

# A Small Region in a Global World.

## Patterns in Scandinavian Film and TV Culture



Ib Bondebjerg & Eva Novrup Redvall

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### **Scandinavian partners and co-authors**

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Obtaining TV data has proved to be one of the hardest jobs during the creation of this report, but Niels Marslev from DR's Media Research Department as well as the research assistant Jonas Secher Borgen both provided crucial help when it came to finding the appropriate material from Denmark, Sweden and Norway. As a consequence, this report is therefore able to present a much broader picture than has previously been possible of the Scandinavian film culture and its real audiences, not just in the cinemas, but also on television. We would have liked to expand the empirical data on Scandinavian cinema to include the digital universe of DVD and VOD, but the empirical data is almost impossible to get down to an individual film title level,

although the European Film Think Tank did provide us with selected DVD data from two years.

### **Interviewees**

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Ib Bondebjerg & Eva Novrup Redvall

## Films in a New Context: Summary and Main Conclusions

In this report we have analysed the Scandinavian film and television culture focusing on films released between 2002-2006, using data drawn from both cinemas in Scandinavia and in the rest of Europe, as well as films shown on television in Denmark, Norway and Sweden. The study involves a comparative look at the support mechanisms and the production sector as well as the distribution sector, especially co-productions, but the main focus is on film genres and TV drama, audiences and the Scandinavian and European distribution of films.

Seen from a national perspective each of the three national film cultures analyzed here seem to do very well: all three countries have a national share of films on their own market that is above the average of other European countries of a similar size. The average Danish national share in this period is 26.4%, the Swedish 20.6 and the Norwegian 14%, and Norway seems to be moving towards a much higher national share in the following years – after an all time low figure of just 7.6 in 2002. Shares like that indicate that the Scandinavian support system works, and the films that do well in the national cinema often do even better on national television.

The system in Scandinavia also clearly has a strong collaborative dimension with many Scandinavian co-productions, and especially with a strong and successful tradition for TV drama co-production that also reaches the Scandinavian audiences outside the main producing country. But our main focus in this report is not on the national success, but on why this national success for films in Scandinavia is often not spread to the other Scandinavian countries: we are looking at the transnational patterns of film distribution inside Scandinavia and to a large degree also in the rest of Europe.

One of the main conclusions of the report in this perspective is therefore that whereas there continues to exist a successful Scandinavian tradition of co-production and co-distribution between the Nordic public service TV stations, with loyal audiences watching TV dramas from their neighbouring Scandinavian countries, this is not the case when it comes to film. Even though a Scandinavian film culture does exist and consists of a rather unique transnational framework for cooperation – at least seen from a European perspective, where no such regional cooperation exists – the result with regards to the exchange of films and film audiences is disappointing. The report shows that if one adds the total cinema admissions for films from Denmark, Norway and Sweden between 2002-2006 and divide them into the three categories *National* (Danish, Norwegian and Swedish films on their own national market), *Scandinavian* (Danish, Norwegian and Swedish films on the other Scandinavian markets) and *EU* (the three

countries' admissions in the rest of EU36) the figures are as follows: 71%, 5% and 24% (fig. 22). The conclusion is thus that on average the non-national Scandinavian market is of least importance, the EU market is almost five times bigger, whereas the national market is the most important.

We cannot conclude from these data that Scandinavians do not want to watch films from neighbouring countries. Examples of Scandinavian films that successfully break borders do exist, one example – after the period in focus here – being the *Millenium trilogy* based on Stieg Larsson's global bestselling crime novels and some of the film dramas also have some success in other Scandinavian countries. Moreover, the figures for Scandinavian TV drama are much more impressive when it comes to the non-national, Scandinavian shares (see fig. 45). However, the numbers suggest that there is no natural cultural Scandinavian feeling of togetherness, which might automatically make us want to watch a film or a TV drama just because it is Scandinavian. Instead, we primarily watch films and TV drama because of their genre, quality and content, and as the numbers show the crime and drama genres travel the best.

The question, of course, is why do the co-productions in TV drama function so well and what is missing in the film culture to improve the Scandinavian co-production and co-distribution? First of all one could point to the fact that the Nordvision cooperation dates more than fifty years back and the network between people from the Nordic public service stations seems much more firmly established than the co-production structures in the film culture – despite the important role of Nordic Film and TV Fund. Perhaps it is also easier for the television sector to cooperate, since this sector has fewer actors than the often fragmented film culture. The public service stations seem to have established not just a close collaborative network, but also a set of creative formulas that combine international and national genre concepts. The international and national success underlines this, but it seems that the Scandinavian TV stations have also worked intensely with the relationship between narrative, genre and audience knowledge. However, it must be noted that even within a Scandinavian TV drama collaboration context it is mostly crime and drama series that travel, not experimental dramatic productions.

The cooperation in the Scandinavian film culture seems much less developed and lacking the same kind of collective directions and goals, again despite the role of NFTF. The number of co-productions inside Scandinavia is moderately impressive, with a total of 124 films between 2002-2006 with some Scandinavian co-productions (see fig. 18). Nevertheless, the number of co-produced films achieving a significant audience on the non-national Scandinavian market is negligible. There is furthermore absolutely no empirically statistically significant



correlation between co-production and co-distribution in co-production partner-countries. Many co-produced films reach a much smaller cinema audience than Scandinavian films that are not co-produced, and many of the Scandinavian co-productions do much better in non-co-producing countries. Co-production is no doubt important for the creation of creative, transnational networks, but it is clearly not a decisive factor for a film's success in the rest of Scandinavia. Co-production as such is an important tool for Scandinavian collaboration, but it is clearly not enough to get the films out there and reach a transnational audience.

The data we present clearly indicates a Scandinavian film culture that remains too focused on production, on getting the films funded and into production, but with not enough focus on reaching a transnational audience outside the national territory. Data released by the Nordic Council, following a recent survey, revealed that around 60% of the Nordic citizens feel a special connection to the Nordic region and even supported a federal Nordic union. This fact cannot be seen in patterns of film consumption in Scandinavia. Scandinavia doesn't appear to be a culturally homogenised region where people watch Scandinavian films because they are Scandinavian: most of the films that achieve (even moderate) success in another Scandinavian country must often attribute this to the director, the cast or the genre and story.

As already indicated the data on film consumption clearly shows that the national market is still the most important and that for many films the European market plays a much bigger role than the rest of Scandinavia. However, there is no reason to believe a stronger inter-Scandinavian exchange could not succeed provided appropriate strategies were developed as shown by the example of Scandinavian television drama. Joint initiatives like the 'Toronto High Five' in 2009 could further this, but in general it is difficult to find explicit Scandinavian strategies that combine national, regional and international elements outside of the Nordic Film & TV Fund. The Nordic Film Institutes and the Scandinavian distributors do not seem to have developed any efficient coordinated strategies.

One difference between the film and TV industry in Scandinavia is that the film sector appears to be much more fragmented. The Scandinavian production sector is weak and fragmented and on the whole somewhat nationally focused and inward looking. In Norway, Sweden and Denmark large and robust companies are rare, and transnational developments of national companies like Zentropa in Denmark are hard to find. Co-production therefore happens between small or very small companies, and as the data from Denmark, Norway and Sweden shows, many companies in Scandinavia on average make less than one film a year. In Denmark only five companies have made more than ten films between 2000-2010 and only five

companies between 4-8 films (see fig. 13). A similar weak and fragmented structure with variations can be found in Norway and Sweden. Diversity is a good thing, but a diversity of this kind challenges the emergence of strong creative clusters with the strength and continuity of productions to succeed transnationally.

The distribution sector in Scandinavia is much more centralised, but here the problem might be that there is no common Scandinavian strategy and that more diversity needs to be supported, allowing for more independent distributors. We have not done any in depth study of the Scandinavian distribution sector, but it seems highly relevant to discuss this dimension further, while taking into account the new digital forms of distribution now moving to the centre of the modern film culture.

Another factor of significant importance to Scandinavian film and one that deserves closer analysis is the film festivals. As indicated in this report the festival system has grown in importance in all three Scandinavian countries, and it now has a stronger international profile and a clearly more diverse genre profile. Studies of the role of festivals for the international exchange and sale of films based on festival participation and performance clearly shows an effect.

In this report we have analysed the main genres in Scandinavian cinema: drama, comedies, films for young and children (CY-film, including animation) and other genres like crime, thriller, horror, action and adventure. We have furthermore analysed the audience profile of these genres, especially in relation to age and life style segments, based on TV data of Scandinavian films seen in Denmark. The films that manage the transition from the national market to a broader Scandinavian market are almost all dramas, with the occasional comedy exception. Animation films in some cases have achieved huge success in Scandinavia and Europe, whereas films for children and young people do not enjoy nearly the same kind of success outside their own national market. It is in fact possible to illustrate that if we compare the success of drama on its national market, the success on the Scandinavian market is much stronger and drama can thus be said to fare better on the non-national Scandinavian market than the national. This means that other types of films are not exported and do not achieve nearly the same kind of success.

The data highlights how some of the family comedies that are often extremely popular nationally are not travelling to the rest of Scandinavia to any significant degree. They are home made products for a traditional, national audience, and if they travel, it is as remakes, one example being the series of Danish *Olsen Banden* films. A closer look at the kind of films that do achieve a wide circulation, not just in Scandinavia, but also in Europe (even though they do not

always have a strong *quantitative* presence) points towards the more art cinema oriented dramas. In generic terms the films by e.g. Lars von Trier and Bent Hamer are part of the drama category, but they belong to the experimental art cinema tradition, and in fact have an international profile and status that must be seen as a vital part of the cultural and aesthetic diversity of Scandinavian cinema.

An important conclusion to draw when studying the state of the Scandinavian film culture today is that there is a serious problem with attracting the young generation and the modern life style segments, especially the modern individual life style segment. A young person belonging to the modern, individual life style segment typically prefers American genre films, films that our analysis shows are not strongly represented within Scandinavian film culture. We do not produce many films that can compete with the American genre films, even though the generation of directors after 1995 have moved in that direction, and despite the Swedish film culture faring better in this regard than Denmark and Norway. TV drama has also contributed to a renewal in terms of the genre, with a number of drama series based on crime-thriller formats and drawing on storytelling strategies often linked with the American cinema. However, Scandinavia seems to be currently losing the fight for the young cinema audience and in the new digital media culture. The genre profile for the typical film user and the audience attributed to the average Scandinavian film success thus consist of the slightly older and more traditional segments, rather than the young, modern segments.

The report points to the fact that Scandinavian film culture, like the film culture in a large part of the Western world, is no longer merely based on cinema. Cinema plays an important role in a film's life, but the audience for films are now also to be found on many other platforms: television, VOD, DVD on TV and computer, downloads, mobile media etc. The Scandinavian film culture needs to adapt to this and develop active strategies instead of traditional defensive strategies. The hold back periods for films must be reduced and made flexible: some films could premiere on several platforms at once: cinema, VOD or DVD, others might enjoy an extended cinema release, before reaching other platforms. In this respect, targeting young audiences will be crucial, because younger audiences will be the first to develop new habits and take up new technologies.

Television, both digital cable and web-based TV, will remain an important part of the new film culture already in place: the figures reported here show that between 2002-2006 in Denmark alone, the total figures for cinema admissions were only 16 million whereas television represented 39.9 million. In fact, while the total admissions for Scandinavian cinema films in all three countries in this period were 43.8 million, the number of viewers for all films on

Scandinavian television was 125 million (see fig. 19). In economic terms the picture is in reality much more blurred, because the role of cinema in a film's economy is rather different from the economy of television. However, the report indicates that based on audience figures television is by far the largest window for Scandinavian films. This fact is clearly not visible in the way data on a film's performance is reported in the statistics of the national film institutes, but it should be taken into account when the cultural and economic impact of film production is measured and discussed.

One of the main conclusions of the report, especially brought forth in the last chapter, is the fact that we need to develop a much broader understanding of what Scandinavian film culture is and of the role of this cinema in a global context and in relation to the new digital film and media culture already present and very much alive. *Cinema is no longer the key element in a film's life.* This sends a message to those making and distributing the films, to the national film institutes and to the cultural politicians in Scandinavia: when documenting a film's life in the future neither cinema data nor national data will do. We need systematic documentation of films in national cinemas and in European cinemas, we need systematic documentation of films on national and European television and we need systematic data on the individual films' digital life (DVD, Blu-ray, sale, rental, VOD etc.). If we want to focus especially on the Scandinavian dimension, the data must be specified to this region. If we want to make policy decisions and encourage international and Scandinavian cooperation we cannot presume to do so based on data and concepts very much derived from knowledge of national film culture and cinema data.

The data collected in this report clearly shows that the profile of Scandinavian cinema is dramatically different if we include the television data, and had it been possible to include systematic data on the digital dimension an even more radical picture would have emerged than the usual one focusing primarily on cinema. DVD figures for the *Millenium Trilogy* are pretty impressive, and the Norwegian success *Max Manus* has sold more than 400.000 DVDs less than six months after its release. DVD-sales are probably not the most important in the new digital media culture, but these figures indicate the potential role of the digital sector.

We can no longer lock ourselves in the national cinema box. A global, digital revolution has already taken place. The audience knows it and acts accordingly. The national film cultures need to get moving and to find new ways of taking both traditional and new platforms into consideration in a national, regional and global perspective – *the future is already here.*

## Introduction: Scandinavian Film Culture, Globalisation and the Digital Challenge

Cinema has always been both a very national and a very global form of culture. Images often travel more easily and faster across borders than literature and other cultural forms. But since 1945 the global trends in cinema have been remarkably stable in the sense that the consumption of films has been dominated by American films and by national films in most European countries, whereas the distribution and consumption of films from other European countries has been rather limited. The figures vary from country to country, but the general structural pattern is very clear. In 2008 for instance (see fig. 1), the average percentage of films in EU27 shows an American share of sold tickets of 63.9% and a total European share (both on the domestic market and in other European countries) of 27.8%.

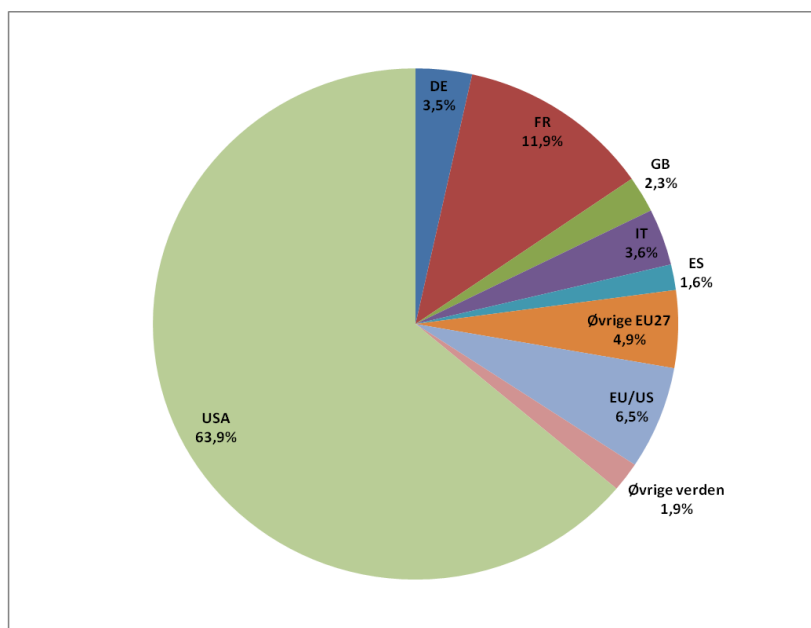


Figure 23. Regional shares of total European cinema market (Lumiere data 2008).

The total cinema admissions this year were 925 million tickets, out of which the US took 591 million. In addition to the dominance by American films, 6,5% of the European films are in fact EU/American co-productions, which means that the US is involved in a further 60 million admissions. The remaining world cinema is almost invisible, accounting for less than 2% in Europe. The actual EU share of total cinema admissions this year was thus only 27.7% or a mere 256 million tickets. The EU is an insignificant player in this context and, furthermore,

most of the 27.7% can be broken down to figures showing that the figure for non-national European films is down to 6-8%. The exchange of films between the European markets is not impressive, despite years of co-production and EU support for films. When we thus examine markets and audience figures it becomes clear there is no European film culture. What we have is a family of film cultures with some regional and bilateral cooperation and interaction.

Into this generally gloomy picture of a weak European film culture comes the Scandinavian film culture, perhaps dominated by a 'myth' of being a film and television culture with a strong affinity between the three countries and a tradition of collaboration. It is a 'myth' supported by the fact that we seem to have a common film policy, a common strong public service television, and an institutionalised structural tradition of collaboration through for instance the Nordic Film & TV Fund. Maybe the feeling of belonging to a Scandinavian culture can also be found in a cultural, historical and social likeness identified as the Scandinavian welfare state. We have to ask ourselves, however, if this is a myth or a reality, and whether or not it is reflected in the way we produce film and television and the modes of distribution of film and television between the Scandinavian countries?

There is no doubt that sales to foreign markets, including the Scandinavian, European and the rest of the world is important for a number of films from the Scandinavian countries and that the Scandinavian *auteur* tradition – dating back to world cinema icons like Carl Th. Dreyer and Ingmar Bergman – has contemporary equivalents in e.g. Lars von Trier, Bent Hamer and Lukas Moodysson. A few of the Scandinavian auteurs do in fact have a transnational audience, but the large proportion of Scandinavian films is rarely able to travel, neither in Scandinavia nor in Europe as such.

In a report for The Danish Film institute (DFI 2010), the Danish and Swedish share of films distributed in the European market is estimated to be 8% (4% per country), however, the share of ticket sales is only 2% (1% for each). The biggest shares go to France and the UK. If we examine how much sales abroad contribute to a film's total sale, however, both Denmark and Sweden figure with quite high percentages: between 2003-2008, 30% of all tickets sold for Danish films and 23% of all Swedish films were sold abroad, both in the EU and the US. In some cases (Lars von Trier's films are an example), the main sale happens abroad. Seen in a broader perspective a globalisation and Europeanisation of Scandinavian cinema can therefore be said to have taken place, even if the national market remains the dominant and most important factor for a film's success.

If we shift our focus to cinema only, how are the general trends in the Scandinavian market? In general terms, the Scandinavian countries are very similar to European countries

when it comes to the division of audience shares: national films account for around 20%, American films around 65% with the remainder attributed to the rest of the world, with Europe accounting for around 7-8%. Another perspective becomes clear if we look at how the entire European cinema market is divided (se fig. 1). The big five (France, Germany, Italy, UK and Spain) dominate what remains of the market after the Americans share. Furthermore, most of the actual share of the European countries is not taken on the European market as such, but on the national markets.

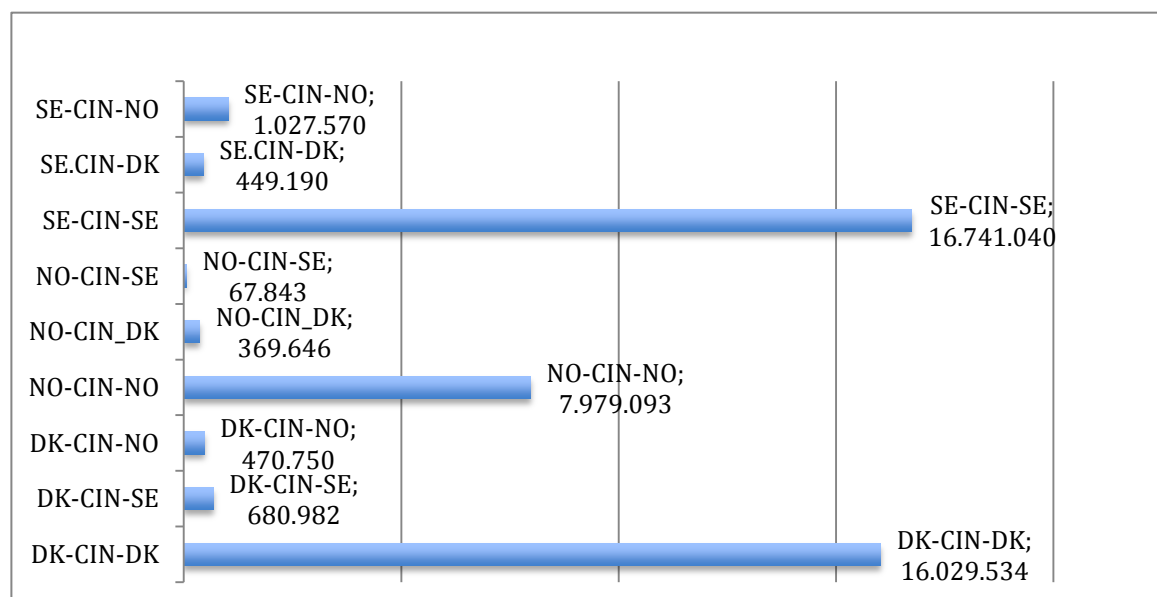


Figure 24. Scandinavian films in own national cinema and in cinemas of the other two countries, total amount of sold tickets 2002-2006.<sup>1</sup>

The Scandinavian patterns are just as clear: Denmark and Sweden dominate, both in terms of the number of films produced, the average audience per film and the average share of the Scandinavian market. The Scandinavian market is, however, much smaller than the national market and the European market, and all in all only 30% of Scandinavian films are distributed to the other Scandinavian countries, a figure only slightly higher than the figure for European distribution. As it is clear in fig. 2 the national, Scandinavian films are almost invisible outside of their national borders, only Swedish films in Norway (SE-CIN-NO) passes the 1 million threshold, and – as described later – only the fact that films from these countries fare much

<sup>1</sup> When Denmark, Norway and Sweden are compared it must be remembered that the population of the three countries is very different: Sweden is the biggest country with appr. 9.1 million inhabitants, Denmark comes second with appr. 5.5 million and Norway is clearly the smallest country with appr. 4.6 million. In all figures in this report based on actual size of audiences the lower figures for Norway can partly be explained by this. On the other hand the fact that Sweden and Denmark come out with almost identical audience figures indicates that size of the population is not the only factor.

better on both national television and the television channels in other European countries creates a Scandinavian film exchange of any significance.

Based on empirical data, the *cultural* argument for Scandinavian film culture, based on deep similarities between countries in the Scandinavian region, cannot be supported. At least the exchange of films between the Nordic countries doesn't indicate a *natural cultural connection*. As fig. 3 illustrates the national home market and the EU market are much more important for each of the Scandinavian countries than the Scandinavian market. On the other hand it is unlikely that culture in itself is an argument for or against transnational exchange, since American films do so well. As we shall see from the following Scandinavian television culture seems to fare much better when we examine the presence of Scandinavian television series in other Nordic countries. A clear hypothesis therefore is that the reasons for a lack of a better Scandinavian exchange have to be found in factors related to areas of production and distribution as well as to film genres.

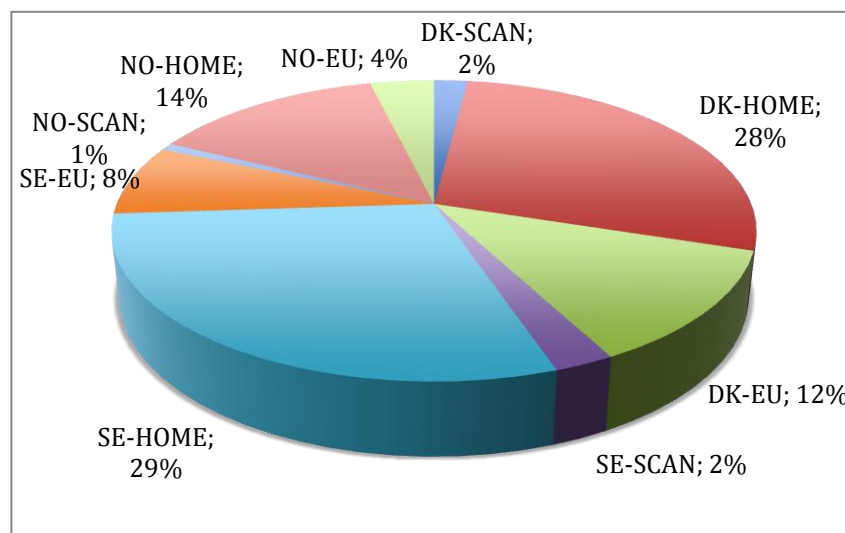


Figure 25. Cinema admissions in Scandinavia, 2002-2006, percentage of national films on home market, Scandinavian market (only NO, SE and DK) and European market, EU36 figures.

In this report we examine the Scandinavian film culture in a new context where films are no longer primarily locked into a national space and can no longer be seen only from the perspective of the cinema as the only place for film consumption. In the *new film culture* globalisation exists on many levels, and films can be seen on many platforms, not least by the younger generation. In fact, it has for a long time been obvious that although the mantra for film lovers has always been: 'films must be seen in the cinema', this is now far from being the actual pattern of film consumption. Nevertheless, cinemas are still an important part of the new



film culture and will probably remain so in the future. After all, live music or live theatre did not disappear when music and theatre also found new platforms and new media.

It is a fact, that many films not only have an increasing audience internationally, but also that films shown on television (often repeatedly and on different channels) are by far the biggest window for films – at least in terms of numbers of viewers. Moreover, we are entering a new digital era where Video on demand (VOD) and other online formats for film viewing will be crucial for a film's life in a longer time perspective. A film's life in the cinema may be a key and crucial window for the film, but in the long run the film's existence on all the other platforms will represent its actual cultural reach and importance. Thus, one of the main points this report wishes to highlight is that we need to readjust our image of the national and Scandinavian cinema to a much broader understanding of the film's actual place within in society, and that we need to face the challenges and possibilities of a new film culture with an open mind.

## The Cultural Diversity Model: The Scandinavian Film Support System

The national film cultures in Scandinavia have many similarities and there is a long tradition for cooperation. As a whole, however, there are also numerous obvious differences based on the size of the population of the three countries and different historical traditions and developments, one of the most striking of these perhaps being the fact that Norway had a very regionalized public cinema sector and until 2001 also a state owned production company. That said, the Scandinavian film and TV culture is one of the European regions with the strongest public service television tradition and with a cinema culture and cinema policy dominated by a culturally oriented '*soft*' *subsidy system* and much less of the kind of '*tough*' *economic oriented subsidy system* based on loans, tax incentives or automatic market support systems with film audience performance and thus commercial success as central criteria that we find in other parts of Europe (Finney 1996). Generally, the dominance of *cultural support criteria* has shifted towards a stronger emphasis on also *market oriented support criteria* and today Denmark, Norway and Sweden combine a film commissioner scheme with market oriented support schemes. The global challenge has been met with much the same response in all three Scandinavian countries, where we can also note a common increase in co-production, both on a European level and through the Nordic Film & TV Fund (NFTF), an important partner in the building of transnational, Scandinavian connections.

Another contributing factor to the shared structures amongst the Scandinavian countries is a very strong and still dominant public service television tradition with a monopoly status that remained until the late 1980s, whereby a dual system of commercial and public service television (in line with the main European tendency) was established. Not only were the public service channels important as a platform for showing Scandinavian films, they also served as co-producing partners. The development of a Scandinavian TV drama tradition with a rather spectacular success from the 1960s and onwards, and with a modern revival after the 1990s in both Sweden and Denmark, has also been of great importance. The production of TV drama increased the creative collaboration between film and TV culture.

Seen in a global perspective, and compared to trends in major European countries, public support and the soft culturally oriented policies and subsidy systems dominate. Nevertheless, the national systems in Scandinavia can be called *the cultural diversity model*, since it is neither just a soft cultural support for the sake of art, culture and creativity, nor a tough

market oriented model based on stimulus to the film sector that automatically creates diversity. The way this cultural diversity model is implemented in the different Scandinavian countries varies – but the common ground is also obvious. The weakness in this otherwise rather successful model is that such a model tends to create *weak production structures* (a fragmented culture of small unstable companies) and that the *motivation and structures for marketing and distribution can be severely undermined*. Since the 1990s the deregulation of the Scandinavian TV system and the increased competition on both the national and the global market has also contributed to new elements in the traditionally soft culture oriented systems. Not least because there has been an increase in (not always) uncomplicated collaboration with TV and many new initiatives to professionalize support for development and production, for distribution and for internationalization of film production and distribution.

### **Film support between the nation state and market**

In Scandinavia, the establishing of public support for film and the recognition of film as an important element in modern culture has a history dating back to the period just after 1945, but the important modern institutionalisation of public film funding happens after the 1970s. In *Denmark* the crucial year is 1972, where film support became part of the cultural state budget and where the creation of the Danish Film Institute (feature), together with the reorganised National Film board (documentary) covered all film support. The system was further centralised in 1997, where the new Danish Film Institute merged all the separate institutions and support forms into one new organisation.

In *Norway*, the establishing of Norwegian Film A/S as a public body under common governance of the Norwegian municipalities already in 1932 (municipalities that also formed a National Association of Municipal Cinemas) gives Norway a special standing in Scandinavia. This rule by the municipalities, a very regional structure, ended in 1971, where Norwegian Film A/S gradually had become more and more dependent on funding from the national government. In 1983, NRK (the main public service channel) and Norwegian Film A/S increased their co-productions. The main event transforming the Norwegian system, however, happened in 2001 when The Norwegian Film Fund (NFF) was created as the sole responsible institution for all public film support. In 2008 however, NFF and the Norwegian Film Institute (NFI) were merged with other film institutions into one organisation with the same broad responsibility for the whole Norwegian film support as DFI.

*Sweden* can boast of being the first Scandinavian country formally to create a public film institution. The Swedish Film Institute was formed in 1963 with the charismatic Harry Schein as the first director. As in all countries, not just in Scandinavia but world wide, the 1960s was a difficult period for the film industry because of the rise of television as the new, dominant medium. The funding in the early period came from a ticket tax that was reinvested, also in artistic quality production (Anderson 1995). Unlike in Denmark and Norway there has been no fundamental change in the institutional structure for public cinema support in Sweden. The Swedish Film Institute has remained the central institution, but since 1990 a number of fundamental structural changes have taken place when it comes to the way in which film support has been organised.

Very few regions in Europe can boast of a transnational funding body with such a broad pattern of support forms as Nordic Film & TV Fund, formed in 1990. The declaration of purpose of NFTF is:

The Fund's primary purpose is to promote film and TV productions of high quality in the five Nordic countries (Denmark, Finland, Iceland, Norway and Sweden), by providing support for top-up financing of feature films, TV-fiction/series and creative documentaries. See Guidelines and Application Forms for further details. We also support a range of other initiatives to assist our productions to travel further throughout our region (Distribution and Dubbing), as well as assist our professionals in developing and improving their knowledge and skills through our Master Classes/Workshops plus support a range of film events of Nordic importance such as festivals, seminars or forums, through our Film Cultural Initiatives. Nordisk Film & TV Fond is also the administrator of the prestigious Nordic Council Film Prize and arranges and hosts the annual Nordic Talents held each autumn.

The organisation is based on partners in the five Scandinavian countries representing both the national film institutes and important public or commercial broadcasters:

**Danish Film Institute**

Danish Broadcasting Corporation (DR)  
TV 2 Denmark

**Finnish Film Foundation**

Finnish Broadcasting Company (YLE)  
Channel 4/Nelonen

**Icelandic Film Centre**

National Broadcasting Service Television (RUV)

Icelandic Broadcasting Corporation (Stöð 2)

**The Norwegian Film Institute**

Norwegian Broadcasting Corporation (NRK)  
TV2 Norway

**Swedish Film Institute**

Swedish Broadcasting (SVT)

TV4

Kanal 5

In many of the Scandinavian countries the process of centralisation of public support institutions follows the need to strengthen the national film culture facing strong global competition. The national centralisation and the globalisation are also connected to a trend towards *regionalisation of film support*. This tendency is perhaps strongest in Norway and Sweden. In Sweden, there are now regional funds in Trollhättan, Luleå, Ystad and Stockholm, and in the recent Swedish film policy report *Vägval för filmen* (2009) it is estimated that about 12% of the budget for Swedish feature films come from these regional funds. Globalisation, it seems, doesn't just mean homogenisation and centralisation, but also trends towards a regional revitalisation of national cinemas (Hedling 2010a). In Denmark, there has been a long tradition for regional film workshops serving more experimental and grass root filmmaking, but since 2000 more professional regional film funds and production facilities have been established under *FilmFyn* (FilmFewnen) and *Den Vestdanske Filmpulje* (The West Danish Film Fund), a trend further underlined by the 2010 film agreement which further develops and supports this tendency. The plan calls for DFI to help establish more regional funds with a budget of at least DKK 28m (or around 4% of the total budget for four years) for support to features and documentaries. But compared to the financial strength of the regional initiatives in Norway and Sweden, the Danish is very weak.

