by the American series *24*.

Season 1 was largely funded by VRT, to the tune of 60%. Other sources include the Tax Shelter (20%), and OetMediaFonds (20%). Following a change in funding rules, OetMediaFonds did not contribute to Season 2, which was funded by a wider variety of sources.

The series aired in 2013 and enjoyed huge international success. It is available on Netflix in Canada and the United States. It generated some \$2 million CAD in export revenue, and the concept was sold to Keshet (Israel) for a 'substantial' sum.



Sources

Interview with Jan Theys, producer, Skyline.

Belgium

Observations

The public broadcasters in Belgium's two main linguistic and cultural regions endeavour to develop drama series that resonate with the Belgian public. Significant funding from the Belgian Tax Shelter supports their efforts. The Tax Shelter was established to encourage Belgian companies subject to income tax to invest in audio-visual and film projects.

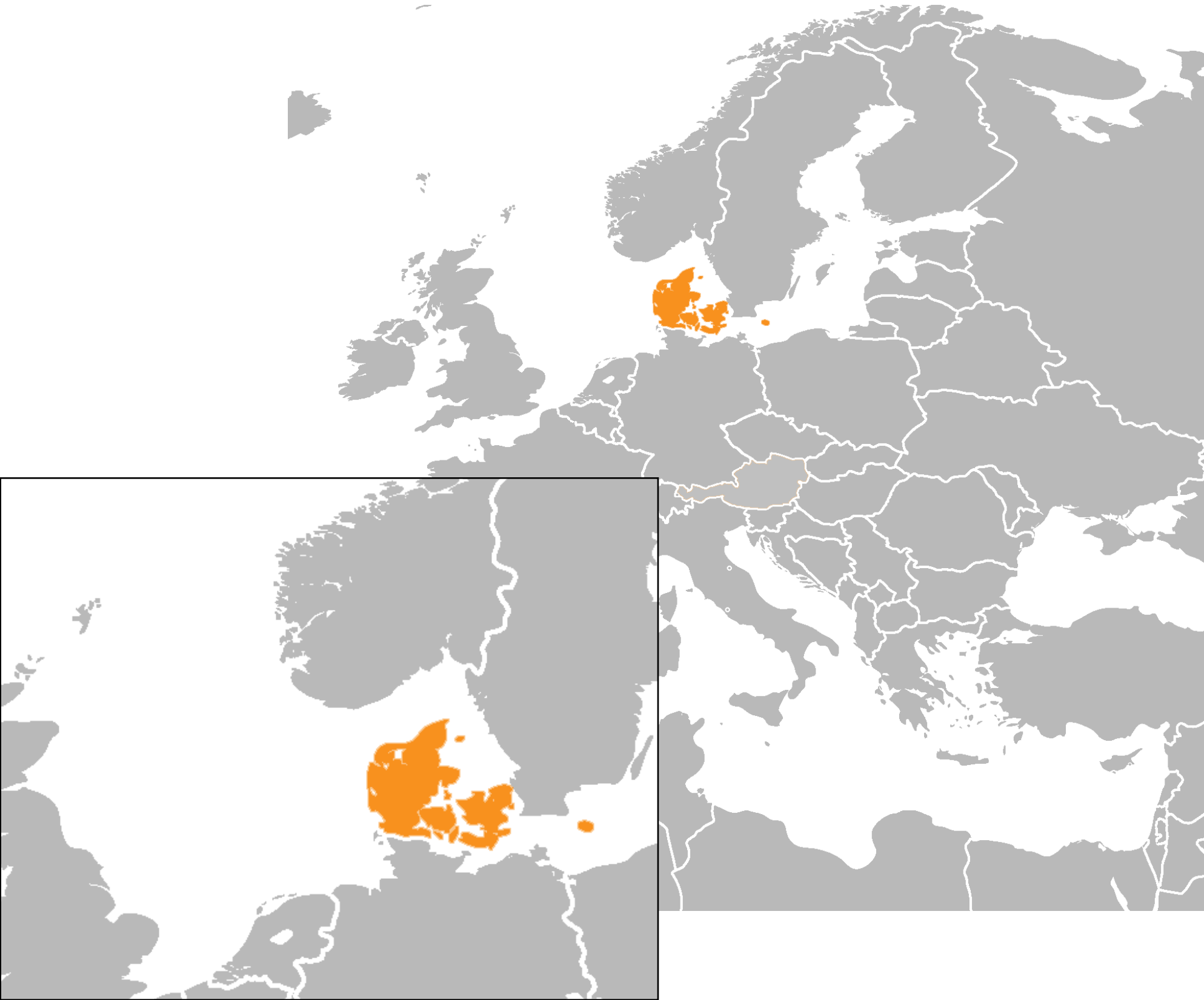
The country's segmented linguistic and cultural market presents a challenge for Belgian producers. For example, Flanders-based producers cannot take advantage of the FWB-RTBF Fund, which is reserved for Walloon-based projects.

Belgian producers are also tasked with delivering high-quality series to satisfy a demanding public, despite having to work within a low-budget context.

Denmark

Country fact sheet

Official name	Kingdom of Denmark
Official language	Danish
Total population	5 699 220
Flag	
Popular series	<i>Borgen</i> <i>1864</i> <i>Badhotelett</i> <i>Heartless</i> <i>Kroniken</i> <i>The Killing</i> <i>The Bridge</i>
Major broadcasters	Danish Broadcasting Corporation (DR) TV2 Viasat
Major funders	Ministry of culture The West Danish Film Fund Nordisk Film & TV Fond



Denmark

Country fact sheet

Denmark is a textbook case in the world of drama series. The relatively small size of its linguistic market has not prevented the country from producing internationally popular series. According to Klaus Hansen, president of the Danish Producers' Association, myriad factors contribute to Denmark's winning formula.

First, the main public broadcaster, DR, plays an important role, similar to that of the BBC in the UK market. Like the BBC, DR has internal facilities for development and production. For many years, the production of Danish drama series was the quasi-exclusive province of DR. Iconic series such as *Borgen* were produced entirely in-house by the public broadcaster.

In 2008, in a move to encourage independent production, the Danish government created a special fund at the Danish Film Institute to produce series to be aired by other broadcasters. With a budget of 5.7 million euros, the fund generated a production volume of 16.5 million euros in 2014. The public broadcaster also launched a call to independent producers for ambitious projects, which resulted in the historical series, *1864*, with a budget of 20 million euros, and *The Bridge*, a Denmark-Sweden coproduction (3 seasons). Danish broadcasters also have airtime obligations with respect to the series. To this end, DR must broadcast 20 hours per year of new, independently produced drama, while its private competitor, TV2, must air 42 hours of new series.

These 62 broadcast hours represent 90% of the Danish independent production market. Two other broadcasters, SBS and TV3, have only low-budget series. As a result of the special fund and the broadcasters' airtime obligations, feature film producers can now produce TV series. During the weekly broadcast window on Sunday evenings, Danish drama series often draw upward of 1 million viewers and hold down more than 50% market share – significant figures in a population of 5.6 million. Domestic series have a high cultural value and a loyal viewership among the Danish public, unlike foreign series, which are considered to be 'filler,' according to Klaus Hansen of the Danish Producers' Association.

Hansen also reports that a major challenge to Danish market vitality is, paradoxically, the weight carried by the public broadcaster, particularly its lack of transparency. DR refuses to disclose the budgets of series produced in-house to its independent production partners. These partners presume that DR's in-house budgets are higher than those allocated to independent producers.

Lars Hermann, from DR's fiction division, went on the record to confirm that it is the DR Corporation's policy not to publicly disclose the costs or sales figures of individual programs.

“It is DR’s policy not to publicly disclose the costs or sales figures of individual programs.”

Independent producers believe that their average production costs are between 500,000 euros (\$733,000 CAD) and 750,000 euros (\$1 million CAD) per hour. The business model is also changing. Until recently, broadcasters funded all production costs and retained exploitation rights. This meant that producers received their remuneration and a percentage of the budget. Danish series production has now been aligned with the film-funding model to include minimum contribution guarantees from broadcasters and co-producers. Like other Scandinavian countries, the short-term international potential lies in neighbouring countries and Germany.



