Key international markets: Distribution and consumption of Danish TV drama series in Germany and the UK

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Introduction

During the 2010s Danish TV drama series unexpectedly achieved global success. A vital role in their journey from this small European country into the world is occupied by the German and British TV markets. According to industry insiders (Interview with Tasja Abel, 2014), the popular and critical acclaim of *Forbrydelsen* (2007-2012), broadcast as *The Killing* in the UK between 2011 and 2012, opened the door to the global TV market. The series' success in Britain was read as evidence of quality. Equally important, it suggested the (hitherto uncharted) existence of an international audience for TV drama series from non-Anglophone countries; even in subtitled form. If Danish series worked in the UK—a country with no close cultural proximity to Denmark, a wealth of domestic TV fiction, and no history of subtitling on television—Danish, and by default other Scandinavian TV series, could maybe find audiences in other markets, too? To understand the rise of Danish TV drama in the global TV market, this chapter argues, we should go further back, though, than what has been suggested by this now well established discourse. Before *Forbrydelsen* gained global visibility through its success in the UK, the German market played a pivotal role in underpinning the rise of Danish TV drama. "Nordic Noir" books and films have long attracted a considerable German audience. As to Danish series on German television, the close collaboration between the Danish and German public service broadcasters, DR (Danmarks Radio) and ZDF (Zweite Deutsche Fernsehen) was pathbreaking. Triggered by the International Emmys for *Unit One* (2000-2004, DR) and *Nikolaj og Julie* (2002, DR) in 2002 and 2003 respectively, ZDF this collaboration led to sustained financial investment from ZDF, raising the production value of Danish TV drama and with this its appeal beyond the country's borders. Subsequently, from 2011 onwards, the British market acted as a global shop window for Danish and other Nordic Noir TV series.

This chapter examines how serialised Danish TV drama—especially through *Forbrydelsen*, *Borgen* (2010-2013, DR) and the Swedish-Danish series *Bron/Broen* (2011-2018, DR/SVT)—entered these two key markets and was helped by each in distinctly different ways. To do so, it considers the specific German and British market dynamics alongside wider technological changes and attendant market transformations. The latter have radically changed television since the mid-2000s, and as a result thereof impacted the circulation of Danish and other TV programmes. Additionally, the chapter explores and contrasts the TV channels, their programme and scheduling strategies as well as the audiences of Danish series in both the German and British markets. The aim of the chapter is to gain a nuanced understanding of TV programme flows. Exploring "Nordic Noir" TV series in Germany and the UK as comparative and complementary case studies is conducive in several ways: Together these two markets have played a vital role in the global rise of Danish TV drama. Germany was one of the first international markets, and vital in raising production values; both markets generated remarkable audience ratings, which led to further sales and investment; and as a result, both helped open doors to other markets. On the other hand, the considerable differences between the two markets are illuminating. They reveal the multiplicity of trade relations, of the factors determining programme trade, and also audiences for Danish TV drama. Finally, this case study demonstrates the increasingly transnational character of TV production, distribution and consumption.

Our empirical data stems from desk research, including ratings' analyses and observation of English language fan sites on social media; expert interviews with key personnel in Denmark, Germany and the UK; 11 focus groups with viewers in the UK and Germany (all conducted between 2014 and 2016); and an analysis of German media coverage between 2008 and 2014 (Eichner 2017).

Theorising transnational programme flows

Historically research on TV programme trade flows is underpinned by either political economy and cultural imperialism theories, or the works of scholars rejecting these economically focused macro-approaches. The first camp tends to highlight the hegemonic position of the US in the audiovisual sector. Explanations include the large domestic market, capable of providing the initial funding, and the well established global distribution model of the US majors (for example, Hoskins and Mirus 1989; von Rimscha et al. 2018). Cultural critics moreover attribute the global appeal of US TV fiction to their 'culturally odorless' (Iwabuchi 2002) or 'de-culturalized' (Straubhaar 2007; Bielby and Harrington 2008) nature. Furthermore, Collins (1989) aptly noted that English is the 'language of advantage', a claim which since has been supported by several studies (e.g. Moran and Keane 2006; Ksiazek and Webster 2008), and also explains, at least in parts, why the US and Britain are the world's No.1 and 2 exporters (Steemers 2016). Those who reject especially cultural imperialism theory also do so on several accounts. Audience researchers have argued for decades that international audiences read imports differently, or in fact might not understand them at all, “let alone in dubbing or subtitles” (Liebes and Katz 1990, 46). Others maintain that, as a rule audiences prefer media content that is most proximate to them in cultural and linguistic terms (Straubhaar 1991, 2007). This minimises the influx of imports whenever possible—financially, technologically, and as soon as adequate craftsmanship has been developed locally. Yet other scholars have highlighted the need for adaptation in various forms, including complete remakes and their notable differences (e.g. Mikos and Perrotta 2013; Moran 2009). Sometimes these scholars take a middle-ground position, but their focus on difference results in a tendency for closer alignment with the opponents of cultural imperialism. Making allowances for this simplified account, what the majority of these scholars share is that they take the nation as their starting point. This, together with the somewhat adversary nature of the (anti-)cultural imperialism argument, has cemented binary positioning and thinking and as a consequence thereof impeded more nuanced theorisiations for a long time (Aksoy and Robins 2008; Harindranath 2005).