In Norway, there is a strong regional tradition dating back to 1981 where *Nordnorsk Filmsenter A/S*, located in Honningsvåg and owned by the three northern counties in Norway together with the municipality of Nordkap, was established. In 1994, *Vestnorsk Filmsenter* was established in Bergen, owned by the city of Bergen and the county Hordaland. In the last five years similar centres have been established in Trondheim (*Midtnorsk Filmsenter*, 2005), in Stavanger (*Filmkraft Rogaland*, 2006) in Lillehammer (*Østnorsk filmsenter*, 2008) and in Kristiansand (*Sørnorsk Filmsenter*, 2008). There is also a plan for a *Sami film centre* in Kautokeino. The Film Centres depend upon a combination of central and local funding. The funding of the centres is intended to strengthen local film production, primarily short and documentary film. In addition to this, the centres are involved with different types of initiatives in order to develop local film competence

related to the different aspects of film production from writing screenplays to editing and distributing the finished film. In 2009, the total funding for regional film centres was NOK 26.7m, but on top of that there are regional funds (Film3, FUZZ, Midtnorsk Filmfond, Filmkraft Rogaland, FilmCamp Filmfond) that also support feature films and television drama, with a budget of NOK 10.5m in 2009.

### **The Scandinavian film support system: economy and cultural principles**

As already indicated, fundamental structural changes have taken place in the Scandinavian film and media culture from the 1990s and onwards as a result of increased globalisation of film and television culture in Europe in general. The increased fragmentation of the television landscape with new commercial channels and also many new public service channels, the development of a European dimension in film and media policy and an increased internationalisation of both film production and film distribution have fundamentally changed the traditional national space for film and television. Moreover, a new digital film and media culture creates both new possibilities and challenges for a national film culture still very much imbedded in a traditional view of film as something primarily linked to the national culture and cinema. However, the national and the regional have not lost their importance, and both the national film policy and the European cultural policy as a whole is very much dedicated to the support of ‘cultural diversity’ and the regional.

As a result of the global challenges for the national film cultures a restructuring of the film support systems and institutions can be observed in Denmark, Norway and Sweden, and we have seen an increase in film support economically and in terms of the number of films produced. In Denmark, the biggest change happened in 1999, where the first four-year plan under the new DFI resulted in a 100% increase of the yearly budget from around DKK 220m to 450m, and consequently also a 100% increase in the number of films produced per year. This plan and the following plans resulted in a national cinema share of films on average around 25% (see below). The Danish support system and its rather differentiated support schemes can be found in different forms in both Norway and Sweden, and the Scandinavian system we see here is characterized by support forms that are aimed at securing a diversity of films related to both genres, generations, media platforms and support to stimulate both market success and artistic innovation and creativity.

Structurally the present Danish support schemes are:

- *Film commissioner scheme* (both for feature films, documentary films, short films, animation films and for films for youth and children) – defined as the *cultural and artistic arm of the system*, maintaining the artistic diversity of film culture. Under the commissioner system you find (according to DFI (2010))
- Script and development for both feature films and documentaries
- Animation scheme
- Regional support scheme
- Co-production scheme
- *60/40 Scheme*: only supporting feature films and defined as the *market oriented arm of the system*, securing the diversity of the film culture through commercial mainstream film success for the large audience (in the just approved film deal for the next year, this is now called the Market scheme)
- *New Danish Screen* (low budget support for feature, short, documentary films and computer games) – defined as the *system for developing new talents* and new directors and products showing new ways. NDS also supports computer games.
- *Workshop support* (experimental and digital productions) – a support scheme dating back to the 1970s and originally conceived as support for grass roots and non-professional production, but by now developed to a more experimental creative lab.
- *Public Service Television Fund* was established in 2007 and is a collaboration between film and television, aimed at creating more quality in TV documentary and TV drama productions
- Support for marketing, cinema, festivals, distribution, promotion is linked to the different genres and schemes

The amount of money allocated to film support in the three Scandinavian countries examined in this report, based on 2009 figures is shown in fig. 4. There are slight differences in both the total budget and the way it is distributed, but on the whole the economic size of the support in Scandinavia is very similar and structurally distributed based on the same kind of support philosophy.

Area	Denmark	Norway	Sweden
Production & development	€32.49m	€27.5m	€20.2m
Audience & Marketing	€6.6m	€7.7m	€4.2m
Archive, administration	€15.9m	After 2008 this is no longer part of NFI's budget and obligations	€13.2m
<b>Total €</b>	<b>€55m</b>	<b>€35.1m</b>	<b>€37.6m/€51.2m *</b>

Figure 26. Total public budget for film support in Denmark, Norway and Sweden (2009).

*\* The Swedish sum only includes the direct support from the state and from TV (SEK 356.6m). An additional SEK 124.4m comes from other sources, bringing the total Swedish support to SEK 481m in 2008, according to The Film Policy Report (2009).*

If we look at the Danish figures the support for feature films is the dominant part of the budget for production (46%) and for audience and marketing (12%) as it does in all three countries. Short films and documentaries take up around 17% of both production and marketing but are also supported through other schemes like The Public Service Fund, New Danish Screen and The Film Workshop. An observation based on the budget could be that there is a relatively small budget for co-production (€ 1m) and that the total budget for audience and marketing is rather small compared to the number of films supported each year (in 2009 it was 30 films). This would indicate that we are talking about a support system where the main focus is on production and on cultural and artistic criteria rather than a market-oriented approach.

Even though Norway with its municipal cinema system and a long tradition for a state production company remains a unique case, they have developed much the same forms of support for more artistic, generic diversity and a more viable film sector. It wasn't until 2001 they developed a market oriented 50/50 scheme (like the one Denmark had developed already in 1989) where the new centralized system under The Norwegian Film Fund was created. Furthermore, another new support scheme that lasted for a few years meant that production companies could apply for interest-free loans in order to initiate film projects. In the early 2000s Norway was thus in line with the main structures of the Danish system and the Scandinavian cultural diversity model.

The new NFI after 2008 has now taken over all forms of public support schemes to film, TV and game producers as well as of Norwegian screenwriters. Support allocations aim to contribute to a diversity of audiovisual products based on the Norwegian or Sami language. For feature films there are four main categories of support:

- *Support according to artistic evaluation* by two feature film commissioning executives. Usually the NFI support will cover around 55% of total production costs. The producer must raise the rest either by investments and/or international funding. Of the 150-180 projects to be evaluated annually about 30-40 may receive development support while an average of six to eight will receive production support.
- *Support for a production company without any evaluation of the film projects as such.* The company get funding on the basis of its track record and the director connected to it. The chosen company will then be granted funding for two productions within a four-year period.
- *Support for producers that have a project with considerably market potential.* In 2010, five films were granted support where two external professionals in cooperation evaluated the



- projects in relation to the commercial potential together with NFI Head of Promotion. NFI's share of the total cost constitutes a maximum of 50% of the budget.
- *Support for films that sell more than 10.000 tickets at the cinemas.* The reason for this type of support is the fact that the Norwegian market is limited and that Norwegian films have a limited chance of being a success on the international arena. The support equals 100% of the producer's net income during the first year after making the film. The support is limited to NOK 7m (NOK 9m for children's films) and makes private investments less risky (normally up to 75%). About 40% of the funding towards feature films belongs to this third category of support.

In addition to this, the NFI may grant support for foreign productions where a Norwegian producer participates as a minor partner or co-producer by application to the NFI by the Norwegian co-producer. The evaluation of co-productions considers the use of Norwegian crew members on both side of the camera and the use of equipment and other facilities. Finally, it should be mentioned that the NFI supports the promotion of feature films and of marketing films at film festivals. Normal promotion costs to promote films in Norway are between NOK 3-5m and the average support from NFI lies between NOK 1-1,5m.

In Sweden we also find the same fundamental support schemes, established in the 1990s, and mainly based on the system of independent film commissioners. But there have always been other forms of support for the production sector, in 2008 formally called marked support and organised like the Danish 60/40 system. This support is supplemented with support for independent production companies and along with the consultant system with its basic artistic and cultural support for diversity and the two more market oriented schemes point to the same kind of balance as in Denmark and Norway between cultural criteria and more market oriented criteria.

### **The Europeanisation and globalisation of film culture**

Even though Norway (just as Iceland) is not a member of the European Union, they joined both the Eurimages programme in 1988 and the later film and media programmes. All three Scandinavian countries are thus completely integrated in the developing transnational co-production and co-distribution film culture in Europe and the emerging transnational film and media policy. As already pointed out, the European dimension of film distribution and income from Europe has become a quite significant element in the modern Scandinavian film culture, and for certain films and directors these are even much more important than the national cinema incomes and audiences. Even though the budget for minor and major co-production at a national level may not be very

large, at least some countries get much more back than they pay out through this transnational exchange economy.

If we look at Denmark the co-production financing structure looks like this:

	2003	2004	2005	2006	2007	2008	2009
100% DK	18	13	11	13	8	13	14
DK major	6	9	9	7	9	7	7
DK minor	6	7	4	4	7	6	7
<b>Total</b>	<b>30</b>	<b>29</b>	<b>24</b>	<b>24</b>	<b>24</b>	<b>26</b>	<b>28</b>

Figure 27. Denmark: Feature film support 2003-2009 and co-production.

The figures show that even though the DFI sets aside a relative small amount of money for co-production, co-production is an important and necessary part of Danish film production. Some years the number of co-produced films actually outnumbers the nationally funded films.

Just as interesting is a look at some of the top performing Scandinavian films on the European market (see fig. 6). There is generally no direct link between the fact that a film is Scandinavian co-produced and the success of the film on the rest of the Scandinavian market, and in many cases the Scandinavian co-productions do better or at least just as well on the European market outside Scandinavia. Many other films achieve the highest cinema admission figures at their own national market, enough to bring them into this Top 10 based on total cinema admissions in EU36 and US even though neither the Scandinavian nor the international admission figures are impressive. This is the case with the three Swedish co-productions *Ondskan*, *Grabben i graven bredvid* and *Masjävlar*.

What is generally pretty obvious from these data is that Finland and especially Iceland are extremely marginal in the Scandinavian film exchange. It is not so surprising for Iceland, given the very small population, but more surprising for Finland, and the pattern goes both ways since Finnish films don't do well in the rest of Scandinavia.

Another surprising fact is that the Scandinavian market, including the national market is actually slightly bigger than the EU/US market. As already shown in fig. 3 (see page 17), the general tendency is that the EU/US figures for the whole of Scandinavia is bigger than the

Scandinavian market. But when we focus on only the top 10 Scandinavian films in this period, both the national market and the total Scandinavian market performs better. Denmark and Sweden are clearly the two dominant players, but the relative strength at display between the two countries in this sample is not indicative of the broader picture, since the sample is small and few films have a significant impact from one year to another. Nevertheless, we can conclude, based on both the total empirical data and this sample of top films, that a certain globalisation of Scandinavian films is taking place, and that the Scandinavian market is not much more important than the rest of the world. In some cases it even appears to be of less importance. An example of the latter might be the Danish film *Den grimme ælling og mig* (*The Ugly Duckling and Me!*, Michael Hegener & Karsten Killerich, 2006) which took very little at the box office in Scandinavia, but had much more international success.

Film	DK	SE	NO	FI	IS	Scan- total	Rest- EU/US	Total
Såsom i himmelen (SE/DK)	11.920	1.433.655	197.882	23.485	0	1.666.942	1.864.994	3.531.936
Dogville (DK+)	109.759	51.347	23.027	20.419	0	204.552	2.332.957	2.537.509
Kopps (SE/DK)	50.178	770.424	293.740	36.269	561	1.151.172	346.232	1.497.404
Efter brylluppet (DK/GB)	388.010	155.330	30.354	11.773	0	585.467	779.568	1.365.035
Den grimme ælling og mig (DK+)	108.267	0	47.391	9.600	0	165.258	1.053.845	1.219.103
Ondskan (SE/DK)	50.697	959.111	16.500	24.696	0	1.051.004	96.400	1.147.404
Grabben i graven bredvid (SE/NO)	3.425	976.027	49.410	8.359	0	1.037.221	9.121	1.046.342
Masjävlar (SE/DK)	6.885	785.716	26.585	21.563	0	840.749	155.671	996.420
Elsker dig for evigt (DK)	506.493	99.501	51.493	4.482	0	661.969	257.382	919.351
<b>Total</b>	<b>1.235.634</b>	<b>5.231.111</b>	<b>736.382</b>	<b>160.646</b>	<b>561</b>	<b>7.364.334</b>	<b>6.899.168</b>	<b>14.263.502</b>

Figure 28. Top 10 Scandinavian films 2002-2006 including Europe36+US (cinema admissions, Lumiere database 2010).

### The national and European blockbuster

Blockbuster films are not normally connected with Scandinavian film culture, especially not at a European and global level. Scandinavian cinema is more known for its contribution to drama and the European art cinema tradition, and many of the films doing well belong to this category. In

general, no films from Scandinavia exceed 4 million cinema tickets globally and they are thus very far from achieving the success of American or European blockbusters, which might reach a global cinema audience between 20 million and 60 million, As an example, a US/UK film such as *Bridget Jones's Diary* (Sharon Maguire, 2001) had a European audience figure of 30.5 million in EU36 and 13.2 million in the US.

Kay Pollak's *Såsom i himmelen* (*As it is in Heaven*, 2004) that tops the Scandinavian list in this period is the closest we get to a both national and European blockbuster, and besides the cinema figures one must also take television and DVD-circulation into account. With 1.434.198 domestic spectators and taking SEK 109.091.600 at the box office, *Såsom i himmelen* was of course also by far the most popular Swedish film in the period 2002-2006 and the international release more than doubled the audience numbers. At 132 minutes, which is very long for a Swedish film, it opened on September 3, 2004 and played at the cinemas for more than a year. Outside Sweden, it sold two million tickets, but looking at the international market it becomes clear that the film's success is mostly a national success (about 45% of admissions are in Sweden and about 50% are outside Scandinavia). So even though the film sold 197.000 tickets in Norway, it is *not a Scandinavian blockbuster, but a Swedish-European blockbuster*.

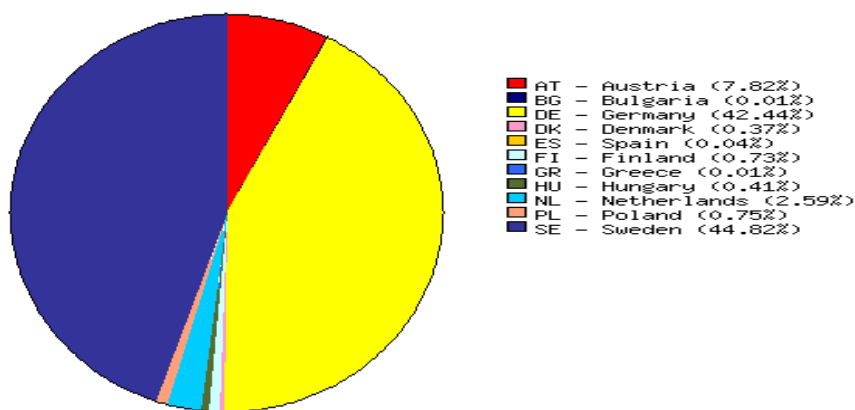


Figure 29. *Såsom i himmelen* (Kay Pollak, 2004, SE/DK co-production). Breakdown of total admissions in national markets, EU27.

The film was a Swedish-Danish co-production, produced by Anders Birkeland and Göran

Lindström for GF Studios AB. The film was co-produced by Sonet Film AB, K. Pollak Film, Filmpool Nord AB, Sveriges Television AB, MovieMakers Syd AB, MovieMakers Nord AB, CineStar Rental AB, Palma Pictures Mediterranean Production Centre, ASA Film Production ApS, Lefwander Kapitalförvaltning AB, Intensive AB, Eskil Johannesson, Persson-Mothander Film AB and CinePost Studios AB with support from the Swedish Film Institute, the Danish Film Institute, Nordisk Film & TV Fund and Cine Tirol. All in all a pretty broad, Scandinavian co-production.

*Såsom i himmelsen* is a melodrama with very strong emotional and also romantic overtones. Daniel Daréus, a world famous musical conductor and composer, suffers from severe burn out and returns to his childhood village in northern Sweden. Although he is determined not to work with music again he is gradually pulled into the village choir. He brings light to what was before dark and suddenly life flourishes in the village, not least in terms of women being sexually attracted to Daniel. In the end, he dies from exhaustion in Salzburg while leading his brethren to a musical festival. The film has strong Christian overtones with Daniel as the obvious Christ figure.

There might be several reasons why the film was so popular in Sweden (Hedling 2006: 303-333): Kay Pollak is a very renowned director in Sweden and the film also starred A-listers of Swedish cinema, actor Michael Nyqvist and Helen Sjöholm. Moreover, choir singing is one of the most popular social movements in Sweden. More than 600.000 Swedes engage with choir singing and 135.000 are members of the eight major choir societies. Also, the film drew heavily on traditional motifs and patterns of rural Swedish cinema, motifs and patterns that have always proved popular.

The film was certainly the most spectacular national success since Lasse Åberg's comedies of the 1980s drew similar audience numbers. This cannot explain the film's success in Europe, however, nor its apparent success in Germany and Spain or lack of success in Denmark and only moderate success in neighbouring Norway. If the myth of a cultural bond between the Scandinavian countries was true, this film, with its universal melodramatic tone, its culturally specific filmic mentality and *mise en scene* ought to be able to benefit from this. But the Danish co-production component and the NFTF support was not enough to convince a Danish cinema audience, and the figures clearly show that the universal melodramatic story and its Scandinavian setting and tone caters much more to a broad European audience. *Scandinavian co-production is thus no guarantee for Scandinavian distribution and success.*

However, if we look at television figures the picture is somewhat changed. In Sweden the film managed to attract 1.5 million viewers, so just on the Swedish home market it was seen by close to 3 million people – a smashing success compared to Scandinavian standards. In Norway, where already 197.000 saw the film in the cinema, the number of television viewers was 663.000, so all in all 860.000. In Denmark, television certainly also improved the film’s audience figures. The measly 11.900 cinema viewers rose to 146.000 as the film was aired on primetime on December 20 on DR. Nevertheless, the fact that it premiered on the more elitist channel DR2 rather than DR1 indicates the status of the film. Looking at the demographics for the film, it becomes clear that the film has a stronger appeal to older and more traditional segments of the population.

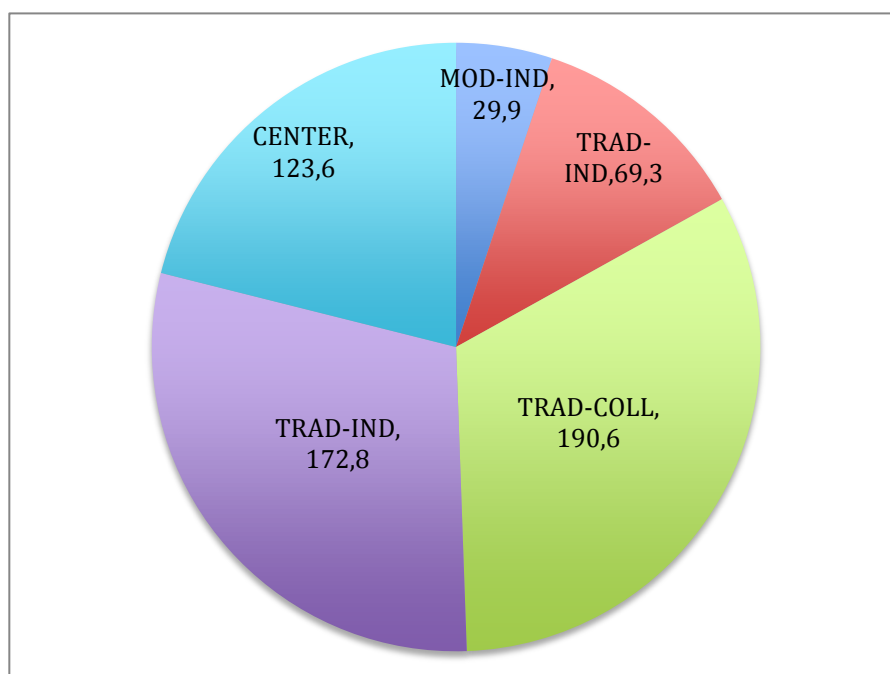


Figure 30. Såsom i himmelen. Audience segments (Gallup kompas model), based on Danish TV data. The numbers in the figure are index number with 100 as average.

The modern, individual segment, where we find the young groups with dynamic, urban life styles and with a taste for modern cultural forms are clearly below average in the audience (29/index 100), and as it can be seen in fig. 9, also the age groups under 50 are below average. The channel, DR2 plays a key role here, since it is not a channel that traditionally appeals to the younger groups, and because TV audiences in general are dominated by the 40+ groups. The large segments are clearly the centre group (which cannot be related clearly to life style segments) or the community

oriented modern or traditional groups. Compared to the film's Swedish and European cinema success the total viewing figures in cinema for the rest of Scandinavia are not high. But if we combine the data from cinema and television in both Scandinavia and EU we come to at least 5.8 million viewers, a very strong audience for a Scandinavian film. So even though the cinema figures in some of Scandinavian countries are a bit disappointing, the total, international and Scandinavian success of the film is impressive. To this we can add the DVD-sale/rent figures, which we do not know and maybe also foreign television sales and viewing figures.

*Såsom i himmelen*, with its melodramatic story set in a typical Scandinavian landscape, is thus the number one Scandinavian blockbuster of this period, based on all known audience figures on all platforms, but it is not a film cutting strongly across generations and segments, and it did not achieve great cinema audience figures in Scandinavia (outside of Sweden). In fact, many European countries achieved much higher figures. But if we include television figures and the estimated DVD-sales and other forms of distribution this film is clearly a major Scandinavian and European success.

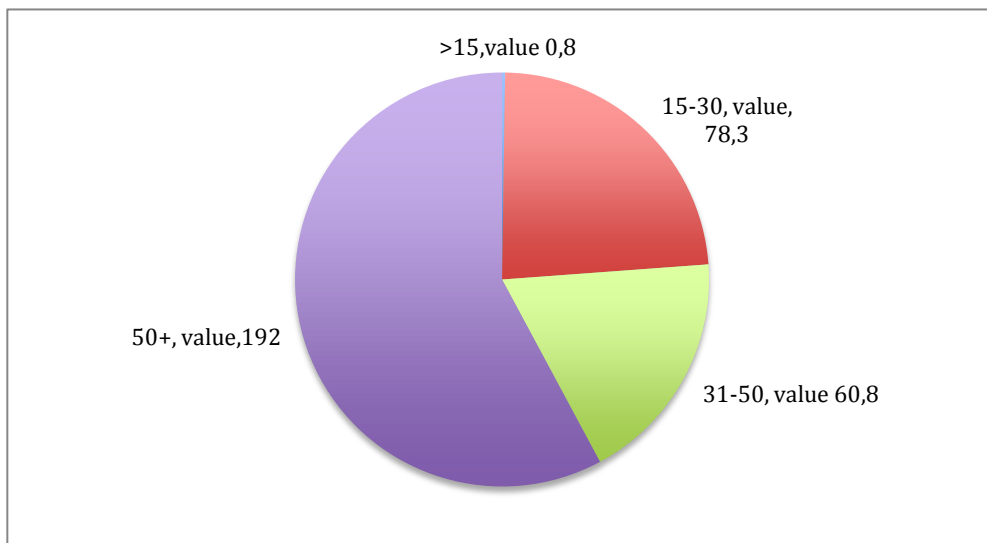


Figure 31. *Såsom i himmelen*. Age distribution – target affinity data, value. Data from Danish TV, DR2.

### The Scandinavian-European crime blockbuster

Recently Sweden/Denmark and other European countries have, however, also collaborated on a more classic kind of blockbuster film, with the films based on Stieg Larsson's crime novels, *The*

*Millenium Trilogy*, that despite their equally strong Scandinavian setting and story appear to have more universal appeal. *Millenium 1*, *Män som hatar kvinnor* (Niels Arden Oplev, 2006) has by now been seen globally by 7.5 million in the cinema alone, and in both Norway, Sweden and Denmark the film has been seen by close to 3 million. To this we can add the television figures: in Denmark 802.000 viewers, in Sweden 1.3 million, and in Norway 539.000. The profile of the films is – judged by the Danish segment-data – significantly different from *Såsom i himmelen* in that all segments are much stronger represented (fig. 10):

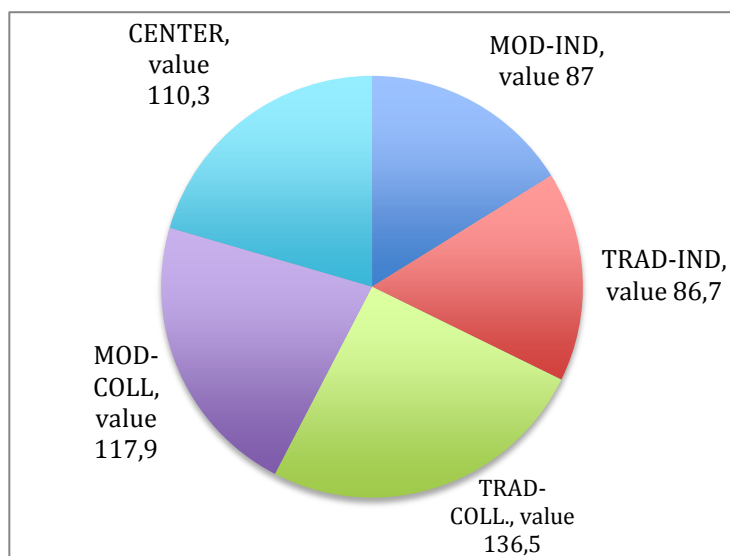


Figure 32. *Män som hatar kvinnor*. Segments. Danish TV data. Target affinity, value.

Furthermore, the age distribution for the film is different, with the younger audiences being better represented, although overall they are underrepresented, while the 31-50 segment is the only one represented normally and the +50 strongly overrepresented. The segment distribution is thus more even than the age distribution.



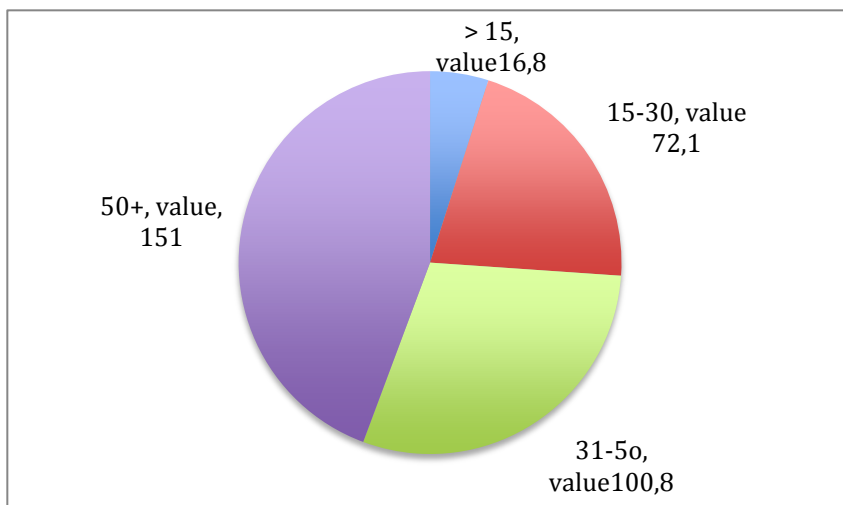


Figure 33. Män som hatar kvinnor. Age groups. Danish TV data. Target affinity, value.

What these figures show is that this is a blockbuster that reaches all segments much more broadly, as well as those with a slightly younger profile. The age profile is almost the same in Norway, while the Swedish figures differ in the sense that the age profile tends towards the 50+. The film has not been released on the European market long enough for us to estimate its European success, but the expectations are high and the American remake of the film will probably add to its global success. The final DVD-figures for the film have yet not been released, apart from the sale of 122.000 copies in Sweden in 2009, but the Danish DVD sale will presumably also be high. There is no doubt that the DVD release can be estimated to multiply these films' cinema-success significantly both in the short and the long run, and that the television figures and DVD-figures, together with the much stronger international reach of some Scandinavian films point to a new type of film culture, where multiple platforms will have a still greater influence on a film's success and distribution.

### The Scandinavian-European art cinema

In all Scandinavian countries there is a clear pattern of mainstream genre films and the films that are often very popular in the national context often not being the same films that do well in the rest of Scandinavia or in the rest of the world. There are some examples of the opposite, e.g. the Danish *Olsen Banden* films that were remade in national versions in both Norway and Sweden or in more recent times the crime films based on Stieg Larsson's novels (see above). There is no reason why a policy to promote Scandinavian mainstream films and blockbusters should be judged an impossible task, but some national mainstream films, like the Danish film-series *Min søsters børn* or *Far til Fire*

will almost certainly remain national blockbusters only. In 2010 however, DFI has just reported the sale of *Far til fire – på hjemmebane* to several foreign TV markets including the huge Chinese market, the French and the German. Again we see a tendency that films that do not travel in cinema more often do so on television. But in general and especially based on cinema figures, the Scandinavian films that do well at home are very often quite significantly different from the films that do well abroad even though there are interesting examples of films that become a hit both at home and abroad.

If we go back to 2002 the most successful Scandinavian film is no longer *Såsom I himmelen*, but Lars von Trier's film *Dancer in the Dark*, a film that to date has sold 4.557 million tickets world wide, with 3.791 million tickets in EU 36 and the rest in the US/Canada. So even though this particular film by Lars von Trier only sold 202.000 tickets in Denmark, and clearly is one of the most successful of his films ever on his home territory, the film represents a national film that is not really national, but a European art cinema film with a broad European and international appeal (see fig. 12). The international distribution profile of this film, a co-production between DK/FR/SE/DE/NO/NL and ISL is characteristic of the successful *European art film* in Scandinavia of which Lars von Trier is the most remarkable example. The film was released in more than 30 European countries and sold more than 1 million tickets in France and had very high admission figures in both southern Europe and Eastern Europe. The European art cinema may not have admission figures comparable to the more popular blockbuster, but they have a very broad European audience profile.

So as a genre this film generally has a solid, international and European distribution profile and clearly makes most of the profit internationally. Lars von Trier's films are often not very successful in Denmark, and the Scandinavian market is not always very important for the film's success either. The figures for e.g. Norway (62.000 tickets) and Sweden (92.000 tickets) indicate that this is certainly not received as a Scandinavian art cinema with the same enthusiasm. If we examine Lars von Trier's *Dogville* (2003), which was seen by approximately 2.5 million world wide, a similar picture emerges, but with even less of an audience nationally and in the rest of Scandinavia. Lars von Trier's films seem to have a strong potential in both central, southern and Eastern Europe, even more so than in Scandinavia. The fact that *Dancer in the Dark* does much better than *Dogville* probably has to do with genre among other things: it is a film that combines a more popular genre like the musical with several elements of art cinema, whereas *Dogville*, despite the

star quality of Nicole Kidman is much more experimental film. The fact that *Dancer in the Dark* won the Golden Palm award in Cannes also helped, since the European art cinema is generally very dependent on the festival system.

Lone Scherfig's *Italiensk for begyndere* (*Italian for beginners*, 2000) is another example of a European art cinema success with elements of mainstream genre. The figures globally bring the film very close to the world success of Lars von Trier with a total of 3.752 million tickets sold. But here, 819.000 tickets in Denmark alone mark the highest score for a Danish film in this period. In Scandinavia, the sales were also remarkably better: 213.000 in Sweden and 132.000 in Norway, Iceland (3.435), whereas the film flopped in Finland (9.170). All in all, the film sold 1.176.605 tickets at the Scandinavian box office, and a figure for the rest of the world of 2.575.395. Unlike *Såsom i himmelen*, this film actually achieved a very acceptable Scandinavian audience figure, although the national market and the European market outside Scandinavia clearly carried the biggest weight. Lone Scherfig's film has all the characteristics of a universal romantic comedy, even though it was a Dogme-film, where genre was not allowed.

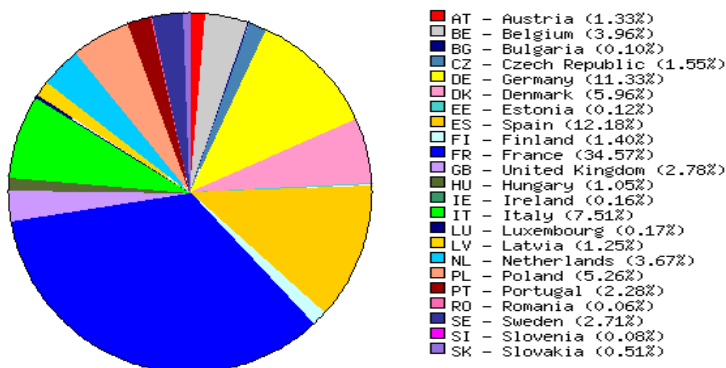


Figure 34. *Dancer in the Dark* (Lars Von Trier, 2000, DK/FR/SE/DE/NO/NL and ISL). National breakdown of EU27 market shares (NB. Norway is not included, but in Norway the film was seen by 132.000).

