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The role of public service media in sustaining TV drama in small markets

Abstract

Via a comparative case study of VRT/Flanders and DR/Denmark, we investigate the role of public service media in sustaining the expensive but important genre of TV drama in small markets in the face of recent cutbacks, shifting revenues and global competition. While the study shows some similarities, there are notable differences between the two cases. VRT has significantly higher production volume and commissions most productions externally, thus supporting the *sustainability of the wider Flemish TV production market*. DR has lower production volume and produces largely in-house, enabling larger budgets per series and, hence, higher production values, which in turn has contributed to an upwards global export spiral for DR, thus supporting *the sustainability of DR's drama content* itself.

Introduction

TV drama has always been closely associated with the role of public service broadcasting (PSB). TV drama is said to connect national audiences, showcase cultural diversity and identity, and reflect on national history and societal issues (Bondebjerg, Redvall and Higson 2016; Blumler 1992). Until monopolies were abolished in the 1980s, public broadcasters were also the main commissioners and producers of TV drama (Bignell and Fickers 2008; Fickers and Johnson, 2012). High-end TV drama still continues to have a key role in the programming strategies of public broadcasters, especially in small television markets, which are traditionally characterised by a limited number of players, limited capacity for export, and a strong dependency on public support mechanisms (Puppis 2009). But following the

proliferation of platforms and content services, the migration of audience and advertisement revenues to online media, and in particular the entrance of new over-the-top (OTT) players, recent shifts to existing production and distribution models have led to increasing concerns about the sustainability of domestic production, especially drama (Doyle 2016). Additionally, governments have recently imposed cutbacks on PSBs in small markets and made PSBs commission more drama from independent producers. This has forced them to reconfigure their existing production, distribution and financing strategies. The examples of Belgium, Norway and Ireland show how the role and legitimacy of PSB has increasingly been tied to its role as a driver of domestic audiovisual production (Raats and Donders, 2017).

It is interesting that despite sharing market characteristics and concerns, PSBs have adopted different strategies in their attempt to make drama production sustainable. By comparing two public broadcasters in two small markets, VRT in Flanders (the Dutch-speaking part of Belgium) and DR in Denmark, this article, firstly, compares the importance of public service broadcasters in terms of producing domestic TV drama. Secondly, we seek to examine differences and similarities in the financing, production and distribution strategies used to sustain domestic TV drama, studying the extent to which these strategies match a broader vision of PSB's role in sustaining small television markets. For our analysis, we have identified three key dimensions of TV drama strategies: (i) the volume of TV drama, (ii) television drama budgets, and (iii) the composition of these budgets. Finally, we question the extent to which their respective strategies help VRT and DR deal with the aforementioned challenges.

The article consists of three parts. The first part contextualises the pressure on domestic television drama in small markets. It does this by discussing structural thresholds for television production in small markets, and by arguing that the pressure being exerted at the moment is a consequence of shifting revenue streams and new market entrants. The second

part introduces the cases and research methods and presents our findings, based on the three dimensions that have been identified (volume, budgets, budgetary composition). And part three discusses a series of challenges with regard to sustaining TV drama in small markets.

Small markets, limited potential?

Various authors (Collins, Garnham and Lockseley 1988; Doyle 2013, 64; Hesmondalgh 2013, 21) have pointed to the existence of thresholds related to the non-exclusive and non-rivalrous characteristics of audiovisual products. The strategies used to counter the ensuing difficulties relate to building scale and enlarging the market for sales, reducing costs by sharing resources, or increasing the lifecycle of audiovisual products by employing multiple windows and territories (Raats, Evens and Ruelens 2016). Small markets are characterised by a limited number of investors and a limited domestic market, generating less available funding for original domestic production (McFadyen et al. 2000; Picard 2011). Public broadcasters generally have less funding to spend than their counterparts in large markets: the advertising revenue is much lower, as are the options for recouping investments through retail and video on demand in such markets; and investments in domestic TV drama by cable distributors or telecom providers are limited due to the limited footprint of small markets.

This results in smaller budgets for domestic programmes, which must compete with big-budget productions originating in much larger markets. A TV drama series in the French community of Belgium can attract around EUR 4 million for an entire ten-episode season, whereas budgets for productions in larger markets easily exceed EUR 1 million per *episode* (*Les Revenants* 1.35 million/episode; *Versailles* 2.8 million/episode, *True Detective* 4.5 million/episode). This in turn affects the potential of cross-border distribution and therefore the potential return-on-investment: domestic viewership forms an important basis for selling distribution rights internationally, and the minimum budget is often regarded as a measure of

production value and hence potential success (Bielby and Harrington 2008).

In theory, broadcasters in small markets can acquire foreign series that were made with far higher production budgets yet are far cheaper than the domestic content they produce themselves. As a result, small markets often have higher levels of imported content than large markets (Lowe and Nissen 2011, 58). However, due to the popularity of domestic TV drama, small-market broadcasters continue to produce the genre all the same (Econopolis 2017).

Furthermore, cultural differences and language can be regarded as barriers to the export of television content (Crane 2014; Lee 2008, 119). This is especially problematic for small markets with a large neighbouring market (Lowe and Nissen 2011, 35), such as Ireland and the French-speaking part of Belgium, where the development of domestic television markets has struggled because television consumption is more oriented towards programmes from the UK and France, respectively. As a consequence, broadcasters and producers in small markets rely heavily on public support. Multiple forms of policy support have been set up in a number of countries, most of them privileging production either directly (in the form of subsidies), or indirectly (tax incentives or investment obligations for cable and over-the-top players) (Hedling 2013; Murschetz and Teichman 2018).