The aim of this chapter is to advance theory on TV programme flows by discarding both national and binary thinking and focusing on the complexity of both the trade in TV drama and its consumption. This includes the ongoing and deepening processes of “transnationalisation”, a concept which raises attention to the fact that increasingly social, political and economic forces are not bound by national borders but operate on supra-national, trans-regional, and trans-local scales and scopes (Levitt and Khagram 2007). In the case of Danish TV drama, the transnational dimension can be traced at the level of production culture (e.g. DR’s showrunner system of “one vision”, adapted from the US; see Redvall 2013), the production itself in the form of co-production and co-financing deals between Danish and German broadcasters, and content distribution (namely German ZDF Enterprises distributing Danish programmes). Finally, both target and actual audiences are transnationalising in a market that is becoming increasingly transnational in orientation and transmission. In other words, we understand “transnational flows” as a form of circulation that is much more complex, dynamic and multi-dimensional in its border crossings than is suggested by the prevailing national approach, which takes national TV markets as its starting point and works on the assumption of national cultures and audiences, and consequently also supposedly national cultural barriers and international/bilateral sales processes. The next three sections will illuminate the remarkably transnational aspects of Danish TV drama production, distribution and consumption. The first traces Danish TV drama series in the German market, with a particular focus on the influential time between 2005 and 2012. This is followed by an account of Danish series in the UK between 2011 and 2016. The histories and differences of these two markets concerning their relation to Danish TV drama reveal the conditions responsible for the influx of Danish television drama into these two markets and subsequently other territories, as well as the increasing transnational nature of the sector. The analysis of the two markets follows a structure-conduct-performance analysis (SCP-analysis), considering technological changes, market structures, relevant media policies and the strategies and performance of pertinent players in each market (Wirth and Bloch 1995).

The German Television Market

The German television market has, until fairly recently, been determined by a "dual broadcasting system", with the public service broadcasters (*ARD* and *ZDF*) and free-to-air commercial channels occupying almost equal market shares for audiences. *ARD* and *ZDF* have an audience share of approximately 40% (in 2018 47%), the two channel families of ProSiebenSat1 Media AG (most notably with Pro7 and Sat 1) and the RTL Group (with RTL and RTL2) another 40% (in 2018 41%). Pay-TV, despite continuous efforts, for a long time failed to gain ground, largely due to the 50+ free-to-air channels that have been available to most viewers for at least two decades. After Germany's sole pay-tv company, Kirch's *Premiere,* went bankrupt in 2002 it was acquired by Murdoch and integrated into his Sky empire in 2009. Between 2009 and 2018 *Sky Deutschland* increased its subscriber base from 2,4 million to 4,8 million (Friedrichsen 2017, 88, Krieger 2018). Together with growing online subscription services, pay TV and VOD services today constitute a still small, but growing third leg in the German television landscape.

With 72 million viewers, 37 million television households (Mediametrie 2016, 212) and a total revenue of over 22 billion Euro annually, Germany is the third largest TV market worldwide after the USA and China (Ofcom, 2015, 139). The German Commission on Concentration in the Media (KEK) currently lists 291 private channels licensed in Germany.[1] Together with the channels that are licensed in other European countries but can be received in Germany this adds up to a total of approximately 400 TV channels, of which the average household today can receive around 80 free-to-air. Despite this plurality of channels the market is still dominated by the four main players

[1] https://www.kek-online.de/medienkonzentration/tv-sender/tv-senderdatenbank/#/, accessed 26.01.2019.

ARD, ZDF, ProSiebenSat1, and RTL. Interestingly the German television market, despite its size and enormous revenues, is markedly import oriented; and it takes prime place amongst European countries when it comes to co-producing (Bondebjerg et al. 2017, 86). In short, Germany is a large market in need of content from the outside. Conversely, there is no export orientation. Due to their financial strengths, the German broadcasters (public service and commercial) historically have had no need to export content to supplement their revenues. There are a few export exceptions, like crime serials *Derrick* and *Der Alte*. Also, some attempts and successful international sales were made throughout the 1990s (e.g. *Alarm for Cobra 11*), but overall there has never been a strong export orientation. Recently several German series have attracted international attention with critically acclaimed shows, *Generation War* (ZDF), *Deutschland 83* (RTL), *Babylon Berlin* (Sky, ARD), or the Netflix production *Dark*. Like the Danish exports, these productions as well as their transnational visibility can be considered manifestations of the changing media landscape with its starkly risen demand for drama of a high production value and increasingly discerning audiences, who seem less bothered by the 'foreign' origin than most television executives have assumed for a long time.