There is no doubt the art cinema brand of *Dogme95* and the universal dimension of romantic comedy gave the film an international boost. The director was at the time not as big an international name as Lars von Trier, and there are no major stars in the film. On the contrary, this is a very local story with a cast only known to the Danish audience, but as a romantic comedy with

a universal storyline and characters it doesn't really matter whether it takes place in Copenhagen or New York. However, if clear-cut genre qualities were the essence of the film, it should in principle have done better, like romantic comedies from UK often do. On the other hand, it is rather positive that a small, local story, maybe because of the Dogme brand, can do so well abroad, but again we see that the Scandinavian market (350.000 tickets including Iceland and Finland) is not a strong part of the film's success, just as it is clearly the case with *Såsom i himmelen*. Again, if we included the television figures, the film gets a much bigger Scandinavian audience, so apparently again – despite the success – cinema distribution is a problem.

The films mentioned here are part of a bigger pattern in Scandinavian film culture that we will return to later. The top 10 list and the rest of the films released in Scandinavia since 2000 indicate that the Scandinavian film support system has managed to develop in a European and global culture where especially the commissioner system and the co-production initiatives have had some success, despite Scandinavia being a rather small region in a global world. As we can clearly see, however, the Scandinavian dimension when it comes to co-production and support is far from being the crucial factor for a film's success in Scandinavia and the rest of the world. Other factors like genre, star quality or the international brand name of the director can be just as important.

If we turn to Norway it is *Elling* by Petter Næss (2001, 1.7 million in EU36) that tops the list with support from only Norway, whereas the heavily Scandinavian and European co-produced film *I am Dina* (Ole Bornedal, 2002, 704.000 million in EU36) is far behind. Behind those figures is a national distribution, where *Elling* takes its biggest audience in Norway (769.000) and Germany (505.000), and *I am Dina* in Denmark (260.000) and Norway (302.000). With *Max Manus* (Joachim Rønning & Espen Sandberg, 2008) and now *Trolljegeren* (*The Troll Hunter*, André Ovredal, 2010), Norway has entered the quest for a Scandinavian-European blockbuster. These two significantly different films have already been sold to more than 40 countries, and *Max Manus* has been seen in Norway by 1.162.820 in the cinema. The figures show that in the period analyzed here or in the years just before or after, all of the three Scandinavian countries have had significant success on their home market and some of the films have also made it with success to the rest of the Scandinavian or European market. But there are still very many films that do not really travel and thus Scandinavian films that are not seen very many people outside the national area, despite co-production. Even though we have a quite developed tradition for Scandinavian collaboration and an

intense effort from NFTF, the joint Scandinavian support systems seems to need an overhaul with a greater view to the broader, European and global context.

### **A weak and fragmented production culture?**

Since the breakdown of the classical film culture in Scandinavia from the 1960s and onwards, the production structure of the Scandinavian film sector has undergone major changes, moving away from a market driven culture with big companies dominating, towards a much more diverse and fragmented structure based on public support, with very few big and strong production companies and a lot of small and rather unstable production companies. In Denmark, the period between 1995-2001 was dominated by two big companies only (Nordisk and Zentropa), producing 37.2% of the total number of films in this period, a number of medium sized companies (Grasten, Nimbus, Metronome, M&M, Thura) producing 26.5% of the films, that is 63.7% for the big and medium sized companies together. A very large number of companies (41 companies in total) produced the remaining 36.3% of films, but many of these production companies during these seven years only produced between 1-4 films and many of them just 1 or 2 films (Bondebjerg 2003: 180).

The situation hasn't changed a lot since then, and many of the same companies are still in operation. The most remarkable change in Denmark is that the biggest and most innovative company, Zentropa, and the oldest and most established (and traditional), Nordisk Film, merged in 2009, thus creating a very large and powerful company in a Scandinavian context. The second important trend to observe is also related to Zentropa, which at this point in time has established international branches and sister-companies in 13 countries (Belgium, Estonia, Finland, France, Germany, Italy, Lithuania, Holland, Norway, Poland, Spain, Sweden and the UK). Following the globalisation of Scandinavian cinema, production companies of this size are thus starting to become European-global players. If we shift our focus to only examine the Danish productions between 2002-2010 we find that 52 companies were behind the 214 films made in this period, while the share of distribution is very unevenly dispersed.

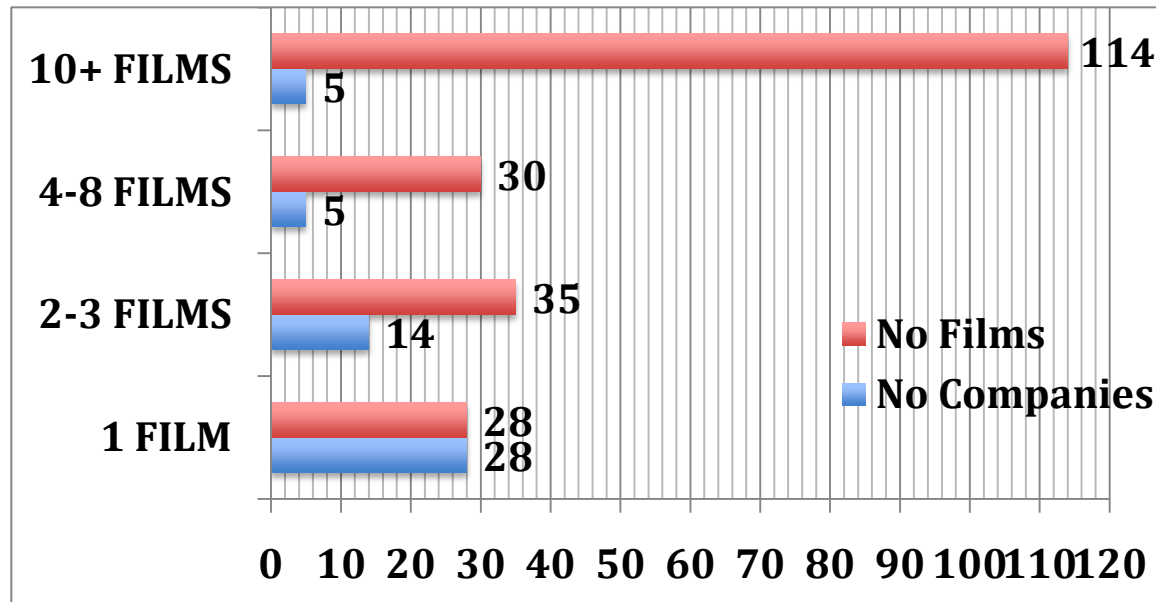


Figure 35. Number of production companies in Denmark 2002-2010 and number of films produced. 52 companies have produced 207 films.

An examination of the main companies behind the production of films in Denmark, Norway and Sweden between 2002-2006, confirm the fragmentation of the production sector is confirmed (see fig. 13). In Sweden, there were around 125 production companies in existence between 2002-2006, but only 13 of these companies produced four or more films during this five-year period, and the two biggest production companies, Sonet Film AB and Memphis Film AB, only made eight films each. However, the data from these years show that, compared to Sweden, Denmark maintains a stronger division between the two big companies, some medium sized and a larger group of very small companies. Sweden has no large-sized companies, instead the landscape consists of medium sized companies as well as a large group of very small companies. Norway proves to be a similar case, where only Maipo Film and Nordisk Film can be counted as medium size companies. In Norway, more than 95 companies produced films during this period, but as in Sweden and Denmark most of them only made one or two films each, and even some of the companies ranked in fig. 13 only make an average of 0.5-1.5 film a year. Denmark is thus the only country in Scandinavia with any large production companies.

Generally, the figures show that indeed very few Scandinavian film companies, even in Denmark, reach a critical mass that could be deemed necessary to meet a greater global challenge and serve as hubs for creative international alliances and co-production agreements. Few companies

have managed, like the Danish Zentropa, to develop a broad international strategy. However, the statistics from this period also show that size is not everything: the success of films produced by large companies compared with those by small companies aren't direct prove that a large company with a sizable output is more likely to produce hits. Some smaller companies seem to manage success with only a few films. However, larger companies do have the ability to both streamline production for large scale mainstream films as well as for smaller and more experimental/innovative films.

Name	Country	Number of films	Average pr. Year
• Zentropa	DK	21	4.2
• Nordisk	DK	17	3.4
• Nimbus	DK	12	2.4
• Nordisk Film (NO)	NO	10	2
• Memfis Film	SE	8	1.6
• Sonet Film	SE	8	1.6
• Maipo Film	NO	8	1.6
• Motlys	NO	7	1.4
• Paradox Film	NO	7	1.6
• Svensk Filmindustri	SE	7	1.4
• Grasten	DK	6	1.4
• Filmlance Int.	SE	6	1.4
• GF Studios	SE	6	1.4
• Dinamo Story	NO	4	0.8
• M&M	DK	4	0.8
• Angel	DK	4	0.8
• Speranza Films	NO	4	0.8
• Filmkameratene	NO	4	0.6
• Auto Images	SE	4	0.6
• Breidablick Film	SE	4	0.6
• Göta Film	SE	4	0.6
• Moviola Film	SE	4	0.6
• Nordisk Film	SE	4	0.6
• Omega Film	SE	4	0.6
• S/S Fladen Film	SE	4	0.6

Figure 36. Top 25 Scandinavian film production companies 2002-2006, ranked according to number of films made (minimum three films in the period).

### **Production cultures, creative strategies and commercial success: Denmark**

Looking at the profile of some of the big Danish companies it would seem some of them have supported not entirely successful commercial strategies. Zentropa has clearly been a creative driver of modern Danish film culture since the mid 1990s, but the merger with the much more traditional Nordisk Film was a signal of the company's vulnerability, even if it was also a strategic merger to gain momentum for international expansion. Zentropa has, besides being the creative art cinema producer par excellence, also been behind the launch of some of the most important drama directors with big audience appeal such as Per Fly and Susanne Bier. Realism and art cinema goes hand in hand here, but in the case of Bier and Fly this is married with a strong narrative mainstream drive. Zentropa has also experimented with films for children and young audiences, and they have produced a few traditional genre films.

Nordisk has a much more blurred and diverse profile, sometimes producing genre films, sometimes drama and art films, but during this period they had no real box office hit nor did they produce many creatively challenging films. Nordisk only had one film in the top 20 (*Sprængfarlig bombe/Clash of Egos*, Tomas Villum Jensen, 2006). Nimbus, on the other hand, has a much more outward creative profile and with both the successful *Kongekabale (King's Game, Nikolaj Arcel, 2004)*, one of the few political thrillers to be produced in Denmark and with a clear nod to its American inspiration, and the action youth film *Klatretosen (Catch that Girl, Hans Fabian Wullenweber, 2002)* the company has certainly made its mark on the national film culture. Other films produced during this period showed an ambitious strategy for genre renewal in Danish cinema, but without the expected success, and Nimbus was one of the larger companies that struggled after 2006. It is worth noting that despite some success the big companies did not do well, and only a few of the smaller companies found any artistic and/or commercial success.

### **Production cultures, creative strategies and commercial success: Norway**

In Norway between 1960 and 1970 there were 25 different production companies making 68 feature films. Discontinuity was regarded as a problem. This situation changed gradually during the 1970s when the three most important companies (Norsk Film, Teamfilm and EMI – Production) were behind 75 of the 99 films made (Hanche et al. 2004: 71). In the beginning of the 1980s widespread opinion suggested that the state subsidy system did not function as expected. The Norwegian films were unpopular among the audience, and some critics went as far as to raise the



question if Norwegian film productions deserved any state support at all. Once again the subsidy model was up for debate. The result was that private investments in film productions rose significantly the following years.

After 2000 a pattern begins to develop, bringing Norway in line with the structure in place in Sweden and Denmark. Yet if we examine the successes of these film production companies no clear picture emerges. Among the two largest companies, Nordisk Film is behind the Norwegian version of the also in Norway very popular *Olsen Banden* films, which were the family blockbuster films during this period, topping the list with between 350.000 and 410.000 cinema admissions. The company has also made semi-serious romantic comedies such as *Mirakel* (*Miracle*, 2006, Thomas Kaiser), but the mainstream profile is clear, also in their pretty substantial production of TV-series. The other medium sized company, Maipo Film, has a much more diverse profile. Maipo Film's biggest success in this period was *Mors Elling* (*Mother's Elling*, 2003, 380.000 tickets in Norway), directed by Eva Isaksen, a follow up to the just as popular *Elling* (Petter Næss, 2000), an innovative drama-comedy about a strange mother-son relation with absurd and comic situations from everyday life. The company also made the more youth oriented drama *Jonny Vang* (Jens Lien, 2003) seen by 81.000 spectators, and the family melodrama *Svein og rotta* (*Svein and the rat*, Magnus Martens, 2006, 149.000 spectators). Maipo Film thus has a more diverse and innovative profile while Nordisk Film tends towards a more traditional profile. Among the very small companies we find Bul Bul Film (only two films in the period) producing the Norwegian art cinema films by Bent Hamer, for instance *Factotum* (2005, only 26.000 spectators).

### **Production cultures, creative strategies and commercial success: Sweden**

The contemporary Swedish production landscape also appears fragmented with small, comparably weak producers and production companies who, on their part, have to rely on a select group of mainly public financial sources. In comparison to the period during which Swedish film was dominated by an oligopoly of three vertically integrated companies (some 40-50 years ago) only one of these still remain, Svensk Filmindustri (SF). Here, however, the main focus seems to be resolutely on distribution and exhibition. Examining the production output during the last decade hardly creates an impression of any conscious effort to provide an annual slate of films. Besides the occasional big production, the company has backed a few non-feature works while also making some co-production contributions. Sandrew Metronome, SF's last competitor, first sold its cinema

chain in 2006 and then, 18 months later, proclaimed that it had decided to finally cease feature production after some seven decades. In effect, Sandrew Metronome transformed itself into a distributor only, a change that might indicate where the profitability in the film business is to be found (*Film Policy Report*: 66). In November 2010, however, the company announced that it will stop its cinema distribution in Denmark.

That leaves the sector with a rather extended group of small independent production companies. Their low level of capitalisation and, therefore, restricted access to the benefits and credits of the financial market distinguish these companies. This is due to film production quite rightly being perceived as a high-risk activity (Lange & Westcott 2004: 158). The majority of companies contributing to the output of films produced during any given year will, thus, often be making only one film. Due to this situation, several sources have commented on how producers remain dependent on more powerful financial contributors such as regional film funds, television companies and distributors. Moreover, this state of affairs have also contributed to a situation where the producer systematically tends to be the most exposed risk taker while at same time getting the smallest part of the revenues (*Film Policy Report*: 10; *Final Report*: 13). Since extremely few projects recoup their costs, the economics of production have also changed and turned into a situation where producers now look towards fees in the production budgets in order to earn their living, which, as one source puts it, creates a “de-motivating fact that has to some degree resulted in sub-optimal performance of Swedish films with audiences” (*Final report*: 13).

In this environment it appears somewhat difficult to highlight any particular success stories, although the three production companies Filmlance, Yellow Bird and Memphis Film may be singled out. The former two have thus methodically explored the meeting point between film, television and the contemporary accomplishments of Scandinavian crime fiction (Hedling 2010b; 2010c). Independently of one another, they have created and produced franchises and brands like *Beck* and *Wallander* and successfully packaged them through a combination of Scandinavian and German funds, mostly from television companies. Memphis Film, on the other hand, has taken what perhaps may be described as a more traditional European route. Accordingly, the company has carefully nurtured and stood by a number of singular filmmakers, such as Lukas Moodysson and Josef Fares, and it has achieved considerable success as a result (Westerståhl Stenport 2010). This aside, producers and the production segment have, for quite some time now, been discussed in terms of a weak link and an unsolved problem within the context of the Swedish film industry. Concurrently,

various strategies have therefore been suggested on how to address this issue and strengthen producers' rights, e.g. in the *Film Policy Report*.

### **Looking for the audience: the Scandinavian film user and the new film culture**

After the break of monopoly in the Scandinavian television culture in the late 1980s, the competition for audiences became a still more integrated part of the development of television programmes. Where the traditional public service culture had a rather general concept of its audience as the enlightened and cultural citizen with elements of needs for more popular entertainment, the modern media culture is still trying to learn more about its audience. The traditional TV drama was to a certain degree more oriented towards a national cultural canon than towards a broader global media culture. With Danish and Swedish television drama in the lead this has changed dramatically since the late 1990s, and today modern television production is based on both much more detailed studies of audiences as well as on a clear mixture of national and global formats. The success of Scandinavian television drama, nationally, in all of Scandinavia and in the rest of the world has been unprecedented.

Similar tendencies can be observed in the Scandinavian film culture, where not only the mixed system of market driven support mechanisms and more culturally and art driven support mechanisms, but also a new generation of more globally oriented filmmakers have made a difference. Researching the audience by means of a more systematic knowledge of actual, empirical data on audience taste and audience behaviour might lead to the development of film and television programmes *too* much guided by a hopeless wish to always being able to predict what the audience wants by looking back on audience statistics – cool calculation rather than creative drive. This is often the case with some program developments in the television industry. On the other hand, not knowing your audience and maybe not even caring to know can also be a damaging and arrogant attitude. The fact is that the film culture doesn't have near the same systematic interest in audiences and consequently don't have instruments and concepts to discuss it.

Discussions about audiences and film should be based on systematic, empirical knowledge of film consumption. It shouldn't just be based on how many saw the film in the cinema, but the profile of film viewers to different sorts of films and the different social and cultural segments of audiences. Data on this can be found when films are shown on television, and some findings have already been pointed out. But empirical data should be combined with fundamental knowledge of

genres, narrative structures, aesthetics, and on how this influences our cognitive and emotional reception of films. The problem is that looking at what we know, what data are available for Scandinavian films, there is a long way to go: we need to know the figures for cinema (nationally, in Scandinavia and the rest of world) and we need to know the same figures for television and the digital consumption of films. But these data are not easy to get on the level of individual films, and neither are demographic data on film – except for television.

### The Scandinavian film viewer

The European Think Tank has commissioned a survey of film consumption in Denmark, Norway and Sweden, and the results clearly tell a story of film consumption, where the cinema is still a strong player, not least in people's mind as the place where films SHOULD be seen and where you get the highest quality experience. But their actual habits tell another story, a story of films being integrated in a much broader variety of platforms, besides television also DVD sale and rental, VOD and mobile formats.

Country	TV	Cinema	DVD-TV	Computer*	Download
DK	61.9	11.6	24.8	1.6	7.5
SWE	58.8	10.8	25.5	4.6	21.2
NO	58	13.5	25.3	3.2	20.4

Figure 37. Average figures (%) for Scandinavian film consumption, national films.

\* Use of computers for film viewing is here divided in two: computer means watching DVDs on your computer or streaming films, where as downloads is taking films down on your harddisk.

This survey of course tell us what people *think* their consumption is – there is an error margin here – but the figures are overwhelmingly pointing in the same direction in all three countries: cinema is much smaller than TV and DVD-viewing at home, and in at least Sweden and Norway downloading of films is on a sharp upward curve. The age variation behind these figures is even more interesting: in both Norway and Sweden the use of downloads among the 15-40 year group is between 30-40% and even in Denmark the low average figures rise to 15-17% in the younger age groups.

*Scandinavians are already fully living in a new film culture, a digital, individualised film culture at home or on the move. But this fact is barely registered in the way we develop future film strategies, other than as a scary, dystopian scenario, and the traditional forms of distribution from cinema to the other platforms is still very much following the logic of the traditional, national, cinema oriented*

mentality and logic. But in the modern Scandinavian film culture also in terms of film distribution we need to know about the audience and meet them on the technological platforms where they are. What needs to be contested is the idea that a much more flexible distribution to several platforms within a relatively short time span, that can vary with the type of film, should in any way diminish a film's reach and its economic potential. There is no reason why these different platforms should not be able to increase the total reach of a film instead of competing with each other. According to the survey in the three countries, more than 30% of Scandinavians own more than 50 DVDs, probably films they have also seen in the cinema and on television.

The survey also documents patterns in the use of film genres and films from different regions. Not surprisingly there is a very clear tendency that the average viewer prefers English/American films over national films and with films in other languages lagging far behind. What is also quite obvious is that the future grown up film user in Scandinavia (15-17 years) has an even more extreme preference for US/UK film, in fact the preference for US/UK film is directly linked to age group. It seems that people need to grow up to develop a taste for films from their own country and also from the rest of EU – the younger generation prefers the Anglo-American culture in almost all their cultural consumption areas including music, games and television. As the figures in fig. 15 show, especially Norway and Sweden seem to have an image problem with the younger generation in relation to both national and European films.

Country	UK/US films	National films	Other films
DK-Average	66.7	27	6.2
DK-15-17	80.2	16.5	3.3
SWE-Average	71.5	24	4.4
SWE- 15-17	93.2	5.1	1.7
NO-Average	78.9	13.8	7.3
NO-15-17	90	6	4

Figure 38. The regional film preferences in Scandinavia, average figures and the 15-17 age group (%).

### **Audiences and genre preferences**

The survey also presents figures on the genre preferences in Norway, Sweden and Denmark, and even though there are many problems with asking people about genre preferences, if you want to

find statistically solid data on actual genre preferences based on viewing figures and not just of people's memory, the figures do at least show what genres are so strong in people's mind that they come up in a survey like this. The figures indicate (see fig. 16) that taken as a whole, the Scandinavian audiences are rather homogenous in their film taste, a film taste not just restricted to cinema, but also to television, which explains the very strong position of documentary. However one difference stands out: apparently the Swedish audience is much more addicted to comedy than the audience of the two other countries, on the other hand they also like to be scared (horror) more than twice as much as the Danes and the Norwegians.

Not surprisingly the top-genres in people's minds are: Thriller (including crime films and TV-series, Comedy (36%), Action (33.7%), Documentary (28.8) and Drama (22.1%). If we combine the figures for the sub-genres of drama, this becomes the dominant category with almost 65%.

Genre	DK	SE	NO	Average
Thriller/Crime	43.4	34.1	39	38.8
Comedy	28.6	48.3	31.2	36
Action	34.4	36.2	30.5	33.7
Documentary	31.8	28.1	26.6	28.8
Drama	18.3	29.1	19	22.1
Drama-Romance	18.7	21	16.8	18.8
Drama-History	16.4	12.8	11.7	13.6
Adventure	11	19.3	14.4	14.9
Sci-Fi	12.1	13.9	11.3	12.4
Animation	11	12.6	11.4	11.7
Drama-War	10.8	9.5	11.1	10.4
Other	8.3	8.6	6.6	7.8

Figure 39. Percentage of people in Denmark, Sweden and Norway that say they *often* see different film genres. \* The sum in the numbers here is not 100%, since this is only the answers to one question in the survey on each genre ( the others being sometimes, rare or never).

If we look at the output of films on TV, on DVD and in the cinema as a whole, both foreign and

national, this clearly reflects the dominance of the American film culture and genres – except for documentaries, that come out strong because of the strong television output in this genre (both documentary film and documentary television genres). The national and Scandinavian film culture seen isolated is clearly not dominated by these very popular genres, except perhaps for comedies and crime films. The rather dominant Scandinavian drama is evident there, especially if we combine the different drama categories. The dominance of drama in people's preferences is thus clearly related to the Scandinavian production profile, where drama is also very dominant. But these figures show the average audience preferences not the preference of different segments and age groups, where drama would come down on the list with younger audience segments.

### **The Scandinavian cinema market**

Even though cinema as the main institution for film consumption is already history, the figures on cinema in Scandinavia did not decline dramatically between 2002-2006, and the following years show no sign of a general decline either. There is a very strong fluctuation between years, though, indicating that individual films can make a big difference, but the average amount of tickets sold in Denmark to all films was around 12.5 million tickets a year and the average visits per inhabitant 2.2. In Norway the similar figures were 12.06 million tickets and the average visit 2.6 and finally in Sweden 16.6 million tickets a year and the average visit 1.5 (Flise & Harrie 2010). There are thus slight differences – partly reflecting the different size of the population in the three countries - but still a pretty stable and similar pattern that underlines the structural similarities in general in Scandinavia. If we look at the share for national films in this period, it is also pretty stable, although peaks and lows occur in each of the countries, and Denmark is clearly in the lead with an average of 26.4% with Norway at only 14% and Sweden 20.6% (Ibid.).

As already indicated Norway had special problems between 2002-2006, and probably as a consequence of this NFI and the film magazine *Film&Kino* in 2008 published a study of the patterns of the Norwegian film audience between 2003-2006 and their relation to the national films (*Norsk film i møte med kinopublikum/Norwegian films ecountering cinemaaudiences*). The study is however mostly a study of the regional success of films and not a study of audiences in any qualitative way, and most importantly the study points to how films doing well in the bigger cities like Oslo and Bergen are not the same that do well in more rural areas of Norway. Some very popular genre films, like for instance *Kvinnen i mitt liv* (Alexander Eik, 2003) with a popular television comedian in the lead had

a pretty even national distribution and success, whereas a regional, rural film like *Gråtass – hemmeligheten på gården* (Trond Jacobsen, 2004), - a CY-film - clearly had its biggest audience outside the bigger cities. The figures analysed in this report, based on a breakdown of admissions on individual cinemas around the country, points to a dimension in the general cinema statistics that is probably underestimated in general in Scandinavia: despite a certain homogenisation of national markets, there are still clear regional profiles and patterns of consumption. The report even states that the Oslo region in this period was losing audiences to other regions.

### **Distribution and consumption: the Swedish case**

In the years that this study concentrates on, the Swedish distribution landscape saw some very important changes. These changes came to have imminent and forceful consequences on the forthcoming development of the already hard state many of the smaller distribution companies found themselves in. In these pivotal years the access to high-speed broadband and an almost unlimited domestic hard drive capacity in combination with an everyman piracy culture became a devastating fact that no distributor or exhibitor could neglect. The total media saturation effect that this overload of culture consuming possibilities had, gave way to a new fatal competitive foe to sellers of moving images. You did no longer, as in the VHS days, compete against piracy of your own material, but against every digital file that found their way into Swedish homes, at 10 Megabytes per second. The reason for not going to the cinema was not that one already had seen *that* film illegally, but that the possible ticket buyer has a packed hard drive with hundreds of films queuing to be seen. And in the end, if the market powers invent the wheel, one cannot expect man to walk.

After we have set the scene in the new digital media culture now widespread all over Scandinavia, let us have a brief look at which companies constituted the landscape that had to deal with these changes in culture consuming. One can roughly part the Swedish theatrical distributors that were active during these years in three main categories.

- *The Americans*: Fox, UIP (the European amalgam of Universal and Paramount), Buena Vista (Disney) and Colombia Tristar.
- *The Scandinavian majors*: Svensk Filmindustri (also the major exhibitor), Sandrew Metronome (handles all Warner titles as well as being an exhibitor) and Nordisk Film. These are also, and have always been, important producers of Swedish commercial films for a domestic market and sometimes art house films fit for the international festival circuit.
- *The independents*: Non Stop Entertainment, Folkets Bio (an important exhibitor as well), Triangel Film (holding three art house theatres in Sweden), Sonet, Atlantic Film, Noble



Entertainment and Danish owned Scanbox Entertainment. The independent film distributors were and still are the important key to diversity in the theatrical market.

The independent companies have one important trait in common, in that they usually focus on art house films with a commercial potential. Films with artistic quality, but with a unique selling point, in terms of award winning festival favourites, films by famous directors or underground sub culture films with a certain hype that can be commercialised. This is the only share that the majors leave up for grabs, since it is risky, and not *instantly* commercial enough. In most cases the hype needs to be created by the company themselves. A fast forward leap to the 2010 of today would give us a rather different line-up much due to the changes that took place during our focus years.

Except for the piracy boom, the years from 2005 to 2007 became the arena for a business agreement that would change the conditions for distribution companies radically, although the change took place inside the exhibition flank of the industry. The second largest theatrical shareholder Sandrew Metronome, owned by the Norwegian Schibsted corporate group, was in 2005 forced to sell its theatre chain. SF, owned by Bonnier Broadcasting Entertainment already holding a firm grip on the Swedish media and news industry saw a chance for total dominance in tightening their 60,3% presence at Swedish cinemas (the statistics on ownership are from Olsberg 2008). They made an offer that was however abruptly stopped by the Swedish competition authority. Instead the independents Atlantic Film, Triangel Film, and the small production company S/S Fladen seized the opportunity, formed Astoria Cinemas and obtained the 14% of the total exhibition share that was held by Sandrew Metronome. Sandrew Metronome had been almost just as commercial in their programming as SF, but Astoria now had the chance to get a synergy effect for Triangel's and Atlantic's art house titles.

However, strong internal turmoil due to differences between the leadership of Atlantic and Triangel, in combination with SF persuading the major distributors to give them sole right to box office hits, made the uneven battle a disappointing but perhaps expected checkmate. In July 2007 Astoria called for bankruptcy and Triangel Film, perhaps the most important art house distributor in Sweden, went down with them. Atlantic managed to survive but lost its whole liquidity in the process. SF, strangely enough, without any complaints from the competition authority, acquired all the Astoria theatres via the company Svenska Bio, owned by the Bonnier group by 49% (51% of the shares is held by Peter Fornstam). From this point on SF held 78,3% of the theatrical market shares regarding exhibition and still does in 2010. As one can imagine the Astoria affair along with the

piracy boom certainly changed the harsh landscape of film distribution during the first few years of the new millennium, creating a veritable monopoly standardizing the theatrical variety and as an immediate consequence to that the sell-through and rental supply suffers as well.

Comparing two independent Swedish companies of the same size, Noble Entertainment and Atlantic Film can make a small case study of acquisition and distribution and some of the problems facing a small independent distributor. Sweden is a very small territory when it comes to acquiring theatrical rights, so usually it is preferred both by the sales company and the buyer to deal with the whole of Scandinavia. For a distribution company the income from a theatrical release is usually nil. It is only a break even marketing device to make way for the DVD sale. Thus, it is of major importance to be able to hold as many territories as possible for sell-through and rental. Atlantic Film, focusing on commercial art house, alone buys rights for the whole of Scandinavia, even though they only have a theatrical office in Sweden. The advantage of this is that they can control and benefit from the DVD sales in all countries after sub leasing the theatrical are firstly.

Atlantic can simply not afford to solely acquire any expensive pre-buys or big commercial titles but rather have to pick the scraps that the big companies do not want, and secondly; there is a gamble involved in the fact that there might not be any company interested in a sublet, accordingly risking the forthcoming sell-through value of the title. Noble Entertainment had a different solution to the same problem. Together with Future Film in Finland, Stars Media in Norway and Mislabeled in Denmark they formed a strong acquisition merger, where each company chips in their part splitting every title connected to the market shares of each country. The pros of this solution include the unique possibility to buy high priced films at a very early stage with big commercial potential, as well as the benefit to only have to care about its own territory, where each company's know-how is paramount. The con of the solution lays mainly in the extremely risky business of pre-buying. In the 2010 hindsight, where Atlantic stands firm and Noble faces an imminent bankruptcy after pre-buying flops like *Nine* (Rob Marshall, 2010) and *The Box* (Richard Kelly, 2009), it appears that safe is indeed better than sorry.

### **Looking for audiences and international markets: festivals**

The importance of film festivals for Scandinavian and European films has increased the last years, not just by the number of films going to festivals and winning prizes, but also through an increase in the number of festivals and the work invested in bringing films to festivals. The festival is not just a

quest for acquiring prizes, but also a window to a transnational market and audience. In general, Scandinavian films come with the label of art cinema or at least serious drama, and the European festival system is exactly the artistic market place for that kind of films. But in recent years, several European festivals have also tried to develop a European star system and a sort of European Oscar competitor with the European Film Academy's European Film Awards (started in 1988, but so far with no big success), given every second year in Berlin and the other years travelling around European cities and film festivals. There are 17 categories in all, among them: Best European Film, European Director, European Actress and European Actor. Although these awards may still not figure in the same category as the big prizes in Cannes, Berlin, Venice or the Oscars, this is clearly a sign of a growing Europeanisation of the national film cultures.

The DFI report *Dansk film. En styrkeposition for den globale udfordring* (2010) has a whole chapter on the strategy of DFI in relation to festivals, and although festivals are seen as the window for art films and for finding an audience through artistic competition, the festivals are also seen as places for trade and international film exchange. Professor Jesper Strandgaard, Creative Industries Research Center, Copenhagen Business School, has investigated the commercial value of artistic prizes and festival branding (Strandgaard et. al, forthcoming), based on the track record of 65 prizewinning films in Europe, between 1996-2005. His conclusions are very clear: winning prizes makes a clear commercial difference, and the commercial effect is stronger with prizes at A-festivals like Cannes than at smaller festivals, and the biggest effect comes from winning the main prize for best film at a major A-festival. So investing in festival work nationally and internationally has a market value and a commercial effect on top of the artistic brand and value.