A perfect storm? Cutbacks, shifting revenues and global competitors

The combination of digitisation and convergence has shifted the business models of the audiovisual industry owing to the ensuing shift in patterns of media use and increase in distribution capacity. Traditional revenue and financing models for the TV sector are under pressure, increasing competition both among legacy media (producers, broadcasters, telecom and cable distributors) *and* between legacy media and new players such as Netflix, Facebook and Google (Lotz 2007; Donders and Evens 2018). For television drama in small markets, four intertwining shifts are putting significant pressure on domestic production.

Firstly, TV consumption is moving from linear to non-linear viewing via transactional and subscription video on demand – both provided by national broadcasters and distributors and by international OTT services alike. The quality programmes of the latter – including Netflix – compete directly with TV series produced by domestic broadcasters. Broadcasters and producers could generate additional revenue by selling television drama on more platforms/windows, and to different territories. However, the rise of new distribution platforms has also increased the pressure on traditional broadcasters, which no longer enjoy the same exclusivity when it comes to TV series. This could potentially result in less available investments in TV drama. It has also increased the pressure placed on broadcasters in terms of retaining rights, and various broadcasters are becoming more reliant on co-production strategies to increase their budgets and distribution markets (Raats, d’Arma and Steemers 2018).

Secondly, not only are new OTT services putting pressure on traditional viewing, they also invest in original content. The fact that Netflix operates worldwide also provides important economies of scale, leading to investments in large-budget productions for the global market. However, given their global business model, Netflix and Amazon are much less likely to invest in other than token productions from small (language) markets, as subscription numbers in these markets by definition are far lower, with investments being far riskier than in larger (language) markets. Despite announcements of increased Netflix investments in European content (Feldman, 2017), most of Netflix’s European ventures are (co-)productions with the large markets such as the UK (*The Crown*, 2016), France (*Marseille*, 2016) or Germany (*Dark*, 2017), because it is far less likely that TV series originating in small markets will become worldwide hits. Domestic producers in small markets therefore fear that the increased importance of international SVoDs will lead to decreased domestic investment because high-end drama can no longer be tied exclusively to one linear brand.

Thirdly, shifting media usage patterns have instigated a migration of advertising spending from traditional media (print, radio, TV and cinema), where domestic players are dominant, to internet and mobile advertising, where international platforms such as Google and Facebook have the largest market share. Revenues previously invested in domestic television ecosystems are thus increasingly flowing to international companies that do not invest in the original local content of small markets. A 2018 report by the European Audiovisual Observatory indicates that 56 per cent of total online video advertising in Europe goes to Facebook and YouTube (EAO, 2018). In some markets there is an even more urgent issue: ad-skipping (the option of fast-forwarding past traditional television commercials), which is putting pressure on free-to-air broadcasting investments in domestic television content (Econopolis 2017, 10).

Finally, the past decade has seen cutbacks in the level of public broadcasting. In 2018 the European Broadcasting Union reported a drop of 2.8 per cent in the financing of European PSB in real terms, with over a third of PSBs facing budget cuts in 2014–2017 (EBU 2018).

Case comparison of financing strategies in two markets

With a view to achieving greater understanding of the sustainability of small television markets, our analysis is based on a comparative case study (Yin 2003). Case studies allow thick descriptions (Eisenhardt 2002, 9), which in our case make it possible to analyse the financing of TV drama as it is interlinked with policy, strategy and contextual factors. They also allow a multi-layered analysis that enables us to gain insights from policy documents, interviews and various data on the output of TV drama and the respective strategies behind this output. Given the focus on small media markets, the case study sets out from a most-similar-case design. In our case comparison, we provide evidence from DR (Denmark) and VRT (Flanders). The two cases share a number of characteristics of small media markets

more generally. Both illustrate the thresholds of small TV markets: they have a limited number of players, high market concentration, and considerable dependency on public funding mechanisms to sustain high-quality audiovisual production. Additionally, they portray specific characteristics that make them highly useful for systematic comparison. Both Flanders and Denmark can be regarded as democratic–corporatist media systems (Hallin and Mancini 2004) and small markets (Puppis 2009; Lowe and Nissen 2011), also in terms of the languages of these two markets (Dutch and Danish, spoken by 6.4 and 5.7 million respectively). The two PSBs occupy a central position (with TV market shares of 40 per cent in Flanders and 34 per cent in Denmark). Both are characterised by the fact that domestic TV drama is very popular. Additionally, they are non-Anglophone and have a limited market size, so they have a limited capacity for production and export (theoretically).

Owing to difficulties in accessing budgets, the highly strategic and confidential character of financial data, and the lack of systematic longitudinal comparisons of TV drama productions, the analysis combines various sources. This approach includes the close reading of policy documents such as management contracts, programme policies and annual reports; the authors' own inventory of TV drama series of both public broadcasters, collected (and cross-checked with various sources) from 2009 to 2018; additional sources reporting on public grants for TV drama such as Nordvision and the Flanders Media Fund or Belgian tax shelter; and data gathered from broadcasters and independent producers, all supplemented by interviews with key stakeholders (such as policymakers, independent producers and PSB representatives) conducted between 2016 and 2018. Our interviewees work at DR, SF Productions, and TV2 (Denmark), and at the Flemish television producers' association VOFTP, VRT, Skyline/De Mensen and Caviar (Flanders).

TV drama is defined as episodic fiction across different genres, broadcast on one of the platforms of the public broadcaster concerned. We make a further distinction between “high-

end TV drama” (or cost-intensive episodic fiction of various genres lasting at least 45 minutes and often programmed in the most popular slot: Nelson 2007); “children’s and young audiences’ fiction” (on any platform); and “other fiction” or fiction lasting no more than thirty minutes. We focus only on original domestic first-run drama. Co-productions in which the public broadcaster has only a minority investment are not included in the analysis.