Sources

Interviews with Lars Hermann (DR) and Klaus Hansen (CEO, Danish Producers' Association)

Denmark

Case study: *Borgen* - 30 x 58 mins. (3 seasons)

Creative team	Producers: Søren Kragh-Jacobsen, Rumle Hammerich, Annette K. Olesen, Mikkel Nøgaard Scriptwriters: Adam Price (creator), Jeppe Gjervig Gram, and Tobias Lindholm
Broadcaster	DR (public broadcaster)
Budget	Unavailable. DR does not disclose its budgets. Three seasons of 10 episodes of 58 minutes each
Development budget	Unavailable
Ratings	Conventional broadcast: 50% market share (over 1 million viewers)
Sales	Norway, Sweden, Finland, UK, the Netherlands, France, Germany, Switzerland, Belgium, Italy, Estonia, Greece, Turkey, Poland, Croatia, Morocco, Canada, US, Mexico, South Korea, and Australia

Against all odds, Brigitte Nyborg, the New Democrats Party leader, is elected prime minister. However, once in office, she faces an unsettling question: how far can we go to hold onto power? Over the course of 10 episodes, she struggles to balance her personal and professional life, as well as her ideals and necessary political concessions. Brigitte soon realizes that it's a difficult balancing act, especially for a prime minister.

The series was created by Adam Price and produced in-house by broadcaster DR.

As all funding for *Borgen* was provided by DR, the broadcaster retains exclusive control of exploitation rights.

In terms of ratings, *Borgen* held down a market share of 50% (more than 1 million viewers out a population of 5.6 million).



Sources

Interview with Lars Hermann, DR (broadcaster)

Denmark

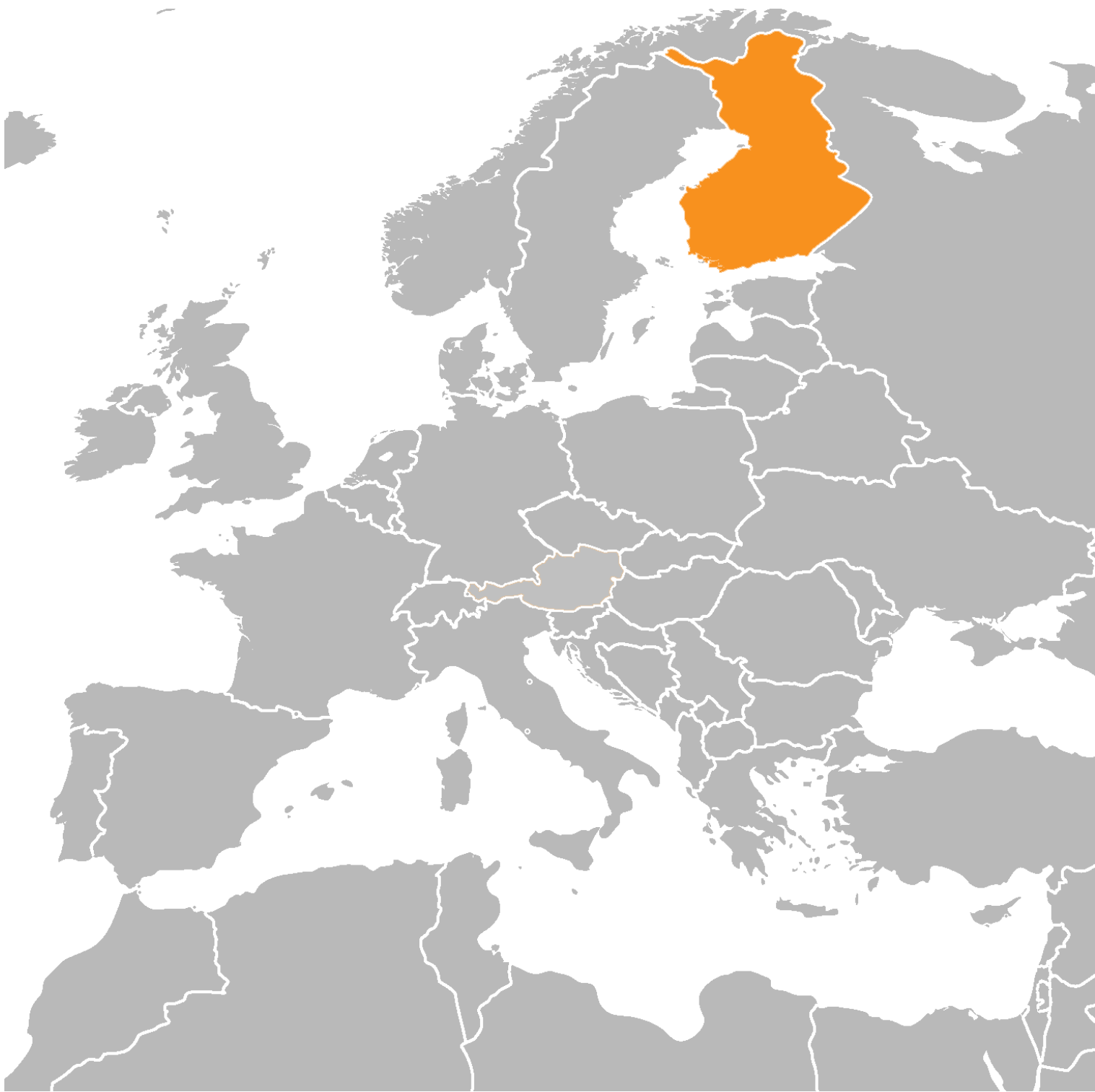
Observations

Denmark's success creating and exporting drama series has attracted strong interest beyond the national sphere. There has been a recent surge in demand for Danish series. However, this success story has been more than 10 years in the making. One of the main drivers was the Danish industry's shift to a collaborative writing process, led by a 'show runner' – a lead scriptwriter who serves as creator/orchestra conductor. Other factors in the Danish winning formula include the pivotal role of public broadcaster DR, and the additional funding injected by the special fund for independent productions. It should be noted that due to very high-quality productions, Danish series have accomplished the rare feat of travelling to the international market in their original version. According to Klaus Hansen, despite successful forays into the American market, with English adaptations of *The Killing* and *The Bridge*, Danish producers opted to forego this export formula. The reason is that Danish production companies cannot absorb the exorbitant costs of launching adaptations and maintaining the relationship.

Finland

Country fact sheet

Official name	Republic of Finland
Official language	Finnish and Swedish
Total population	5 491 054
Flag	
Popular series	<i>Nurses</i> <i>Border Town</i> <i>Nymphs</i> <i>Black Widow</i>
Major broadcasters	YLE Nelonen Kutonen
Major funders	YLE and other broadcasters Finnish Film Foundation Nordisk Film and TV Fond



Finland

Country fact sheet

The Republic of Finland shares borders with Norway, Russia, and Sweden. Finland is similar to its Scandinavian neighbours in that it has a very small market (population of 5.5 million).

In recent years, Finland's television market has been undergoing tremendous change. Expenses are on the rise for public broadcasters, while private broadcasters are seeing the opposite trend. This situation is mainly due to growing advertising demand. Public broadcasters, like YLE, are primarily financed by the taxpayer. However, the most striking change is at the international level, with the proliferation of opportunities for sales of domestic series remake rights.

According to the Association of Independent Producers, public broadcaster YLE has bigger series production budgets and they are not necessarily transparent. It is hoped that independent production quotas will be set. YLE allocates 5% of its turnover to independent producers. However, the Association's Task Force is calling for an increase of that figure to 20% or 30%.

Recognized for numerous successful TV series, Finland is home to several renowned production companies such as Yellow Film & TV, Moskito and Fisher King Production. For

many of these companies, a main line of business is coproductions with other countries in northern Europe. The primary objective of producer associations, such as the Association of Independent Producers in Finland (SATU ry), is to develop and expand domestic audiovisual productions.

Each year, large sums are dedicated to series production in Finland. For example, private television channels each spend approximately 4 million euros per year to produce two series of 10 or 12 episodes (2 million euros per series). Public broadcasters grant producers a 7-million euro budget to produce a 20-episode series, a 12-episode series and seven single episodes of approximately one hour each. Between 85 million and 90 million euros are required to ensure adequate funding of Finnish series production. Ultimately, between 85 and 90 hours of series are produced each year and telecast over 11 TV channels. In general, the costs of each production range from 160,000 to 200,000 euros per episode. The Finnish Film Fund supports this effort with an allocation of 600,000 euros for the production of five series.

With respect to almost all projects, the production team's daily or weekly salaries are pre-determined against a standardized rate. For example, the daily rate for an assistant is between 106 euros and 126 euros (1,815 euros to 2,137 euros per month). The same rate for a cinematographer ranges from 214 euros to 301 euros (3,486 euros to 4,514 euros per month).

Drama series usually air on Mondays, Tuesdays, and Wednesdays. Repeats are broadcast 30 to 180 days later. First broadcasts draw an average of 300,000 to 600,000 viewers out of a total population of 5.5 million. Repeat and online audiences account for 7% to 17% of overall viewership.