In all Scandinavian countries nationally, initiated, but always internationally oriented festivals have developed strongly as well. In Denmark the documentary film festival CPH:DOX, with already quite a strong international reputation can be seen together with the newly restructured CPH:PIX (also covering the BUSTER-festival for films for children and youth) can be seen as Denmark's bid for an international and European profile in this area. But Sweden can boast of the oldest and biggest Scandinavian film festival with Göteborg International Film Festival (GIFF), started in 1979. Today it stands as the largest film festival in the Nordic countries and is heavily subsidized by the Swedish Film Institute (SFI) focusing on art house titles from all over the world. Shortly after, the Uppsala International Short Film Festival saw the light of day in 1982 and very soon it became an important premiere arena for international and national short films as well

as being recognized by the American Academy of Motion Pictures Arts and Sciences, thus making the award winner a possible Academy nominee. Next in line to be inaugurated were BUFF, the International Children and Young People's Film Festival in Malmö in 1984. The Stockholm Film Festival (SFF) followed as late as 1990 with a slightly more commercial profile focusing heavily on American independent cinema and Asian films. Five years later the Lund International Fantastic Film Festival (LIFFF) was born. The Lund festival, a member of the large European Méliès federation, very soon established itself as the largest venue for films of the fantastique in the Nordic countries. The last of the main festivals in Sweden was the formation of Tempo in 1998, a documentary film festival based in Stockholm.

The Lund Festival for Fantastic films (LIFFF) is the youngest of the Swedish Festivals, so far without support from SFI, and this probably has something to do with attitudes in the dominant film culture towards the genres of the “fantastic”, **constituting films that aim to broaden the limits of the imagination such as fantasy, horror, animation, thrillers etc.** It has never been rooted in Scandinavian film culture and is not as well established here as in the rest of the world. In addition, the festival has suffered from a prejudice that horror film audiences consist mainly of male viewers. This preconception has been proved wrong many times, and the LIFFF audience is indeed as mixed as any other festival. This is not just a regional Swedish conflict, it clearly has to do with deep rooted concepts of what the real Scandinavian film culture is, a film culture still very much oriented towards an art cinema concept with drama and realism at the centre of the cultural value chain. Although a new generation of Scandinavian and European directors (e.g. Nicolas Winding Refn, DK, Ole Bornedal, DK, Josef Fares, SE, Kjell-Åke Andersson, SE) have challenged the concept that genre films are mainstream and not art, and that mainstream is primarily a case for a commercial cinema and for Hollywood, the main trend in the film cultures of Scandinavia is still not very strongly tuned towards the kind of film genres that the younger generations prefer.

*The Norwegian Film Festival* dates back to 1973 and in the first ten years the festival was ambulating between different cities before it found a stable place in the city of Haugesund in 1984. In addition to this festival there are annual festivals in Bergen (Biff; Bergen International Film Festival), in Trondheim (Kosmorama), in Tromsø (Tiff; Tromsø International Film Festival) and a children film festival in Kristiansand. The “Film from the South” festival takes place in Oslo exhibiting mainly non western films. The national (municipally based) cinema organization Film & Kino supports most of the film festivals in Norway.

## Scandinavian Film Culture: National and Transnational Patterns

### A natural cultural region? Patterns of co-production and distribution of Scandinavian films

There is no doubt that international co-production has become much more important for Scandinavian film culture as a whole and that in this regard both the Nordic and European dimension of this internationalisation plays an important role. As mentioned previously, this is emphasised by the existence of a regional institution like Nordic Film & TV Fund and the hitherto strong tradition of collaboration between public service film channels. However, as the total figures for the production and distribution of films from Denmark, Norway and Sweden show (see fig. 2), the number of and the importance of co-productions is not reflected convincingly enough in the distribution of films in Scandinavia. Many films that have Nordic partners do not receive wide distribution in Scandinavia, not even in the co-producing countries, and many films that are not co-produced get a better distribution and better admission figures than those co-produced.

Moreover, the figures show that when it comes to audiences, European distribution and television distribution holds much more importance than the Scandinavian cinema sector. All in all, nothing really points to Scandinavia as a natural, cultural region for films: on the contrary other factors such as genre, an A-list director or star often appear to be much more significant. There is no doubt the relatively low priority distribution and marketing has in the European film culture, when compared with the American film culture, plays a part. As shown (in fig. 4), the average distribution and marketing share of the public film funding is low, and often the private sector doesn't have the power or will to make a difference.

Furthermore, initiatives to promote Scandinavian films are very rare and, as in the rest of Europe, the synergy between even closely related national film cultures has not been developed to its full potentials, although NFTF has obviously tried to encourage and support Scandinavian production and collaboration and develop strategies for Scandinavian distribution and co-production on the international markets. One recent example of this is *The High Five* at the Toronto Film Festival in 2009 and 2010 where NFTF and the Nordic Council branded Scandinavian film through a presentation of both upcoming Scandinavian film projects and already completed films. This was a coordinated, Scandinavian event and a promotion aimed at launching Scandinavian films

more efficiently internationally by giving support to foreign distributors of the selected films. Initiatives of this kind are rare, however, both in Scandinavia and the rest of Europe, and if this region is small on a global scale, the individual Scandinavian nation states carry even less weight.

### **Patterns of Scandinavian co-production**

Co-production, as has been noted, is on the rise, although in the period from 2002-2006 there are still a majority of films in the three countries that are not co-produced. In Denmark, the figure is 34 films out of 110, in Sweden it is 53 out of 174 and in Norway it is 17 out of 72. Despite Europeanisation and globalisation, production structures still to a large degree remain national. National support for minor co-productions must be added to these figures, but international collaborations are not dominant, although in e.g. Denmark these have been increasing over the last five years.

Moreover, a different picture emerges of the structure of co-production if we take a closer look at the countries and regions with which Scandinavia collaborates. The two big countries here are clearly Denmark and Sweden with 77 and 91 partner countries involved in co-production. Norway in this period must be characterised as a rather closed, national film culture with only 25 noted co-production partners, but this must also be seen on the background of much fewer feature films in this period. Furthermore, there is a clear tendency towards both a much stronger Scandinavian and European profile in Denmark and Sweden than in Norway, whereas the rest of the world plays a more minor role with regard to co-production. As an example, Danish films have made use of 36 co-production partners from Scandinavia, 36 partners from EU and only five from the rest of the world, and in addition Denmark is involved with 40 other Scandinavian film productions, most of them Swedish. Swedish films have even more partners from Scandinavia, mostly Danish (34), but as the only one of the three countries Sweden also has extended to co-production with Finland. The co-production partners found in the EU and rest of the world partners are on the other hand a much smaller number than in Denmark.

Country	DK	NO	SE	Rest-Scan	EU	US/CA	Other	Total
DK-films		11	21	4	36	4	1	77
NO-Films	6		12	1	4	2	0	25
SE-films	34	15		20	20	1	1	91
<b>Total</b>	<b>40</b>	<b>26</b>	<b>33</b>	<b>25</b>	<b>60</b>	<b>7</b>	<b>2</b>	<b>193</b>

Figure 40. Co-productions in Scandinavia 2002-2006, by country/region.

Note: Figures reflect the number of times a country is involved in a given co-production, the actual number of co-productions in Scandinavia is lower than 193. If a film has more than one co-production country, each country is calculated.

Based on these figures one conclusion might be that the Scandinavian co-production is more developed than in many other regions of Europe, but that the three countries have very different co-production patterns. Only Sweden and Denmark seem to have solidified any Scandinavian co-production habits. Moreover, Denmark emerges as the most European oriented country, a fact that is underlined by other reports, e.g. as previously mentioned *Analyse af dansk films markedspotentiale i Europa og Norden* (DFI 2010), which concludes that Denmark is the Scandinavian country with the greatest export and the most developed European cooperation and co-production strategy.

### Watching national and Scandinavian films

As already indicated the inter-Scandinavian film market, here referring to the actual distribution of Scandinavian films in each of the three countries, is not as strong and well developed as one could expect, and there is an unequal power balance between the three markets. As seen in fig. 19, the total cinema admissions for Sweden and Denmark are roughly in a par with approx. 16 million spectators, whereas Norway only has a cinema market of 10.3 million spectators. As always this should be seen on the background of number of inhabitants in the three countries as already pointed out: Sweden (9.1 million), Denmark (5.5 million) and Norway (4.6 million). The data represented according to number of inhabitants can be seen in fig. 19a, but even seen from his perspective the Danish audience is pretty amazing, whereas the Norwegian result is only slightly improved.

	SE-CIN	SE-TV	DK-CIN	DK-TV	NO-CIN	NO-TV	EU 36 - CIN	Total
<b>DK-films</b>	680.982	4.815.000	16.029.534	39.869.000	470.750	4.904.000	7.058.067	<b>73.827.333</b>
<b>SE-films</b>	16.741.043	45.190.000	449.190	2.598.000	1.027.570	7.759.000	4.349.805	<b>78.114.608</b>

<b>NO-films</b>	67.843	1.450.000	369.046	1.022.000	8.093.080	13.245.000	2.185.264	<b>26.432.233</b>
<b>Total</b>	<b>17.489.868</b>	<b>51.455.000</b>	<b>16.847.770</b>	<b>43.489.000</b>	<b>9.591.400</b>	<b>25.908.000</b>	<b>13.593.136</b>	<b>178.374.174</b>

Figure 41. Total admissions for Scandinavian films 2002-2006, cinema and television data, films on own market and on the other three markets and EU36 cinema. The number of films included in the SVT, NFI and DFI data on films 2002-2006 (SE: 193, NO: 72 and DK: 110).<sup>2</sup>

Tickets sold per 1000 inhabitants		Swedish tickets	Danish tickets	Norwegian tickets
		(tickets sold per 1.000 inhabitants)		
Tickets sold in	Denmark	47,3	2.914,5	67,1
	Sweden	1.762,2	71,7	7,1
	Norway	228,3	104,6	1.773,1
Tickets in percentage, based on sale pr. 1000 inhabitants		Swedish tickets	Danish tickets	Norwegian tickets
		Share of Scandinavian tickets sold		
Share of Scandinavian tickets sold in	Denmark	2,67%	95,14%	2,19%
	Sweden	95,72%	3,89%	0,39%
	Norway	10,84%	4,97%	84,19%

Fig. 19a. Total admissions for Scandinavian films 2002-2006 both cinema and television, based on figures per 1000 inhabitants.

The numbers reveal the weak position of Norwegian films in this period, especially in Swedish cinemas with only approx. 49.000 spectators. The figure for Norwegian films in Denmark is in fact much higher (369.646), but it must be noted this is mainly due to one film, Ole Bornedal's *I am Dina* which on its own sold 260.800 tickets – a film we shall return to later, as an example of a Scandinavian co-production.

Conversely, Swedish films are faring much better in Norway with over 1 million cinema admissions. Danish films in Sweden clearly do better than Norwegian films, with an audience of 666.000, a figure that is slightly lower for Danish films in Norway (458.000). But perhaps the single most important conclusion to draw from this macro-picture of how Scandinavian viewing habits is related to the staggering television viewing figures compared to those for the cinemas. In Denmark, the total number of cinema admissions for all Scandinavian films in this period is 16.9

<sup>2</sup> The data here on Norway reflect that on top of Norway being the smallest of the three nations by population, the years 2002-2006 represent a rather bad period for Norwegian films, both in terms of number of films produced and the success of these films in Norway. Since 2006, after major structural changes of the Norwegian system, the figures have changed. Between 2002-2006 Norway just made 72 feature films, but also 24 documentary films with sometimes rather good cinema admission figures. Norway in this period has more documentary films in the cinemas than the two other countries, but documentary films are not included in this report.



million, but on Danish television almost 40 million viewers tuned in to see a Danish film, and in Sweden the ratio between cinema and television was even more favourable towards television. This underlines the fact of an already existing new film culture, where other platforms than cinema are taking precedence. The problem with these figures, of course, is that economically the high viewing figures for films shown on TV are not reflected in the economy: it is difficult to determine what this contribution might accurately be.

### The inter-Scandinavian cinema-market: audience patterns and genre-preferences

The general picture of the internal Scandinavian market, if we focus on cinema admissions only, is thus that it has little significance, and in fact as shown in fig. 18 the smallest part of the market for Scandinavian films is the non-national Scandinavian cinema market. There is no natural, cultural connection visible in these figures. The national films on their own cinema market and their own television market pull in by far the larger audiences. On a rare occasion films from one of the Scandinavian countries do well in a neighbouring market, but often there are other contributing factors to that success. As mentioned, this can be assigned to genre, specific cultural connections related to a film's director, the characters in the film or other story elements. If we, for the sake of comparison, consider television drama, it becomes quite clear that the low visibility of both Norwegian and Swedish films in Denmark (and between these three countries in general) is not repeated, because apparently television drama and especially crime series travel well. In the same period, Swedish television series in Denmark attracted an audience of 14.9 million, and even Norwegian television series managed to attract 3.1 million viewers.

If we examine this by breaking down the top 10 films from each of the three countries outside of their own national area (see fig. 20), it becomes clear different kinds of films make it to top 10 in all three countries.

DK-Films NO	DK-Films SE	SE-films DK	SE-Films NO	NO-films DK	NO-films SE
<i>Arven</i> (drama): 87.422	<i>Efter brylluppet</i> (drama): 150.593	<i>Peterson &amp; Findus</i> (animation): 130.395	<i>Kopps</i> (comedy): 286.978	<i>Jeg er Dina</i> (drama): 260.897	<i>Jeg er Dina</i> (drama): 31.022
<i>Adams øbler</i> (drama): 41.872	<i>Dag og Nat</i> (drama): 134.164	<i>Ondskan</i> (drama): 50.776	<i>Såsom i himmelen</i> (drama): 199.617	<i>Karlsson på Taket</i> (animation): 44.224	<i>Salmer fra kjøkkenet</i> (Drama): 20.775
<i>Efter brylluppet</i> (drama): 30.356	<i>Elsker dig for evigt</i> (dogme-drama): 99.501	<i>Kopps</i> (comedy): 50.178	<i>Peterson &amp; Findus</i> (animation): 118.992	<i>Elling</i> (comedy): 37.236	<i>Ikke naken</i> (CY- comedy): 6.546
<i>Drabet</i> (drama): 26.034	<i>Dogville</i> (art film): 51.347	<i>Elina – som om jag inta fanns</i> (CY-drama):	<i>Populærmusik fra Vittula</i> (CY-drama-	<i>Glasskår</i> (drama): 25.332	<i>Hawai, Oslo</i> (drama): 2.867

<i>Dogville</i> (art film): 23.027	<i>Bang, Bang</i> <i>Orangutang</i> (drama): 40.963	17.882 <i>Lilja 4ever</i> (drama): 16.122	comedy): 46.759 <i>Ondskan</i> (drama): 34.033	<i>Salmer fra kjøkkenet</i> (comedy-drama): 20.960	<i>Mors Elling</i> (comedy): 2.056
<i>Terkel i knibe</i> (animation): 20.491	<i>Arven</i> (drama): 28.239	<i>Vingar av glas</i> (CY- drama): 15.003	<i>Masjävlar</i> (comedy): 26.594	<i>Heftig og begjret</i> (dok): 10.511	<i>Vinterkyss</i> (Drama): 1.138
<i>Drengen der ville gøre det umulige</i> (animation): 19.726	<i>Midsommer</i> (thriller): 20.690	<i>Tsatsiki – vänner för altid</i> (CY-comedy): 13.776	<i>Heartbreak Hotel</i> (romantic comedy): 21.748	<i>Reprise</i> (drama): 5.648	<i>Bare Bea</i> (CY-drama): 1.154
<i>Nynne</i> (komedie): 19.245	<i>Send mere slik</i> (CY- comedy): 17.736	<i>Såsom i himmelen</i> (drama): 11.964	<i>En Kärlekshistoria</i> (drama): 21.155	<i>Factotum</i> (drama): 3.573	<i>Øyestikker</i> (Thriller) 773
<i>Oscar &amp; Josefine</i> (CY- drama): 9.615	<i>Brødre</i> (drama): 17.481	<i>Populærmusik fra Vittula</i> (CY-drama- comedy): 11.520	<i>Tur &amp; Retur</i> (CY- drama): 18.296	<i>Buddy</i> (comedy): 1.664	<i>Buddy</i> (comedy): 549
<i>Reconstruction</i> (art film): 8.180	<i>Okay</i> (drama): 11.798	<i>Det nya landet</i> (drama, 8.991)	<i>Fjorton Suger</i> (CY- drama): 18.042	<i>Himmelfall</i> (comedy): 1.512	<i>Monstertorsdag</i> (Drama) 26

Figure 42. Top 10 Danish, Swedish and Norwegian films outside their own national market, based on cinema-admissions.

Perhaps the most troubling fact to be gleaned from this overview is the extremely low number of Norwegian film admissions in the two other Scandinavian countries. Apart from *Jeg er Dina* (I am Dina), which sold 260.897 tickets in Denmark (most likely because of its Danish director, Ole Bornedal), but only 31.022 in Sweden as the top Norwegian film there, most other Norwegian films take in below 10.000, and as low as 1.000. Even an internationally well-known art cinema director like Bent Hamer only attracts around 20.000 Danes and the same number of Norwegians into the cinema, and in this period, Hamer doesn't even figure on Danish television. It is of minor comfort to the Norwegians that the Danish market is slightly more positive towards Norwegian films than Sweden. Furthermore, to add to these gloomy Norwegian figures, there is a much stronger preference for Danish and Swedish films in Norway

As far as the most successful Norwegian and Danish films in Sweden goes, *Efter brylluppet* (After the wedding, DK, Susanne Bier, 2006) and *Salmer fra kjøkkenet* (*Kitchen Stories*, NO, Bent Hamer, 2003) both had established Swedish actors in major roles (Rolf Lassgård in the former, Reine Brynolfsson in the latter), presumably part of a conscious strategy of trying to compete also on the much bigger Swedish market. In Sweden, however, these two films both rank as minor films in line with national Swedish films like *Paradiset* (Paradise, Colin Nutley, 2003, 152 003) and *Mun mot mun* (*Mouth to mouth*, Björn Runge, 2005, 20 503). So compared to the successful national films they were ranked rather low. However, especially Danish films do get a lot of critical acclaim in both Sweden and Norway, particularly among critics who favour art cinema. In Sweden, Lars von Trier's *Dogville* (2003) consequently attracted an audience of 51.347, but his follow up, *Manderlay* (2005), only attracted 3.785 viewers. Other Danish *auteurs* attracting critical attention are Susanne

Bier and Per Fly, both with an established reputation, and their films were also moderately successful at the box office.

### **Nationality vs. genre**

The data in fig. 20 further undermines the concept of a natural, national and cultural affiliation between the Scandinavian countries. Audiences in Scandinavia do not primarily choose to watch films based on nationality-criteria, except perhaps to a certain degree when it comes to their own films. They follow generic patterns, though their choice are of course influenced by marketing, branding and the number of films that are easy accessible. The films from the other Scandinavian countries are scarcely represented in the national cinema, often due to a lack of branding and advertising, and neither the directors nor the characters or stories are immediately recognizable. American films and national films clearly attract attention and are much more easily accessible in the cinema. However, the popularity is not necessarily connected to nationality and cultural factors. We have already pointed to examples on television and in the cinema, where a particular film unexpectedly breaks the spell and becomes a transnational, Scandinavian blockbuster: the films based on the novels by Stieg Larsson is the latest example. Suddenly being a Swedish film was not a problem.

The top ten in fig. 20 indicates a genre pattern underneath the national pattern: *Drama* is completely dominant for all national films on the other Scandinavian market, albeit it being very different forms of drama, the films are nevertheless still dramas. Dealing with the family, everyday life or social and global problems seems to be the universal way to reach at least the older and more educated audience segments. The second most important genre is *comedy*, the universal sister of drama, dealing with the same kind of problems and human relationships, but from a more distanced and humorous perspective. The third Scandinavian genre is *films for a younger audience* (CY-drama, CY-comedy and animation). Some of these films have proved to be fairly popular outside of their own national space, e.g. the Swedish animation film *Pettson och Findus 3: Tomtemaskinen* (Jørgen Lerdam, 2005), which tops the list as the most popular Swedish film in Denmark, although since animated films for children are dubbed they are hard to compare with other film genres, and also the second most popular Norwegian film in Denmark, *Karlsson på taket* (Karlsson on the Roof, NO, 2002, Vibeke Idsøe). It should also be noted that there are quite a few Scandinavian *art films*, and although they do not attract high numbers, they still carry importance, just like the European art

cinema tradition is in fact one of the most widespread European genres. The least represented are the *genre-films* (thrillers etc.), which is a type of film that evidently appeals to the younger segments.

### **Scandinavian films in a global perspective**

As already demonstrated, the Scandinavian film culture as a whole is already Europeanised and globalised, both with regards to production and distribution, and in terms of directors shooting international films (e.g. von Trier, Hamer, Scherfig, Moodysson). As shown in fig. 6, the top ten films from Scandinavia, based on total cinema admissions, show that the admissions in Scandinavia of these 10 films (7.364.334) are almost equalled by the European-global admission (6.899.168). For a large number of films, the European-global share carries more weight than both the national and the Scandinavian share. One example of this is the Danish CY-drama *Klatretøsen* (*Catch that Girl*, Hans Fabian Wullenweber, 2002) that nationally sold 237.292 tickets, but achieved no real Scandinavian success (19.763) despite being a co-production with Sweden and Norway. Conversely, it sold 179.000 tickets in Europe. An even more radical example is the Norwegian film *Salmer fra kjøkkenet* (*Kitchen Stories*, Bent Hamer, 2003), which sold only 128.938 tickets in Scandinavia (including Norway), but 456.239 in the rest of Europe. What becomes apparent here is an example of a more widespread tendency, where some directors achieve an international art cinema success that isn't matched at the national market.

However, it should be noted that despite the rising globalisation of Scandinavian cinema on the European market there is still a long way to go before any inroads can be made on the American market. No Swedish film was distributed in the US in the period 2002-2006, and for Denmark and Norway there are also only few examples of American distribution. In NFI's *Eksportundersøgelse* (2008), it is documented that the Norwegian film export from 2002-2008 has grown by 23% (NFI 2008: 2), and the total European sale in this period is measured to 3.1 million compared to the 11.9 million tickets sold nationally (or 26% compared to the national sale). The report doesn't cover the American/Canadian region, but there are Norwegian films with a minor transatlantic distribution. Bent Hamer's *Salmer fra kjøkkenet* was seen by around 5000 Canadians, and his English language co-production with US, *Factotum*, have had a minor American festival and art cinema distribution.

In Denmark the structural relationship between the Scandinavian, European and American market is in essence the same as in Sweden, but a few films and directors have developed a more permanent relation with the US-region. An example of this is, of course, Lars von Trier, with *Breaking the Waves* (1996) as the most bestselling Danish film in US/CA (897.193), closely followed by *Dancer in the Dark* (2000) with 755.907 tickets. Lone Scherfig's *Italiensk for begyndere* (*Italian for beginners*, 2000) with 767.719 admissions. Some of Susanne Bier's films have also established a transatlantic position, not least her latest film *Hævnen* (*In a better world*) that won a Golden Globe for best foreign film in 2011.

If we examine the bigger picture and measure cinema admissions for Scandinavian films on their own market (HOME), in cinemas in the other Scandinavian countries (SCAN) and in the rest of the EU36 countries a fairly clear picture emerges of the relationship between the national film culture and the global (see fig. 21 and fig. 22): the national market is by far the most important, and Sweden and Denmark are in the lead. The Scandinavian holds no real sway, and for all three countries the EU market is much more important.

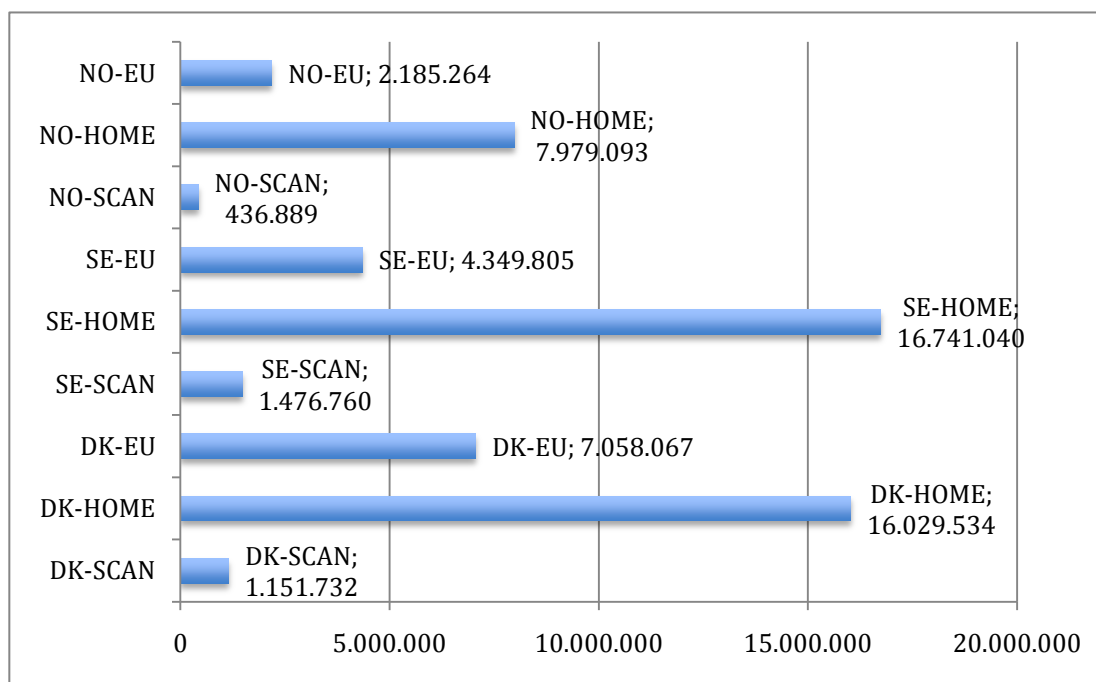


Figure 43. Regional shares in Scandinavia based on cinema admissions 2002-2006 in EU36, absolute numbers. Lumiere database 2010.

If we simplify the data and divide these figures into the Scandinavian films on their own market (DK, NO and SE together) on the other non-national Scandinavian market (SCAN) and EU 36 we get a very strong picture of the strength of the national cinema market, the weakness of the non-national Scandinavian market and the rising role of the EU-market (see fig. 22)

If we turn our focus towards the television figures for the same three countries, we can observe much higher numbers, because the films are watched by far more people on television. Yet the relationship between the national TV market and the non-national Scandinavian market for these films is no better: the national TV figures dominate, although the TV exchange between Denmark and Sweden is generally better and the share of Swedish films on Norwegian television clearly the highest among the three countries (see fig. 23). We have no TV figures for EU36.

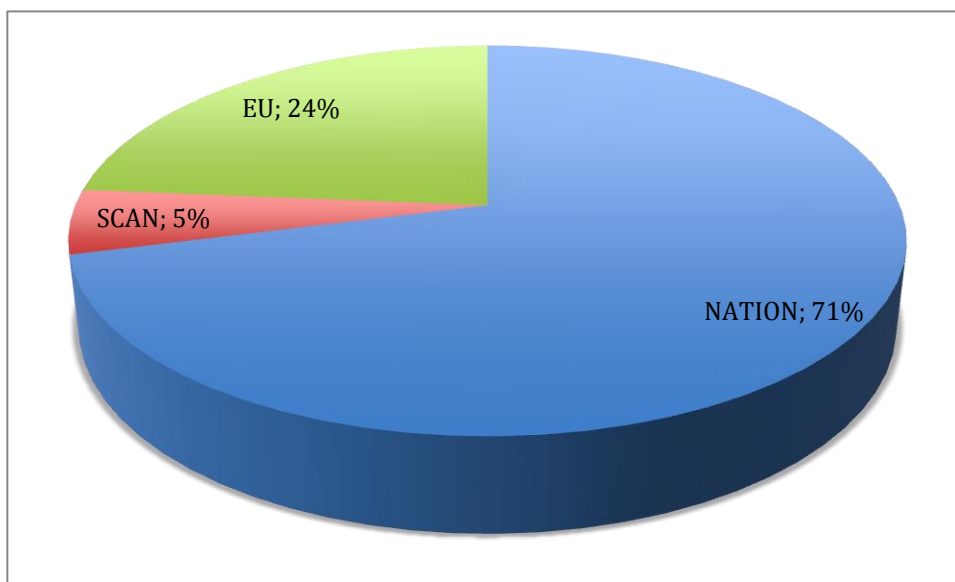


Figure 44. Regional shares for Scandinavian films 2002-2006 based on cinema admissions for Norway, Denmark and Sweden in Scandinavia and EU36.

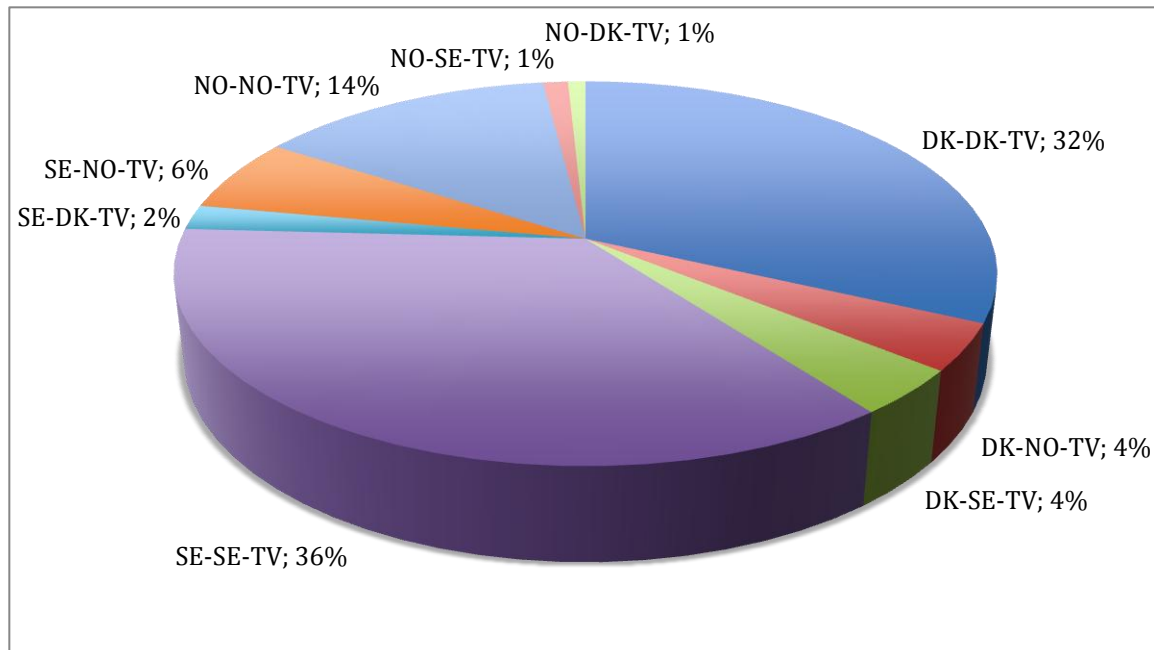


Fig 23. Regional shares for films 2002-2006 on TV in Norway, Denmark and Sweden.

## Genres and trends in Scandinavian Cinema

As already indicated in the statistical overview of the cinematic exchange patterns between Denmark, Norway and Sweden, the relatively institutionalised tradition of collaboration and co-production has not as of yet resulted in a well functioning distribution of the national films on the neighbouring markets, and very few films achieve real Scandinavian success outside their own market. If it was not for the much stronger success for Scandinavian television drama (where especially Swedish crime series or crime TV-films are a big success), and the both national, Scandinavian and also international success of Danish television drama, one would have to conclude the Scandinavian film project is a failure. However, there are success stories, and the picture improves if viewing figures for Scandinavian films on TV are added, both for their own market and the other Scandinavian markets. TV figures generally show that people in Scandinavian countries are not adverse to watching films from other Nordic countries, even though their preference might still be for films from their own country or American films.

This role of television in promoting a transnational film culture relates to its traditional role as a national platform for news, entertainment and fiction. The key factor here has been the national public service channels. This, however, looks set to change as national television becomes increasingly fragmented with many more channels targeting specific audience groups and with a general move away from a few channels holding the main share. The move towards digital channels, VOD and other web-based forms of film viewing all point in the same direction, especially among the younger segments of the population. However, in many European countries as well as in the Scandinavian countries, the old public service channels have already subdivided into several digital channels, but still have a firm grip of national audiences. In Denmark, DR has managed to keep the Sunday evening timeslot between 8 and 9 pm for quality TV-drama, often attracting between 1.5-2.5 million viewers. Also, films can reach an audience of more than 1 million on some channels in Scandinavia. In Norway, NRK1 drew 700.000 viewers to Alexander Eik's romantic comedy *Kvinnen i mitt liv* (a film seen by 226.000 in the cinema, and thus also a cinema success). In Denmark, a serious drama like Jesper W. Nielsen's *Okay* (2002) was seen by almost 1.1 million viewers on DR1, a film that was seen by 235.000 in the cinema.