In terms of their domestic programming strategies and performances, the German public service broadcasters (PSBs) historically provide a mix of their own productions (initially following a vertical integration model), co-productions and licensed programming. Commercial free-to-air television primarily provided imported canned programs, largely from the US and, to a lesser degree, from the UK, thus organizing content production in project networks (Windeler and Sydow 2001, 1046). All imported programmes, it is important to note, are dubbed. As far as Danish TV series in the German market are concerned, ZDF plays a pivotal role. The PSB has a long history of collaborating with Danish PSB DR, and since 2005 has been broadcasting the majority of Danish crime series. ZDF has the highest audience share of all channels in Germany (13-14% of all viewers aged 3+; Media Perspektiven Basisdaten). It also has the oldest audience with an average age of 62 (the average age in Germany is 44).[2] For a long time now, ZDF, and similarly ARD, have struggled to attract younger viewers and overcome their "fossil" structures whilst continuing to cater to their senior audiences. According to industry insiders, this leads to tensions in the creative processes and hampers innovation (Wachholz 2014). Yet, while creatives and critics alike denounce structural conditions and the avoidance of risk taking, it must also be acknowledged that strong audience

[2] https://www.dwdl.de/magazin/60418/wie_die_sender_gealtert_sind__und_wer_sich_dagegen_stemmt/

ratings prevent innovation despite clear shifts in viewing habits and platform use amongst the younger generations.

With approximately 150 feature films a year, ZDF is Germany's biggest content producer (Interview with Volker Lehmann and Susanne Müller 2016), and contrary to its image as old-fashioned, conservative and dull amongst non-ZDF viewers, it in fact supports a broad variety of fictional content. ZDF's in-house produced fiction portfolio includes, the "TV Movie of the week", labeled as "demanding entertainment" by renowned writers and directors; "Das kleine Fernsehspiel", offering young writers and directors a platform for one-off TV fiction and documentary programmes; movies for children and teenagers; big screen co-productions; event movies and mini-series (such as *Ku'damm 56*); "Herzkino" (cinema for the heart), featuring melodrama and romantic comedies; and "Comedy and Crime". As far as ZDF's overall fictional programme portfolio is concerned, the category "fiction film" additionally encompasses licensed films of various genres and from various countries of origin.[3] The category "European Crime", which has its own weekly slot, is well established and plays an important part in ZDF's fiction portfolio. It is here that ZDF placed the Danish drama for its crime-oriented audience after its first collaboration with DR in 2004.

Audience preferences and Danish television series in Germany

As noted in an earlier publication (Eichner 2018), crime is the most popular genre in the market, attracting audiences across gender, age, education and TV channels. With domestic serial *Tatort* leading the way, a multitude of now classic (e.g. *Derrick*, *Der Alte*) and contemporary crime series (e.g. *Bella Block*, *Huber & Staller*) crowd German screens with enduring popularity. *Tatort* (ARD, 1970-), the most successful crime series, in terms of audience ratings and running time, frequently hits the 10 million viewer mark and with this achieves an audience share of up to 40%; something normally achieved only by the big entertainment shows and sport events. Placed on the most popular, Sunday night primetime slot on ARD (20.15pm), its outstanding popularity forces all other general interest channels to adopt a counter programming strategy. ZDF uses its romance slot "Herzkino". Afterwards, at 10pm—intending to attract and benefit from the *Tatort* audience—ZDF schedules foreign crime drama. It is this programming decision, we want to argue, that created the possibility for a large German audience for Scandinavian drama series. Scandinavian crime novels,

[3] https://www.zdf.de/zdfunternehmen/zdf-programmprofile-und-kosten-genre-filme-102.html

popular in Germany since the 1970s, arguably paved the way for the series, including Swedish *Beck* (since 1998, first on ARD), *Wallander* (since 1998, first on regional ARD channel WDR) and *Maria Wern* (since 2011, first on ARD) (Gamula and Mikos 2014). In many instances, ZDF re-ran these in their Sunday night European Crime slot. The “Nordic Noir” label, according to Bergmann (2014), made its mark around 2000, popularising representations of cold, dark and desolate winter landscapes, explicit scenes of violence, and the tristesse of the crime genre. The books of Larsson’s *Millennium*-trilogy (available in German since 2007) and the subsequent TV miniseries (broadcast in 2011) were extremely popular with German audiences. Moreover, not only novels but Scandinavian films, too, bolstered the success of “Nordic Noir”. The films of Ingmar Bergman, Aki Kaurismäki, Lars von Trier, Thomas Vinterberg and Susanne Bier were all popular among German moviegoers and led to Scandinavian cinema’s reputation as radical and authentic. Finally, the pioneers of the fertile crossover between cinema and television, Ingmar Bergman’s TV series *Scenes of a Marriage* (1973), shown in a shortened version on ZDF, and Lars von Trier’s *The Kingdom (trs. Geister),* shown on the German-French PSB channel*, ARTE* (1994-1997), are likely to have contributed to paving the way for the success of Danish TV drama series in the new millennium.