Series export rights are held by the broadcaster for four to eight years from the purchase date. The series *Black Widows* was the first international format sale. Incidentally, for foreign production companies, the purchase price of a series only represents 4% to 7% of the total series remake budget.

Sources

Interview with Stiina Laakso (CEO, Association of Independent Producers in Finland)

<http://fisherking.fi/aboutus/>

<http://www.satu.fi/english>

Finland

Case study: *Nurses* - 30 x 50 mins. (3 seasons)

Creative team	Producers: Joonas Tena, Aleksis Mäkelä, lead screenwriter: Petja Peltomaa
Broadcaster	YLE (public broadcaster)
Budget	160,000 euros per episode (\$234,000 CAD)
Development budget	150,000 euros
Ratings	Conventional broadcast: 50% market share (more than 1 million viewers out of a total population of 5.5 million)
Sales	UK, Norway, Denmark, Germany, with an adaptation underway for Sweden

After more than two years in the writing and development stage, the first 20 episodes of the series (10 episodes per season) were filmed in one block at an average cost of 160,000 euros per episode. The protracted development period was due to the strong focus on quality and international potential. Public broadcaster YLE, which provided all funding to develop and produce the series, has increased budgets for Seasons 3 and 4.

To date, 30 episodes of 50 minutes each have been produced. YLE aired the series on Wednesdays in Finland's prime time slot (9:00 pm). This series can be considered a success as the first episode in Season 1 drew 500,000 viewers via the Arena digital online channel. The series was initially broadcast as single episodes, but the formula was modified to air five episodes at a time to allow binge-watching. Yellow Film & TV owns the rights, which were negotiated by distributor EcchoRights.

No additional revenue was registered in Finland following the production and broadcast of this series, which has already been exported to the UK, Norway, Denmark, and Germany. Sweden also recently ordered a remake. *Nurses* was written with a focus on optimal quality and international potential.

The *Nurses* series revolves around four nurses in a hospital trauma ward who are determined to save lives in a system that seems designed to do just the opposite.

Sources

Interview with Milla Bruneau, producer of *Nurses*
<http://variety.com/2016/film/global/swedens-tv4-orders-remake-of-finnish-medical-drama-nurses-1201721653/>
<http://ecchorights.com/our-offering>




Finland

Observations

Finland has several associations and national funds that encourage domestic audiovisual production. However, series productions are still largely funded by broadcasters, which hold export rights. Moreover, the series are generally exported to European countries, particularly between Nordic nations. To diversify production funding sources, lobbying efforts are currently underway to establish a tax credit. This initiative appears to be on the right track.

Israel

Country fact sheet

Official name	State of Israel
Official language	Hebrew and Arabic
Total population	8 489 400
Flag	
Popular series	<i>Hatufim</i> <i>BeTipul</i> <i>Kfulim/False Flag</i> <i>Fauda</i> <i>Arab Labor</i> <i>The A Word</i>
Major broadcasters	Reshet Keshet Israel Broadcasting Authority (IBA) Hot Telecommunication Systems Ltd.
Major funders	Reshet Keshet



Israel

Country fact sheet

Israel is a Middle East country with a population of 8.5 million. Because of its small domestic market, the country has few major broadcasters. The main broadcasters, Reshet and Keshet, are private.

Most series developed and produced in Israel are entirely funded by broadcasters. The scarcity of resources is due to the limited market of 8.5 million. This potential viewership pool shrinks further if we discount a large portion of Arab Israelis (20% of the population) who tune into other channels, and the segment of the public that doesn't watch TV.

Based on our interviews, the main funding sources of Israeli television series are the public and private broadcasters. For example, in Israel, the Keshet Media Group is the largest private broadcaster, reaching 70% of households and holding a 38.4% TV market share in prime time. Keshet also owns the Mako internet platform, which broadcasts exclusive content online and generates more than 1 million unique visitors a day. Apart from private broadcasters, most public television stations are operated by the Israel Broadcasting Authority (IBA), which does not produce series. A unique feature of the Israeli television market is that the two main private operators, Keshet and Reshet, share the private Channel 2. They each control three or four programming days per week.

Sources

Interview with Limor Got Ronen (Keshet International)

Due to high quality scripts, Israeli series sparked interest from US broadcasters before they even aired.

This paved the way for the *Kfulim/False Flag* series to become the first foreign language series acquired by Fox International in 2015.

Betipul, *Kfulim/False Flag*, *Fauda* and *Hatufim* are some of the Israeli series that have enjoyed enormous national and international popularity. A shining example of export success is the *Hatufim* series, which subsequently inspired the US series, *Homeland*. *Hatufim* also won nine Israeli Academy Awards in 2010, including best drama and best director.



Israel

Case study: *Hatufim / Prisoners of War* - 24 x 45 mins.

Creative team	Scriptwriter/producer: Gideon Raff
Broadcaster	Keshet
Budget	Not provided. Keshet does not publicly disclose its data. The estimated budget per episode for Season 1 is \$200,000 US
Development budget	Not provided
Ratings	Conventional broadcast: 40% market share (2 million viewers)
Sales	20 countries, including: Canada, France, Germany, Belgium, UK, Norway, Japan, Italy, India. Adapted in the US by Showtime as <i>Homeland</i>

Two Israeli soldiers are freed after being kidnapped during an operation in Lebanon and held prisoner for 17 years in Syria. After returning home, they must learn to reintegrate into society and overcome the trauma of the abuse suffered in captivity.

Sources

Interview with Limor Got Ronen (Keshet)
<http://www.keshetinternational.com/show/drama/prisoners-of-war/>

The Homeland pilot cost more to produce than two full seasons of the Israeli version.

Entirely funded by the private broadcaster, Keshet, two seasons totalling 24 episodes of 45 and 55 minutes each were produced. The series maintained a 40% market share from 2010 to 2012, making *Hatufim* the highest-rated drama series in Israel to date. Almost 2 million people also tuned into the series via on-demand viewing on the Mako internet platform, boosting market share to 80%.

In terms of export, the series has sold around the world. A total of 20 countries purchased the Hebrew version of *Hatufim*.

In 2010, before the first episode was broadcast, Keshet sold the series script to US broadcaster Showtime to be remade as *Homeland*. Gideon Raff, creator of the original series, was retained as cowriter of the US remake pilot. The *Homeland* pilot cost more than two full seasons of the Israeli version.



Israel

Case study: *Kfulim/False Flag* - 8 x 45 mins.

Creative team	Scriptwriters: Amit Cohen, Maria Feldman; producer: Oded Ruskin
Broadcaster	Keshet
Budget	Not provided. Keshet does not publicly disclose its data
Development budget	Not provided
Ratings	Conventional broadcast: over 40% market share (a record-breaking 2 million viewers)
Sales	In 2015 Fox International announced an exceptional launch of the series in 127 countries

Five ordinary Israeli citizens find themselves caught up in international espionage. Their names are splashed across the media in relation to the kidnapping of the Iranian defence minister, who disappeared while on a secret visit to Moscow. Their claims of innocence fall on deaf ears. The government and Mossad deny any involvement in the kidnapping and implicate the five as suspects. Even their close friends and families begin to have doubts. So who are they?

Sources

Interview with Limor Got Ronen (Keshet)
<http://www.keshetinternational.com/show/drama/false-flag/>

Keshet's first broadcast of the series *Kfulim* was the television event of fall 2015 and smashed all audience records in Israel. The series grabbed a 44% market share, three times that of the competing program. *Kfulim* was also available for on-demand viewing via Mako, where it racked up 3 million viewers, making it the platform's biggest hit to date. Catch-up viewing further increased market share to 80%.

Riding on the earlier success of *Hatufim*, the *Kfulim* series sold at MIPCOM 2015 to Fox International, ensuring its launch in 127 countries – a first for a foreign language series.




Israel

Observations

Like their Danish colleagues, Israeli drama series producers have adopted the concept of a 'show runner' – a lead scriptwriter who acts as creative driver of the series. It is important to bear in mind that Israeli series are produced on very tight budgets compared to US productions. As no public funds are allocated to drama series, private broadcasters must assume the entire cost. According to private broadcaster Keshet, the series must explore topics that resonate with the domestic public. The broadcaster believes the international success of Israeli series is the result of their strong characters.

Norway

Country fact sheet

Official name	Kingdom of Norway
Official language	Norwegian
Total population	5 205 434
Flag	
Popular series	<i>Okkupert</i> <i>Young & Promising</i> <i>Nobel</i> <i>The Heavy Water War</i>
Major broadcasters	Norwegian Broadcasting Corporation (NRK) Egmont Holding AS (TV2) ProSiebenSat. 1 Media (TVNorge)
Major funders	Norwegian Broadcasting Corporation (NRK) Norwegian Film Institute SVT/DR Nordvision Nordisk Film & TV Fund Film3



Norway

Country fact sheet

Norway is comparable to Denmark in terms of population and the vitality of its drama series sector.