However, somewhat characteristically for the lack of efficient and successful Scandinavian film exchange, neither of these films, despite their national success, managed a successful transition onto their neighbouring markets. *Kvinnen i mitt liv* was shown neither on Danish television, nor in Danish cinemas, and this was echoed in Sweden. *Okay* did in fact open in both Norwegian and Swedish cinemas, but it only sold 4.838 tickets in Norway and 11.798 in Sweden. Again, television saved the film: on Norwegian Television (TV2) the film attracted 119.000 viewers, whereas on Swedish television it managed to attract an astonishing 420.000. These two films were not Scandinavian co-productions, but the story repeats itself with many co-produced films, which still do not break the barrier of their co-producing markets, not even with merely satisfactory cinema audience figures.

### The popular national film and the popular main genres

It has often been pointed out that since around 2000, Denmark has been one of the countries with the biggest national market share in Europe. This is clearly indicated by the average figures for 2002-2009 for the share of national films, European films and American films in Danish cinemas.

Region	Share in %	Average ticket sales per film
Denmark	25.8	140.400
USA	60.1	67.500
Europe	12.5	22.800

Figure 24. Average regional film shares in Danish cinemas between 2002-2009.

What these figures tell us is that national films in Denmark are very popular with the national audience and that the average Danish film achieves a much higher audience figure than both European and American films. It is only the quantity of American films that provide them with a stronger market share. Denmark's position, compared to the Nordic market as a whole, shows that just as we talk of the big five (film nations) in Europe, we may talk about the big two in Scandinavia: Denmark and Sweden. Sweden and Denmark have a 30+ production of films a year and an average *annual* sale of tickets on their national home market well above 3 million, with both Norway and Finland only managing 1,9 and 1.3 million (according to the DFI report from 2010 on Danish films abroad).

However, a clear tendency emerges from the more detailed data on films produced in Denmark, Norway and Sweden, where many of the films with a solid national success are not transgressing their neighbouring Scandinavian markets. Furthermore, when it comes to export, there is a clear tendency towards the dominance of only a few genres, with drama taking the lead. This means many films and film genres dominating the national market are not exported, and also that some genres are almost absent on the Scandinavian export market, either because they are only made in few numbers (for instance thriller, horror, adventure, action etc.) or because they – although produced in a large quantity – do not cross borders (like many family films and some comedies). If we look at the numbers for Danish drama, we can see that drama in Denmark have less than or around 1/3 of the national market share in both cinema (approx. 5 million tickets out of 16 million) and on television (13.6 million out of 39 million). On the Norwegian market alone it is around 50% or more (cinema: 246.000 out of 470.000; television 2.8 million out of 5 million). In Sweden, this tendency is even more palpable: out of the total cinema-sale of 680.982 tickets for this period, drama counts for 582.242, thereby significantly beating comedy and all other genres when it comes to Scandinavian shares.

### **The Scandinavian audience: average profiles**

The profile of the Scandinavian film viewer, as we have established, cannot be described based on cinema admissions, since Scandinavian film culture is characterised by a lack of knowledge of the audience. Whereas television has a systematic and instant image of how viewers react to programmes, a similar set up does not exist for the film culture. Audience knowledge is invaluable and the film culture ought perhaps to listen more to its audience, without being steered too rigidly by dangerous attempts of trying to predict successes and failures. Without audience insight you will yourself fumbling in the dark. We know that some production companies do make use of audience data and test screenings, but there seems to be a scepticism towards the same kind of approach used in TV productions where data on genres and audiences are used as creative tools.

Since we do not have more qualitative data on cinema audiences, and have not been able to find complete data from all three countries on television either (the data on segments are not directly compatible), we have made a summary of the Scandinavian film viewer, based on TV data from Danish television, and only on Danish and Swedish films. The data on Norwegian films on Danish television is so negligible, because few films have been shown and the audience figures so

low they cannot produce any statistically significant results. We do, however, have data on age and segments.

The data on age confirms that the groups from 31+ and 50+ are overwhelmingly dominant (66%) and that Scandinavian cinema has a problem with the younger generation (see fig. 25). As already pointed out, Scandinavian cinema also has a problem with the modern and individual segments. The graphs on segments for both Danish and Swedish cinema indicate the modern and traditionally individual life styles are strongly or moderately below the average for these groups, and that both the modern and traditional collective life styles are above average (see fig. 26 and 27). This clearly has to do with the type of genres dominating Scandinavian cinema, a leaning towards social drama of a different sort, a perfectly legitimate and artistically important genre, but not a genre that might satisfy all groups and life styles.

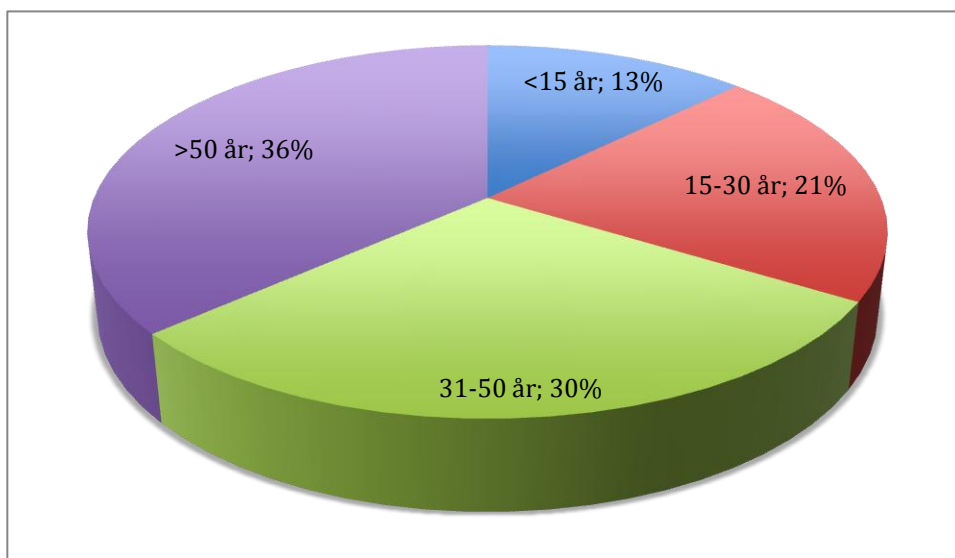


Figure 25. Average age. Target affinity % Danish films on TV.

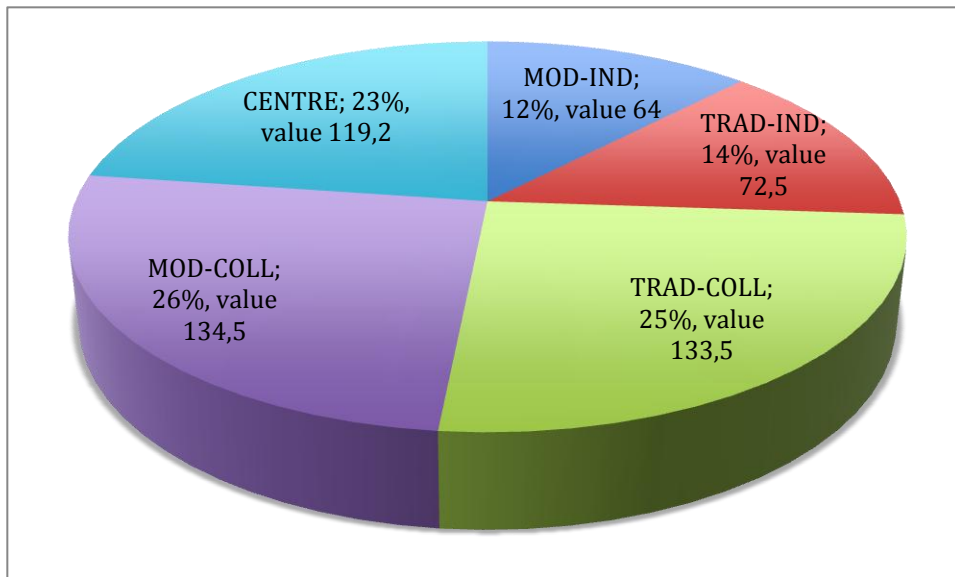


Figure 26. Segments. Target affinity %. Swedish films on Danish TV.

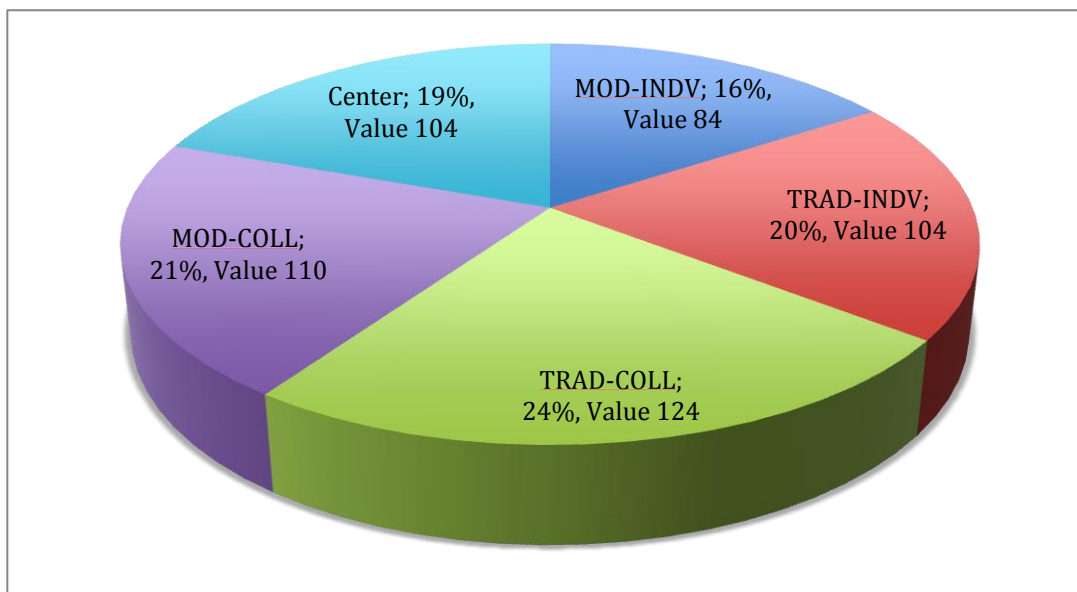


Figure 27. Average target affinity %. Danish films on TV. Segments.

The popularity of the national films on their own national market, a tendency illustrated by the Danish figures (but where variations can be found in the whole of Scandinavia), and the fact that this popularity is not transported into a Scandinavian success, calls for a more qualitative analysis. In the following chapters, the key Scandinavian genres will be characterised through genre analysis and an analysis of audience reach and appeal, as well as analysis of data on audience segments.

### Family pleasures: the Scandinavian family film

The Scandinavian family film is one of the most popular genres on all the national markets and at the same time a genre that is almost never exported. The film is almost always a national production only, made with the support of the market oriented support scheme of the film institutes. In Denmark, it is films like the franchises *Min søsters børn* (*My Sister's Kids*) or *Far til fire* (*Father of Four*), which are both remakes and updates of classical success formula films from the 1950s. In Norway, the equivalent are the *Olsen Banden* films (*The Olsen Gang*), which are imported and remade on the basis of a Danish formula, still being used also in Denmark. The Olsen Banden film formula is actually one of the few rare examples of a very national, popular formula that has been a major export success, both in Scandinavia and some parts of Europe (e.g. Germany). In Sweden, the Olsen Banden films exist as the *Jönson Liga* films, and in the period between 2002-2006 two of these films reached the Swedish screens, now in the form of *Lillajönsson ligan*. The films are not as popular in Sweden as in Denmark and Norway but they still sell around 250.000 tickets in the cinemas. In Sweden, there are generally more popular single films than family franchises, and the crime film and crime series remain very popular.

The family film in its essence is a comedy with elements of other genres (farce, crime etc.), but all of this is designed and made for a broad family audience and thus aiming at reaching both genders, all ages and lifestyle segments of the national population. *Min søsters børn*, a Danish series with two films made between 2002-2006, were together with other similar series very popular, and amongst some of the most seen films in Denmark in this period (see fig. 28). However, none of the films, in their Danish version at least, made it to other parts of Scandinavia, or for that matter to other parts of the world. Despite the fact that the plot and narrative of these films could be considered universal and can be found in most film cultures in national variations, these films are not part of any co-production or international distribution. Some of the films were in fact shown in Norway, but achieved very small audience figures both in cinema and on television.

Film title	Year	Cinema	TV	Total
Min søsters børn i sneen	2002	525.493	1.200.000	1.725.493
Far til fire gi'r aldrig op	2005	506.770	829.000	1.335.770
Min søsters børn i Ægypten	2004	466.480	871.000	1.337.480
Anja efter Viktor	2003	345.563	571.000	916.563
Far til fire i stor stil	2006	331.616	1.030.000	1.361.616

Møgunger	2003	305.299	711.000	1.016.299
Krummerne - så er det jul	2006	193.166	870.000	1.063.166

Figure 28. Danish family comedies 2002-2006, film and TV figure, Denmark.

If we consider these films as films reaching out for all groups and segments it is, however, also clear when we look at the demographics that they only reach parts of the audience. In other words, these films draw their audience much more from selected segments than others (see fig. 29).

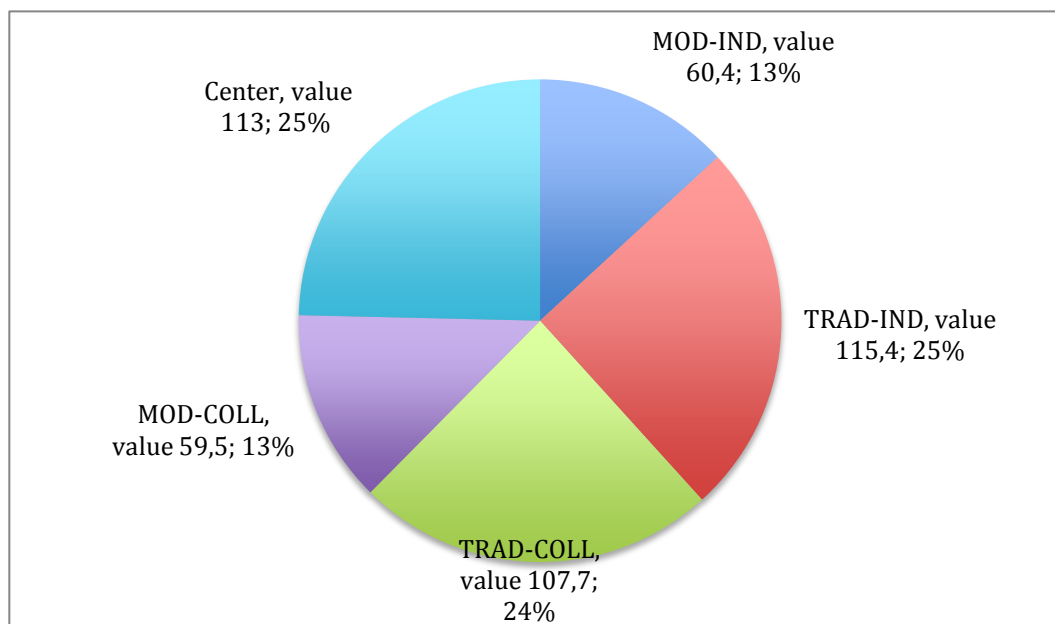


Figure 29. Min søsters børn. Segments. Target affinity data %, value. Based on Danish TV data.

These figures are based on Danish TV-meter data and the large viewer group should mean the data is valid. The data are index-figures, which means that figures over 100 equals a representation above average of that segment, while figures under 100 means representation below average of the segment – in relation to this segment's share of the Danish population. What the figure shows is that the film mostly appeals to the traditional groups, typically the centre, centre-right groups who have a more traditional outlook on family values and who are not very keen on modern technology, globalisation and changes in life style as such. But the traditional community oriented segment of the population also represent a group of the traditional with a very strong social community feeling, a belief in the welfare society. Visibly, it is only the centre and traditional groups that are above

average here, whereas both modern groups clearly reject this film. The fact that the neutral centre group is above average also indicates the film's appeal to mainstream groups.

Looking at the age groups to which these types of films appeal, it is also obvious (see fig. 30) that the main audience consists of the older (50+) and the younger (<15) audience: it is parents, grand parents and their children and grand children who watch these films.

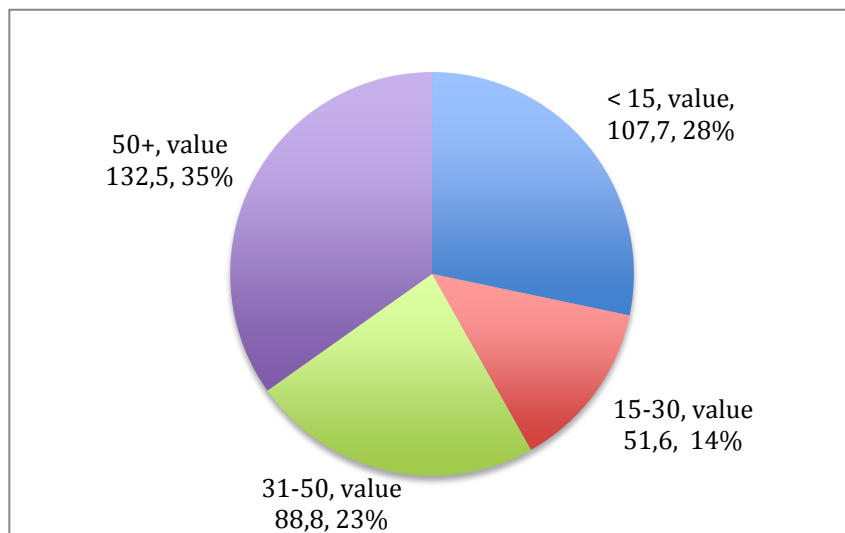


Figure 30. Min søsters børn. Target affinity %, age, based on Danish TV data.

In Norway, we find similar kinds of family films, but in the form of the *Olsen Banden Jr. films*, of which three were represented in both cinema and on television between 2002-2006. The total audience for these three films in the cinema was just over one million, and on television the audience was 728.000. Unlike in Denmark, the television figures in Norway for these films are normally lower than for cinema. Furthermore, these films are only marginally more popular than single film comedies like *Mors Elling* with a total audience in cinema and on television of 907.407, a film that may be seen as much more of a realistic drama with comedy elements than the formula driven family comedies in Denmark and the Norwegian equivalents. The story of the relation between a middle aged son and his old mother contains farcical elements, but it is not a full blown cinematic farce such as the NRK TV comedy with Fleksnes (played by the actor Rolv Wesenlund, based on the British show *Hancock's Half Hour* and running impressively from 1972-2002) for which Norway is still famous in the rest of Scandinavia. *Mors Elling* clearly moves between drama with its

critical eye on modern mass tourism, and – for a comedy – the tragic ending with the death of Elling’s mother is more typical of drama than comedy. The first film *Elling* (2001) was a moderate success in Sweden (91.130 tickets) and in Denmark (37.236), at least compared to the normally very low figures for Norwegian films, but the films so far never made it onto Danish or Swedish television.

In Sweden, this kind of serial family comedy was not strongly represented in the period 2002-2006, although the Olsen Banden formula also had a Swedish version. The average Scandinavian film and television viewer is much more likely to link Sweden with crime films or series like those of Beck or Wallander. In Denmark, these films are mostly sent on TV, and in this period they generated an audience of almost 15 million viewers.

### **Dealing with reality: contemporary and historical drama in Scandinavia**

There is overwhelming empirical evidence to support that drama as a genre in a Scandinavian context is an extremely dominant and important genre, and that both the national and Scandinavian cinema culture as a whole has mainly achieved its limited success with films of this genre. It is primarily drama that crosses the Scandinavian borders. As documented in fig. 20, there were seven dramas on the Norwegian top ten cinema list between 2002-2006, including one drama for children and young people. The three remaining films consisted of one comedy and two animation films. This is echoed in Sweden, with eight out of ten films belonging to the drama category, and only one comedy and one thriller. Swedish films released in Denmark also tend to be dramas, although the ratio is only six out of ten, something that is repeated with regards to Norwegian films. When it comes to Norwegian films in Sweden and Swedish films in Norway, the picture becomes more blurred, partly because in general Norwegian films in Sweden don’t do well. Out of the top ten Norwegian films, however, we still find five dramas, and (as is the case with Swedish and Danish dramas on the two other markets), dramas dominate not only in terms of released numbers, but also where audiences are concerned.

As already shown with Danish/Norwegian data, drama is often more popular abroad than at home, in the sense that the total audience figures for drama on the Norwegian market is proportionally higher than drama on the Danish home market. While drama occupies slightly more than 1/3 of the national market, it dominates between 50-75% of the Scandinavian market. The national distribution of genres can be seen in fig. 31 (Denmark), fig. 32 (Norway) and fig. 33



(Sweden). The genre categories used here are purposefully broad for the sake of simplicity and clarity: *drama* of course includes a variety of sub-genres, including melodramas, romantic dramas, social dramas as well as very experimental forms of art cinema drama. The *comedy* genre also includes different types of comedies, like the family comedies we have already analysed, romantic comedies etc. *CY-films* (films for children and young people) include drama, comedy and animation. The group *other genres* is defined here as containing the mainstream genres that are often rather rare in Scandinavian film culture: thrillers, action films, science fiction, adventure and horror. What the figures from all three countries show (with minor variations) is that drama dominates, followed by comedies and CY-films and the other genres lacking significantly behind.

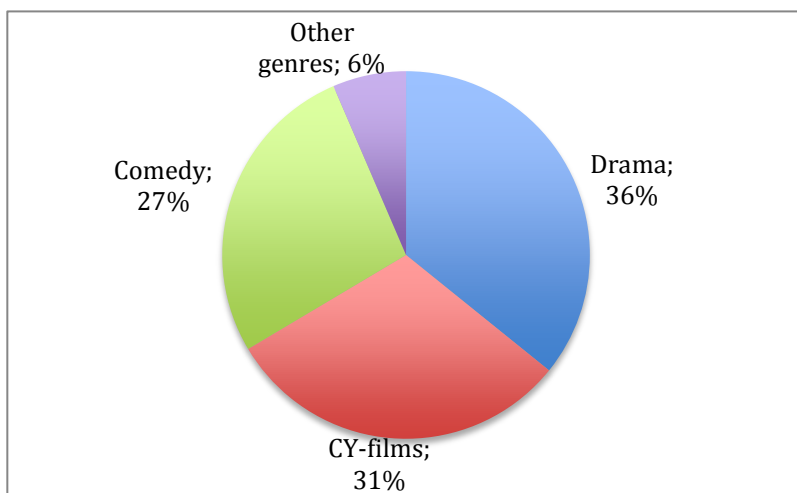


Figure 31. Danish films 2002-2006 by genre, data from both Danish cinema and television.

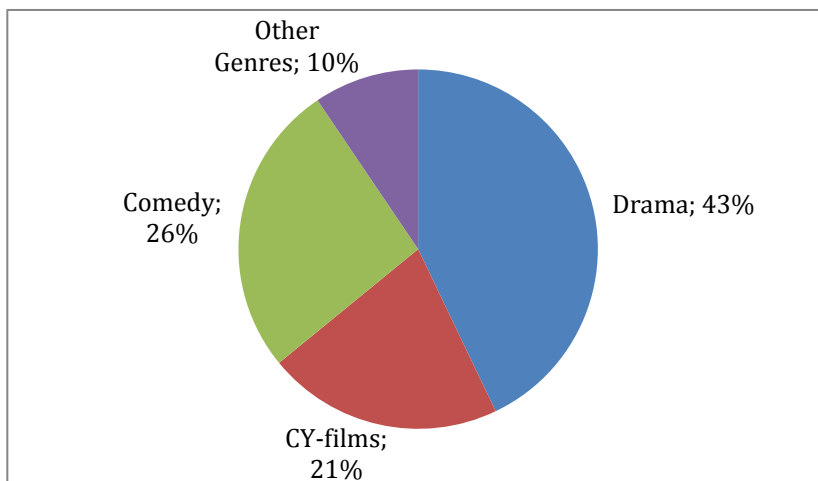


Figure 32. Norwegian films 2002-2006 by genre, data from both Norwegian cinema and television.

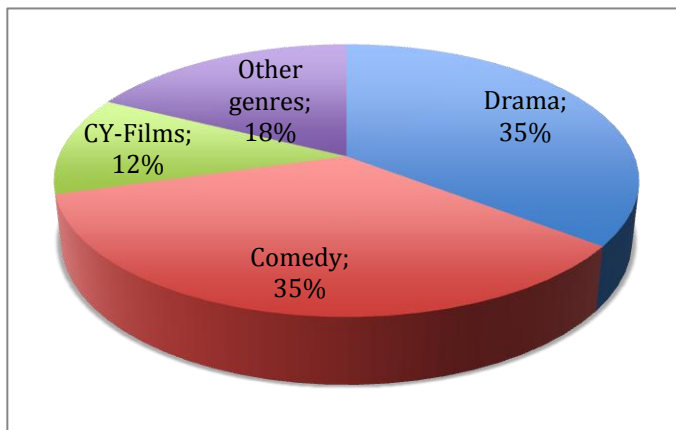


Figure 33. Genres in Swedish films 2002-2006, cinema admissions.

Let us take a closer look at a few Scandinavian dramas, both of the popular and less popular kind, a few that managed transnational success and some that didn't. We have already analysed the success and profile of the most successful Scandinavian drama during this period, Kay Pollak's *Såsom i himmelen*. This film represents melodrama, with love and human psychology and relations close up, and clearly draws on Scandinavian landscapes and characters. However, it barely makes it into the Danish top 10 of Swedish films and doesn't do well in Norway either – it's the national and European success that matters.

Other types of dramas from this period, however, seem to speak more directly to both a Scandinavian and a European audience although their success is rarely achieved across the board and varies within the Scandinavian countries. Some of the Danish dramas from this period are characterised by realism and a more socially oriented narrative that seems to fare well with a Scandinavian audience (even if not to the same degree as crime blockbusters, e.g. the films based on Stieg Larsson's novels). Susanne Bier proves to be the second most popular drama director in Scandinavia, noticeably for *Efter brylluppet* (*After the Wedding*, 2006). The film sold 388.010 tickets in Danish cinemas, 150.593 in Sweden and 30.356 in Norway. The film was a Danish production only, and the fact it is the number one Scandinavian film in Sweden has thus nothing to do with effects of co-production.

The difference between the film's success in Sweden and lack of success in Norway might be more due to the fact that Bier is considered a Danish-Swedish director in Sweden and the fact that popular Swedish actor Rolf Lassgård stars in a leading role. Nevertheless, the film's somewhat

disappointing Norwegian cinema audience figures did not prevent it from being number one on Norwegian television with 483.000 viewers. If we take the total audience figure for the film, including Scandinavian cinema and television and European/US cinema figures, the film has reached an audience of about 2.5 million to date.

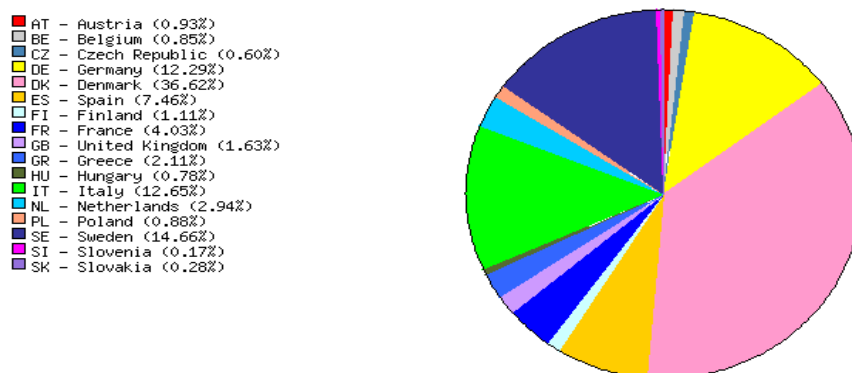


Figure 34. Lumiere data. Susanne Bier's *Efter brylluppet* (After the Wedding, 2006), regional audience distribution EU 27. Not the big success in the big five countries, but a good spread in countries in Eastern and southern Europe as such.

As a drama, *Efter brylluppet* is characterised by a new trend in Scandinavian and European drama in which the global problems are mirrored and reflected in a national, classical family drama. It is a form of new social, global drama, which raises a number of the perhaps often abstract problems of globalisation in a concrete, dramatic and narrative way. The film's popularity in Scandinavia and in Europe might have to do with this ability to combine everyday life with a global agenda. That this type of film is indeed on the rise in Scandinavia can be seen by the audience success in both Denmark and Sweden of Susanne Bier's latest film *Hævnen* (*In a Better World*, 2010), dealing with a similar agenda pushed even more to the forefront.

How may we evaluate this film's attraction to different segments of the audience?<sup>3</sup> As it is documented in fig. 29, the film retains a very clear segment profile, a profile very different from the family comedy *Min søsters børn* and also the melodrama *Såsom i himmelen*. The film scores much higher in the collective-community oriented segments, both the modern and the traditional and

<sup>3</sup> We have only been able to obtain data on segments following the so-called Kompas-model from Danish television. The data from Norway and Sweden is not directly compatible, and we have been unable to adjust the three systems within our time frame. Thus, segment data is only based on Danish data.

also the centre group, whereas when it comes to the individual segments it is clearly below average. This indicates the film leaves a strong imprint on the minds of people worried about tendencies in both their everyday life and family life, and people (both left, right and centre) that place importance upon today's global problems.

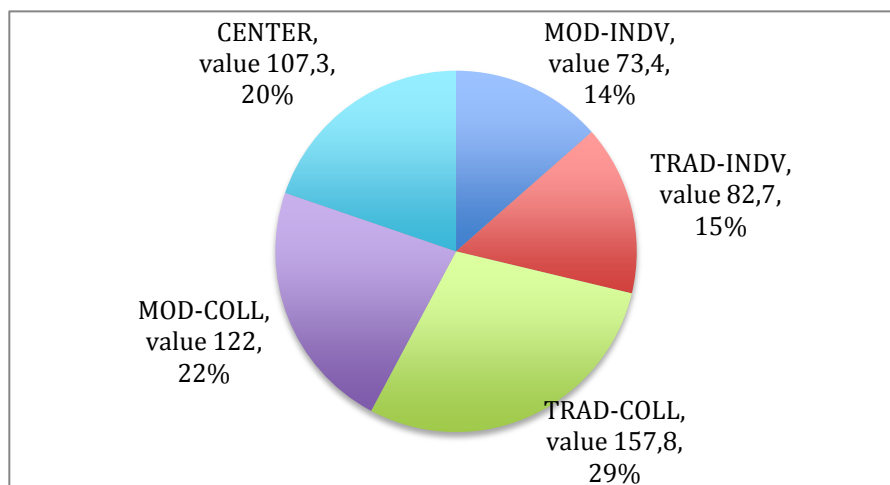


Figure 35. *Efter brylluppet* (Susanne Bier, DK). Target affinity %, value, DK-TV-data.

A similar audience profile to that of Susanne Bier's films can also be found for Danish director Per Fly, the second big Scandinavian social drama director whose focus is less on global problems, but instead on the class-based dilemmas of the modern welfare state. Per Fly's trilogy, *Bænken* (*The Bench*, 2000), *Arven* (*The Inheritance*, 2003) and *Drabet* (*Manslaughter*, 2005) did reasonably well in Scandinavia and the rest of Europe. However, the film did much better in Norway, where *Arven* is the most seen Danish film in this period (87.422 cinema tickets), whereas in Sweden it only sold 28.239 cinema tickets. Again, television comes to the rescue – in Denmark alone it reached 847.000 viewers, in Norway 331.000 and in Sweden 335.000. All in all this brings the total Scandinavian audience to about 2.5 million.

We have already analysed one of the Swedish melodramas, but looking into the other dramas produced in Sweden in this period it becomes clear there are national differences between genre trends in Scandinavian cinema. Apart from the type of social and global dramas in Danish film and the more experimental art cinema drama (which will be dealt with in a later chapter), the Swedish drama seems much more oriented towards a traditional national space and psychological and social problems related to families or national institutions. This is the case with *Såsom i himmelen*, as it is with some of the other dramas on the Swedish top 25. The second most seen

drama is Mikael Håfström's *Ondskan* (*Evil*, 2003), a film based on a bestselling novel by Jan Guillou, concerning the internal fights and struggles in a Swedish boarding school. The local drama reflects more existential conflicts on a much larger scale, the roots of evil in societies everywhere. The film was seen by 959.233 people in the cinemas, and by 950.000 on Swedish television. In Norwegian cinemas it sold only 34.000 tickets, but on television 426.000 people watched the film; in Denmark it was seen by 50.776 in the cinemas and on television by 274.000, which meant that the film had a total Scandinavian audience of 2.7 million. The film had clear elements of a CY-drama and the segment profile of the films shows this, see fig. 36.