Flanders

In Flanders, two private broadcasters (Medialaan and SBS Belgium) compete with VRT in terms of domestic content production and high-end drama. Television drama is usually outsourced to the independent production sector, which comprises over forty small and medium-sized production companies. Market leaders include Studio 100, which specialises in children’s content; Warner Bros Belgium (formerly Eyeworks); Woestijnvis (a subsidiary of the DeVijver group, which is part of Telenet); and DeMensen. The cable distributor Telenet, a Liberty Global subsidiary, holds a quasi-monopoly position in the cable market. In 2014, Telenet took over the private broadcaster SBS. Over the past years, Telenet has been playing an increasingly important role for TV drama, as it often participates in co-production deals with broadcasters to provide subscribers of its pay-TV services with exclusive previews as it aims to reposition itself against competitors such as Netflix, which was launched in December 2016 on the Belgian market. In December 2018, it was estimated that 20 per cent of all households had a Netflix subscription (Econopolis 2018).

Volume: VRT as a lever for independent drama production

As revealed by the total volume of fiction broadcasts, VRT’s fiction strategy is based in general on five pillars. These are (i) dedicated Sunday evening slots for its high-end programmes, attracting significant viewing shares. In 2017, this included two high-end TV

drama series (*Tabula Rasa* and *Hotel Beau Sejour*), which also attracted international acclaim and were later sold to Netflix; (ii) usually lighter-genre TV drama programmed in midweek, such as the romantic comedy *Zie Mij Graag (Please Like Me)*; (iii) a limited number of shorter, more experimental series on VRT's second channel (Canvas), such as the dystopian interpretation of Belgian adolescents in *Generation B*; (iv) a daily soap, *Thuis* (five days per week) programmed all year except in the summer months; and (v) dedicated programmes for children and young audiences, either on the third channel (Ketnet), or (this is still limited) online. Table 1 shows a total of 104 series broadcast between 2009 and 2018, or an average of ten fiction series per year. VRT broadcasts three to four high-end productions per year. The number of episodes of high-end drama ranges from eight to ten. While the total volume of fiction produced annually might differ, the total budget available for fiction remains more or less stable (interview with VRT drama strategist, September 2018).

INSERT TABLE 1 HERE

The large volume of TV drama productions can be explained in a number of ways. In most cases, VRT fiction has achieved a great deal of success in terms of market share and viewer ratings. The popularity of VRT drama has triggered private broadcasters to follow suit and invest heavily in domestic television drama production as well, thereby contributing to a very competitive market for drama production with a volume of 14 to 18 fiction series produced annually in Flanders (including children's drama, soaps and sitcoms) (Raats, Evens and Ruelens 2016). High-end drama is usually aired on VRT's generalist channel "Eén"'s Sunday evening slot, thirty- to forty-minute "dramedy" is usually programmed in a prime time midweek slot. More quirky, experimental drama (usually comedy) is programmed on the second channel, "Canvas." Series are also available for catch-up (thirty days for up to three months) on the online platform "VRT.NU" for free.

Furthermore, aside from the daily soap *Thuis*, all TV drama at VRT is commissioned

externally from independent producers. In the 1990s, VRT increasingly commissioned externally in order to be more cost-efficient; independent producers were also often considered to be capable of providing more creative and successful programmes. Together with investments by private broadcasters, this has resulted in the development of a dynamic yet competitive independent sector for drama commissions since the 2000s. The maintenance of a strong and vibrant production sector has been the underlying reason for various policy measures taken over the past decade, resulting (among other things) in a higher quota for external commissioning for the public broadcaster and the establishment of a tax-shelter system in 2003. The tax shelter allows private third parties to take part in investment in productions in return for a fiscal advantage. Additionally, to trigger broadcast investment and increase the overall volume of TV drama, the Flemish Media Fund was launched in 2010. In 2014, the Flemish government launched an additional investment obligation for cable and telecom distributors to invest in original Flemish productions (aside from the co-productions with broadcasters that were already taking place) (Raats and Wauters 2018). These measures mostly prioritise production and volume, and have succeeded in maintaining the number of TV drama commissions from broadcasters. For independent producers, a wide array of support mechanisms has made TV drama a more attractive genre to invest in, resulting in fiercer competition among TV drama producers.

The VRT management contract does not specify a minimum volume of TV drama. However, it does clearly emphasise the role of VRT in the Flemish independent production industry. Rather than seeing TV drama as a lever for public-interest objectives, at least in its policy obligations, the contract is linked primarily to its financial importance for the Flemish media ecosystem (VRT and Flemish Government 2016). Our interviews with VRT representatives, by contrast, clearly show that the large number of drama series is justified by the popularity of this genre and by the perceived need to keep domestic fiction in the programming

schedules throughout the entire year, which also results in far less foreign fiction being broadcast in prime time on the generalist channel. This significant investment in TV fiction also fits VRT's objective of helping to maintain the Flemish media ecosystem, even if it is not seen as the driver VRT's fiction strategy (interview with VRT drama adviser, July 2017 and August 2017).