Public broadcaster NRK plays a key role as contractor for the independent sector, and as a producer of live series.

According to NRK's Tone Rønning, the public broadcaster maintains an open dialogue with the arts community and independent producers, while maintaining editorial responsibility. To this end, NRK is often responsible for series development. The public broadcaster works with independent producers on the basis of two production models: collaboration and production services. The Norwegian Film Institute (NFI) and the broadcasters jointly support funding for series development in the independent sector. According to Mia Lindrup of NFI, the Institute contributes funding to the production of eight series per year. The NRK produces three drama series per year of eight episodes each.

Domestic series are very popular with the Norwegian public. The biggest recent success, *The Heavy Water War*, is a historical series with a substantial production budget (75 million NOK, or \$11.2 million CAD) that drew 1.8 million viewers (65% to 67% market share of viewers under 25). Another 'heavyweight' series, *Okkupert/ Occupied*, was funded by private broadcaster TV2 and distributed by Netflix. NRK is always on the lookout for new operating avenues and the imprint of digital viewing is increasingly prominent.

Sources

Interview with Tone Rønning, NRK

Interview with Mia Lindrup, Norwegian Film Institute

In this perspective, NRK developed and produced *Skam/Shame*, an in-house production with 16-year-olds as the target audience. The Norwegian public has changed its viewing habits and is shifting to catch-up TV via personal video recorders. This trend is illustrated by the audience data of three successful series: *The Heavy Water War* drew 1.2 million viewers during the conventional TV broadcast and 500,000 via digital platforms; the *Young & Promising* audience was split equally between the conventional broadcast and catch-up TV; and in the case of *Skam*, 80% of viewers watched the online broadcast and only 20% tuned in to the conventional broadcast.

According to Tone Rønning of NRK, the next development phase of Norwegian series will involve more international coproductions with world-class partners. While expensive to produce, drama series can 'travel.' Therefore, it is important to develop coproductions, and as a small country, Norway must look for inspiration from other cultures.



Norway

Case study: *Nobel, Peace at any Price* - 8 x 42 mins. (slated for broadcast in late 2016)

Creative team	Producer: Per Olav Sorensen; scriptwriter: Mette Bolstad
Broadcaster	NRK
Budget	72 million NOK (\$11.2 million CAD) for 8 episodes of 45 minutes each (9 million NOK, or \$1.4 million CAD, per episode)
Development budget	1 million NOK
Ratings	To come
Sales	To come

After a tour of duty in Afghanistan, Lieutenant Erling Riis is glad to return to his family and leave the war behind. But he soon realizes his mission isn't over.

Sources

Interviews with Haakon Briseid, producer of *Nobel*, and Tone Rønning, NRK
<http://monster.as/scripted/i-produksjon/>

Nobel had a substantial budget as it was developed from an original concept – a rare case in the Norwegian series landscape. Most comparable productions are either historical series or adapted from successful novels. The *Nobel* series was made possible by the producer's prior success with *The Half Brother/Halvbroren*, adapted from a popular novel. Without this initial success, it would have been very difficult to develop an original, ambitious idea like *Nobel*.

The series development budget (1 million NOK / \$156,000 CAD) was jointly funded by the producer, the Norwegian Film Institute (NFI), and public broadcaster NRK. *Nobel* was in development for two years. The series, filmed over the course of 100 days in Norway, the Czech Republic, and Morocco, is slated for broadcast in fall 2016. NRK funded two-thirds of the budget and the producer contributed the remaining third. Funding partners – NFI, SVT (Swedish public broadcaster) and DR (Danish public broadcaster) – also contributed via the Nordvision mechanism.



Norway

Case study: *Nobel, Peace at any Price* - 8 x 42 mins. (slated for broadcast in late 2016)



Funding structure:

Total budget: 72 million NOK (\$11.2 million CAD) for 8 x 45 mins.

NRK: 47 million NOK (\$7.3 million CAD)

Norwegian Film Institute: 12 million NOK (\$1.8 million CAD)

SVT/DR via Nordvision: 2.5 million NOK (\$380,000 CAD)

Nordisk Film&TV Fund: 3 million NOK (\$467,000 CAD)

Czech tax credit: 2 million NOK (\$312,000 CAD)

Minimum guarantee on international sales and the producer's investment: 5.5 million now (\$692,000 CAD)

Aware of the unique opportunity presented by the series, the entire team demonstrated flexibility. The series was filmed in three countries and involved a combination of production methods adapted to each ecosystem. For example, the size of the film crew varied according to country. In Norway, the crew was limited to 40 people, but expanded to 100 in Prague, and 120 in Morocco. Among the reasons for this disparity: one driver was assigned to the production in Norway and 10 in Morocco. At 72 million NOK (\$11.2 million CAD), the budget was insufficient, a fact acknowledged by broadcaster NRK. With respect to the salaries of key team members, the cinematographer received 10,000 NOK (\$1,500 CAD) per day, for a total of 1 million NOK (\$156,000 CAD) for 100 days.

Norway

Case study: *Unge Lovende/Young & Promising* – 6 x 29 mins.

Creative team	Producer: Eirik Svensson/Bård Fjulsrud Scriptwriter: Siri Seljeseth
Broadcaster	NRK
Budget	14 million NOK (\$2.1 million CAD) for 6 episodes of 29 minutes each, which breaks down to 2.3 million NOK per episode (\$360,000 CAD). Season 2 was recently confirmed by NRK
Development budget	400,000 NOK (\$62,000 CAD)
Ratings	Conventional broadcast: 350,000 viewers; catch-up TV: 450,000 viewers. Total viewership: 800,000 out of a population of 5 million
Sales	None to date

Three twenty-something women in Oslo seek love, success, and the meaning of life.

Sources

Interview with Haakon Briseid, producer of *Young & Promising*
<http://monster.as/scripted/produksjoner/>

The *Unge Lovende/Young & Promising* series is an original creation. Development funding to the tune of \$400,000 NOK (\$62,000 CAD) was provided by NFI (50%), and broadcaster NRK (50%).

NRK entirely funded the production of Season 1. Production costs were kept relatively low by using a young team with varied backgrounds and TV and film experience; and by filming all episodes in the Oslo area.

For promotional purposes, the series was pre-released on NRK's VOD/VSD platform. The initiative met with resounding success – 200,000 viewers tuned in to the advance series and recommended it on social media. A conventional broadcast followed on Saturday at 11:00 pm and drew 350,000 viewers. Between the conventional screening and catch-up TV, the series reached a cumulative average of 800,000 viewers.

This is a 'niche' series with low export potential. Discussions are underway for a possible adaptation in another Scandinavian country. The series also has interesting potential for SVOD platforms.



Norway

Case study: *Trio* (youth drama series) - 30 x 24 mins. (3 seasons)

Creative team	Producer: Atle Knudsen Scriptwriters: Morten Hovland, Trond Venaasen, Margret Bergheim
Broadcaster	NRK
Budget	An average of 26 million NOK (\$4 million CAD) for 10 episodes of 24 minutes each; 3 seasons of 10 episodes have been produced to date
Development budget	1 million NOK (\$156,000 CAD), provided by NRK (50%), and the Norwegian Film Institute (50%)
Ratings	Conventional broadcast: 60% market share; 200,000 viewers per episode (out of an age group population of 60,000)
Sales	Germany, Sweden, Finland, Denmark and Poland

When 12-year old Nora moves from the city to the village of Skjåk (400 km north of Oslo), she befriends Simen and Lars. The trio have fun solving a variety of village mysteries. But their biggest case finds them on a treasure hunt for the legendary gold of the Norse God, Odin.

Sources

Interview with Rune Trondsen, producer of *Trio*
<http://www.sfinternational.se/Details/trio-odins-gull-season-1>
<http://www.film3.no/omoss/english>

Trio is a youth drama series produced for NRK Super (Norway), Nordvision (an organisation dedicated to strengthening cooperation among Scandinavian public broadcasters) and the NDR Children's Channel (Germany).

The two main broadcasters, NRK (public) and TV2 (private), have regulatory obligations to produce Norwegian content for children. The Norwegian Film Institute shares this mission, which is a top priority for the Norwegian industry.

Based on an original idea, *Trio* was instigated under the auspices of regional investment fund Film3. In 2009, seeking independent projects that could be filmed in the Trøndelag, Oppland, and Hedmark regions, Film3 contacted the NordicStories production company. Producer Rune Trondsen, who specializes in youth drama series, invited two NordicStories scriptwriters to create a series about kid detectives. The series was in development for three years before it was greenlighted for production. In 2009, NordicStories agreed to the initial concept. In 2010, the Season 1 scripts were written, and in February 2011 broadcaster NRK gave its stamp of approval. In an unusual move, NRK committed to funding 60% of three seasons of the series.