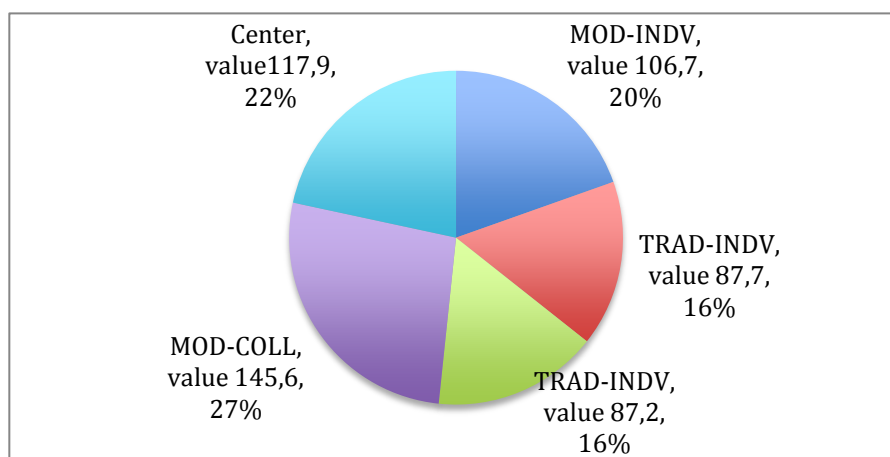


Figure 36. *Ondskan* (Mikael Håfström, SE). Target affinity %, value, DK TV data.

Modern segments and the individual segments are stronger represented than normally and the traditional clearly under average. The younger, more individualistic segments respond to the theme of the film due to its action genre elements, similar to e.g. *Fight Club* (David Fincher, 1999) and because it deals with conflicts between the individual and the collective, and furthermore has a critical view on traditional, established institutions like boarding schools. This is further confirmed by the age data, where the 15-30 group (103), the 31-50 (131) and the 50+ group (105) are above average, but with a leaning towards the younger segments.

In Norway, dramas are generally oriented towards the same themes as we find in Swedish cinema. Global dramas are therefore not seen often here either, and the two most popular dramas from Norway have a very different profile. Ole Bornedal's *Jeg er Dina* (*I am Dina*, 2002) is a historical period drama based on a bestselling Norwegian novel, and the film got a total Scandinavian audience in cinema and on television of 2.3 million. The second most popular drama is *Uno* (Aksel Hennie & John Andreas Andersen, 2004), a dark social drama about a young man, his

family and friends (a group of small time criminals) in the inner city of Oslo, caught in a vicious circle of death and social decline. The film had a much lower total Scandinavian audience of only 504.630 and was not shown in Denmark and Sweden, neither in the cinema nor on TV. The theme and the visual style of *Uno* bear similarities to *Ondskan* and belong to the social drama tradition also represented in Per Fly's films.

Ole Bornedal's *Jeg er Dina*, on the other hand, represents a drama type that is scarcely found in the films between 2002-06, though it was previously strongly represented in Scandinavia. In a modern form the historical drama is back again with *Max Manus* (NO, Joachim Rønning & Espen Sandberg, 2008) and *Flammen og citronen* (*Flame and Citron*, DK, Ole Christian Madsen, 2009), both historical dramas combining a more action packed genre style with classical drama elements. *Jeg er Dina* contains both elements of historical period drama and romantic drama, and based on Herbjørg Wassmo's bestselling novel *Dinas bok* (*Dina's Book*, 1989) the film also tells the story of a strong headed and independent woman, with references to the current society and the modern liberation of women and free love. It was the fifth most seen film in Norway in this period (302.000 in cinema and 568.000 on television), and the film was also the most seen Norwegian film in Denmark (260.897 and 853.000 on TV) and in Sweden (31.022 and 290.000). All in all, it reached a Scandinavian audience of more than 2 million.

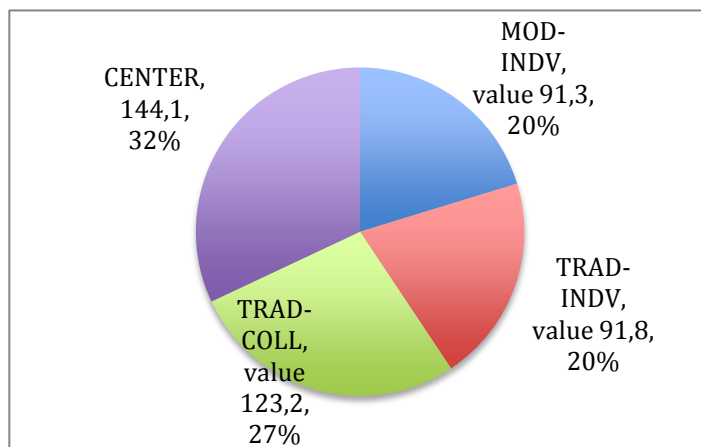


Figure 37. *Jeg er Dina* (*I am Dina*, NO). Target affinity value, segments, Danish TV data.

If we examine the segment profile it becomes evident that it is the traditional collective segment that dominates, not surprisingly, since this is the cultural segment par excellence, and if we look at age groups and gender, unsurprisingly women are well represented (117), just as the 31-50 and

50+ segments are heavily overrepresented. However, a further look at the film's performance in Europe reveals that despite Gerard Depardieu's leading role in the film, this was not a European blockbuster drama. Even in France, the film only sold 22.000 tickets, and nowhere else in Europe did it sell more than a few thousand tickets.

### **Crime, suspense, horror and action: Scandinavian genre films**

Amongst our box office data presented here, covering different film genres, the group 'other genres' sold by far the smallest amount of tickets. In this context, 'other genres' covers the more action and suspense oriented mainstream genres that are not comedies, drama or CY-films. In short, the genres often preferred by the younger audience segments, which are not often supplied by the national, Scandinavian cinema, but by Hollywood, or by UK-US co-produced film series like *Harry Potter*, *James Bond* and others. The culturally oriented support system in Scandinavia, in combination with the traditional discourse on national and European cinema as serious art cinema or simply the sheer lack of budgets and appropriate talents makes it difficult to produce films of this kind. But the new generation of directors from the 1990s and onwards are nevertheless more open minded when it comes to working in these genres as is the case with Nicolas Winding Refn or Ole Bornedal in Denmark and Roar Uthaug in Norway. In general, however, only a few thrillers, horror films or action movies are produced in Scandinavian cinema. They are not considered culturally and artistically 'kosher', since they almost always carry with them an air of commercialisation, Americanisation and financial speculation. A provocative quotation from the Danish director Ole Bornedal concerning his thriller *Nattevagten* (*Nightwatch*, 1994) illustrates this:

There had been two big box office successes before *Nightwatch*. One was *House of the Spirits* (Bille August), which was the film that our parents and grandparents went to see. That film was able to appeal to everyone, because it was Bille August's film with lots of big stars. The other film, *Waltzing Regitze* (1989), was a classical Danish art film at its best. It effectively conveyed a fine story that simply appealed to a wide audience. *Nightwatch* was in many ways more modern and appealed to a younger generation (...) made use of a contemporary cinematic language while mobilising the classical thriller genre (...) it pursued certain entertainment values almost shamelessly. I don't think that the film is a great work of art, but it did help to legitimate the idea that even European art film can make good use of generic stories.

(Bornedal in Hjort & Bondebjerg 2001: 233-234)

Looking back at the period before 1990, the situation was even more unbalanced in Scandinavian cinema, if one considers diversity and inclusion of all genres of importance. After 1990, a new generation of filmmakers started engaging with these genres, challenging and mixing them to new hybrid forms, but still these genres do not have a strong place in Scandinavian film culture.

There is, however, one area in which Scandinavia, and especially Sweden, has a long track record: the crime film. This is also founded in a strong literary tradition, dating back to the crime novels of Sjöwall & Wahlöö that combined suspense and social critique. The recent Stieg Larsson novels and films from the 2000s are modern incarnations of this tradition, more than mere entertaining crime stories, instead creating narratives into which big social and even often global problems are imbedded.

The Wallander and Beck franchises together with the *Millenium* trilogy based on Stieg Larsson's novels singles out Sweden as the number one crime film nation in Scandinavia. The two Beck-films produced in this period, *Beck – Sista vitnet* (Harald Hamrell, 2001) and *Beck – Skarpt läge* (Harald Hamrell, 2006) were each seen by almost 275.000 people in Swedish cinemas and the Wallander film *Innan Frosten* (*Before the Frost*, Kjell-Åke Andersson, 2005) by almost the same number of people (257.346), whereas the film *Paradiset* (Paradise, Colin Nutley, 2003) based on a novel of Liza Marklund was seen by 155.000. The 'cinema life' of these films, however, is no more than the tip of the Scandinavian iceberg. On Danish television alone, TV series of Swedish crime films of this vein have attracted more than 15 million viewers. The profile of the Danish TV audience displays a clear overrepresentation of the 'collective segment', both modern and traditional (see fig. 38), thus indicating that the films are considered to be dealing with both contemporary and social issues, rather than mere entertainment. The age profile for the films follows a similar pattern: the 31-50 group has an above average representation (index 103), the 50+ heavily above average (174) and the younger are barely represented at all (the 15-30 segment only index 33). Unlike other genre films discussed in this section, it would appear these films are not attracting the young and modern segments at all.

Let us now examine more closely two very different crime genre films. *Innan frosten* is a contemporary police drama about a quasi-religious organisation that has withdrawn to the vicinities of the southern Swedish town of Ystad. Here, a series of spectacular misdeeds and murders are orchestrated. As a consequence, Ystad police detective Kurt Wallander initiates an investigation. Additionally, events are complicated by the fact that Wallander's daughter Linda, a recent police academy graduate, has joined the Ystad police force. While the investigation progresses, ultimately triumphant, a parallel story concerning the bond between father and daughter develops.



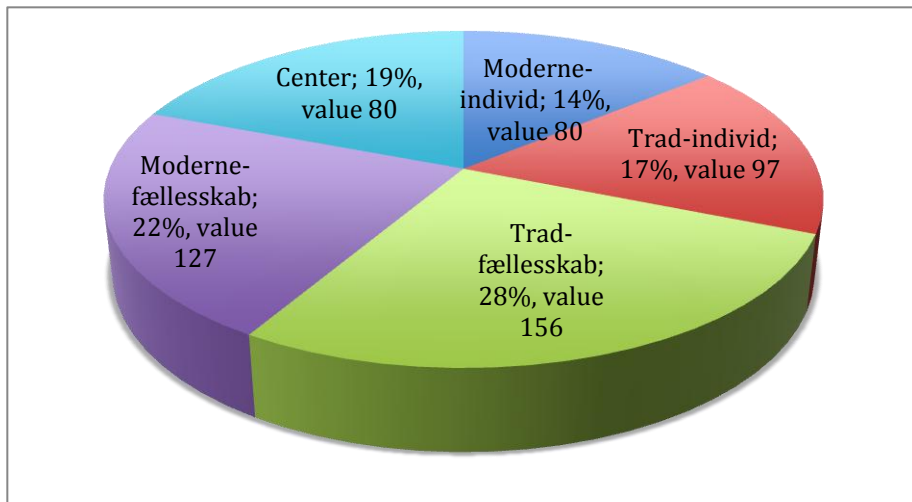


Figure 38. Swedish crime films on DK TV. Segments (target affinity %). Average of all films 2002-2006.

*Innan frosten* is a topical story in several ways. It is based on the ninth book in the successful series about Ystad police detective Kurt Wallander, written by Henning Mankell. Several of these had previously been adapted for the screen. Moreover, the narrative is loosely based on several well-publicised incidents. In the international context there was the notorious Jim Jones and the Peoples Temple killings in Guyana in 1978. Domestically, the so called Knutby murders had occupied Swedish tabloids and readers ever since a series of appalling events among the representatives of a small Pentecostal congregation outside Uppsala had been exposed in 2004.

The film opened on January 14, 2005, and co-producer and distributor Svensk Filmindustri circulated 85 copies. Despite lukewarm reviews, it sold 257 337 tickets at the box office, making it the fifth most seen Swedish feature film and the thirteenth of all films that year. *Innan frosten* was also released in Denmark, Finland, Norway and the Netherlands. Together with a few additional territories the theatrical run abroad added some 30.000 admissions.

Although this is a relatively successful cinema audience story, what is noteworthy about *Innan frosten* is the production setup behind it, which, in a way, represents one of the few financial success stories in contemporary Scandinavian audiovisual production (Hedling 2010c). Produced by Yellow Bird Pictures – now part of Zodiak Entertainment – together with TV4, Degeto-Film and the regional film fund Film in Skåne, the film was also supported by Canal+ Scandinavia, Danmarks Radio, TV2 Norway, MTV3 Oy and Svensk Filmindustri. The film is thus a Swedish, Danish,

Norwegian, German co-production with various television companies, particularly the German ARD/Degeto, providing most of the funding.

*Innan frosten* was consequently conceived as a marketing engine of sorts for a series of in total thirteen films about Wallander, all starring newcomer to the role Krister Henriksson as Wallander. Except for the first film, they were all based on short drafts by Mankell and produced consecutively in pairs during a period of almost two years. The location was Ystad where most studio work was also conducted. The project was initially announced as the largest ever film project in Scandinavia and the overall budget reportedly stood at SEK 190m (it ended up at about SEK 212m according to one of the co-producers).

Of the thirteen films, three received theatrical distribution in Sweden. Two of those had been granted production support from the SFI, with *Innan frosten* being awarded SEK 3 million. Most of the films, however, were designed as straight-to-DVD fare and later on showed up on cable and on broadcast television successively. The entire series was also available on DVD as well as broadcast across Scandinavia and Germany. Much later, in territories like the Netherlands and the UK, the series was also shown on a variety of television networks.

Even if the production and distribution setup may appear very big within a Scandinavian setting, it was well established at the time. With a series of six Sjöwall-Wahlöö films, Danish producer Ole Søndberg together with various colleagues had first pioneered a similar setup in the early 1990s. Since then, it had been applied on several occasions and appears directly linked with the acquisition of rights to Scandinavian and particularly Swedish crime fiction. These literary properties do in general have TV series potential since they are popular in all of Scandinavia as well as in Germany and therefore make transnational funding feasible (Waade 2010). The novelty about the Wallander series was that the dexterous way in which the concept was linked to the new Swedish regionalised production environment. Since then, similar large crime productions have been undertaken with properties such as Gunnar Staalesen's *Varg Veum* (2007-2008) in Bergen, Norway, and again *Wallander* (2008-2010), also remade in the UK with Keneth Branagh in the lead, and thus also an international success and brand.

*Innan frosten* may not be festival fare. Nevertheless, the film is representative of a dependable, broad film of the kind that seems readily fit for finance, audience friendly and that has repeatedly been met with considerable interest by television audiences abroad. However, apart from the rather solid success as documented by the Danish TV figures, this film was neither a success in

Scandinavian cinemas, nor elsewhere in Europe. The films have a life of their own on TV and DVD, and are thus examples of a Scandinavian tradition for mostly TV films. They are, however, also examples of a Scandinavian genre tradition that doesn't alter the age and segment profile of Scandinavian film in general.

An interesting genre hybrid with huge success in Sweden is Josef Fares' *Kopps (Cops, 2003)*, a film about a very regional police station that mixes crime and action comedy to such an extent it seems to be able to attract at least some parts of a younger audience. In the film, especially one of the policemen has fantasies taken directly out of American action films, and the film, at least based on Danish TV data, attracted a much higher number of the 15-30 group, than the traditional crime films (see fig. 34), even though the 50+ group was also strongly represented. The viewing figures for the film on Danish TV (a mere 82.000), however, were rather disappointing compared to the Swedish success. In Sweden, the film sold 770.000 tickets in the cinemas and was seen by 1.5 million viewers on TV. But the age profile of the film from Danish data is not confirmed among the Swedish TV viewers: the core viewers are the 50+ male viewers, indicating that the film's regional milieu and characters doesn't attract a younger, modern and urban group. In Denmark *Kopps* was seen by only 50.000 people in the cinema (though still number three on the Danish box office list of Swedish films), whereas 286.000 Norwegians saw the film in the cinema, making it the most popular Swedish film in Norway from this period.

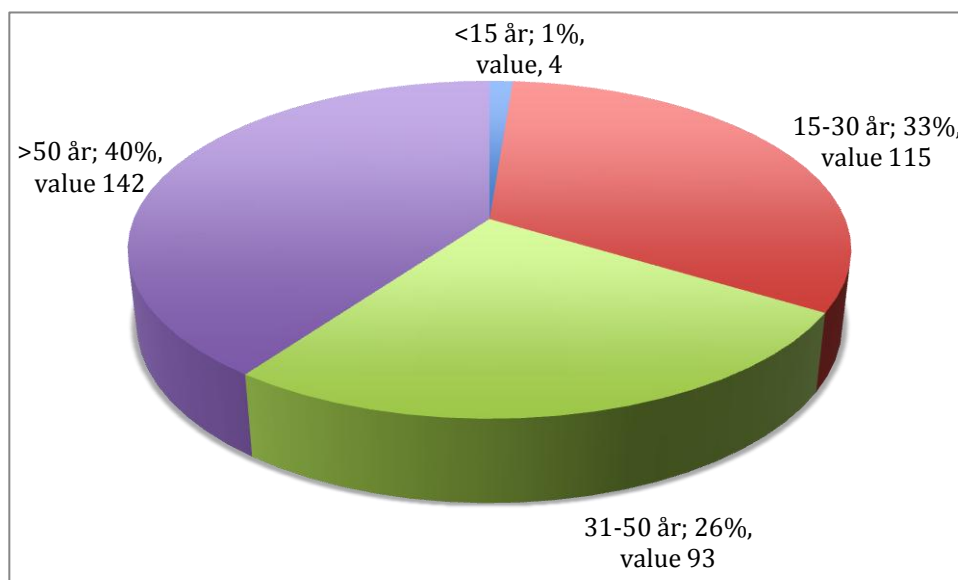


Figure 39. Age group representation in Danish TV viewers of *Kopps*.

One of the interesting observations regarding these genres in Scandinavian cinema is how these films often try to develop more unusual sub-genres and are inspired by more global formats. These are the films that break away from the mainstream cultural drama profile and perhaps also address the audience most difficult for national cinemas to attract, the audience with a preference for American genre films. The Swedish film *Den tredje vågan* (*The Third Wave*, Anders Nilsson, 2003, 291.000 in Swedish cinema) is an attempt to make such a film, and it is – like many other Swedish crime films – based on the same character, Johan Falk, who also appears in *Noll tolerans* (*Zero Tolerance*, Anders Nilsson, 1999) and *Livvakterne* (*Executive Protection*, Anders Nilsson, 2001). The production company is Blind Spot Pictures, and the films in this series are more global and action oriented than most of the traditional crime films. However, *Den tredje vågan* is not an international or even Scandinavian success: outside Sweden it was seen by only 3.249 in Finland and 330 in France (Lumiere data 2010).

These new genre films are much more strongly represented amongst both Danish and Norwegian productions than in Sweden, although none of the films in this group can boast of major audience success. In Denmark, Nicolas Winding Refn, with his *Pusher I-III* (1996-2005), a dark gangster drama trilogy taking place in the multi-ethnic Copenhagen neighbourhood Nørrebro with elements of both Martin Scorsese and Quentin Tarantino but, was one of the pioneers of this development in Denmark. Refn's trilogy was no doubt conceived as a new kind of international genre film, but none of the three films had any major impact on audiences abroad, at least not in the cinema. In total all three films were seen by 384.972 in Danish cinemas, by 35.257 in other Scandinavian cinemas and by 12.310 in other EU36 countries. Again, it is only the Danish TV viewers (613.000) and 62.000 Norwegian TV viewers, who provide the trilogy with an element of success. Nevertheless, if we look at the segment profile of the *Pusher* films (see fig. 40) we can clearly see that the film actually attracts the younger and more modern segments, those segments that Scandinavian cinema often cannot reach.

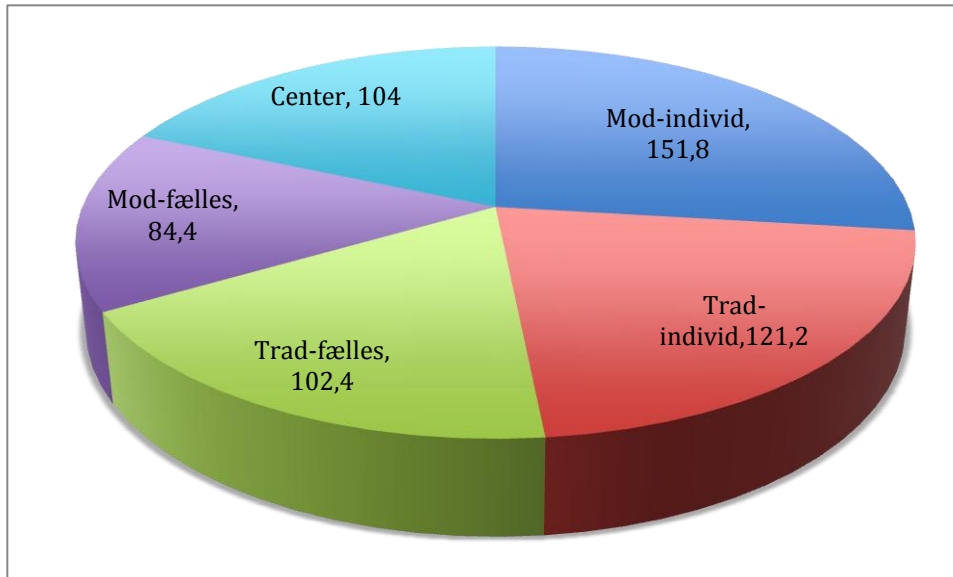


Figure 40. Segments, Pusher II, Danish TV.

Following on from this, a few other examples appear of a new type of genre film, exploring fictional worlds we only normally find in American films. In Denmark, we find horror films such as *Midsommer* (*Midsummer*, Carsten Myllerup, 2004, 121.487 cinema admissions and 504.000 TV viewers) and *Mørke* (*Murk*, Jannik Johanssen, 2005, 100.682 admissions and 422.000 viewers) as well as an action film such as *Den gode strømer* (*The Good Cop*, Lasse Spang Olsen, 2005, 95.000 admissions, not shown on TV) that explore darker genres like horror and action genres. In Norway one can mention films like *Fritt Vilt* (*Cold Prey*, Roar Uthaug, 2006, 256.350 admissions, followed by two sequels), *Villmark* (*Dark Woods*, Pål Øie, 2003, 165.000 admissions), *Naboer* (*Next Door*, Pål Sletanne, 2005, 154.000 admissions) and *Den som frygter ulven* (*Cry in the Woods*, Erick Nörtnagel, 2004, 64.712 admissions) are all examples of films developing a new Norwegian film language and aiming at a younger audience fascinated by American thrillers, action movies and horror stories, but none of these films achieve success outside of Norway and are thus not even exported (at least not between 2002-2009) to other Scandinavian TV stations. However, the moderate success of these films in Norwegian cinema is followed by a moderate success on Norwegian TV, where more than 1 million viewers tuned in. All in all, on the national market, these kinds of films reach a reasonably sized audience, especially among the younger and more modern segments.

### **Challenging artistic worlds: The Scandinavian art cinema**

Many observers of European cinema (e.g. Bordwell 1979; Neale 1981; Elsaesser 2005; Bergfelder 2005) have pointed to the art cinema as a strong tradition linked to both the realist drama and more experimental forms of non narrative cinema. As a genre or aesthetic trend, this kind of cinema seldom reaches a very large audience. Lars von Trier is an example of a European exception to this rule, but overall this is a cinematic form, which often has a much wider distribution internationally than many more national mainstream films. In the data on Scandinavian film presented so far, art cinema is included in the drama category, but within this broad category, a group of more experimental art cinema directors have a special position, all of them challenging and expanding the norms of realism and narrative structure of the drama genre. The European and Scandinavian art cinema is linked to a tradition of manifestos and movements from the new wave of the 1960s to the Dogma 95 movement, and institutionally they are clearly dependent not just on cultural support and public funding, but also on a growing network of festivals that are international launching sites for this kind of films.

Art cinema may flirt with mainstream genres like Lars von Trier did with the musical drama in *Dancer in the Dark* (similarly, many of the Dogma-films, even though genre was against the rules). But often the art cinema also plays with cinematic language, becoming reflexive works with complex and innovative aesthetic strategies. In both *Dogville* and *Manderlay* Lars von Trier again moved away from the realism and spectacle of mainstream cinema, and closer to what you might call theatre. The Danish director Christoffer Boe is another experimental director, with films such as *Reconstruction* (2003), a drama and romance running in circles. Norwegian Bent Hamer with *Salmer fra kjøkkenet* (*Kitchen Stories*, 2003) clearly develops his own artistic form of dry black humour, satire and absurd realism, whereas Swedish director Roy Andersson in both *Du levande* (*You, the Living*, 2007) and the earlier *Sånger från andra våningen* (*Songs from the Second Floor*, 2000) is a representative of what might be labelled the existential essay film.

### **Bent Hamer – A Norwegian-European art cinema director**

Bent Hamer is an example of a Scandinavian director who has found a wide international audience for his character-driven art house films through successful festival distribution. He made a name for himself when his quirky film *Eggs* (1995) which premiered at the Director's Fortnight in Cannes and was awarded The International Film Critics' Prize (FIPRESCI) at the Toronto International

Film Festival. *Eggs* was produced by Bent Hamer's own production company, which he had established in 1994, and since then he has produced all his feature films through Bulbul Films. His second feature film, *En dag til i solen* (*Water Easy Reach*, 1998) about a young Norwegian sailor (Eric Magnusson) stuck in a Spanish port town, didn't enjoy the same kind of success, in spite of being shot predominantly in English and with an international cast including Nicholas Hope, Francisco Rabal and Ingrid Rubio.

This changed with *Salmer fra kjøkkenet* (*Kitchen Stories*, 2003), however, which saw Hamer back in the Director's Fortnight in Cannes, while the film was the Norwegian submission for the Academy Award for Best Foreign Language Film. *Salmer fra kjøkkenet* was a Norwegian-Swedish co-production with a story perfectly suited for attracting the attention of spectators in both Sweden and Norway. Based on real post-war research on the efficiency of Swedish housewives, the story explored the fictional set up of a Swedish researcher who is sent to a small Norwegian town to live with an aging bachelor to document his kitchen habits. Besides the intriguing and humorous set up of the Swedish researcher Folke (Tomas Norström) trying to silently study the Norwegian man Isak (Joachim Calmeyer) from the top of an umpire's chair in Isak's kitchen, the story also draws upon themes of overcoming post-war Norwegian-Swedish animosity and fostering friendships despite initial differences.

The film sold 85.000 tickets in Norway, a little over 20.000 tickets in both Sweden and Denmark. Thus, the film can hardly be deemed a Scandinavian success. However, the film enjoyed widespread success in Europe, selling 456.062 tickets in EU36 (not including Scandinavian countries) and audiences in especially Germany, Italy and France bought into the story. This makes the film a perfect example of the European 'success' of Scandinavian art cinema films: not a blockbuster success in quantitative terms, but in more qualitative terms a film that reaches a broad European audience along with critical and festival success.

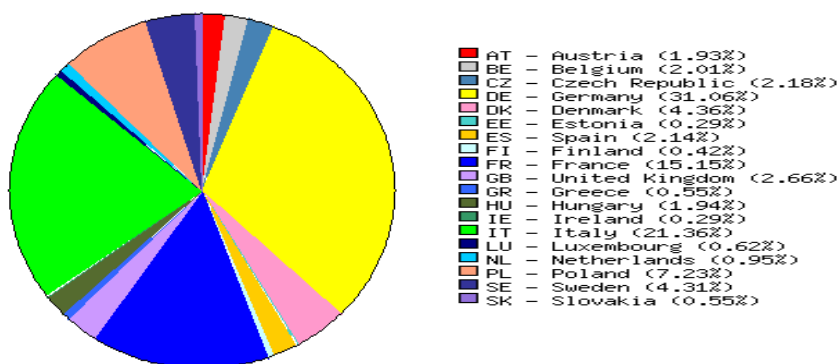


Figure 45. Salmer fra kjøkkenet. Distribution on the national markets in EU27. Lumiere database 2010.

The European success of *Salmer fra kjøkkenet* – which in 2010 was voted best Norwegian film of the past decade by the Norwegian film magazine *Rushprint* – was followed by the production of the English language drama *Factotum* (2005), shot in the United States and starring Matt Dillon as the fictional alter-ego of *Factotum*-author Charles Bukowski. *Factotum* was also selected for the Director's Fortnight in Cannes, but has become an example of a Scandinavian director turning his hand to an English-language film only to be deserted by his local audience. Even though Matt Dillon – as well as supporting actresses Lily Taylor and Marisa Tomei – is well known in the Scandinavian countries, the film only attracted 26.284 spectators in Norway, 3573 in Denmark, 2253 in Sweden (Lumiere 2010) and sold 321.000 tickets in EU27, making it less popular than Hamer's previous film.

Bent Hamer returned to Norway and his native language with his next feature, *O'Horten* (2007), exploring themes of loneliness and old age. *O'Horten* follows the events on the evening of the retirement of the 67-year-old train engineer Odd Horten. The legendary Danish actress Ghita Nørby plays an important part as the mother of O'Horten, but the film never opened in Danish cinemas. The film was chosen for Un Certain Regard in Cannes, but in spite of the festival attention, an international sale to 40 countries, and a good critical reception, the Norwegian audience didn't bite, buying only 35.000 tickets and to date the film has only sold 153.509 in EU27, again with much bigger sales in France and Germany (76.000). So again, a film with a European art cinema profile, although less successful. Hamer's latest film, *Hjem til jul* (*Home for Christmas*, 2010), which won the prize for best screenplay in San Sebastian, opened in Norwegian



cinemas on November 12 2010. The box office sales have not impressed, and it would appear Bent Hamer is an example of a hitherto critically acclaimed and internationally renowned Scandinavian director from the art house arena now struggling to find his domestic audience. While the film festival circuit and the international critics hail films directors such as Hamer and von Trier, the local audiences have shrunk during the years of their international success. Thus, while the high profile art house films are popular with an international audience looking for interesting alternatives to the American fare, the domestic audiences seems to prefer other national films as alternatives to the English-language films.

### **Roy Andersson – a Swedish-European auteur**

*Du levande* (*You, the Living*, 2006) is the fourth feature film by celebrated Swedish filmmaker Roy Andersson. The film was released seven years after its predecessor *Sånger från andra våningen* (*Songs from the second floor*, 2000), which in turn was preceded by a hiatus from theatrical features on the director's part of almost twenty-five years. *Du levande* (a quote from Johann Wolfgang von Goethe's *Roman Elegies*) was made in what may be recognised as Andersson's mature style, developed in the years when Andersson supported himself by directing commercials. Consequently, the film can be described as the stringing together of approximately fifty loosely connected shots, each reminiscent of his commercials, though in this case conversely, not aiming to sell anything. Rather the film is instead concerned with moods and functions as a sort of testimony on the sorry state of Sweden and the Western world.

The director's mature style consists of painstakingly crafted, almost static tableaux shots, containing in depth staging and carefully controlled mise-en-scène on, primarily, cleverly built studio sets. Moreover, there are no or very few cuts – except between the various tableaux – and scarcely any camera movements. Andersson uses amateur actors, chosen for particular physical traits, rather than any particular acting ability, all with pale faces and instructed to do very little, something they often succeed at after the 40 to 50 takes the director occasionally requires for a particular shot. In all, the exercise creates an icily beautiful, gloomy, existential and somewhat sad stance but with a blend of more theatrical moments mixed in. Paradoxically, humour is a vital part of the overall effect.

In 2003, after the festival recognition and general audience success of *Songs from the Second Floor*, Andersson received SEK 5m in production support from the SFI for his new project. In the

following period and during the almost two years of shooting between 2005-2007, further funding was supplied by agencies such as Eurimages, Nordic Film- & TV Fund, Filmstiftung Nordrhein-Westfalen, The Danish Film Institute and The Norwegian Film Institute. The project was also given further, if limited, means from the SFI in 2005. As the production gained steam, TV channels in Sweden, France and Germany – Arte, WDR and SVT among them – came on board while various contributions to the budget were provided by an assortment of co-producers. Accordingly, the film ended up as a Swedish-Danish-Norwegian-French-German-Japanese co-production. Reportedly, the final cost was almost SEK 50 million, or nearly three times the average budget of a normal Swedish film.