Budgets per production: limited, but changing at a rapid pace

While exact data on VRT investments remains confidential, the aggregated data on Flemish TV drama that we collected does shed light on the total budget of VRT drama series. Analysis of the budgets of Flemish drama series shows that the average budget for each 50-minute drama series between 2012 and 2017 amounted to EUR 2.9 million for series which did not receive additional Media Fund (VAF) support, and EUR 4.7 million for series that did receive production grants from this fund (based on an inventory of 54 series broadcast between 2012 and 2017). However, it is clear that budgets in recent years have increased markedly. For instance, one 2017 study (Econopolis 2017: 47) reported an average of EUR 520.000 for each 50 minutes for projects that received Media Fund support in 2017. While in general VRT productions have higher budgets than their commercial counterparts, the differences are – at this point – not particularly large. For VRT high-end drama, budgets rose gradually from EUR 3.6 million in 2009 to an average of EUR 4.8 million per series in 2018 (Raats, Wauters, Tintel et al. 2018). Our interviewees named the following two reasons to explain this increase in budgets: (i) the higher costs of professional crew and talent, technical equipment and wages; and (ii) increased investments added to productions owing to the use of co-production or co-financing (in which a distributor secures a deal with the producer before production). In particular, competition with foreign TV drama has increased the need to secure higher-budget productions to compete on the international market. As explained by one interviewee: “You can only sit at the table and start talking from the moment you have a budget of at least 500,000 Euros per episode” (translated quote, interview with VRT drama strategist, June 2018).

Budgetary composition: significant dependence on domestic public support

A consideration of the financial composition of production budgets from all TV drama investments since 2009 reveals that although public broadcasters still provide most of the financing for their own drama, all VRT fiction productions are essentially co-productions. Soaps, sitcoms and children's fiction aside, the budgetary composition of VRT's high-drama consists both of broadcasters' investments and of other public investments.

A typical high-end TV drama series involves up to EUR 1.125 million from the Flemish Media Fund, with broadcasters' investment corresponding at least to the amount granted by the Media Fund. In practice, however, broadcasters' investments in television series are higher than this minimum (approximately 38 per cent of the production budget of high-end drama series). A third important source for VRT's fiction budgets is tax-shelter funding, which constitutes approximately 27 per cent of every television drama production. Additional financing from cities and regions and from product placement (which is allowed at VRT) were important until 2015, but have decreased since: the former due to cutbacks at the level of municipalities, the latter because producers fear it would impede authenticity of the series. More recently, distributors Proximus and Telenet have also started investing in production, seeing preview slots with exclusive new drama as a means to attract new subscribers to their video-on-demand platforms. Aside from this preview window, distributors also have to invest an annual proportion of their turnover in TV drama series. Interestingly, although these are independent productions, investments from independent producers remain limited, with only major players adding investments (often in the development phase) in the total budget. Most producers do not have the means to make significant investments since the potential for recouping investments, due to the small market scale, is very limited.

The data clearly shows the importance of public support mechanisms, even when television dramas are commissioned by a public broadcaster. Secondly, the data shows that most of the financing for VRT fiction is arranged up front and only rarely includes investments based on

expected revenue. Thirdly, the data shows that budgets are composed primarily of Flemish investments. Investments in the form of pre-sales of exploitation rights remained relatively limited up until 2018, as are co-productions with the Netherlands (also Dutch-speaking). Flanders does have a history of co-producing with the Netherlands (Dhoest, 2004), mainly driven by financial need, but volumes have significantly reduced since the introduction of private broadcasters (which privileges purely domestic fiction) and with the advent of new public support mechanisms for Flemish drama. Data from VRT series commissioned between 2016 and 2018 does show two new forms of co-production involvement: cable distributors have started securing preview rights in return for investments; and revenue from co-financing deals with international distributors such as ZDF-E or Lagardère is increasing and starting to resemble the Danish TV drama model.

Denmark

Besides DR (formerly Danmarks Radio), the Danish television broadcasting sector consists of three major players: TV 2 Danmark, MTG (Modern Times Group), and Discovery Networks. The licence-fee-funded public broadcaster DR has a total of six Danish-language channels, and so has the second, commercially funded public broadcaster TV 2, a public limited company whose main channel (TV 2) has a public service remit similar to that of DR. As their names imply, both MTG and Discovery are owned by large, transnational media conglomerates. Their channel universes consist of five to six Danish-language channels and approximately the same number of transnational channels, such as MTG's Comedy Central and Nickelodeon, and Discovery's TLC and Animal Planet. Despite the presence of these large transnational players, the Danish market remains heavily dominated by the two public broadcasters. The TV 2 channels have a share of no less than 39 per cent of viewers, while DR's channel universe is close behind with a 37 per cent share. MTG and Discovery have

shares of approximately 10 per cent each (Knudsen and Christensen 2019). Denmark has about sixty active production companies, roughly 15 of which produce *fictional* genres within TV and film. Netflix entered the Danish market in 2013, heralding a true SVoD revolution, and 40 per cent of the Danish population now uses Netflix on a weekly basis, with 48 per cent using various SVoD and VoD services to access TV series and film (ibid.).

Volume: low on volume, high on international acclaim and export

Danish TV fiction is largely made for and by the two public broadcasters DR and TV 2, both of which have the production of original Danish TV drama as part of their political remits. DR is obliged to produce a yearly average of at least twenty hours of such drama, but tends to produce more, including high-end drama, satirical/comedy drama and fiction for children and adolescents (DR's Public Service Contract 2015–2018), as shown in Table 2. In 2016, for example, DR broadcast 32 hours of fiction, including seasons one and two of the high-end drama *Bedrag/Follow the Money*, the second season of the dramedy *Ditte & Louise*, one of their biennial advent calendar series for children and adolescents called *Den anden verden/The Other World*, plus the two children's series *Kanonkongen Freja/The Human Cannonball Freja* and *Klassen/The Class* season one. In 2015, DR broadcast 23 hours of fiction, including the second season of *Arvingerne/The Legacy*, the third season of *Bron/Broen/The Bridge* and the first season of *Ditte & Louise*. Besides the short-format dramedy *Bankerådet/Bankrupt*, in 2014 DR broadcast the first season of *Arvingerne/The Legacy*, the war drama *1864*, and *Tidsrejsen/Time Travel*, another of DR's biennial advent calendar series, amounting to over thirty hours of original TV drama. In other words, DR produces two high-end drama series a year, as well as (recently) one other shorter-format series. In addition to this, there are various series produced for children and adolescents, which DR often labels "family drama" series. As for the high-end series, all but one (*The*

Bridge season one) have been broadcast in the highly successful Sunday evening 8–9 pm slot and have attracted exceptional audience shares (Degn and Krogager 2017).