Norway

Case study: *Trio* (youth drama series) - 30 x 24 mins. (3 seasons)

Funding structure for Season 1: 24.5 million NOK for 10 episodes of 24 minutes each

NRK : 14.7 million NOK (\$3.8 million CAD), or 60%

Norwegian Film Institute : 4.9 million NOK (\$771,000 CAD), or 20%

Film3 (regional fund): 1.2 million NOK (\$188,000 CAD), or 5%

Skjak (community where the series was filmed): 1.2 million NOK (\$188,000 CAD), or 5%

Swedish FilmIndustri (sales agent): 1.4 million NOK (\$220,000 CAD), or 6%

Funding to develop the series was provided by broadcaster NRK (50%) and the Norwegian Film Institute (50%). The two entities regularly share funding for the development of Norwegian series.



The total development budget was 1 million NOK (\$156,000 CAD), spread over two phases: :

Phase 1: 650,000 NOK (\$102,000 CAD)

Phase 2: \$370,000 NOK (\$58,000 CAD)

Seasons 2 and 3 of *Trio* were co-produced via funding from German public broadcaster NDR-ADR. The broadcaster operates in northern Germany, a region with strong cultural ties to Scandinavia, and was seeking to establish coproductions with Scandinavian countries.

The average cost per season of 10 episodes of 24 minutes each is 26 million NOK (\$4 million CAD), which breaks down to 2.6 million NOK (\$400,000 CAD) per episode. As an illustration of salaries, in season 1 the cinematographer earned 550,000 NOK (\$86,000 CAD), taxes included.

Trio aired on Saturdays at 7:00 pm - a very favourable time slot to reach the target audience of 8-to-12-year-olds – with a repeat on Sundays at 7:00 pm. The series has been very successful, reaching 60% market share during the conventional broadcast. Catch-up viewing increased between Seasons 1 and 3. NRK airs one online episode at a time. Approximately 97% of viewers watched the full catch-up episode.

In terms of international sales, the series has sold in Germany, Sweden, Finland, Denmark, and Poland. According to the sales rep, larger territories, such as France and the UK, are waiting until all three seasons (30 episodes) are available.

Norway


Observations

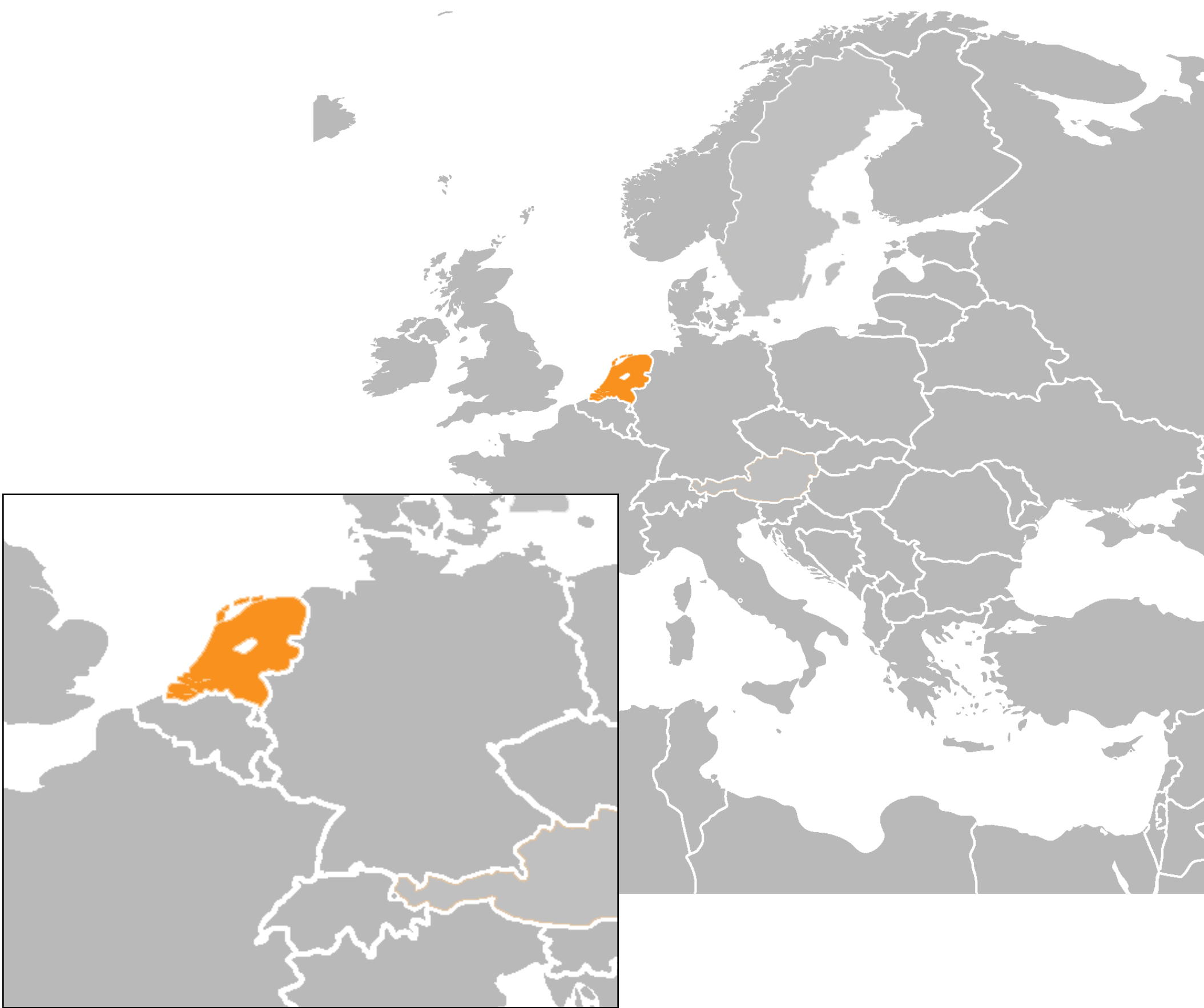
Like its neighbours, Norway's drama series ecosystem mainly revolves around its public broadcaster. Nevertheless, NRK is an interesting case in that it took the innovative step, almost by accident, of becoming Europe's first public broadcaster to collaborate with Netflix. This same industry giant enabled broadcaster TV2 to bring the series, *Okkupert/Occupied* to the screen, even before it became a domestic hit.

Riding the wave of Scandinavian success, Norway exports its drama series productions, even if the economic benefits are still fairly limited.

The Netherlands

Country fact sheet

Official name	Kingdom of The Netherlands
Official language	Dutch
Total population	16 902 103
Flag	
Popular series	<i>Penoza/Red Widow</i> <i>The Neighbours</i>
Major broadcasters	NPO RTL Group Talpa Media



The Netherlands

Country fact sheet

The Netherlands' two main television channels are RTL Nederland (national commercial channel) and Nederlandse Publieke Omroep (public broadcaster). NPO is financed directly by the government. A number of other channels such as AT5, Omrop Fryslan, RTV, Omroep Flevoland, NH, TV West, and L1 Televisie Broadcast regional programs. Interestingly, these channels all have a fixed maximum limit for advertising.

The Dutch Public Broadcasting System is a set of organizations that protects public service TV and radio broadcasting, and is financed by the Ministry of Education, Culture, and Science. Furthermore, the *Dutch Media Act*, which came into force in 2008, regulates airtime and the public broadcasting system.

Foreign television programs (mainly subtitled content from neighbouring countries) enjoy a large following among the Dutch public.

In 1992, the Netherlands saw the launch of its first commercial channels. Prior to that date, any cultural, political, or religious group was free to operate a channel that promoted their particular view.

In September 2010, the government began a series of cutbacks. As a result, in 2012 public broadcaster NPO announced it would close two channels. At the present time, *Red Widow* and *The New Neighbours* are the only series that can be studied.



The Netherlands

Case study: *Penoza/Red Widow* - 38 x 60 mins. (4 seasons)

Creative team	Producer: Diederik Van Rooijen Creators/scriptwriters: Diederik Van Rooijen, Pieter Bart Korthuis
Broadcaster	NPO 3
Budget	Not available
Development budget	Not available
Ratings	Not available
Sales	Germany, Sweden, Finland, Denmark, and Poland

Carmen Walvaren de Rue is the widow of a criminal assassinated by a rival. In the wake of his death, Carmen has only one way to protect her family – she must take her husband’s place in the crime syndicate.