*Du levande* had its premiere at the Cannes film festival in May 2007 in the *Un Certain Regard* selection. After additional festival screenings at Karlovy Vary and Toronto, where the film failed to pick up any significant awards, it opened in domestic cinemas in September. Notwithstanding, the film continued its round on the festival circuit and eventually won awards at several less prestigious events. *Du levande* was nominated for best film at the European Film Awards and received three prizes, Best Film among them, at the national film awards in Sweden, Guldbaggegalan.

Despite being possibly the most well received and reviewed film of the year in Sweden, *Du levande* only managed to attract an audience of 54.569 in the months following its release. When the film was taken out of distribution at the start of 2009, 71 209 had paid for admission. *Du levande* was picked up in several countries, but achieved little success anywhere. Germany (59.000), France (26.000) and Norway (25.000) appear to be the places in which the film performed best. According to the Lumiere database, the amassed European audience was 277.198.

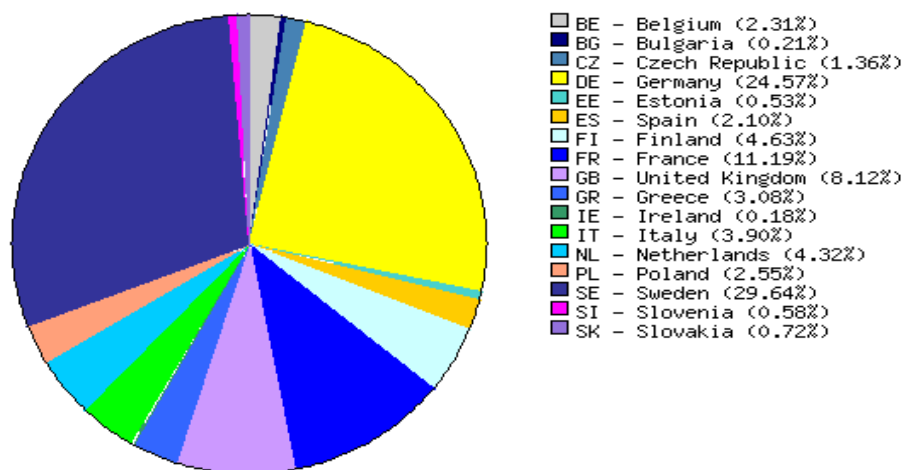


Figure 46. *Du levande*. National market shares in EU27. Lumiere database 2010.

The production, critical reception and performance of *Du levande* inevitably raises questions about European cinema, film festival practices, the funding system and about the fact that so many critically acclaimed films are unsuccessful in finding a broader audience. The American film historian David Bordwell has discussed the environment in which the kind of film *Du levande* may be said to be representative of the European “art film” exists. According to Bordwell:

Few of these subsidized films attract a local audience or overseas distribution, so as purely economic investments they are disastrous. Instead payback shifts to another level. The subsidized film competes to win places in the world’s four hundred film festivals, which are hungry for non-mainstream fare of all kinds. If a festival entry wins acclaim, perhaps an award, the sponsoring agency is confirmed in its decision to back the project, with honour flowing to the national culture. (Bordwell 2000: 6)

Now, as hinted above, the sales performance of *Du levande* is far from a worst-case scenario and may even be deemed quite respectable. The film was praised for its singular vision, won numerous prizes, was seen to some extent and got distributed, even abroad, although the mass audience largely ignored it. We may therefore ask: does the budget and the large amounts of money spent by the various sponsoring agencies and broadcasters – all publicly funded – who made the film’s production possible correspond with the “honour flowing to the national culture”? And who

specifically, in that case, is the recipient of that honour? Is it the executives at the funding agencies and the broadcast companies, the quite limited middle class audience who saw the film in theatres or the TV consumer who eventually will encounter the film on late night television? Do the populations at large feel pride as they read about the film in the arts section of the local newspaper, or is it primarily the individual filmmaker who is happy because he was able to realise his dream. Again, the performance of *Du levande* is far from a worst-case scenario. Nevertheless, the questions linger on.

### **Christoffer Boe – challenging the normal Danish reality**

Lars von Trier is the Danish, international art cinema director par excellence and by now almost an established film institution of his own, always searching for ways to provoke and challenge the accepted ways of making films. Most of his films are not, as already documented, very popular with the Danish audience, and his audience is to be found on a European level. Other directors such as Simon Staho or Thomas Vinterberg could be mentioned, but one of the more radical art cinema directors in Denmark, Christoffer Boe, can illustrate the dilemmas of art cinema and national, Scandinavian and European audiences from a Danish perspective.

Boe has made three films between 2002-2006, which indicates that he is considered to be an interesting director by the film commissioners at DFI. *Reconstruction* (2003) is quantitatively his most successful film with a total of 180.000 in EU36, of which Denmark took around 51.000 and with France and Portugal second and third. In Norway, the film was only seen by 10.000 in the cinemas, and it was not released in Sweden (see fig. 42). Again, national television comes to the rescue with 140.000 viewers. In Norway, the film was seen on TV by 77.000 and in Sweden the film was an even bigger success, seen by 177.000 viewers. In total, 574.000 tickets were sold. Measured by normal cinema standards this is not a success, but for a typical art cinema narrative it's a success.

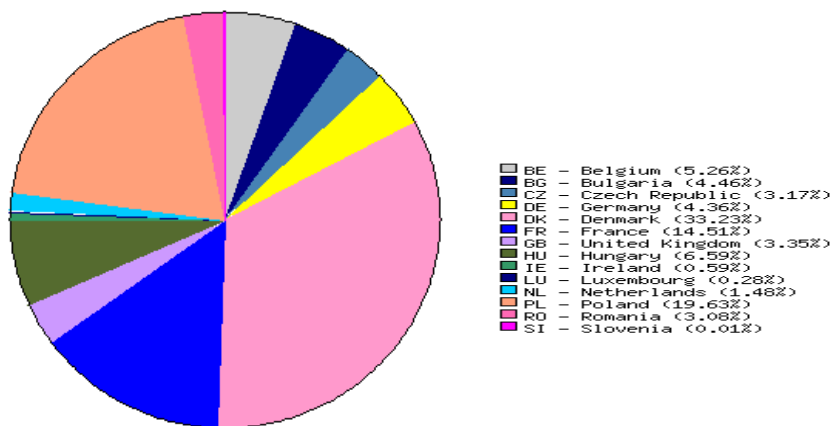


Figure 47. Reconstruction. National market shares in EU27. Lumiere database 2010.

*Reconstruction* was produced by Boe's own company, Hr. Bo & Co., and by the Nordisk Film low budget scheme Director's Cut and must be characterised as a labyrinthine romantic drama that plays with the notion of time and space. The main character (Nikolaj Lie Kaas) leaves his girlfriend (played by the Norwegian actress Maria Bonnevie) to follow a more mysterious and attractive woman (also played by Bonnevie). An otherwise traditional romance is broken up by a lyrical, visual style and an undermining of the plot-driven narrative. The film won the Caméra d'Or prize in Cannes, the Norwegian Amanda Award for Nordic Newcomer as well as prizes in Chicago, San Sebastian, Sofia and at other festivals.

In Boe's following films, *Allegro* (2005) and *Offscreen* (2005), Boe pushed his audience even further. *Allegro* again combines a love story with an almost science fiction like theme with the mysterious Zone in Copenhagen where normal rule of nature seems to be suspended and where time and space collapse. In *Offscreen*, he utilised the subjective nature of a 'documentary' camera and exposure of privacy, pushing it to a radical limit. Generally this development meant a further decline in audiences nationally and in Scandinavia as a whole, both in cinema and on television. Whereas the two films was seen by 77.00 and 41.000 on Danish TV, they have not been shown on other Scandinavian channels. The European audience also declined, and *Allegro* has not won any prizes abroad, whereas *Offscreen* won prizes in Venice and at SFSW in Austin Texas.

### **Growing up in Scandinavia: children, youth and animation**

There is a strong tradition in Scandinavian film culture for supporting films for children and young people, a tradition both firmly present in film production, in television and also in computer games. This is to ensure there is a quality response and alternative to the dominant American culture, the extremely popular Disney culture – understood in a broad sense. If USA has Donald Duck, Scandinavia has Pippi Långstrump (Pipi Longstocking), and in Scandinavia the perception is that a unique culture exists, which respects and provides children and young people with a broader freedom of expression. The animated film in this respect enjoys a particular success and support, in recent years developed to a much more international level, but films for children and young people cover most genres: drama, comedy, adventure etc.

Looking at the period 2002-2006, the most popular films in the three Scandinavian countries are clearly the animated Swedish films about the characters *Pettson & Findus* (first film produced in 1999), seen in Europe by more than one million people and in Scandinavia by 537.459 people, and the Norwegian *Karlsson på taket* – seen in Scandinavia by 411.510 people in cinemas. The latter was also seen by more than 200.000 in Germany and thus enjoyed some European success. Both films have been developed as series and on several media platforms, *Pettson & Findus* now since 1999 as four films and a TV series, and *Karlsson på taket* not exactly as a film series though film versions date back to 1974. In Denmark, animated films have also been developed in different ways, and with reasonable international success as in the case of *Terkel i knibe* (Terkel in trouble, 2004) made by the well established company A-film, and with a national audience in cinema and on TV of 881.000, though only 19.000 in the cinemas in Norway and Sweden together and only 57.000 in the rest of EU.

As already indicated in the genre figures for Scandinavian cinema, CY-films are strongly represented in all three countries, with Denmark taking the lead with 31% only surpassed by drama. In Sweden, the percentage is 35% leaving Norway last with only 21%. Examining the type of CY-films more closely, the two strong categories are definitely drama and comedy with adventure following behind. The line between drama and CY-drama can be a fine one, as it is demonstrated by one of the most popular Swedish dramas of recent years, *Alla älskar Alice* (*Everybody loves Alice*, Richard Hobert, 2002), in which the children's perspective is rather dominant. The film was the 13<sup>th</sup> most successful film in Sweden in the period 2002-2006 and had 320.985 spectators in Sweden. Internationally it only attracted 4.104 viewers, but the TV success in Sweden was quite

spectacular with 1.4 million viewers. The film was produced by Peter Possne and a co-production between Sonet Film AB, Film i Väst AB and Sveriges Television with support from the Swedish Film Institute and Nordic Film & TV Fund.

The film tells the tragic story of the 12-year-old girl Alice. Along with her family, she lives in a typical Swedish Stockholm suburb. One day she sees her father with another woman and it becomes clear the father has a love affair. The world falls apart for Alice, even more so when her parents divorce and the father moves in with the other woman. Alice suffers at school as well as at home and to begin with she won't have anything to do with her father. Although she slowly relents, there are still a lot of conflict and calamities, often caused by Alice. Her parents quarrel ceaselessly and the mother and the father's new woman are at loggerheads. It is only when the mother saves the father's new stepson that things calm down. The film's success is both related to the intense and realistic family drama, seen from a child's perspective and an all-star Swedish cast. Lena Endre as the father's new woman and Mikael Persbrandt as the father are among the most popular actors since the 1990s. In all, *Alla älskar Alice* is a typically Swedish low-key drama, drawing on images from both life in the Stockholm suburbs and from the Stockholm archipelago. It refers to a long standing Swedish tradition for family dramas on both film and television, e.g. seen with Ingmar Bergman, but here there is an important shift to the child's world, mentality and perspective, something that made the film popular in Sweden, even if it did not result in export to the rest of Scandinavia.

### **Finding a place in life: youth drama**

*Alle älskar Alice* is a typical Scandinavian CY-drama in that it uses social and psychological realism drama conventions, transporting them into the world of children and teenagers. A similar Norwegian example is *Bare Bea* (*Just Bea*, 2003, 183.000 cinema tickets and 460.000 TV viewers in Norway), a romantic drama about 16 year old Bea and her longing for a love affair and her sexual debut, made by Petter Næss, the successful director of the *Elling*-films. The film is a straight forward everyday life story with a dashing of Hollywood teenage drama sprinkled on top, but it struggled outside of Norway: it was only seen by 228 in Sweden while it did not open in Denmark, and in the rest of Europe, though curiously it attracted 22.500 spectators in the Czech Republic.

Another example is a Danish film aimed at a younger age group, *En som Hodder* (*Someone like Hodder*, 2003) by Henrik Ruben Genz. The film only sold 167.000 cinema tickets in EU36 with the

majority sold in Denmark (146.702) and a few tickets in Germany. It was, however, seen by 358.000 on Danish television. Despite the lack of European success, the film won prizes at the Danish Festival Buster, the Chicago International Children's Film Festival and the London Film Festival. What makes this children's film unique is the combination of realism and magical realism. The film tells the story of a 9-year old lonely boy, bullied by his classmates, neglected by a wimp of a father, but whose fantasies and daydreams (in which he speaks with his late mother) sees him through.

Another popular teenage drama (albeit of a more genre bending kind) is the second most popular CY-drama in Norwegian cinema, *Venner for livet* (*Finding Friends*, 2005, Arne L. Næss, 191.268 tickets in Norwegian cinema and 186.000 on TV). The film's protagonist is a 12-year old boy, who is dragged away from his urban life and into the countryside. This is not a straightforward teen drama, however, and *Venner for livet* is a complex mix of action, crime and comedy along with ethnically and socially diverse characters. The appeal of the story lies in the clear contrasting of socially different lives and cultural upbringings, but the film has not found any audience outside Norway.

### **Youthful adventures**

As with the Scandinavian films for an adult audience, the genres outside drama and comedy are not often explored, except perhaps in animated forms. However, a small handful of films from the 2002-2006 period marks the beginning of a new tradition. These films either took the form of 'realist' adventures in which characters transgress their age or gender, like the successful Danish drama *Klatretøsen* (*Catch That Girl*, Hans Fabian Wullenweber, 2002, 436.000 tickets in EU36), explored more historical adventures like *Tempelridderens skat* (*The Lost Treasure of the Knights Templar*, Kasper Barfoed, three films 2006, 2007 and 2008, the first one seen by 300.000 in EU36) or dealt with mysterious contemporary worlds in which past and present, known and unknown worlds collide, as in the Norwegian *Ulvesommer* (*Wolf Summer*, Peder Norlund, 2003, 238.000 in Norwegian cinemas and 171.000 on Norwegian TV, but no sales abroad), or the Danish *Fakiren fra Bilbao* (*The Fakir*, Peter Flinth, 2004, seen by 220.000, mostly in Denmark and Germany, and virtually no Scandinavian distribution, except a mere 5.500 tickets in Norway).

The Norwegian *Ulvesommer* is part of the more realist CY-adventure tradition and tells the story of a young girl, who is nearly killed in the wild but survives, and through a friendship



developed with a wolf she helps it escape from the shepherds that want it dead. The transgression of the traditional drama lies in the portrait of the adventurous and unusual young female protagonist, as well as the fact that civilisation and the wild are brought together. In many ways the film resembles Wullenweber's *Klatretøsen*, a strong very action-driven 'girl power' drama about the 12-year old Ida, whose excellent climbing abilities soon come in handy: When her father gets seriously ill and needs a costly treatment abroad she takes matters into her own hands. The film did much better internationally and nationally than *Ulvesommer*, and additionally, Wullenweber's film has won a strong international reputation by winning the Crystal Bear in Berlin and several other international prizes.

These new CY-adventure and action dramas represent a new tendency in Scandinavian cinema, both in the way they are developing realistic stories dealing with contemporary life seen from the point of view of teenagers and in the way they are challenging the traditional drama format. *Klatretøsen* is the most successful film from the examined period, and if we in addition include TV viewers, both this film and more fantasy-oriented adventures like *Fakiren fra Bilbao* achieve a decent national and international success. *Klatretøsen* was seen by 552.000 on Danish TV, and 70.000 on Swedish TV, whereas *Fakiren fra Bilbao* was seen by almost the same number of viewers: 518.000, though all of them on Danish TV only.

## The Smell of Global Success: The Scandinavian Television Drama

Never before has so many Nordic residents watched so much Nordic television drama as they did in 2009. That was the cheerful conclusion regarding the state of the Nordic television drama in Nordvision's Annual Report for 2009 (Nordvision 2010: 13). Based on figures analysed by the television drama group within Nordvision, the conclusion was that Nordic television drama is extremely popular in practically all the Nordic countries. It enjoys the greatest popularity in Norway, where drama series from neighboring countries achieve an average share of 34%. Some series, such as *Krøniken* (*Better Times*, DR 2004-2007) have topped 54% in Norway (Ibid.).

### Emmy Awards for television drama from Danmarks Radio 2002-2009

2009: Best international drama: *Livvagterne / The Protectors*.

Producer: Sven Clausen. Writers: Peter Thorsboe and Mai Brostrøm.

2005: Best international drama: *Ørnen / The Eagle*.

Producer: Sven Clausen. Writers: Peter Thorsboe and Mai Brostrøm.

2005: Best mini series: *Unge Andersen / Young Andersen*.

Produced by Nordisk Film for DR. Director: Rumle Hammerich. Writers: Rumle Hammerich and Ulf Stark.

2003: Best international drama: *Nikolaj og Julie / Nikolaj & Julie*.

Producer: Piv Bernth. Writers: Søren Sveistrup and others.

2002: Best international drama: *Rejseholdet / Unit One*.

Producer: Sven Clausen. Writers: Peter Thorsboe and Mai Brostrøm.

Figure 48. Emmy Awards for television drama from Danmarks Radio 2002-2009.

At the same time, television drama from Danmarks Radio has won no less than five Emmy awards in ten years from the Academy of Television Arts & Sciences, earning international acclaim for the national series and attracting foreign sales. An American remake of the popular crime series *Forbrydelsen* (*The Killing*, DR 2007-2008) will be premiering on the American cable channel AMC in the spring of 2011, and the latest long running series, *Borgen* (*The Government*, 2010) on politicians,

spin doctors, and journalists in and around the Danish parliament at Christiansborg, was voted Best Drama Series at the European television awards Prix Italia in Torino in 2010. There is thus a number of success stories to present when it comes to Scandinavian television drama from the past years, but as the following will show there are of course nuances to the widespread enthusiasm and important discussions to be had as to the state of co-production between the Nordic countries as well as the patterns of distribution.

### **The production of television drama in an inter-Nordic perspective**

The collaboration between the Nordic countries in the field of television has been institutionalized since the establishment of Nordvision in 1959. Nordvision is a television and media collaboration between the five Nordic public service broadcasters Danmarks Radio (DR), Norsk Rikskringkasting (NRK), Sveriges Television (SVT), Yleisradio (YLE) and Ríkisútvarpið (RÚV) with Sveriges Utbildningsradio (UR), Greenland's Kalaallit Nunata Radioa (KNR) and Kringvarp Føroya (KVP) from the Faroe Islands as associated members. The core activity of Nordvision is co-production, programme exchange and strategic collaboration through expert groups.

As stated in a summary from the first meeting in 1959, the original intent was to create a machinery for an organised collaboration, not only from an economic and production-based perspective, but primarily as a cultural initiative (Rowold 2009: 9). In his book on the fifty years history of Nordvision, Finn Rowold describes how this framework has played an important part in the history of Nordic television, both in the field of fiction as well as other genres.

The establishment of the Nordvision Fund in 1988, supporting both the development and production of bigger Nordic co-productions, is now an important source of financing for major drama productions. In 2009, The NV Fund allocated DKK 49m to co-productions between the partners of NV and around DKK 1,8m to research and development (Nordvision.org). As described in Finn Rowold's book, collaborations on expensive drama productions have been an important part of the Nordic collaborations since the days of the TV-Theatre (Rowold 2009: 42). In 2008, collaborations on drama represented 43% of the co-productions financed by the NV Fund and was the area receiving the most support (Ibid.). According to Rowold, the drama productions are also where the highest numbers of viewers are found for Nordic programs in the neighboring countries (Ibid.). In 2009, all in all 162 hours of drama was co-produced as 188 episodes (Nordvision 2010: 87).

As mentioned earlier in this report, Nordic Film- and TV Fund is another important institution in the history of Nordic co-production in film as well as television. Established in 1990, the Fund's primary purpose is to promote film and TV productions of high quality in the five Nordic countries. In regard to television, this involves providing support for top-up financing of TV-Fiction and series as well as creative documentaries, and there are also a range of initiatives to assist the financed productions to travel in the Nordic region. Another core activity in the realm of NFTF is the planning of workshops and master classes to develop and improve the knowledge and skills of practitioners in the Nordic media industries. Among the recent activities, NFTF organised a master class on Nordic TV Drama Series called *There's Something Going ON ...* November 2-3 2009.

All people interviewed for this report find the existence of support mechanisms and the institutionalized nature of the collaboration between long time partners to be crucial for co-production in the Nordic countries. However, while there historically used to be a stronger focus on the cultural arguments for Nordic collaboration, the major arguments are now of a more financial and logistical nature. As DR-producer Sven Clausen stated in relation to winning a third Emmy in 2009: "We have an incredibly fertile partnership with NRK, SVT, RUV and YLE with whom we have developed increasing trust between the Nordic drama departments and heads of drama, benefiting our spending, our quality and our viewers" (Hartmann 2010: 67).

Clausen goes on to emphasize that the level of quality in the Danish drama series could not be attained without the co-financing from the Nordic partners, but when interviewed for this report he admits to no longer seeing any clear cut cultural arguments for the Nordic collaborations. However, he especially finds the networking and the knowledge sharing through Nordvision and NFTF master classes of great importance, since the Nordic markets have a lot in common and the countries in many ways face similar challenges when it comes to production as well as distribution. This sharing of information and ideas to facilitate collaborations is highlighted by many other interviewees who see the institutionalized gathering of data, the sharing of information, and the existence of a professional framework for collaboration as fundamental for encouraging Nordic co-production.

According to Henrik Hartmann, secretary general of Nordvision, the Nordic collaboration is currently doing very well on the production side. Whereas Nordvision previously saw many co-productions between two partners only, there is currently a minimum of three partners involved in

the majority of productions. Moreover, some Nordic productions have been able to attract foreign financing in the past years. As Sven Clausen tells, this has been the case since *Ørnen* (*The Eagle*, DR 2004) attracted the attention of ZDF in the German market. However, the German prebuy has only been on the high profile crime series like *The Eagle*, *The Protectors* and *The Killing 1 and 2*, while the family drama series have been nationally financed. Stefan Baron, head of drama for SVT Stockholm, similarly finds that foreign investors are primarily interested in the crime genre. According to Sven Clausen, the German investors are especially interested in the money being spent on more location shooting and a more filmic look to create an attractive, visual feel to the series. Crime fiction from the other Nordic countries also enjoys popularity in Germany where Scandinavian fiction according to Nordvision now has a regular Tuesday slot in the programming schedule (Jensen 2009).

### **Copying international modes of production and storytelling strategies: drama from DR**

If there is one thing that everyone seems to agree on regarding Nordic TV-Drama it is that the Drama Department at DR has found a successful recipe for producing long running series. A number of reasons have been brought up by interviewees for this report to explain the success of drama from DR Fiction in recent years, from both inside and outside of the department. From the point of view of DR Fiction, both head of drama Ingolf Gabold and producer Sven Clausen emphasize the importance of a deliberate strategy to make a change from the production apparatus of the TV-Theatre towards more modern modes of production from the mid 1990's. According to Sven Clausen, with the arrival of Rumle Hammerich as head of drama from 1994, there was a new focus on what the audience might actually like to watch rather than what one would like the audience to watch.

Clausen was sent around the world to benchmark the production modes of other countries (among other places the Fox Studios in Los Angeles), and the resulting knowledge was communicated in a number of seminars upon his return. This led to a new approach to production that is especially characterised by the concept 'one vision', which can be seen as a sort of Danish version of the American showrunner-concept. As explained by Gabold, the idea of one vision makes the main author of a series the creative person in charge, but with the support of the expertise of the producers at the drama department. Clausen finds that the current concept at DR

in many ways best can be described as a ‘twin vision’ since there will often be a very tight collaboration between writer and producer from an original idea all along to the finished series.

Another central concept highlighted by Ingolf Gabold is the idea of ‘producer’s choice’ (Gabold in Redvall 2010a). Part of the re-organisation of the drama production at DR involved leaving the idea of having a full time employed production staff and in stead drawing on freelancers from the film industry for the central functions on the team. This interplay between the production cultures of film and television has often been highlighted as an important reason behind the success of both Danish film and television drama in recent years (e.g. Hjort, Jørholt & Redvall 2010). On the production side, it has also played a part that DR has had studios of their own. A Norwegian study of the success of the Danish Drama Department emphasizes this aspect as one of three influential differences between the Danish and Norwegian mode of production, mentioning the idea of ‘one vision’ and the use of film industry people as the two others (Iversen 2010).

In Norway, a fierce debate about how to produce television drama arose in November 2010, when a NRK report revealed plans to change the production of drama dramatically by moving all productions to external companies. The debate continuously compared the Danish and the Norwegian model (e.g. Lismoen; Nederhoed & Eriksen 2010), with writers complaining among other things that while the Danes started rethinking the drama production in 1994, the Norwegians didn’t really take an ambitious and critical look at the mode of production until a much talked about plan to win an Emmy by 2007 was announced in 2004 (Iversen 2010).

### **Differences in production modes, genres and formats**

Head of drama at NRK, Hans Rossiné, was interviewed for this report before the November news on the drama front. He finds that ‘the international look’ of the Danish drama productions is a key reason behind their international success, but also points to the existence of studios and the fruitful collaborations between people from the film and television industry. From the Swedish perspective, another reason for the success of the Danish drama productions brought up by Stefan Baron is that while Norway and Sweden in the past years have produced drama in many different genres and formats, the Danish production has been targeted on perfecting the storytelling in ten episodes of 60 minutes and this deliberate focus has paid off.

SVT has previously been working with many different formats and genres as one can get an account of in the SVT public service-statement for 2009 (SVT 2010: 22-25). However, according

to Stefan Baron, SVT – inspired by the success of the Danish production structures – has now decided to primarily focus on the ten episode format combined with what he calls ‘flagpole-productions’ of two episodes of 90 minutes or three times 60 minutes. SVT commissioning editor for drama and culture Peter Gustafsson finds that the 10 x 60 format is popular with viewers who seem to think that one can have an overview over ten episodes while they more easily lose track of longer series. Gustafsson also thinks those days are over where each country could improvise its own formats (Gustafsson in Hellekant 2010) and in the Norwegian debate there is much talk about what can be gained from more standardization of the formats (e.g. Iversen 2010). As a consequence of the new decisions on drama in Sweden, genres like the long-running soaps (e.g. *Rederiet*) will no longer be produced. Stefan Baron finds that the soaps have been an interesting genre for testing new talent behind the camera and experimenting with the storytelling as the series were aired, but for now the focus is on crime series (like the upcoming ten episode series based on the crime novels of Arne Dahl and the historical crime series *Anno 1790*) and relationship dramas like *Våra vänners liv* (SVT 2010).

The issue of where to find new talent if one only produces high profile drama with no room to fail is an issue that is often discussed from the Danish perspective. Ingolf Gabold would like to see more Danish drama production in shorter formats and for less profiled slots than Sunday nights at eight o’clock where new talent can be tested and new ideas explored (Gabold in Redvall 2010a). While this is not the case as of right now, both Gabold and Clausen emphasize the importance of the collaboration between the drama department and the National Film School of Denmark, where the screenwriters and producers team up for half a year during their education to develop a potential series to pitch for DR. This institutionalized collaboration between the film school and the public service television station has led to a number of the screenwriting graduates being employed by DR straight after film school and, as a consequence, to the film industry complaining that television is currently stealing the best screenwriters in the industry (Redvall 2010b; Redvall 2010c).

### **Adapting American storytelling strategies vs. a Nordic brand of storytelling**

A number of interviewees point to the American storytelling strategies of the Danish series making them more accessible for foreign audiences used to American product. According to Sven Clausen and Ingolf Gabold, this imitation of narrative strategies known from American television –

combined with the incorporation of work methods from the American television studios – has been a deliberate choice at DR since the creation of *Taxa* (1997-1999). However, both Clausen and Gabold insist that the approach to storytelling in the Danish drama series is more than ‘just’ copying the efficient American fare. Clausen describes the approach as a constant interplay between fascination and identification. Gabold explains that there is a conscious strategy to always aim for a history with two dimensions; on the one hand, the aim is to have a good story containing elements that both fascinate viewers and that create a room for identification; on the other hand, the intention is always – not the least from a public service perspective – for this story to have social and ethical connotations.

Some critical voices raise the question of whether the imitation of the American fare is the best way for Nordic fiction or whether a special kind of Nordic storytelling is being lost in the process. Among the points being brought up is how the recent success of the Danish product has led to a tendency to focus on the numbers and prizes, overshadowing important discussions of quality, public service obligations, and alternative approaches. However, according to representatives from both DR, NRK and SVT questions like these are often discussed at gatherings like the two yearly meetings of the Nordvision television drama group, again highlighting the inter-Nordic meetings as important places for reflections and inspirations across the borders.

These meetings are also crucial in relation to try to get better at collaborating earlier in the development processes of each other’s series, an issue where Stefan Baron finds that there is a room for improvement. He mentions the current production of *Broen* (*The Bridge*, forthcoming 2011) as an example of a happy marriage between Danish and Swedish production companies and interests, since the story of a crime taking place on the Øresund Bridge invites obvious Danish and Swedish elements in the production rather than trying to force elements into a Nordic-pudding. Stefan Baron regards *Broen* as a case of natural collaboration from an early stage and hopes to see more of this in the future.

### **New players outside of the traditional Nordvision partners**

While the recent years show more co-production among the traditional Nordic partners in Nordvision, a number of new players have also started to produce more drama in the past years. In Denmark, the expense of producing local fiction for a small market has often made the production of national television drama an almost exclusive public service product. In the past years,



competing broadcasters like TV 2 & TV3 have started producing series of their own (e.g. *Anna Pihl* (TV 2, 2006-2008), *2900 Happiness* (TV3, 2007-2009)), a development which has been encouraged by new support schemes like the Public Service Scheme managed by The Danish Film Institute. The Public Service Scheme was a part of the Media Act for 2007-2010 and allocated DKK 75m to the production of fiction and documentary for television, with the aim to spend 70% on fiction and 30% on documentary. The ambition was to support original productions and encouraging quality as well as diversity in an attempt to create a greater variety of genre, themes, narrative strategies and look in the programmes produced for television. All broadcasters reaching more than 50 per cent of Danish households were eligible to apply, and among the first series supported were *Lærkevej* for TV 2 (2009-2010) and *Lulu & Leon* for TV3 (2009-2010).

*Lulu & Leon* ended up being an interesting case of trying to make a national series reach as wide an audience as possible, since its 12 episodes first aired on TV3 in the fall of 2009 and the spring of 2010, before being bought for a rerun in prime time on DR1 in the fall of 2010. As explained by head of DR Ulla Pors Nielsen, when this surprising change of channels was announced, DR was only happy to see television drama produced outside of the traditional channels securing more local fiction to attract the national audience than what DR was able to produce (Kamph 2010). On the whole, the past years have thus seen an emergence of more domestic drama from a wider range of companies on the Danish scene creating a more competitive environment and challenging DR's brand as the sole producer of prime time quality drama. While Sweden has a long standing tradition of not producing all drama in house, DR has produced all long running series themselves and has only had a few mini series produced by other production companies. Some interviewees highlight how this approach has helped create a strong DR-brand for the long running series, but that input from other production companies can of course create a greater diversity and introduce new benchmarks from the industry.

In Sweden, private production companies have been providing series for public service television for a long time. Stefan Baron finds this to be a fruitful way of exchanging ideas and crew between the film and television industry, and especially the flagpole productions are an invitation to get people from the film industry to contribute. However, he finds that the production landscape in Sweden has changed in the past years, where some production companies are now very big, transnational players making it harder for the smaller companies to compete. He doesn't

necessarily find the emergence of bigger players to be a negative development, but one has to be aware of the issue of plurality when fewer players tend to dominate the market place.

### **Issues of copyright and challenges arising from new platforms**

Among the current conflicts for inter-Nordic collaborations being mentioned for this report are especially two issues. Firstly, the issue of copyright and the payment of both actors, screenwriters, directors and others when it comes to showing national productions on foreign television.

Secondly, the issue of rights in relation to catch up-viewings as online streaming of each other's series. As Henrik Hartmann from Nordvision states in relation to the first issue, there are currently five Nordic countries with a number of different collective agreements for a number of different trades within the industry. He sees this as a great limitation to creating more collaboration and calls for major structural changes in this regard. As of right now, it is often much more expensive to air a Nordic production than buying American television series because of the rights of the people involved in its making. This is not only the case in the Nordic countries, but also a challenge on the European level.