The high-end drama series – such as *Borgen*, *The Legacy*, *Follow the Money* and *Ride Upon the Storm* – are also exporting exceptionally well. Ever since the first season of *The Killing* took the UK (and subsequently the rest of the world) by storm, such series have been earning DR a reputation as a drama series powerhouse within the industry (Jensen, Nielsen and Waade 2016, Waade, Redvall and Jensen 2020) as well as with many viewers around the world (Jensen and Jacobsen 2020). DR's series have been highly successful in winning international awards, especially Emmy awards, of which DR has won six since 2002, together with many other international awards: all of which suggests that these series have indeed struck a chord when it comes to the distinctive qualities of their content. In 2016, DR was presented with an honorary International Emmy Directorate Award for its outstanding contribution to international TV drama.

The impressive international as well as domestic success of Danish series has been partly attributed to the so-called dogmas of DR's drama division, which have been applied since the mid-1990s. In this connection, it is important to note that DR's acclaimed high-end drama is based on an in-house production strategy. Indeed, most industry people and academics agree that the four dogmas developed by DR ("one vision," "double story," "crossover" and "producer's choice") summarise DR's particular approach to television drama production, thereby partially explaining the current success of series such as *The Killing*, *Borgen* and *Ride Upon the Storm*. These dogmas have allowed DR to create a new conception and interpretation of television drama, in combination with a change in the production culture of the drama division itself (for more on the DR dogmas, see Redvall 2013). Another set of explanations – related to the above – is found in the texts themselves: that is, in the uncompromising narratives, characters and audiovisual style of the series, often referred to

internationally as Nordic Noir or Scandinavian Noir (Waade and Jensen 2013; Creeber 2015; Agger 2016) and including series from other Nordic countries. According to the Head of DR Drama in the period 1999–2012, Ingolf Gabold, the dogmas were created as part of a conscious strategy for the division under his management to win precisely these international awards in order to attract funding from abroad. One way of doing this is by maintaining a clear focus on producing a smaller volume of high-end drama with bigger budgets; while another option involves including co-financing and co-production investments in the budgetary composition (Jensen, Nielsen and Waade 2016).

INSERT TABLE 2 HERE

Budgets: bigger budgets to create a global brand

With regard to the size of DR's production budgets, it is relevant to note that DR – like the Danish television market in general – produces very few drama series. As we have seen above, DR produces only about two high-end drama series each year. The small number of high-end series has two important implications for both the domestic and international success of such series. Firstly, the domestic market for TV fiction is by no means saturated and, as the ratings show, these series are still in great demand among audiences. And secondly, these productions – especially those that originate in DR – probably have bigger budgets than productions from smaller and more saturated markets. While hardly any information on actual budgets is available from the trade press or from our interviewees, there are a few indications as to the actual budget sizes of DR's high-end drama series: in an interview with *Drama Quarterly* in 2016, the former DR Head of Drama, Piv Bernth, reported that one episode cost about EUR 1 million. Additionally, DR drama is often produced in-house, utilising existing facilities, logistics and staff, which are indirect costs that are not always included in the budget (interview with Danish public broadcaster; Fry, 2016).

While somewhat atypical in its production model (being a co-production with SVT/Sweden and two independent production companies), the hit series *Bron/Broen (The Bridge)* season three had a budget of EUR 13.4 million, and the budget for season four was EUR 12.4 million, a significant gap in relation to productions on other small markets (Copenhagen Film Fund 2017).

Financial composition: co-productions and pre-sales key to sizeable budgets

The composition of DR drama also reveals how DR succeeds in creating bigger budgets, which (theoretically) increases the quality potential and international appeal of its drama. DR produces programmes using international money to varying degrees on top of the licence fee. Whereas two decades ago most international money in Danish television was in fact Nordic, this international money now comes from large nations such as France and Germany. Funding comes from a variety of sources, of which co-funding from external partners, pre-sales of programmes and international funds are the most important for the argument of this article (cf. Jensen, Nielsen and Waade 2016 for a detailed account of the full variety of external funding sources in relation to DR's drama series).

Following the revamp of DR's drama division and the consequent rise in the quality of its productions – which had already begun in the mid-1990s, but escalated with the introduction of the dogma strategy of Gabold's management (Jensen, Nielsen and Waade 2016) – the 2000s saw a significant relationship develop between DR and the German public broadcaster ZDF and its commercial sales arm ZDF-Enterprises (ZDF-E). *Ørnen/The Eagle* (2002–2004) was the first DR series sold for distribution by ZDF-E, which paid an amount up front for the right to distribute the series, which in turn was used to heighten the production value of the series, making it easier to sell. Similarly, all three seasons of *The Killing* were produced in-house at DR, with seasons two and three being partly financed by ZDF and ZDF-E as well as

investments from Nordic public broadcasters and other distributors (such as the Belgian Lumière) who had already secured rights in specific territories up front. The fact that the public broadcaster itself (in the form of DR Sales) is also involved in sales allows closer synergies, increases DR's incentive to generate a return on its investment, and allows the marketing and sales division to be involved in projects at a really early stage (interview with Head of DR Sales, quoted in Jensen, Nielsen and Waade 2016).