Penoza was produced by Endemol for public broadcaster NPO 3. Since it first aired in 2010, four seasons have been broadcast. The format was sold for adaptation in a number of markets, including Sweden, Poland, Russia, Slovakia, and the US.

In 2012, the ABC network ordered a US adaptation for broadcast in spring 2013, but cancelled the series after eight episodes.



Sources

http://www.npo.nl/penoza/POMS_S_KRO_123909
<http://www.endemolshinedistribution.com/penoza-formats/>
<http://deadline.com/2012/05/abc-starts-new-series-pickups-with-penoza-red-man-van-270810/>

The Netherlands

Case study: *Nieuwe Buren/The New Neighbours* (adapted from a novel) - 10 x 60 mins. (1 season)

Creative team	Producer: Bobby Boermans Scriptwriter: Karin van der Meer (based on a novel by Saskia Noort)
Broadcaster	RTL
Budget	Not available
Development budget	Not available
Ratings	Not available
Sales	Not available

Expecting their first child, Peter and Eva buy a house in the suburbs. Before they can move in, Eva miscarries. While she has trouble coping with her loss, Peter, who is infertile, hopes the ‘child’ chapter of their lives is closed. They meet their new neighbours, Rebecca and Steven, a carefree, fun-loving couple who help them forget their pain. But are the new neighbours really who they say they are?

Nieuwe Buren was produced for broadcaster RTL4 and first aired in fall 2014.

The series was adapted from a novel by Dutch author, Saskia Noort. In March 2016, RTL4 confirmed that a second season would be produced.



Sources

<http://www.rtl.nl/nieuwe-buren/#!/>

The Netherlands

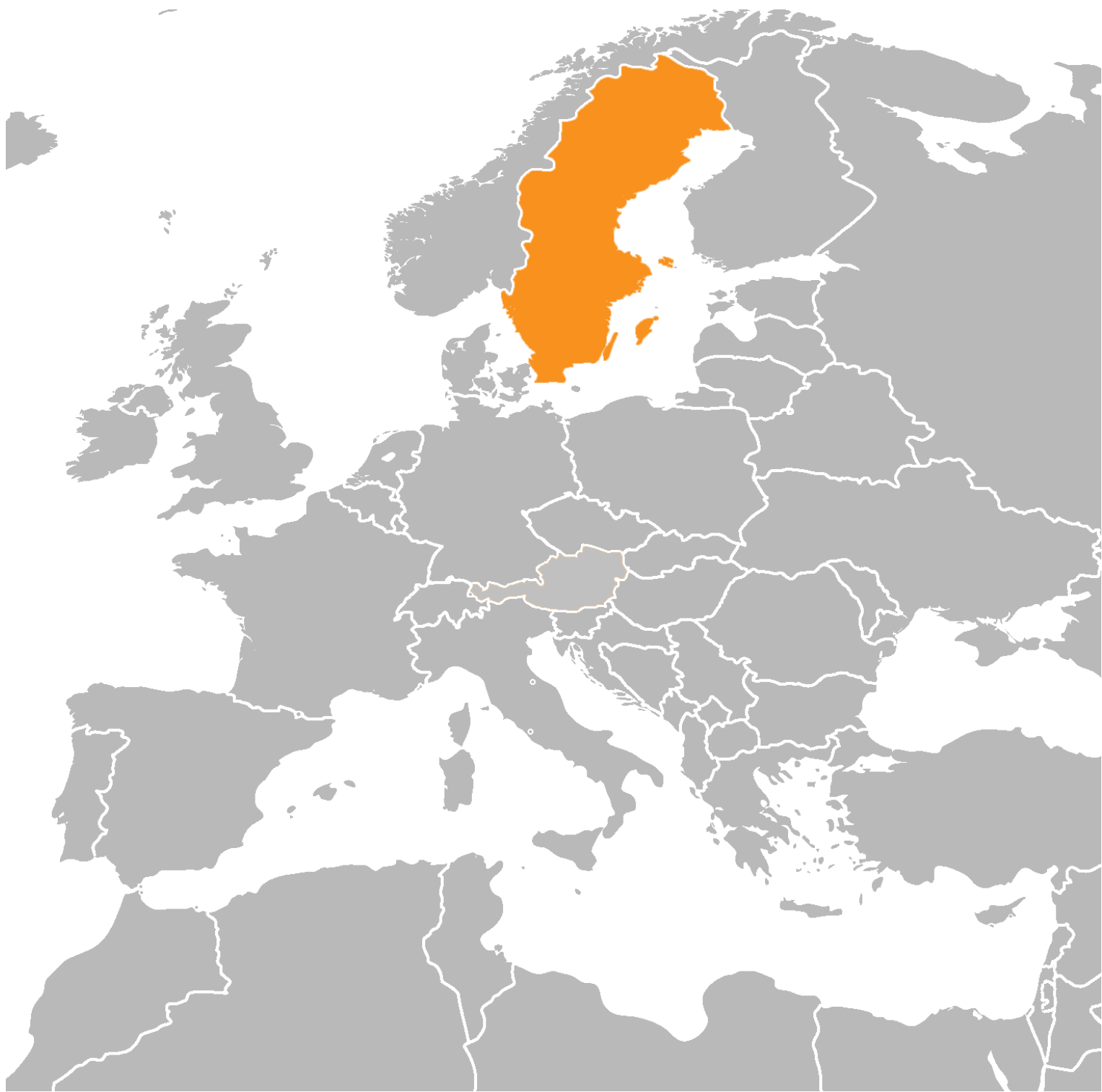
Observations

Despite numerous attempts, our team was unable to contact the people we had previously identified as key players involved in drama series in the Netherlands. Moreover, the internet contains scant information about series produced in this market. However, we observed that in the Netherlands the public broadcaster's role is far less predominant than in other European countries. In this sense, it is similar to Israel.

Sweden

Country fact sheet

Official name	Kingdom of Sweden
Official language	Swedish
Total population	9 845 155
Flag	
Popular series	<i>Wallander</i> <i>Etor Nollor (The Fat and the Angry)</i>
Major broadcasters	SVT TV4 Group Viasat/MTG SBS Discovery Media
Major funders	SVT Swedish Film Institute (SFI) Regional funds TrustNordisk Swedish FilmIndustri



Sweden

Country fact sheet

The Kingdom of Sweden shares borders with Norway, Finland, and Denmark. Like its Scandinavian neighbours, Sweden has a very small market (population of 9.8 million).

The Swedish Film & TV Producers' Association, which represents 130 production companies across Sweden, strives to promote and create the best possible production environment. The Association advocates on behalf of production companies with public authorities and broadcasters. It also provides members with legal advice.

Many world-renowned production companies, such as Yellow Bird (owned by Zodiak Media Group) and Göta, export their series internationally.

The export of a number of domestic series has boosted the international reputation of Swedish production companies. For example, Yellow Bird considerably raised its profile with the production of *Wallander*, a TV series based on a novel by Swedish author Henning Mankell. Acclaim for this series paved the way for international successes like *Millennium* by Stieg Larsson, the British remake of *Wallander* (under the same name), *Headhunters*, and the Annika Bengtzon series *Liza Marklund*.

A number of Swedish production companies have opted to partner with foreign producers from small markets.

Sweden has worked with production partners in Norway, Denmark, Finland, Iceland, the UK, Germany, France, Hungary, and Italy. These collaborations allow for sharing ideas and costs. The Swedish Film Institute serves as an incubator for the development of domestic series. Moreover, funding for series production is often shared by public investors including: the Swedish Film Institute, the Nordic Film Institute, the Nordic Film & TV Fund; regional funds such as Film Väst, Filmregion Stockholm Mälardalen, Filmpool Nord and Film Fyn; and broadcasters like SVT, TV4, Canal+, DR, NRK, YLE, ZDF, ARTE, and AVRO.



Sweden

Case study: *Ettor & Nollor/The Fat and the Angry* - 2 x 90 mins.

Creative team	Producer: Johan Renck; scriptwriter: Oskar Soderlund
Broadcaster	SVT
Budget	24 million SEK (\$3.7 million CAD) for 2 episodes of 90 minutes each
Development budget	600,000 SEK (\$94,000 CAD)
Ratings	Conventional broadcast: estimated at 600,000 to 700,000 viewers
Sales	The BBC for adaptation

After an explosion leaves a trail of body parts, the local police detain Sebbe for questioning. But when Interpol and the FBI get involved, time is running out for Sebbe.