When in 2002 the Danish public broadcaster DR won its first International Emmy for Best Drama Series with *Rejseholdet* (2000-2004) and repeated its success story with *Nikolaj og Julie* (2002) in 2003, Peter Nadermann, then head of co-production and fiction at the distribution company ZDF Enterprises (ZDFE), called Ingolf Gabold, then head of drama at DR, to suggest ZDFE and DR collaborate. *Rejseholdet*—marketed in Germany as *Unit One - Die Spezialisten*—was scheduled in 2004 on ZDF’s Tuesday late-night crime slot. After performing well, ZDFE started co-producing DR series regularly, as a minority partner. In exchange for the money it received the exclusive international distribution rights, with DR benefitting from ZDFE’s stronger links with middle and south European broadcasters (Interview with Ingolf Gabold, 2014). DR productions *Ørnen* (*Der Adler - Die Spur des Verbrechen*, ZDF, from 2005), *Livvagterne* (*Protectors – Auf Leben und Tod*, ZDF, from 2009), *Forbrydelsen,* (*Kommissarin Lund - Das Verbrechen,* ZDF, from 2008), and *Den som dræber* (*Nordlicht - Mörder ohne Reue*, ZDF, from 2011) were all co-produced with ZDFE/ZDF (as well as other, mostly Scandinavian partners) and successfully broadcast to a ZDF audience on the prominent 10pm Sunday night slot. Due to the stable popularity of Danish crime, ZDF continued with its international crime slot on Sunday night. Around 50% of programmes came from Scandinavia, the other 50% were either British productions or co-productions. Volker Lehmann, Vice President Acquisitions and Coproductions, ZDFE, and Susanne Müller, Head of Fiction, ZDF, pointed out that ZDF is exclusively interested in crime series; other genres are sold on, mostly to culture channel ARTE (Interview with Lehmann and Müller in 2016). ARTE, for instance acquired *Borgen* (2012), *1864 - Liebe und Verrat in Zeiten des Krieges* (2015), *Arvingerne* (*Die Erbschaft*, 2016), *Norskov* (2016) and *Herrens veje* (*Die Wege des Herren*, 2018). ZDF is not restricted to collaborating with DR, though. It has co-produced crime series with other Danish partners, for instance the TV2 programmes *Anna Pihl* (ZDF, 2007-) and *Dicte* (ZDFneo, 2014; ZDF, 2016). According to former head of DR Sales and Marketing, Helene Aurø (2014a), Germany and France were the most important markets for Danish television (Interview with Aurø 2014).

The cooperation between DR and ZDF was beneficial for both. ZDF fiction head, Susanne Müller explained:

> "I think the level of our investment was good for our Danish partner because it gave them the possibility to make the programmes better, fluffier, nicer. And for us, and of course for the quality of the programme we got, our investment was not as high as would have been necessary for a German commissioned programme. So I really think it was a win-win situation." (Interview with Susanne Müller, 2016).

Danish drama did well in German television: For instance, in 2010 and 2013, *Forbrydelsen II* and *III* attracted around 3 million viewers. These equated to average audience shares of 14% and 14.7% respectively (all adults); matching and even surpassing ZDF's annual overall market share. The audience share in the segment of viewers aged 50+ was 20%. The average audience ratings for *Bron/Broen* (*Die Brücke – Transit in den Tod*, ZDF from 2012) were slightly lower at around 2.8 million viewers, with average audience shares for the first season (2012) of 12.6% (all adults; 18.2% for 50+) and the second season (2014) of 13.6% (all adults; 18.6% for 50+), but according to Susanne Müller, this was a respectable success that fulfilled and even excelled their expectations.

The series, we could argue, came to a well prepared and suitable market. ZDF's core audience encompasses a notable audience segment that is crime affine. Moreover, German players' established practice of co-producing with other European countries, plus the tradition of programme exchange amongst European PSBs via the European Broadcasting Union (EBU), meant that viewers in Germany were already familiar with European cultural products. Finally, through the personal relationship between Ingolf Gabold and Peter Nadermann, Danish series were successfully placed in a suitable niche at a time when frustration about the lack of quality of German TV fiction started to dominate public discourse. When *Borgen* was broadcast in 2012 by ARTE, the series was quickly picked up and hyped by the press as intelligent, high quality television. Eichner's (2017) media coverage analysis covering the years 2008 to 2014 in the German national press shows the enormous praise that the Danish series received for their perceived quality, and also how the interpretative frame quickly shifted towards aspirations for more quality in German television. The coverage of Danish drama series served as a justification to discuss the "poor" German PBS strategy and output and to demand better quality, more risk, and greater trust in what audiences want—a demand that was acknowledged and discussed in the industry, as Müller confirmed (2014a). Thus, at a time when German TV fiction was seen as being of poor quality, and when the television landscape diversified and shifted from a dual to a triple broadcasting system, Danish series functioned as a catalysator for public debates that paved the way for domestic programme innovation.