Even more complex is the funding constellation for the four seasons of *The Bridge*, all of which were produced in collaboration with Swedish production company Filmlance, Swedish public service broadcaster SVT, Danish production company Nimbus Film and German ZDF-E (plus other minor contributors such as NRK and YLE). All in all, thirteen partners are involved (interview with executive producer, Nimbus Film, quoted in Jensen, Nielsen and Waade 2016). DR's most recent success series (*Herrens veje/Ride Upon the Storm*) has had the French Studio Canal involved as an important financier. The obligation to include the French Studio Canal resulted from DR's collaboration with creator Adam Price, who developed the series within his own SAM Productions, a subsidiary of the Canal+ group (interview with executive producer, DR, 2016).

Additionally, a number of international – particularly Nordic – funds finance DR series to a varying extent. One fund that is often involved is the pan-Nordic fund Nordvision, which is available to Nordic public service broadcasters. Several series have received funding from Nordvision, for example *Borgen 3* (DR, 2013) and *Arvingerne* (DR 2013, 2014, 2017). The third season of *Arvingerne* received DKK 13.5 million (EUR 1.81 million) from this fund, while the fourth season of *Bron/Broen* received DKK 10 million (EUR 1.34 million) (Nordvision, 2018). A similar type of fund is the Nordisk Film & TV Fond, which provides support for development, production and distribution, mostly in the form of top-up or gap financing (DR, 2014).

Following its international rise and established track record, DR now sells the rights to broadcast its drama series before it broadcasts them domestically. The sales process is different from the sale of canned programming in that this type of sales activity is based more on trust and well-established business relationships. Pre-sales generate higher prices than canned programme sales, making this a more attractive option that provides extra funding early on and has the added bonus of slowly building up hype around an upcoming production via trendsetting broadcasters in trendsetting markets such as Britain and France, for instance. This dynamic creates pathways to wider international success due to these broadcasters' substantial ties to the Anglophone and Francophone world (interview with Head of DR Sales, quoted in Jensen, Nielsen and Waade 2016).

Evaluation: sustainable *content* or sustainable *markets*?

Linking back to the thresholds for developing sustainable content and industries in small television markets, our analysis shows some similarities. Firstly, both VRT and DR play a standard-setting role in commissioning and programming high-end drama. In both markets they are the most important driver of TV drama production, not only in high-end drama but also in genres such as children's fiction. Secondly, while both public broadcasters play key roles in sustaining television drama, broadcasting investments are not the only form of investments in TV drama production, and this applies both to in-house and to externally commissioned independent production. As such, the composition of these budgets also shows the importance of public support in the financing of high-end drama, either directly in the form of public broadcasting investments, additional subsidies or tax incentives, or indirectly in the form of partnerships and pre-sales with other public broadcasters. It is clear that without public support mechanisms, hardly any small television markets in Europe for high-end domestic content would be sustainable. Our interviews confirm that even global sales and

large-scale distribution deals can only partly recoup the significant investments that these broadcasters make.

There are also notable differences between VRT and DR, especially with regard to volume. VRT broadcast 104 original fiction series between 2009 and 2018, DR only 48. The clear differences relate to the higher volume of children's fiction in Flanders, as well as an increasing number of short-format drama series. A recent report indicated that the total volume of VRT drama between 2014 and 2017 consisted of 28,594 minutes of fiction, compared with DR's output of 7,505 minutes (Raats, Wauters, Tintel et al., 2018). VRT also indirectly plays an important role in sustaining TV drama commissioned by private broadcasters owing to its popularity. In Denmark, by contrast, discrepancies between DR's successful high-end drama and the less successful and, in some cases, even quantitatively insignificant domestic drama production of Denmark's commercial players (MTG and Discovery) are a lot larger than the corresponding discrepancies in Flanders. From the perspective of the sustainability of the audiovisual sector in Flanders, the apparent upsurge has been a key driver of the independent production sector. VRT works with more than sixty independent producers per year (for all genres) (Raats, Wauters, Tintel et al., 2018). However, paradoxically, this has also increased the pressure on domestic producers, as there are only three broadcasters in Flanders commissioning content and as competition for TV drama commissions increases the competition between producers. Despite various forms of public support, broadcasters find it hard to maintain their investments in TV drama, but feel that they are under increasing pressure to continue to commission original domestic production in order to compete with global OTT platforms.

A second observation with regard to sustainability relates to the content itself. While in recent years in Flanders an uptake can be seen in high-concept drama that also explicitly appeals to international tastes, the bulk is still produced for domestic consumption. The financing of

television drama relies almost solely on sales of linear broadcasting rights. For many years, the development of distribution capacity and scale has not been a priority in VRT's content strategy. In this respect, DR drama's funding model has three key factors that have contributed to the sustainability of its content.

Firstly, building on strategic partnerships and pre-sales, as well as restricting the annual volume produced by DR and strategically prioritising high-end content, has meant that DR's budgets are significantly higher than VRT's, hence increasing the potential for production value and international success. A second factor is that DR has cleverly built financing through scale. Its long-standing partnership with the other Nordic PSBs in Nordvision secures financing through the distribution of its drama series in the Nordic nations and through distribution deals with German ZDF-E, Belgian-Flemish Lumière and French Studio Canal (for instance). It is indeed impressive that a public broadcaster originating in a small country with an audiovisual production industry that is similar in size to its Flemish equivalent can manage to export globally to as many as one hundred and fifty territories. A third factor relates to the fact that most DR series are in-house productions, which creates an explicit incentive to generate revenue from foreign sales through DR's commercial subsidiary, DR Sales. All these factors indicate how important it is to build a brand in order to attract investments and secure new export deals for future revenue. DR has clearly managed to build an extremely strong brand over the last decade both within the global industry and with audiences around the world (cf. Jensen, Nielsen and Waade 2016; Jensen and Jacobsen 2020; Waade, Redvall and Jensen, 2020).