Sources

Interview with Christer Nilson, producer of *The Fat and the Angry*
<http://svtsales.com/programme-sales/the-fat-the-angry/>

The total production budget for this mini-series (two 90-minute episodes) was 24 million SEK (\$3.7 million CAD). Joint development funding was provided by the Swedish Film Institute (10%, which covered phase one) and public broadcaster SVT (90%). The total development budget was 600,000 SEK (\$141,000 CAD), including 350,000 SEK (\$94,000 CAD) earmarked for the scriptwriter.

Joint production funding was provided by broadcaster SVT (18 million SEK, \$2.8 million CAD), a regional fund (2.5 million SEK, \$394,000 CAD) and TrustNordisk (1.5 million SEK, \$236,000 CAD). It took 40 days to produce both episodes.



Sweden

Case study: *Ettor & Nollor/The Fat and the Angry* - 2 x 90 mins.

Funding structure: 24.5 million SEK for 2 episodes of 90 minutes each

SVT: 18 million SEK, or 75%

FilmRegion Stockholm: 2.5 million SEK, or 10%

Trust Nordisk (sales rep.): 1.5 million SEK, or 6%

Deferred - producers + suppliers: 2 million SEK, or 8%

Swedish Film Institute: 60,000 SEK, or 1%

The average hourly production cost was 12 million SEK (\$1.8 million CAD), including 5.5 million SEK (\$867,000 CAD) earmarked for the 'above the line' team (director, producer, scriptwriters, and actors). Salaries, including those related to preparation, were negotiated on the basis of a fixed rate. For example, the cinematographer received a total of 500,000 SEK (\$78,000 CAD) for 40 days of shooting.

SVT aired the series at 9:00 pm on two consecutive Mondays in February 2014. The production team cites the late time slot as the reason the conventional broadcast drew only 600,000 to 700,000 viewers, somewhat lower than the average audience share for other drama series. *The Fat and the Angry* was deemed too violent and disturbing for a general audience. The mini-series was available for online streaming via the SVT Play platform for a period of 30 days.

For the moment, the rights are shared on a *pro rata* basis among the various investors. BBC UK is currently developing an expanded adaptation of the series.



Sweden


Observations

Funding to develop and produce Swedish series is provided by a number of public agencies, including investors, regional funds and broadcasters. It should be noted that organizations like the Swedish Film Institute and the Nordic Film Institute fund television projects primarily with a view to promoting national culture. In Sweden, the substantial support for the creation and production of drama series provided by the Swedish Film & TV Producers Association significantly strengthens ties among the various organizations involved.

Coproductions between European countries, especially Nordic nations, also promote the creation of series specific to the target regions. And series that showcase unique regional features have higher export potential.

Switzerland

Country fact sheet

Official name	Swiss Confederation
Official language	German, French, Italian, Romansh
Total population	8,211,681 (63% German, 22.5% French)
Flag	
Popular series	<i>Anomalia</i> <i>Station Horizon</i> <i>Gothard</i> <i>Der Bestatter</i>
Major broadcasters	RTS SRF TeleZuri
Major funders	Succès Passage antenne Fondation CineForom Fonds de production télévisuelle



Francophone Switzerland

Country fact sheet

Switzerland is at the crossroads of many European cultures, with a population that is comfortable in several languages. According to official statistics, 63.5% of the total population speaks predominantly German, and 22.5% speak French. Switzerland has a federal public broadcaster, the Swiss Broadcasting Corporation (SRG SSR), as well as specific channels for language markets.

Swiss Radio and Television (Radio Télévision Suisse, or RTS), which broadcasts two channels (RTS Un and RTS Deux), established its Franco-Swiss drama series policy in 2008. The majority of its production had previously consisted of made-for-television movies, often in coproduction with France. According to Françoise Mayor, head of fiction at RTS, they experienced some frustration with coproductions. Because it had a minority position in terms of financing, RTS was also in a minority position in terms of artistic expression. Most of the scripts were written in France and had shooting locations in Switzerland. Regarding itself not as a regional broadcaster, but as the national television network of French expression, RTS went all out in its policy on Francophone drama series, inspired by Quebec's example.

RTS invited Francine Allaire, former head of drama at Radio-Canada, to Switzerland to share our public broadcaster's recipe for success. The ties forged have been maintained with her successor André Béaud. Françoise Mayor and RTS consider Allaire and Béaud as the godmother and godfather of the Swiss Francophone series.

Sources:

Interview with Pierre-Andrian Irlé, producer of *Station Horizon*
Interview with Françoise Mayor, RTS
Interview with Thierry Spicher, producer

RTS's goal is to produce two series per year. The way things stand now they're achieving about one and a half. The average intake in series financing is 3.4 million Swiss Francs (\$4.5 million CAD), with a budget of 4.6 million Swiss Francs (\$6.1 million CAD) for seven 48-minute episodes of *Station Horizon*, and 4.9 million Swiss Francs (\$6.5 million CAD) for eight 42-minute episodes of *Anomalia*. The financing efforts for Franco-Swiss drama series is 6.0 million Swiss Francs (\$8.0 million CAD) in total. RTS's contribution aside, the balance of the financing comes from various public funding bodies like Cinéforom and Teleproduktionfonds, private funding from efforts like product placement, private foundations, or even international minimum sales guarantees of 50,000 to 100,000 Swiss Francs (\$66,000 to \$132,000 CAD) per series).

RTS has an annual call for projects, where producers are invited to pitch one idea to Fiction and to Programming. Four to five projects are then chosen for development and are 100% financed by RTS: this phase includes a bible, a first episode dialogue, the detail of one to two episodes, as well as a production and financing plan.

The Swiss series are very well received and capture an average 25% to 30% market share in the prime-time slot (8:10 pm). The Swiss are big fans of catch-up viewing via RTS's Replay or Digital Recording. For example, 37% of *Anomalia* viewing was of a catch-up nature. The Swiss series are beginning to pique the interest of international buyers.

Francophone Switzerland

Case study: *Station Horizon* - 7 x 48 mins.

Creative team	Producers: Pierre-Adrian Irlé, Romain Graf Scriptwriter: Léo Maillard
Broadcaster	RTS
Budget	4.6 million Swiss Francs (\$6.1 million CAD), including 500,000 Swiss Francs (\$664,000 CAD) in RTS service contributions for seven 48-minute episodes
Development budget	320,000 Swiss Francs (\$425,000 CAD)
Ratings	Not available
Sales	Russia

Station Horizon is a comedy-drama of seven 48-minute episodes, coproduced by the Fiction Production division at RTS. It tells the story of a Swiss community that, inspired by the American way of life values of freedom, fights for its survival against the menace of modern livingd

Sources

Interview with Station Horizon producer Pierre-Adrian Irlé
http://www.jumpcut-prod.com/?page_id=173
<http://www.rts.ch/fiction/2015/station-horizon/>

The series was developed from an original idea, loosely inspired by a photographic endeavour that focused on finding how passionate Swiss were about an idealized vision of America.

RTS works with yearly calls for projects, and development goes as follows: Phase 1 (six months) is devoted to producing the first season's scripted dialogue, bibles, and structure; Phase 2 (10 months) to writing out all seven episodes. The RTS internal editorial committee then decides after reading scripts if the series will be produced. Breakdown of the development budget: 90,000 Swiss Francs (\$120,000 CAD) for Phase 1, and 230,000 Swiss Francs (\$306,000 CAD) for Phase 2, for a total of 320,000 Swiss Francs (\$426,000 CAD), used to pay three authors and an external consultant.

The average cost per episode is 542,000 Swiss Francs (\$721,000 CAD). Production spanned 11 five-day weeks, for a total of 56 shooting days. The cinematographer/cameraman was paid a fixed gross sum of 75,000 Swiss Francs (\$100,000 CAD) (excluding employer contributions) for 17 weeks of work.



Francophone Switzerland

Case study: *Station Horizon* - 7 x 48 mins.

The financial structure of the development budget of 320,000 Swiss Francs (\$425,000 CAD) is as follows:

RTS: 270,000 Swiss Francs (\$359,000 CAD)

Cineforum Foundation: 30,000 Swiss Francs (\$39,000 CAD)

Television production funds: 15,000 Swiss Francs (\$19,000 CAD)

Succès Passage Antenne (reinvestment): 5,000 Swiss Francs (\$6,600 CAD)

The series was broadcast on Saturday nights at 8:10 pm, with a repeat on Mondays at 11:00 pm. Production of Season 2 has been suspended due to budgetary restrictions bringing development to a halt. There's a risk of a possible delay of one to two years, and just at a time when Swiss series were beginning to benefit from sustainable funding.

The series has been sold to Russia (Sony). Discussions are underway with several territories, and the assessment made following the recent MIP is that there is a certain reluctance from buyers because the series is difficult to categorize.