By 2010, ZDFE had five years of experience in selling Danish drama to other territories. At the end of 2010 they placed their first deal with the BBC, which acquired *Forbrydelsen* for digital niche channel BBC Four, where the programme achieved an unexpected ratings success. According to Tasja Abel, ZDFE.drama Vice President from 2013 to 2017, ZDFE benefitted from this (Interview with Tasja Abel, 2014). The UK success of *Forbrydelsen* opened up new opportunities for the German distributor, who had the worldwide distribution rights (except for the Nordic region) for the majority of Danish series. ZDFE, she said, now found an open door not just to sell more to the UK but also to other, formerly inaccessible territories.

The UK market

The British market has provided inspiration and served as a global shop window for international TV executives since the 1940s, due to the global standing of the BBC and, during the past 15 years also the country's outstanding success in expanding independent production and selling reality and lifestyle formats globally (Chalaby 2016). This major television market would not have been as influential in putting the spotlight on Danish TV series however, we maintain, had it not been for the great surprise at the enormous popularity first of *The Killing* (BBC Four, 2011-2012) and subsequently *Borgen* (BBC Four, 2012) and *Bron/Broen* (*The Bridge*, BBC Four, 2011-2018), which all achieved outstanding ratings of initially half a million and then more than 1m viewers. The executives responsible for buying these series, BBC Four channel controller Richard Klein and BBC Head of Programme Acquisitions, Films & Series, Sue Deeks both conceded in interviews (2016) that they "had no idea *The Killing* would become iconic" (Interview with Klein 2016). Their surprise, which was shared across the industry presumably had several reasons: With 58 million viewers (4+), more than 26 million TV households, and an annual TV broadcast revenue in the 2010s between EUR 15-16 billion, the British TV market is the fifth largest in the world (Mediametrie 2016, 544; Ofcom 2015, 139). After the US, if by quite a margin, it is the world's second largest exporter of TV content, with annual export revenues surpassing 1.3 billion Euro (Ofcom 2015, 158). Consequently, British audiences have always had plenty of domestic drama to choose from. Of the five large European markets, the UK traditionally has had the smallest share of imported TV Fiction (Esser 2007). When it imports, it does so from other English-language markets, mostly the US. In the mid-2000s, its average share of European imports was less than 1 per cent, European co-productions accounted for half a percent (Esser 2017). Unlike audiences in Germany, UK viewers thus were strangers to Danish and other European TV fiction (subtitled or dubbed) when BBC Four bought *The Killing*. Also, different from the German scenario, British people were not generally knowledgeable about Denmark, nor did they feel culturally close. Historically, the cultural allegiance of the UK is with the US, Australia, Canada and other Commonwealth countries. Finally, the crime genre, although popular, does not dominate primetime schedules and top10 programme lists to the same extent that it does in Germany.

The UK's highly competitive market structure made the success of *The Killing* even more surprising. In 2011 and 2012, when the first three seasons of the *The Killing, Borgen* and the first season of *The Bridge* were broadcast, viewers were able to receive around 50 channels on the *FreeView* platform, and the overall number of TV channels stood at over 500. Roughly half the population subscribed to pay-TV, half had *FreeView*. Like in Germany, very few people had a TV set with integrated online services ("connected television"), and just 29 percent of adults used catch-up services online (Ofcom 2012, 116, 154). Digital streaming had not yet taken off: LoveFilm had a subscriber base of less than 2 million, Netflix only entered the market in January 2012. Consequently, DVD sales were still strong, according to Jon Sadler from Arrow Films, the first UK company to buy DVD distribution rights for Scandinavian TV series and vital in cementing the Nordic Noir brand through their website and Nordicana screen festivals. Even so, Sadler astutely remarked, binge watching was becoming popular, and so *The Killing* "hit a good market". According to Sadler, Arrow Films sold around 300,000 box sets of *The Killing* in the UK. "And that's big in television. There will be a lot of English dramas that haven't sold that many" (Interview with Jon Sadler 2016).