The analysis above has shown that while both VRT and DR play an important role in sustaining TV drama, different types of sustainability are involved and PSB's role in sustaining drama is referred to in different ways. In terms of sustainable financing, DR seemingly has a more beneficial system than VRT, with larger resources being focused on

limited productions, engaging distribution in the financing of projects. This makes content sustainable in the sense that DR can combine distribution, sales and financing without ending up in difficult co-productions and having to make creative concessions.

However, this strategy has concentrated the sustainability of high-end drama within the confines of DR and very rarely benefits the independent sector. Additionally, sustainability does not mean that markets operate without additional support – quite the contrary. The evidence shows that DR’s model does not involve less public funding, because DR actually invests considerable amounts and Nordvision represents investments from various public broadcasters. Sustainability therefore relies on the prioritisation of TV drama in DR and on the funding that policymakers allocate to other Nordic PSBs. At the same time, *sustainable content* does not say anything about how sustainable the independent Danish production market is. Conversely, VRT’s emphasis on volume and successful low-budget productions has increased the sustainability of independent producers while putting pressure on the ecosystem as a whole, as its huge volume of content becomes increasingly difficult to finance.

Finally, one could of course ask the question whether DR’s obligation towards the Danish audience would be better served by producing more series at a lesser cost, i.e. placing quantity before quality, more in line with VRT’s strategy. It is clear from the above that Flemish audiences are exposed to more domestic content from VRT than are Danish audiences from DR and – if we are to take seriously that domestic drama has the potential to connect national audiences, showcase cultural diversity and identity, and reflect on national history and societal issues – Flemish audiences may actually be better served.

On the other hand, as we will argue based on our case study analysis, the focus on higher quality, less volume and international investments has, if perhaps inadvertently at first, led to DR’s international market expansion and thus has become precisely one of the pillars of the

genre's sustainability in a small market such as Denmark, where the closest competitors are international OTT giants such as Netflix and HBO, with a high volume of high-quality content and even higher production values, but with very little Danish-language content. As we stream increasingly more audiovisual content online, be it via OTT streaming services or existing broadcasters' on-demand services, PSBs do not enjoy the same exclusivity in exposing audiences to TV drama. It is therefore no longer a given that audiences will watch a primetime domestic series just because it is domestic and broadcast by a domestic provider. The production values and the quality must at least resemble those of high-budget series originating in markets such as the US and the UK.

Conclusions and discussion

This article has described and analysed various strategies to keep cost-intensive television sustainable, even on markets with a limited capacity and additional cultural and structural thresholds. While seemingly similar in terms of market structure, the cases show significant differences in the strategies used to overcome problems associated with limited scale. Both cases show that TV drama production is increasingly becoming networked, but also that public support is of continued importance in genre sustainability, despite international acclaim and sales. The article also shows that successful strategies do not necessarily rule out commissioning drama externally, as in the case of VRT.

In recent years, VRT and DR have converged. As the Danish model has been adopted in Flemish production strategies, Flemish series have increasingly been sold internationally, resulting in an increase in co-productions, pre-financing deals and higher budgets. On the other hand, DR has increasingly been forced to commission content externally, while the Danish government has announced increased funding for the so-called public service fund, available only to commercial broadcasters, while at the same time cutting DR's budget by 20

per cent (DR's Public service Contract 2019–2022). Along with this, key DR staff, such as former head Piv Bernth, have left DR to launch their own production companies. This could potentially mean less future control of distribution for DR, as the example of *Ride Upon the Storm* shows, where showrunner Adam Price's SAM Productions (part of Canal+) also brought in Canal+ as the distributor of the series.

Indeed, as media markets continue to shift rapidly and content production and distribution strategies are increasingly defined by the success of new streaming services, a series of challenges face the current PSB strategies. Compelling TV drama investments from new market entrants have confronted PSB with competition in one of its core remits. The rise of OTT SVoD constitutes significant challenges. The first of these relates to the extent to which PSB companies should collaborate with these new services, thereby risking damaging their brand identity and cannibalising their own streaming services and programmes. A second challenge relates to the extent to which public broadcasters should join forces with commercial pay-TV operators or domestic SVoDs, creating opportunities to obtain financing for high-end drama production, yet risking putting pressure on PSBs' role to offer services that are free and accessible on all PSB platforms for all audiences. A third challenge, particularly relevant for Denmark, is how PSB can reinvent itself in such a way that it remains distinctive, but also stands out internationally. In recent years, amid an abundance of crime noir all over Europe, DR has abandoned its Scandinavian Noir strategy, exploring other themes such as financial corruption, religion and family roots, which risks jeopardising its recognisable international brand. Indeed, key questions involve the extent to which public broadcasters can position themselves as a brand for distinctive high-end drama in worldwide promotion activities without compromising their main *raison d'être*, namely to reflect societal, historical and cultural themes pertaining to the specific domestic reality for their domestic viewers. Likewise, it can be argued that a policy focus on PSB that sustains the

entire television ecosystem will only work if this does not mean compromising on the presentation of distinctive television content.