Excluding RTS services and development, the seven-episode “cash” production budget totals 3.8 million Swiss Francs, broken down as follows:

RTS: 3 million Swiss Francs (\$3.9 million CAD)

Cineforum Foundation: 460,000 Swiss Francs (\$611,000 CAD)

Television production funds: 200,000 Swiss Francs (\$265,000 CAD)

Sponsors: 50,000 Swiss Francs (\$66,000 CAD)



Francophone Switzerland

Case study: *Anomalia* - 8 x 42 mins.

Creative team	Producer: Pierre Monnard Scriptwriter: Pilar Anguita-Mackay
Broadcaster	RTS
Budget	4.4 million Swiss Francs (\$5.85 million CAD) for eight 42-minute episodes, or 550,000 Swiss Francs per episode (\$730,000 CAD)
Development budget	320,000 Swiss Francs (\$425,000 CAD))
Ratings	19% of traditional-mode market share
Sales	Russia

Recently separated, the neurosurgeon Valérie Rossier moves back to her birthplace in Gruyère with her son Lucas. As she begins working with the famous Professor Wassermann, strange events occur that gradually make her discover her healing powers – much to her dismay. Can fixing a mistake from the past influence the present? Tormented characters, contrasting worlds, mesmerizing and sometimes frightening... A fantastical series at the crossroads of science and faith.

Sources

Interview with Jean-Marc Frohle (producer)
<http://www.rts.ch/fiction/2015/7210883-anomalia-notre-nouvelle-serie-fantastique.html>
<http://www.pointprod.ch/fr/projet/fiction/anomalia-serie-fiction-8-x-42-min>

The series was developed from an original idea proposed by Pilar Anguita. With *Anomalia*, the author and producer filed a mini three-page dossier with joint intention notes signed by the producer and submitted with the CVs of both parties. RTS selects three to five projects, and each obtains a development envelope.

The production of the series requires 10 to 12 weeks of preparation, 12 weeks of shooting and 12 months of postproduction. In terms of fees and wages, production paid between 120,000 and 140,000 Swiss Francs to its producer, while the lead actors earned between 70,000 and 120,000 Swiss Francs.

Anomalia captured a 19% of market share in its time slot, while stimulating the interest of “catch-up” viewers. Moreover, nearly 30% of its total audience comes from catch-up viewing.



German Switzerland

Country fact sheet

German Switzerland, which represents 63% of the confederation, has a population of 5 million, a small market according to Urs Fitze, head of fiction at broadcaster SRF. The federal public broadcaster SRG operates three German channels: SRF1, SRF Zwei, and SRF Info.

The potential market for drama series is quite restrained. Even the use of the word “market” might be an exaggeration, according to producer Reto Schaerli, given that there is only one current Swiss German series, *Der Bestatter/The Undertaker*.

The Swiss German position is complex. There is a willingness to partner with the neighbouring German market, but the role of German Swiss dialect has proven to be a factor. The dialogue in *Der Bestatter* consists of this dialect.

Like their French speaking colleagues at RTS, SRF produces made-for-television movies, including two “episodes” from the crime series anthology *Tatort*, with participation from both Germany and Austria. The success of *Der Bestatter* has prompted SRF to move its focus from made-for-TV movies to series, and to double its investment in drama series by beginning production on a second one.

Similar to RTS, SRF conducts a call for projects. In order to select a second series, Swiss German producers submitted 100 projects: 20 were initially selected and 12 went to “pitch.” Of these, three were developed in a more extensive way, with bible and scenarios. Two of the three were selected, with the aim of producing only one. The restricted local market is a challenge for producers, resulting in a real need for additional financing if Swiss German series hope to get developed.

For now, the single funder is the public broadcaster, with private channels being unable to produce or acquire first-window local series due to costs deemed too high for their business models. The public broadcaster, whose central role is reinforced by the strict control of the development process, prefers working in service production with independent producers



Sources

Interview with Reto Schaerli, producer
Entrevue avec Urs Fitze, SRF

German Switzerland

Case study: *Der Bestatter/The Undertaker* - 22 x 58 mins. (4 seasons)

Creative team	Producers: nine producers, including Markus Fischer and Chris Niemeyer Scriptwriters: Dave Tucker, Claudia Putz, Dominik Bernet
Broadcaster	SRF
Budget	4.1 million Swiss Francs (\$5.4 million CAD) for six episodes, with 22 episodes produced to date
Development budget	Internal at SRF
Ratings	40% of traditional-mode market share (with 28% the norm for this niche); 750,000 viewers, 40,000 per episode in “catch-up” viewing
Sales	Switzerland: RTS, RSI, Germany, Austria, Canada, US, Netflix (Belgium, the Netherlands, Luxembourg, France, Germany, Austria, Switzerland, Italy)

“The most important thing is that the dead are happy,” says Luc Conrad, an ex-cop turned undertaker. The kind of guy who rubs his former cop buddies the wrong way, who comes back through the window when you show him the door. Because Luc Conrad, flanked by his rock-goth intern, sniffs out crime and criminals like no other.

Sources

Interview with Urs Fitze, SRF
<https://www.globalscreen.de/television.fiction.series/content/show/165101>
<http://www.rts.ch/emissions/series/toutes-les-series/6385137-le-croque-mort.html>

Der Bestatter is a production initiated by the broadcaster, in service production with SnakeFilm. During service productions, SRF controls development, notably contracts with authors. The brainchild of German author Harmut Block, SRF acquired the property and started development in 2012, inspired by the process of their colleagues at RTS. Writing is done collaboratively, with four writers in a “writer’s room,” two of them lead. Writing runs from September to May-June, production from January to September, and broadcasting begins in January.

The series is broadcast on Tuesday evenings at 8:00 pm, in the crime series time slot. *Der Bestatter* is a phenomenal success with the Swiss German public, with record ratings of 40% (close to 750,000 people) in a niche that usually captures an average of 20%. Catch-up repeats also win a high level of viewers, with an average of 40,000 per episode.

There are multiple reasons for the show’s success. It’s a unique series in Swiss German dialect, and the main actor is very popular in Switzerland. It’s a light drama that’s not afraid of taking on heavy subject matter. The public feels at home with the series, which takes place in a small Swiss town instead of a big city.



German Switzerland

Case study: *Gothard* - 2 x 90 mins. (on air end of 2016)

Creative team	Producer: Urs Egger
Broadcaster	RTS
Budget	5.73 million Swiss Francs for two 90-minute episodes
Development budget	Internal at SRF
Ratings	Not available – on air end of 2016
Sales	Switzerland: RTS, RSI, Germany, Austria

The construction of the Gothard tunnel between 1872 and 1881 represented a Herculean challenge. This project was, at the time, the largest of its kind in the world. The series revolves around those who lost their lives for the sake of the common good.

Sources

Interviews with Urs Fitze, SRF and Reto Schaerli, producer
<http://www.hebdo.ch/hebdo/culture/detail/%C2%ABgothard%C2%BB-le-t%C3%A9%C3%A9film-le-plus-ambitieux-de-la-ssr>
<http://blog.sbbcargo.com/fr/18834/gotthard-la-srf-tourne-la-plus-grosse-production-de-tous-les-temps/>

This mini-series is a first in Switzerland: it has the biggest budget to date, and is the first events-based mini-series. The original screenplay was co-written by three writers from the world of film and television. The idea of a historical mini-series on the construction of the Gothard Tunnel during the 19th century, a colossal construction site for its time, was pitched to producers by two writers. Zodiac Pictures then submitted it to SRF in 2013 in order to have broadcasting coincide with the inauguration of the new tunnel in 2016.

The project became a Swiss-German-Czech tripartite coproduction, with the support of the three main German public broadcasters: SRF (Switzerland), ZDF (Germany), and ORF (Austria). The mini-series was shot in the three coproducing countries.

Financial structure: 5.73 million Swiss Francs

SRF: 3.83 million Swiss Francs, or 67%

ZDF: 1.71 million Swiss Francs, or 30%

Czech: 171,000 Swiss Francs, or 3%



Switzerland

Observations

The two public broadcasters have set up a drama series stimulus plan which is beginning to bear fruit, and which has achieved its primary objective: to reach the public in Switzerland. The huge success of *Der Bestatter* with the German public, as well as the two French series, suggests a revival of the Swiss series.

The mainly public financing model of the series will have to evolve, with the cooperation of new players such as telecom provider Swisscom, for example. A possible coproduction with the pay-TV operator for a second series at SRF has been mentioned.

Finally, discussions are underway between RTS and SRF to produce a national series.

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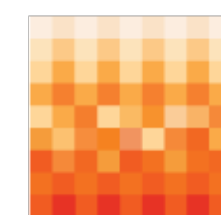
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