Whilst DVD sales were remarkable it is clearly television, which has played the most important role in the discovery of Danish series in the UK and their ongoing consumption since. The vast majority of 28 people interviewed and 400+ participants in a poll posted in the *Fans of Scandinavian Crime Fiction Genre* Facebook group reported to watch Danish TV drama on television, when broadcast or recorded with a time-lag (Esser 2017). As noted above, the UK TV market is fiercely competitive. BBC1 and ITV1, the two largest free-to-air channels, still have a combined share of 37 per cent, but the remaining 63 per cent are heavily fragmented: four channels have a share of between 2-6 per cent, the remaining approximately 500 digital channels have shares of under 1 per cent each. The audience share for BBC Four, which was launched as a freely available digital channel in 2002 under the concept of 'Everybody Needs a Place to Think' and attracts the oldest, wealthiest and best educated viewers amongst the countries main channels, too, stood at under 1% when *The Killing* was first broadcast in January 2011 (Esser 2017, 416). Prior to the launch of *The Killing*, BBC Four had regularly shown subtitled films, about 20-30 a year. But, Richard Klein conceded, "no one ever watched them" (Interview with Klein 2016). As to TV series, the channel had shown French crime drama *Engrenages [Spiral]* in 2006 (season 1) and 2009 (season 2) and two episodes of Italian detective TV series *Inspector Montalbano* in 2008. Moreover, there had been multiple broadcasts in 2008, 2009 and 2010 of the Swedish film series *Wallander* with Krister Henriksson (Esser 2017, 419). *Spiral*, according to Sue Deeks, "did well enough" to make them realise that "there was maybe something to this contemporary subtitled modern crime drama. (…) And it was because it performed to a certain level that we then looked at other dramas." (Interview with Deeks 2016) The next series they bought was *Wallander* (TV4, 2005-2013), and a single episode was broadcast to coincide with the British adaptation on BBC One (2008-16), starring Kenneth Branagh. According to Klein, the existence of this popular British adaptation with the same title raised interest in the Swedish version and "so it did well" (Interview with Klein 2016).

Swedish *Wallander*'s audience increased from 147,000 for this single episode broadcast in 2008, to an average audience of 295,000 in 2009 on the Monday 9pm slot. In 2010 the series was moved to the now famous Saturday 10pm slot, where it reached 418,000 viewers on average and a maximum of 538,000 (Esser 2017, 419). Following this success, Klein asked his team to bring him more "cheap" series from around the world. Like Deeks he highlighted financial as well as programming/marketing benefits: On the one hand, these TV series were "peanut" cheap because no other UK channels competed for them, on the other, "drama is a very good way of giving a channel character." (Klein 2016) *The Killing* was acquired and scheduled to follow straight on from the final *Wallander* episode, promoted by a trailer during the weeks preceding the series' launch on 22 January 2011. The day before the launch Michael Hogan (2011), a *Guardian* culture journalist, introduced it as follows: "It's been a cult hit in Europe, was nominated for the Best International Drama Emmy and is being remade by Fox in the US", and soon there was much favourable "noise", as Gerard Gilbert (2011) in *The Independent* wrote. With 534,000 viewers average viewers, audience ratings for the first season superseded those of the preceding *Wallander* episodes by more than 100,000 viewers. Dramatic change, though, came with the second season, broadcast in November 2011: ratings doubled with average viewing figures of over 1.1 million. The first season of *The Bridge*, launched five months later, in April 2012, brought nearly identical ratings; and even political drama *Borgen*, launched in January 2012, attracted nearly 750,000 viewers on average. All three series were shown as a double bill in the prominent Saturday primetime slot (9-11pm) and for BBC Four these were outstanding results (Esser 2017, 422).

To understand the enormity of and surprise at this popularity, we need to recall that the series were broadcast with subtitles and that the UK audience overall was unfamiliar with subtitles. Moreover, we need to take into account that entertainment formats consistently outperform ratings for TV fiction in the country; even the most popular domestic TV series rarely reach the 10 million mark any more (Mediametrie 2016, 545). This is also why Saturday night television, against which the subtitled TV series compete, is dominated by the big entertainment shows, *The X Factor* (ITV1, 2004-present), *Strictly Come Dancing* (BBC1, 2004-present) and *The Voice* (BBC1, 2012-16; ITV1 2017-present). A ratings comparison demonstrates the success of subtitled Danish drama on niche channel BBC Four particularly well: To date, Danish-Swedish co-production *The Bridge* is the highest rating subtitled series on BBC Four, which now has an annual all-day market share of just above 1%. In 2015, *The Bridge III* regularly attracted around 1.5 million viewers. The launch episode had 1.78 million viewers and this put the series in third place for the day’s primetime ranking for viewers aged 16+, behind hit reality show *I’m a Celebrity– Get Me Out of Here!* (ITV1, 2002-present) with 8.65 million viewers and long-running UK medical drama serial *Casualty* (BBC1, 1986-present) with 4.65 million viewers. In market share currency this is 7.6% compared to 38% and 19.6% respectively (Esser 2017, 425).

Although the BBC Four audience for subtitled TV series was gradually built, it is the magnitude of the success of the Danish and Danish-Swedish series since 2011, which explains how these series came to cement a programme slot for European subtitled drama on BBC Four. A second reason, which should not be overlooked, is the low costs of these series. Financial considerations in fact seem to be the main reason why BBC Four got interested in Danish TV drama in the first place. After all, *The Killing* was already broadcast to great critical and popular acclaim in nine other European countries and AMC had already bought the remake rights for the US market (reference Pia?). What made BBC Four finally pay attention, we contend, is the 2010 strategic review of the BBC, which saw the Government demanding that the Corporation cut its budget by 25%. Moreover, together with the BBC’s commercial rivals it pressured the Corporation to “reduce spending on foreign acquisitions” (meaning fictional programmes from the US). The BBC agreed to cut its foreign acquisitions budget amongst other things. BBC Four’s already small annual budget of £50m was also affected, and its remit was adapted. Before the review its remit had been to act as “a mixed-genre television channel for all adults offering an ambitious range of innovative, high quality output that is intellectually and culturally enriching” (BBC Trust 2006: 1); one of the many objectives stated was that it should show “the best international and foreign language feature films, programming and documentaries”. The revised service licence published in February 2011 stipulated that BBC Four’s primary role from now on was “to reflect a range of UK and international arts, music and culture” (BBC Trust 2011: 1).