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	High-end drama, min. 45 min	Fiction, max. 30 min (soap, sitcom, telenovella, short format)	Fiction for children and adolescents, various formats (excl. animation)
2018	<i>Over Water</i> <i>Professor T. 3</i> <i>Salamander 2</i> <i>Gevoel voor Tumor/Sense of Tumour</i>	<i>Thuis</i> <i>Zie Mij graag 2</i>	<i>Secrets</i> <i>4ever 3</i> <i>D5er 5</i> <i>Regel van 3s 2</i> <i>Buck 1</i> <i>Nachtwacht 4</i> <i>Campus 12</i>
2017	<i>Tabula Rasa</i> <i>Beau Séjour</i> <i>Tytgat Chocolat</i>	<i>Generatie B</i> <i>Thuis</i> <i>Zie mij graag 1/Please</i> <i>Like Me</i>	<i>4Ever 1</i> <i>4Ever 2</i> <i>Ghost Rockers 4</i> <i>Nachtwacht 3</i> <i>De Regel van 3s 1</i> <i>Samson en gert 27</i>
2016	<i>Als De Dijken Breken</i> <i>De Ridder 4</i> <i>Den elfde van den elfde/ The Eleventh of the Eleventh</i> <i>Eigen Kweek 2</i> <i>Professor T. 2</i>	<i>De 16</i> <i>Clinch</i> <i>Thuis</i>	<i>Nachtwacht 2</i> <i>D5er 4</i> <i>Ghost Rockers 3</i> <i>Nachtwacht 2</i>
2015	<i>De Ridder 3</i>	<i>Bevergem</i>	<i>Nachtwacht 1</i>

	<i>Professor T 1</i> <i>Tom en Harry</i> <i>Voor wat, hoort wat/What goes around, comes around</i>	<i>Nieuw Texas</i> <i>Thuis (Home)</i>	<i>D5r 2</i> <i>D5r 3</i> <i>De Zoon van Artan</i> <i>Ghost Rockers 2</i> <i>Prinsessia 3</i> <i>Prinsessia 4</i> <i>Rox 5</i>
2014	<i>Biker Boys</i> <i>De Ridder 2</i> <i>In Vlaamse Velden/In Flanders Fields</i> <i>Marsman</i>	<i>Thuis</i>	<i>Rox 4</i> <i>Ghost Rockers 1</i>
2013	<i>Albert II</i> <i>Eigen Kweek 1</i> <i>De Ridder 1</i>	<i>Thuis</i>	<i>Mega Mindy 6</i> <i>Rox 3</i> <i>Galaxy Park 3</i> <i>De Elfenheuvel 3</i>
2012	<i>The Spiral</i> <i>De Vijfhoek</i> <i>Quiz Me Quick</i> <i>Salamander</i> <i>Witse</i> <i>Wolven/Wolves</i>	<i>Thuis</i>	<i>Rox 2</i> <i>Galaxy Park 2</i> <i>De Elfenheuvel 2</i>
2011	<i>Rang 1</i> <i>De Ronde</i>	<i>Kiekens</i> <i>Red Sonja</i> <i>Thuis</i>	<i>Rox 1</i> <i>Galaxy Park 1</i> <i>De Elfenheuvel 1</i>

2010	<i>Dubbelleven/Double Life</i> <i>Het Goddelijke Monster/The Divine Monster</i> <i>Witse 7</i> <i>Witse 8</i> <i>Oud België</i> <i>Goesting</i>	<i>FC De Kampioenen</i> <i>21</i> <i>Duts</i> <i>Thuis</i>	<i>Mega Mindy 5</i> <i>De 5e boog</i>
2009	<i>Kinderen van Dewindt 6</i> <i>Flikken 10</i> <i>Witse 6</i> <i>Los Zand</i> <i>Van Vlees en Bloed/ Flesh and Blood</i>	<i>FC De Kampioenen</i> <i>20</i> <i>Thuis</i>	<i>Mega Mindy 4</i>

Table 1: VRT first-run domestic fiction 2009–2018

	High-end drama, 45–60 min. episodes	Other fiction, usually 30 min. or shorter episodes	Drama for children, various formats
2018	<i>Herrens veje/Ride upon the Storm 2</i> <i>Mord uden grænser/The Team 2</i>	<i>Doggystyle</i> <i>Klaphat</i>	<i>Theo og den magiske talisman/Theo and the Magic Talisman</i> <i>Klassen 4/The Class 4</i>
2017	<i>Arvingerne/The Legacy 3</i> <i>Herrens veje/Rides upon the Storm 1</i>	<i>Yes No Maybe 1</i>	<i>Klassen/The Class 2</i> <i>Klassen/The Class 3</i>

2016	<i>Bedrag/Follow the Money 1</i> <i>Bedrag/Follow the Money 2</i>	<i>Ditte and Louise 2</i>	<i>Den anden verden/The Other World</i> <i>Kanonkongen Freja/The Human Cannonball Freja</i> <i>Klassen/The Class 1</i>
2015	<i>Arvingerne/The Legacy 2</i> <i>Bron/Broen/The Bridge 3</i> <i>Mord uden grænser/The Team 1</i>	<i>Ditte and Louise 1</i>	
2014	<i>Arvingerne/The Legacy 1</i> <i>1864</i>	<i>Bankerådet/Bankrupt</i>	<i>Tidsrejsen/Time Travel</i> <i>Pendlerkids 3</i>
2013	<i>Bron/Broen/The Bridge 2</i> <i>Borgen 3</i>		<i>Pendlerkids 2</i> <i>Paphoved/Cardboard Face</i>
2012	<i>Forbrydelsen/The Killing 3</i> <i>Lykke/Happy Life 2</i>		<i>Pendlerkids 1</i>
2011	<i>Bron/Broen/The Bridge 1</i> <i>Borgen 2</i> <i>Lykke/Happy Life 1</i>		<i>Julestjerner/Christmas Stars</i> <i>Limbo 2</i>
2010	<i>Borgen 1</i> <i>Livvagterne/The Protectors 2</i>		<i>Isa's Stepz 3</i>
2009	<i>Forbrydelsen/The Killing 2</i> <i>Livvagterne/The Protectors 1</i>		<i>Pagten/The Pact</i> <i>Mille</i> <i>Isa's Stepz 2</i>

Table 2: DR first-run original fiction 2009–2018