Christian Wikander, head of drama and entertainment for SVT Göteborg, also points to a need for a better standardization of rights when it comes to the issue of streaming each other's programs online. There are currently very different rules for this, and since platforms like svtpplay.se now offers viewers the chance to watch a number of international productions on the web, the audience doesn't understand if the Nordic productions are not available online. Steen Salomonsen, head of acquisition of fiction for DR, finds that changes are currently happening on both a Nordic and a European level in regard to this at the moment. While there was a widespread skepticism towards the level of security for streaming just a few years ago, the systems are now trusted and the rights are more easily negotiated.

Christian Wikander mentions another technical challenge, namely the digital technologies posing problems because of the many different technical formats in which things are now produced and delivered. This was discussed at the latest Nordvision television drama meeting in October 2010, since the new technological innovations and digital equipment in many ways have created more problems than they have solved.

While there is a general sense of a very good collaboration going on production wise between the Scandinavian countries and a sense of enthusiasm for the years to come in both

Denmark, Sweden and Norway, there are at the same time a number of issues to address and a strong emphasis on the importance of a continuous dialogue to create the best Nordic drama possible.

### Patterns of distribution for Scandinavian Drama Series

As analyzed by Niels Marslev in his report on Nordic drama series based on audience data from 2004-2009, domestic television drama is among the most popular content measured in audience numbers in most Nordic countries (Marslev 2010). Moreover, drama is an important part of the broadcasters' image and brand. In Denmark and Iceland, the drama series are very popular compared to other types of programming, while drama is relatively popular in Sweden and Norway, but a little below the average levels of shares. Finland stand out by having remarkably lower figures for domestic drama and by not having had a local success series in the past years, while this has been the case in the rest of the Nordic countries. In Iceland and Denmark, the series *Svartir Englar* (*Black Angels*, RUV 2008) and *Better Times* have reached ratings of 56 and 48%, while having impressive shares of 89 and 85% respectively.

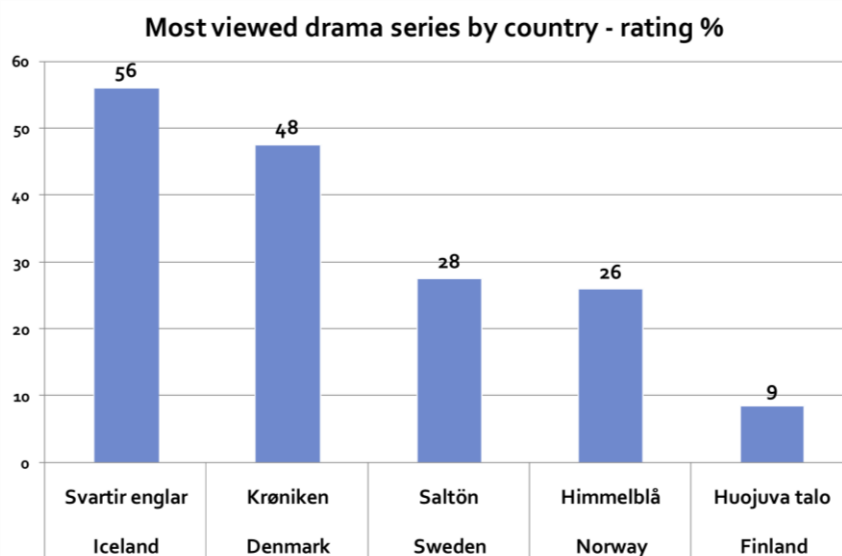


Figure 49. Most viewed drama series 2004-2009. Source: Nordic Television Audience Measurement / Nordic Public Service Broadcaster Research Departments (Marslev 2010: 4).

When it comes to showing series from the other Nordic countries, Iceland and Norway are by far the best at showing Nordic import. A comparison of the Scandinavian figures in Niels Marslev's data from 2004-2009 shows that while Norway aired 51 Nordic drama imports, Denmark showed 17 Nordic episodes per year while Sweden showed only 11 (Marslev 2010).

As for audience figures, the most viewed drama series from other Nordic countries are far from the domestic numbers. *The Killing* has done best in Iceland, receiving a rating of 24%, while *Better Times* has done the best in Norway and Sweden attracting a share of 18 and 12%. In Denmark, *Kronprinsessan* (2006) – based on a novel by Danish author Hanne-Vibeke Holst and directed by Kathrine Windfeld – had a rating of 18%. In Iceland and Denmark, the Nordic imports are far from the domestic share, while the Nordic series are not that far behind the domestic series in Sweden and Norway.

Based on analyses of four different Danish series, Niels Marslev sees a tendency for the local hit series to also find the largest audience in the neighboring countries. The four Swedish case examples indicate that it is an advantage with series involving elements to which the other Nordic countries can more easily relate. Thus, *Kronprinsessan* with Danish input as mentioned above and *Om ett hjärta* (2008) starring the well-known Danish actress Paprika Steen performed equally well or even better in Denmark than in Sweden. The analysis of Norwegian titles show that few have premiered in more than two neighboring countries. The local success *Himmelblå* (2008) has, for instance, still not been shown on Danish television. The crime series *Hunter* with a local share of 49% has premiered in both Denmark and Sweden, but with shares of 21% in Denmark and 13% in Sweden the series has been far from the level of domestic popularity. Overall, Danish exports have performed best in Scandinavia in 2004-2009. However, on average, series from other Nordic countries do not benefit the audience bottom line of the broadcasters, particularly since the series have a hard time attracting the younger audience.

Sven Clausen finds that thinking about the different segments and age groups are a crucial part of not only producing but also marketing Nordic drama series. Several people at the Danish drama department have taken courses in American marketing strategies to study what the American studios do to attract attention to their series in different contexts. As an example of a deliberate effort to target the younger audience with a broad drama series in Denmark, Sven Clausen mentions *Better Times*. DR was afraid that a historical series beginning its storytelling in 1949 would not appeal to the younger audience and that was the main reason why all material and spots

advertising the series began with the words: “This is a story about four young people ...” Sven Clausen is certain that marketing and positioning the series in the right way is crucial to finding the right audience and believes that this is an area where there is place for improvement in the Nordic context.

### Genres that travel: crime and family

When it comes to genre, crime and family are the two genres that travel while other genres have a hard time crossing borders. Most people interviewed for this report have singled out crime as the genre that travels the best in the Nordic region. However, the statistics in Niels Marslev’s report indicate that while crime and family are about equally popular on the domestic market, family does better than crime in terms of indexed share of audience when exported.

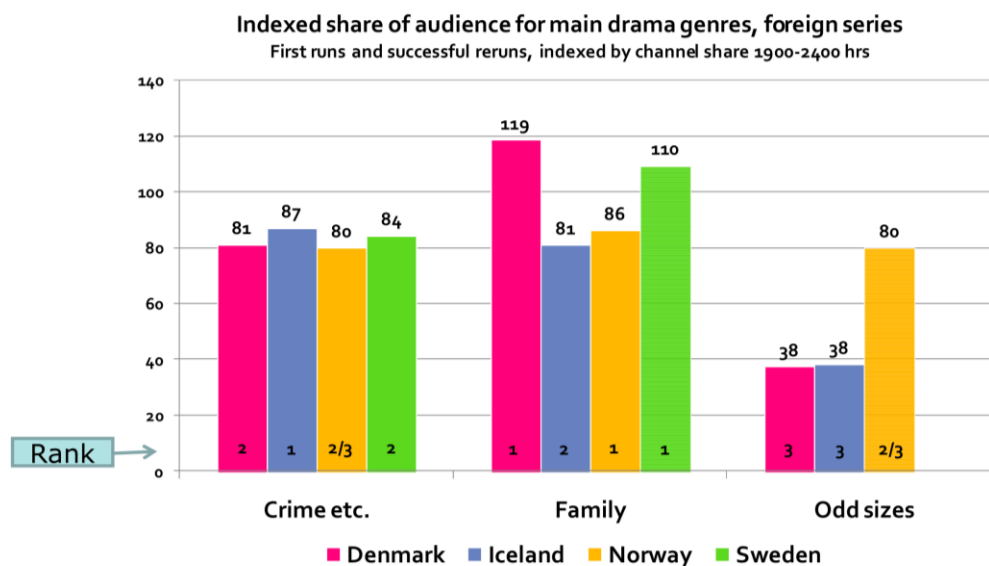


Figure 50. Indexed share of audience for main drama genres, foreign series. Source: Nordic Television Audience Measurement / Nordic Public Service Broadcaster Research Departments (Marslev 2010: 30).

A number of interviewees highlight the importance of scheduling in relation to the success of Nordic drama on foreign screens. It is a widespread point of criticism, that the Nordic import is often offered unattractive slots, making it a challenge to reach a large audience. In Niels Marslev’s report, he finds a tendency towards stronger performances on weekends for domestic as well as

imported series. However, several people interviewed emphasize the value of a steady slot for Nordic imports, which can also be on weekdays. Hans Rossiné mentions how NRK had a successful slot for Nordic crime fiction on Thursdays at 9.30 pm. According to him, the average share was then around 40%. However, the slot was cancelled three years ago to try out new approaches to the Nordic imports. In Sweden, Monday and Wednesday nights at 9 pm are now for Swedish and Nordic drama. Stefan Baron emphasizes that SVT has great expectations for this slot, hoping that a mix of both popular and more challenging drama will create an overall success for the slot.

In Denmark, the highly successful slot on Sunday night at 8 pm, which is where all the long running Danish series premiere, seems not to have been regularly used for Nordic imports, but in 2006 *Kronprinsessan* was allowed to borrow this slot, maybe partly explaining its relatively successful audience numbers in Denmark. The same year, another Swedish series, *Kommissionen* (2005), was scheduled for Sundays between 11 pm and midnight making the potential audience limited from the outset. In 2007, *Höök* (2007-2008) had the same late night slot, while there has been a tendency from the premiere of the follow up to *Kronprinsessan*, *Kungamordet* (2008, again based on a Danish novel by Hanne-Vibeke Holst and directed by Kathrine Windfeld), to let more Swedish crime series use the attractive 8 pm slot on Sundays. Thus, *Isprinsessan* (*The Ice Princess*, 2007), *Maria Wern: Främmande Fågel* (2008), *Predikanten* (*The Preacher*, 2007, based on a popular crime novel and presented by the author's name as *Camilla Läckberg's The Preacher* in Denmark), *Om ett hjärta* and *Arn* (2010) have all been shown in this slot in 2008-2010. These have all been mini series of a maximum of six episodes, making them easier to schedule between the Danish high profile long running series using the same slot. The second season of a series like *Höök* was in 2009 still shown as late night fare, now on Wednesday evenings from 11 pm.

### **Alternative scheduling and the hardships of re-runs**

According to Steen Salomonsen, DR in the fall of 2010 had very good numbers for showing the three feature films about the police officer Johan Falk (1999, 2001, 2003), which had previously never been shown on Danish television, followed by the series about the same character from 2009. And – besides the amount of people watching – the viewers' judgment of the quality of what they saw was remarkably high. This is an interesting example of older feature films finding a natural context for being programmed by being linked to the more recent series.

Another interesting number from DR recently, is the fact that the 're-run' of the TV3 series *Lulu and Leon* attracted 700.000 viewers when the first episode was shown on Sunday at eight. When it moved to Mondays at eight from the second episode and onwards, the numbers dropped to 400.000 viewers per episode which according to both DR and the production company Fine & Mellow is too little to greenlight a second season. In comparison, *The Government* has found a steady audience of around 1,4-1,5 million viewers every Sunday at eight this fall, while 375.000 Norwegians are watching when the series is already showing on Norwegian television (Dohrmann 2010).

According to producer Sven Clausen, DR has been forced to stop producing mini series for financial reasons in the past years, leaving only the long series for export. As already mentioned, Norway and Sweden, in contrast, produce more mini series, odd sizes and experimental fare while also having a greater diversity in the approach to programming. Several interviewees wish for a more dynamic relationship between the long and the short formats as well as between the different slots while calling for a real effort to be made to guarantee the Nordic imports good slots. Of course it will also make a difference if these series are available as part of the online screening platforms where people can choose to see the programmes when they so desire. However, the audience has to find the programmes, and advertising the series better on each other's channels is of importance both for the regular television screenings and the screenings on the web.

A problem emphasized in Niels Marslev's report is how reruns of most drama series are not doing very well. This is a problem since drama productions are costly and a rerun potential would therefore make a huge difference to the over all picture. However, the rerun challenge is not only a Nordic, but very much also a domestic problem. As the figure of Danish rerun statistics below shows, only *Matador* (1978-1982) and *Unit One* have performed well as reruns.

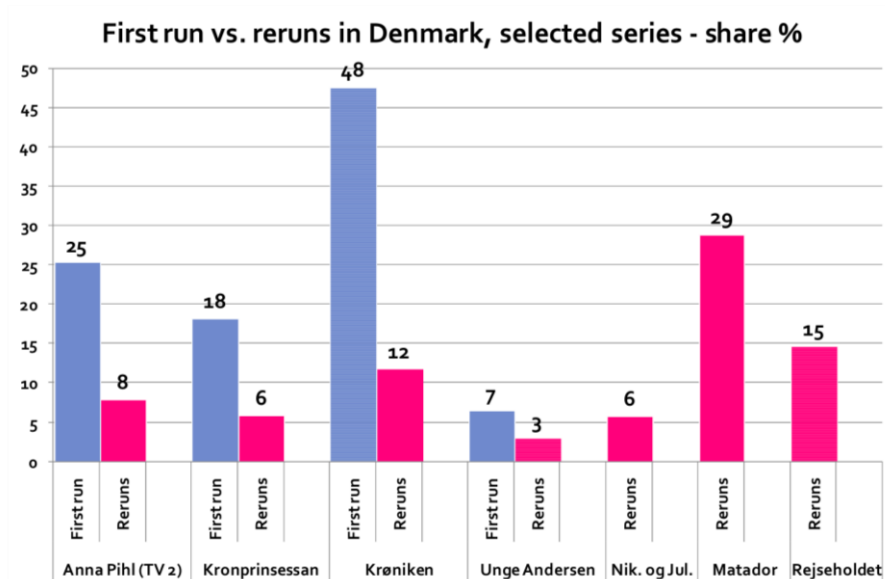


Figure 51. First run vs. reruns in Denmark, selected series. Source: Nordic Television Audience Measurement / Nordic Public Service Broadcaster Research Departments (Marslev 2010: 35).

The sale of the drama series on DVD is also worth counting as part of the whole picture. As the DVD figures in the Danish Film Institute report on the market potential of Danish film in Europe as well as the Nordic countries indicate, the DVD sales of Danish television fiction on the Swedish market in 2008 and 2009 actually had a higher market value than the sale of Danish fiction films (DFI 2010: Appendix c).

### **Current and future challenges: a time for Arte-Norden?**

The interviewees for this report primarily mention scheduling as a problem for the distribution of Nordic television drama across the borders, but the prices per minute is also up for discussion. Originally, the Nordvision collaboration was based on free programme exchange with no money on the table. This principle was given up in relation to the drama productions in 1991. As Hans Rossiné states in Finn Rowold's book on Nordvision one of the current and future challenges for the collaboration is this move from a nonprofit and noncommercial outset towards a more financial sort of collaboration (Rowold 2009: 42). Rossiné are among the proponents for creating a strong Nordic drama brand and maybe even an inter-Nordic drama series. As documented in Rowold's book, attempts have been made over the years, but when the approach has been to deliberately design a series of interest to all Nordic audiences, they have tended to fail. Sven Clausen highlights



the nature of collaboration on a series like *The Eagle* as a better way to create actual Nordic co-production. Having a travelling task force at the center, *The Eagle* could easily move episodes to other Nordic countries and incorporate foreign actors, but this is of course not always the case.

According to Henrik Hartmann from Nordvision, there are now talks of maybe creating rating-based prices for drama productions to hopefully make the productions travel more easily by being affordable for not only the mother channels. As for the Nordic collaboration, Henrik Hartmann is however keen on emphasizing that thinking about Nordic collaboration cannot and shall not only be discussions of shares and ratings. To him, it is important that discussions of values and quality are central parameters in the general approach to Nordic collaboration.

From the Nordic Council, representatives have recently voiced the idea of creating an Arte-Nord TV-channel as well as web-TV-channel as a new approach to what some have termed years of unsuccessful attempts to create something in the Nordic audiovisual scene where the whole are bigger than its parts (Johansson & Thommesen 2010). With the French-German television channel Arte as the model, the intention is to create a platform for Nordic quality product to an inter-Nordic audience (Bull 2010).

New ideas are thus continuously on the table, especially trying to deal with the new channels of distribution in a digitalized media landscape. But contrary to the state of the film scene, the field of Nordic drama production is marked by a general satisfaction with the over all state of affairs combined with an openness towards new initiatives to be discussed through the established channels for Nordic collaboration.

## Small Region in a Global World: Scandinavian Film and Media Culture and the Future Challenge

Cinema has historically been, and to a certain degree still is, the cornerstone of film culture, at least for the professionals in the film business and film culture. The cinema is the place where films *should* be seen, before anything else. But as the data on film and film consumption presented in this report shows, the empirical reality is very different: Scandinavians still treasure cinema and when asked they consider cinema to be the best place to watch films, but in reality they watch films in many other ways and on very many different platforms.

Film is by now part of a global digital media culture, and technically films can spread in global networks that are not controlled from any national centre – both legally and illegally. This situation creates tensions in contemporary film culture between cinema as platform and all the other new platforms, and it creates tensions between those who produce and make films and those who want to control how particular films are released into the new system. The traditional chain of hold back periods with cinema first and then dvd and television is breaking down all over the world and will not last for long.

The Danish newspaper *Politiken* recently wrote about one of the first experiments in Denmark with a film launch simultaneously in the cinema and on VOD (Benner 2010). The film in question here was Casey Affleck's mockumentary feature *I'm still here* (2010) with Joaquin Phoenix in a bizarre role as himself. For a couple of weeks, people could choose between seeing the film in the little art cinema, Husets Biograf, or on VOD for DKK 99 (about DKK 20 more than a normal cinema ticket) at the biggest Danish VOD site, You See. The reactions to this very limited experiment in the Danish film culture were quite characteristic for the positions in the fight between the old and the new film culture. Representatives for the cinemas have no desire to change anything, they want to keep the monopoly of film openings and a long hold back period; the producers want a shorter hold back and flexible possibilities of releasing films in different ways, according to what they judge would serve the individual film best and maximize the audience, and the VOD companies obviously want to cut in on a deal as early as possible.

The hostility among cinema owners in this case was so strong that the Danish company negotiating the films distribution, Angel Film, could not get any other cinema than Husets Biograf

to take part in the experiment. One can only imagine the clash of interests, if we were talking about an American blockbuster or a much awaited national drama.

### **Cinema and the many digital platforms of films**

Nobody in the global film culture really has a solid knowledge of the magnitude and character of the new digital film culture. In many ways we are talking about an *invisible digital culture*. None of the national film institutes have systematic data on DVD rental, DVD sales, VOD-viewing figures, online film use, downloads or films seen on mobile platforms, and if they have some aggregated figures for some years, it will typically be selected figures on the total amount of sold DVDs for instance, not exact figures on individual films. The national film institutes don't even have systematic knowledge of traditional TV viewing figures for their own national films, not to speak of films from other Scandinavian countries.

As the data gathered in this report clearly demonstrates, the TV data on film viewing are extremely important if you want a picture of the real cultural importance and use of films. The total number of people watching films in Scandinavia is more than doubled if you include TV. TV is by far the biggest window in Scandinavia for films, and many films that do not do too well in cinema are clearly 'saved' by TV. In the data we have presented on TV, we have only taken first runs into consideration, but we know that many films are sent repeatedly on TV and on different channels, so 'the TV effect' for films is much bigger than the one we document. We can't judge the effect of other types of platforms in the new digital film and media culture, but a good estimate is, that it is even more important and a much bigger multiplication factor for films than TV.

### **The invisible, digital film culture**

We have not been able to get hold of data systematic data on films in the new digital film culture. The fate of films after they leave the cinema seems to be a secret well kept. We do not hesitate to call this a cultural scandal: it means that cultural products supported by public money have a life that is completely locked in a commercial world that not even the people that have directed the films can access. The digital world is of course a new and difficult world to document properly, because it is in part guided by bottom up consumer behaviours that doesn't necessarily involve an institution. When we buy a DVD this can be registered by the shop or some kind of agency

documenting the purchase, but if we borrow it or copy it to friends we are in the private domain. Online use and downloads have the same kind of double nature.

But there are other parts of the digital system that can easily be documented, if the procedures were in place, and it should not be impossible to measure DVD sales, DVD rentals and VOD use down to individual film titles, at least for national films. This is not done today, just as the by now rather well established film viewing on traditional TV is not included in the official film statistics. We have managed to get a hold of some figures on DVD sales in Denmark and Sweden in 2008 and 2009, and in those two years in Denmark alone the total number of DVDs sold amount to 1.780.803. Accordingly, if we set the average number of tickets sold for national films in the cinema to 3.2 million, based on the 2002-2006 figures, then the DVD sales are 25% of the cinema sales per year. However, this is of course only the tip of the iceberg in the new film culture.

What would also be interesting to gain more knowledge of are the types of films and genres represented in these DVD sales figures. One thing to be expected is that older films will get a new life in the digital media culture. This is in fact one of the main points in Chris Anderson's famous book *The Long Tail* (2006) in which he predicts that the potentially endless choice in the digital media culture will create an unlimited demand for content that will give both old films, new films, popular films and films with a traditionally more limited audience a second life. Art cinema films for instance, or documentaries with a perhaps limited audience in a short term and on a limited national market will be able to exist and reach a much wider global audience if they are out there and easily accessible, online and on demand or for download or streaming.

This prediction is at least partially confirmed by breaking down the films represented in this 2008-2009 sample. Looking at just the films in the 2008 sample, we find the genre profile than can be seen in fig. 47. What is visible here is that the classical comedies (basically things like Olsen Banden films and the like, even films from the 1950s) are very well represented, together with more contemporary comedies. These films are however not individually the most sold films. The top three on this list are very different contemporary films: the historical drama *Flammen og citronen* (Ole Christian Madsen, 2008, 90.705), the romantic comedy *Oh Happy Day* (Hella Joof, 2004) and the documentary about the Danish national soccer team ... *Og det var Danmark* (Carsten Søsted & Mads Kamp Thulstrup, 2008, 32.028). The CY-films are also as usual well represented, and the films on the list are both classics and contemporary films, as well as drama, comedy, adventure and animation. Like the figures for cinema also drama is a strong category, mostly contemporary, but

even some classics by for instance Bille August and Nils Malmros. All in all, this shows that the digital film culture is pretty diverse, all genres and both contemporary and classics.

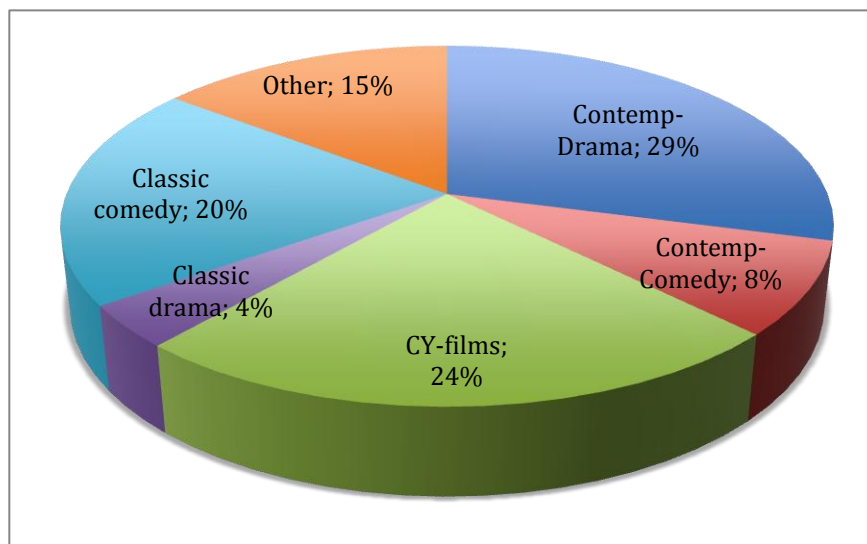


Figure 52. DVD sales in Denmark 2008, genre categories.<sup>4</sup>

The figures from Denmark are probably also in some way representative for trends in DVD sales in the other Scandinavian countries, but the figures for Sweden can't be compared to the Danish since they are only for the top 20 films. But for example the DVD sale of *Män som hatar kvinnor* (The girl with the dragon tattoo) is 122.632, a figure that should perhaps be compared to the sale of the Norwegian bestselling historical drama *Max Manus* that as of this year, since April has sold 400.000 copies. These figures for single films indicate that the digital potentials can be quite big.

### National cinemas – global networks

What the developments of the new digital film culture makes visible, although we do not know the exact nature and scope of this film culture, is the globalisation of cinema down to the level of the individual user. Up until now, we may have seen globalisation of films as a phenomenon playing out between nation states, on a transnational regional basis or between film companies of different sort. This is of course still an important part of globalisation, and policies and strategies for the

<sup>4</sup> The data here are from GFK and are collected from selected stores: COOP, DS, Fona, special shops and internet shops covering 85% of the defined market for DVD and 60% of the defined market for Blu-ray. The figures are multiplied with an x-factor to make them representative for the whole market.

development of a transnational film culture are highly needed. But the new dimension in globalisation is user driven globalisation, based on the simple fact that networks can be created of a much simpler nature and on a much more informal kind through the digital network technology available.

We have seen this when technology nerds create networks and facilities for the downloading of music or films, and we see it with the rapidly developing professional and semi-professional establishing of online services related to films. An example of this was reported by NFTF's electronic newsletter on November 19, writing about a new VOD service based on a concept earlier called The Auteurs, but now going by the name of MUBI and designed for Sony Play Station:

Founded in 2007 by Efe Cakarel, (see interview below) a young entrepreneur and film buff, MUBI is backed by Celluloid Dreams, The Criterion Collection, Costa Films (Latin America), Cineart Distribution (Belgium and the Netherlands) and supported by the MEDIA Programme. The online film distribution service is also the exclusive partner of Martin Scorsese's The World Cinema Foundation. Since November 3, around 400 world cinema classics and new quality films such as Michael Winterbottom's 2003 *In this World* or Louis Malle's 1974 film *Lacombe Lucien* can be watched in original language with English subtitles by Scandinavian households with Sony PS3 game platforms, against one off payments or monthly subscription fees. In Sweden for instance, the unlimited monthly subscription costs SEK120. An individual feature length film can be watched for SEK32 and a short film for SEK10. MUBI's local distribution partners are Angel Films, Atlantic Films, NonStop Entertainment, Sandrew Metronome, Sunrise Distribution and Another World Entertainment. Through a deal signed with TrustNordisk, MUBI also offers around 45 Nordic titles for online streaming in territories where distribution rights are still available. This includes most Lars von Trier library films and Baltasar Kormákur's *101 Reykjavik* and *Jar City* for example. Films are not only watched online. They can also be discussed and reviewed through MUBI's popular social network (see <http://www.mubi.com/>).

What we are dealing with here is clearly an example of both Anderson's long tail theory, where even the most non-commercial product can have a distribution over a long period and to a vast but very special and fragmented global audience, and an example of a liaison between art cinema and new technology. The article in the newsletter further points to the rather impressive growth of the European VOD market, measured in turnover from € 27m in 2003 to € 544 million in 2008, and with an estimated rise to around € 2.2 billion in 2013.

There are already several global online cinema networks where you can watch parts of films or whole films and if you google a film title you will most likely immediately get to either a clip from the film on YouTube, IMDb or another site. Even very small films in languages that not many people understand are possible to find. The new film and media culture is thus a colossal building up of a global cultural memory bank, a collection of all those films than in the old film culture tended to disappear after their cinema release or would at least become very hard to get a hold of, if they are outside the normal national territory. If for instance you search YouTube for Hungarian films, more than 5.000 hits come up, which means that in less than a couple of hours you would probably be able to get a pretty good impression of a film nation that is not exactly

strongly present in your local cinema or your choice of TV stations. Danish film actually only generate 688 hits, Swedish films 1.308 and Norwegian films 528 hits. Since Google works by uploading of users, this indicates that while people in Hungary or elsewhere are pretty active making Hungarian films present on the Internet, Scandinavians do not see the same need for that.

### **Old culture – new horizons**

But maybe the Scandinavian film culture as a whole should be much more open to the possibilities which the new digital culture offers, instead of stepping along the same old paths of film distribution. Amazing sites like *Freedocumentaries.org*, where you can actually watch thousands of documentaries for free is trying out new ways, and the plans for making *Myfilmstation.com* points in the same direction. VOD online or on your TV is definitely something that will develop rapidly in the near future, and also the Scandinavian film culture will have to develop strategies on how to unite old and new models.

Maybe it is not so strange that documentary filmmakers seem to be taking the lead in this regard, since documentaries are not so dependent on cinema. Some of the most prominent female documentary directors in Denmark (among them Eva Mulvad and Phie Ambo) have showed the way with their *Danish Documentary.com*, a site that is both an information web site presenting the films of their company Danish Documentary, a link to their own YouTube channel with film clips and finally also an online store. A platform made by the filmmakers themselves, but imbedded in a global digital network that gives this part of Danish film culture a very direct presence in the new media culture.

But what will surely explode in the coming years are oninternet-based film platforms where you can stream or download films legally to both your television, computer and other mobile platforms like smart phones and things like iPad. The established distributors and cinema owners may fear this development, but if the user wants it they will have to follow and change the rules of the game. Production companies and cinema chains may even want to enter this market, like Curzon Cinemas in the UK, who combine a film and cinema network online with a video on demand function, or like Zentropa Trust Nordisk who have announced an interest in VOD (*Politiken*, December 26, 2010). Curzon cinema and the perhaps most user friendly VOD in the world, Netflix in the US are presently limited to national spaces, but this will change in the long run, just as the otherwise pretty open art cinema VOD mubi.com have certain national restrictions,

especially on newer films. But the new, networked, mobile and user driven film culture is already in place and will expand and change the national and global film culture in the very near future. A challenge, but also a big chance for Scandinavian film culture.



## Methodological Postscript

### Basic empirical data

This report is based on data on films in Denmark, Norway and Sweden released in the cinema between 2002 and 2006. The primary data concerning admissions from the national film institutes have been added systematic information on co-production, genre and data on admission of the films in each of the other countries and in the rest of Europe. On top of that we have gathered data on the films from the same period on national television in all three countries. The source and validity of the data can be listed in the following way:

- Data on cinema admissions is taken from the official lists from the three national film institutes, only feature films are included, so documentary films are not taken into account. This data both include data on national films on their own market and in the other Scandinavian countries included.
- Data on cinema admissions outside Scandinavian is taken from the Lumiere database (2010), (see <http://lumiere.obs.coe.int/web/search/>).
- Data on co-production is taken from the Lumiere database (2010), and from the IMDbPro, database (see <http://pro.imdb.com/>).
- Data on TV drama and films on TV have been extracted from the TV-meter system in Denmark, Norway and Sweden. The data include ratings (actual number of viewers), share (% of those watching television at a particular time slot) and the so-called Target Affinity data (measuring the audience in relation to an index related to gender, age and segments).
- Survey data from Denmark, Norway and Sweden on film viewing habits made for the European Film Think Tank, based on a large scale questionnaire.
- Selective data on DVD sales in Denmark (Top 100 2008-2009), Norway and Sweden (Top 20, same period).

### Validity

The comparative data presented in this report has a high validity when it comes to the comparative analysis of cinema admissions in the three countries and the structure of national shares, shares in

other Scandinavian countries and in Europe. These are hard facts that document to what extent there is such a thing as a Scandinavian film and TV culture with a dynamic culture of collaboration and exchange. In the analysis of genres, production and co-production, we also have fairly stable and valid data. Unfortunately, we cannot extend the analysis to the digital film and media culture. We do not have data that makes a full comparative study possible, but we can point to trends and tendencies.

What is quite new in this report is that we go into more qualitative analysis of different film genres as well as the way in which these genres relate to an audience. Whereas the Scandinavian TV culture (as it is demonstrated in the TV drama chapter) for the last 15 years has developed quite sophisticated knowledge about their audiences and the relation between different genres and different audiences, the Scandinavian film culture doesn't have the same tradition and knowledge. This might be part of the problem.

In this report we have included data on segments and the audience profile of selected film genres. We have used the Danish TV-meter data, but we have not had access to similar data on segments in Sweden and Norway, where we only have data on gender and age. This is a weakness in this part of the report, because we cannot be absolutely sure that the same film would have the same audience profile in all the three countries. However, it is probably fair to say that due to the social similarities in the three countries involved, the variations are probably not very big.

One last methodological remark: the report shows that TV figures are much higher as a whole for the films we analyse than cinema admissions. However, it should be noted here that figures vary very much with time of broadcast and type of channel, and furthermore the strong position for TV cannot be translated to *economic* dominance. But this is not analysed in this report, which does not deal specifically with film economy.

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