The BBC’s state of affairs, it should be noted, also significantly impacts programming in the British market overall. Forty percent of the market's total non-news commissioning budget fall to the BBC; together with the other three main broadcasters (ITV, C4 and C5) the BBC accounts for 80% of the non-news commissioning budget (Oliver & Ohlbaum 2015, 8). In contrast to Germany, where the licence fee is the largest source of revenue, in the UK it is subscription (Ofcom, 2015, 147). However, pay-TV channels’ investment in original UK drama accounts for only 20%. According to

Steemers (2016), British broadcasters, though, can no longer bear the costs of drama production on their own and as a result their investment in original British drama declined by a "whopping" 44% between 2008 and 2014. With this considerable shrinkage we might assume that the domestic offer of TV fiction in the early 2010s might not have been as attractive as during previous decades. In fact, members of one UK focus group (30 April 2015) bemoaned the lack of domestic quality drama. In short, a "dearth" (Steemers 2016) of domestic drama might also explain the success of *The Killing*, *Borgen* and *The Bridge*, and subsequent subtitled TV series on BBC Four from across Europe, many of which achieved ratings of around 1 million viewers, including *Spiral* (2006-present), *The Young Montalbano* (2008-present), *Salamander* (2014), *Inspector de Luca* (2014) and *Trapped* (2016-present). Like in Germany, thus, a lack of domestic quality TV series at the time is likely to have opened up audiences to foreign TV series and made them realise that there was some good non-Anglo-Saxon drama out there.

Circulation in the age of online distribution

As a result, of these high and stable UK ratings, other broadcasters and streaming platforms began to compete for high production value TV series from around the world, and in the process growing potential and actual audiences. In the UK, younger people began to be introduced to non-English language drama in 2016 on both Channel 4 and its *All4* digital platform under the "Walter Presents" label. Danish TV series offered on *All4* for box-set viewing include *Dicte* (TV2, 2013-16), *Norskov*. (TV2, 2015-17) and *Ride Upon the Storm* (DR/ARTE 2017). In Germany, the focus groups revealed that Danish series had not only reached the regular, crime affine senior viewers on ZDF at the time, but also younger, highly educated viewers, who accessed them on "Mediatheken", the public broadcasters' joint online platform (some had also bought DVDs). When *Forbrydelsen* was first broadcast on ZDF in 2008, streaming was still a niche phenomenon. More than a third of the population were still offline and a third of Internet users had never even heard about streaming services. Early adult adopters used it primarily for non-linear television, most notably Mediatheken. Only teenagers (14-19 years) periodically used video content on the Internet, mostly via YouTube and the German speaking video platforms, MyVideo and Clipfish (von van Eimeren and Frees 2010, 352-353). Maybe not surprisingly, for the young German viewers interviewed, accessing Danish TV series via Mediatheken thus functioned as a distinguishing factor and cultural markup. Interestingly, whilst watched and perceived differently, the "double storytelling" with themes of topical relevance, strong female lead characters, the specific Nordic Noir aesthetics, and the high production value constituted a product that, like in Denmark, worked for older "mainstream" viewers as well as young, German "elite audiences".

In addition to catch-up services, young people in both Germany and the UK were increasingly able to discover Scandinavian and other non-English language TV series on Netflix and Amazon Prime Video. Netflix entered the UK market in early 2012, Amazon Prime Video in 2014, both streaming services entered the German market in 2014. In 2015 and 2016 respectively, they began to invest in original, non-English language serialised fiction, which is offered in both dubbed and subtitled form. In 2015, 26% of British and 16% of German people said they were using these two and other non-broadcaster subscription video-on-demand services in a given week. Looking at the total non-linear consumption, 66% of respondents in the UK and 45% in Germany claimed to have viewed an online television or film service. Catch-up services thus were still the driving force in both countries: 44% of UK viewers used a catch-up service provided by free-to-air broadcasters in a given week, 29% those of pay-TV providers. In Germany the figures were 20% and 10% respectively (Ofcom 2015, 34). The effects of digitisation were clearly underway, and whilst both the British and German TV markets still had very low rates of connected television sets and viewing at the time Danish TV series entered these markets (in the mid-2000s and early 2010s respectively), and in each country only one broadcaster was responsible for buying and broadcasting Danish TV drama series, by 2016 this situation had markedly changed.

Other companies reacted to these new players and user patterns and so the markets continued to change. In Germany, UnityMedia KabelBW launched a pay TV service in 2015 and Telecom and Vodaphone followed in 2018. In addition to Netflix and Amazon Prime Video, OTT services Maxdome (2013)[4], MagineTV (2015) and Zatoo (2018) were launched (VAUNET 2018, 10). In 2018, with more than 8 million pay TV subscribers, 10 million SVOD subscribers, and many more users, we could argue, the long lasting dual broadcasting system came to be superseded by a triple system. The same is true for the UK, where Netflix, the by far biggest OTT, announced it would shortly hit 9.78 million subscribers, overtaking satellite pay-TV service Sky.

[4] Maxdome is the former Leo Kirch streaming platform. Since 2013 it has been the streaming platform of ProSiebenSat1.

One of the effects of this irreversible trajectory is the need for more serialised drama of a high production value, like the once rare “quality” HBO (e.g. *Six Feets Under*, *Sopranos*) and later AMC series (e.g. *Mad Men* and *Breaking Bad*). The vast increase in demand has further opened up and transnationalised markets—in terms of production, distribution and consumption. The downside for the industry is that such series are now acquired in a highly competitive market. Prices no longer resemble the “peanuts” originally paid by Klein and Deeks, and both PSBs who helped push subtitled TV drama into the global limelight have lost out to larger competitors on several accounts. As von Rimscha et al. contend, the recent “technological innovation is not only promising but costly: It appears to favour media companies that can bear investment risk, and economic imbalances between dominant English-language and non-dominant language media companies are reproduced” (2018, 6).

Conclusions and outlook

Throughout this decade, the transnational success of Danish TV drama series has surprised and astonished the European and global TV market(s). However, this ‘success story’, as this chapter has shown, began much earlier, with multiple facilitating factors, including Scandinavian novels, films, and in both Germany and the UK other European crime series that preceded the Danish programmes. Furthermore, the ground for Danish series was paved by a comparatively weak domestic offer in TV drama in both countries, a crime affine German audience with a well established crime slot for foreign drama on ZDF, and a ready-made educated niche audience on BBC Four, who seem to have been given the chance to discover Danish TV series because of BBC Four’s financial pressures and revised remit. We also highlighted the critical acclaim of the Danish series and the personal relationship responsible for initiating the close collaboration between DR and ZDF, and how this allowed DR to raise the production value of its crime series and with this their appeal. Audience ratings in both countries were remarkable: In Germany, *The Killing* and *The Bridge* attracted around 3 million viewers—in dubbed form, broadcast by market leader ZDF. In the UK these two series attracted on average between 1 and 1.5 million viewers after the initial season of *The Killing*—subtitled and broadcast by niche channel BBC Four. *Add ratings for Denmark to highlight the size (and financial value) of these audiences*. Both the UK and Germany, we argued, were vital in pushing Danish TV drama series into the global limelight, if in very different ways. Finally, we noted the significance of the emerging, radical market transformation caused by digitisation. Concerning the circulation of Danish TV drama, it meant that the timing was conducive to success. Amongst broadcasters, demand for serialised TV drama was growing to attract and bind audiences. Audiences, on the other hand, discovered the pleasures of binge-watching and created demand for serials. The Danish crime serials, with their episodic cliffhangers, rather than the more old-fashioned crime series, which were still the norm at the time, fulfilled that desire.

We started the chapter by referring to the complexity, multiplicity and the dynamic nature of trade relations, factors determining trade flows, and also audiences. The complexity and multiplicity hopefully have become sufficiently clear by now. As to the dynamic nature, we showed how one thing led to another, and of course this has not stopped. DR's position has been significantly strengthened. Following the hype around Danish series other parties but ZDF became interested in co-producing with DR, and ZDFE, the German distributor, found itself unable to uphold its demand for global distribution rights. For instance, *Bedrag* (*Follow the Money*), which premiered at the Berlinale Series Section in 2015, was pre-sold on pitches and fully funded without German money. The global distribution rights remained with DR (Interview with Helene Aurø 2014b). In addition, there was high demand for Danish creatives. For instance, crime serial *Fortitude* (Sky Atlantic, 2015-2018) was produced for the UK with a considerable number of Danish talent, both behind and in front of the camera. Also, British and German and other producers across Europe were inspired by the successful Danish TV series, leading to both domestic programme innovation and increased attempts to produce serialised TV fiction of a high production value that might appeal to a transnational audience.

To conclude, there can be no simple explanations and theories of TV programme trade flows, or circulation. What is certain though, is that countless instances and types of border crossing are involved, and this means that the production, distribution and consumption of TV programmes should no longer be described as international (i.e. between nations). Transnational, and transnationalisation, are more adequate and draw attention to the plurality of producers, commissioners, distributors and audiences crossing borders on a daily basis in complex, fluid webs of interdependency and collaboration.

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