



# EUROPEAN POLICY BRIEF



## DETECT: DETECTING TRANSCULTURAL IDENTITY IN EUROPEAN POPULAR CRIME NARRATIVES

Creative Europe's Support for European TV Fiction Programming



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### INTRODUCTION

DETECT is a research project funded by the Horizon 2020 programme. DETECT is a large collaborative initiative across ten countries, which involves scholars, teachers, students, professionals of the creative industries, and the general public in investigating how practices of transnational production, distribution and consumption in the field of popular culture have facilitated the appearance of engaging representations of Europe's cultural identity.

This policy brief concerns Creative Europe's MEDIA subprogramme, the European Commission's framework programme for support to the culture and audiovisual sectors (2014-2020), with special attention towards the support scheme for TV programming. The general programme "provides opportunities for European production companies interested in producing a television work". The TV programming support scheme specifically aims to "increase the capacity of audiovisual operators to develop European audiovisual works with a potential to circulate in the EU and beyond and to facilitate European and international co-production" by supporting the "production of TV programmes involving the participation of at least three European broadcasters" from three countries with up to €1m.

Based on a quantitative and qualitative evaluation of the awards between 2014 and 2020 (first funding round), this policy brief acknowledges that fiction productions supported by the scheme have successfully travelled across Europe and enabled co-productions which enrich the European imagery. At the same time, the data indicates that the programme's goals to support TV with a European (co-)production profile and distribution potential may effectually incite a North-Western European bias, which limits the potential for (independent) producers and televisual culture from other regions to benefit from the programme's stimulus to international visibility, innovation and job creation.

In the period 2014-20, 69% of the grants for TV programming went to only five North-Western European applicants: France, Denmark, the UK, Germany and Sweden. As the DETECT project's research area is fiction, this policy brief focuses on funding for fictional programming (not animation and documentary). In this case, the North-Western bias becomes even more conspicuous, as 77%

of the €44m in fiction award sums distributed in this period have been awarded to production companies based in Sweden (23%), Germany (18%), Norway (12%), Denmark (12%) and France (12%). Altogether, this creates a policy problem, since few and rich countries with well-developed and already interconnected creative sectors are the regions that, effectively, receive the programme's benefits of production support and transnational exposure of local co-productions.

This policy brief provides evidence of the quantitative imbalance in the Creative Europe funding practices for fictional TV programming, and recommends a qualitative shift in the evaluation criteria for future funding programmes for collaborative transnational TV production. Thereby, this policy brief has implications for the Creative Europe MEDIA Programme 2021-27 and its aims to support successful European works, co-production, and talent development.

## EVIDENCE AND ANALYSIS

### 1. Applications and awards by country

Our analysis of the TV programming scheme's statistics shows that two thirds of the grants awarded go to five territories: France, Denmark, the United Kingdom, Germany and Sweden. These are at the same time also the territories with the highest numbers of applications, although their success rates vary. France, Germany and the UK are the biggest TV producing countries in Europe, accounting for 60 percent of the nearly 1.000 fiction titles produced per year in the EU between 2015 and 2018. With 24 and 8 fiction titles per year, Denmark and Sweden both belong to the countries with low or medium production capacity, whose applications receive five extra points in the evaluation for the programming scheme in order to support production in these countries. Regarding the sum of awards for fiction production in the TV programming scheme, the big three account for about the same amount of support (€15.9m) as Denmark and Sweden together (€15.5m). From this point of view, the TV Programming scheme sufficiently addresses the difference in production capacities between Europe's large and small nations.

The dominance of France, Germany, the UK, Denmark and Sweden, however, implies that other countries do not receive support from the TV programming scheme to the same degree. Spain and Italy, for example, are also popular countries of origin in European subscription video-on-demand (SVoD) catalogues. Spain is, in fact, a booming producer of internationally popular TV series. It has achieved broad international attention with series like *La casa de papel* (2017-), investment in Spanish TV series has risen sharply since 2015. In 2019, Spain produced 40 high-end series. Yet, only 7 of the 307 grants from the TV programming scheme have gone towards Spanish production companies, and only €371.000 of the programming scheme have gone towards fiction production by Spanish companies. This imbalance is not due to the quality of their proposals since the Spanish applications achieve nearly the average success rate of 35%, but due to a lack of applications. Spain only accounted for 2.4% of the applications. In the case of Italy, this is even more striking since Italian applications have had a success rate above 50%. Titles like *Gomorra* (2014-), currently available in 42 VoD catalogues in Europe, and the Netflix adaptation of *Suburra* (2017-) show that there is international demand for Italian content, too. Therefore, the first caveat of the current distribution of TV programming funding is the lack of applications from countries with distribution potential outside the North-Western network (see models below).

### 2. Potential for international circulation

The TV Programming scheme seeks to support productions, which have the potential for international circulation on streaming and linear services. The content, origin and (co-)production profile of the supported fiction titles corresponds to this criterion. About half of the productions supported by the programming scheme belong to the crime genre, which tends to circulate best internationally. The majority of the fiction productions supported by the TV programming scheme belong to the form of "high end" series with 3 to 13 episodes, which make up nearly half of SVoD service's catalogues. This suggests that these series are in high demand among streaming services looking for content on the international market.

The five countries that receive most of the grants are also the countries whose productions currently circulate best on streaming services: 82% of European titles on SVoD services available in the EU come from the UK, France, Germany, Denmark and Sweden. The cases of Denmark and Sweden show that this popularity is not merely a reflection of production capacity since the small Nordic nations together provide 5% of EU SVoD titles, while Germany, the country with the highest production capacity accounts for 9%.

The TV Programming scheme has supported landmark production from the big TV producers such as the acclaimed German crime series *Babylon Berlin* (2017-), but also internationally successful dramas from the “small” Nordic TV nations such as *Bron | Broen III* (SE/DK 2011-18). *Bron | Broen* has been sold to 157 territories and has thus been instrumental in creating worldwide visibility for Nordic TV drama. According to the British producer of *The Last Panthers* (F/UK 2015), the first crime series to receive €1m from the TV programming scheme, having the support of European funding makes drama more attractive to buyers and increases the prices they are willing to pay. Hence, in addition to going towards productions with high potential for international circulation due to genre and country of origin, the funding from the TV programming scheme can be said to have a positive impact on circulation.

### **3. Supporting co-production and cooperation**

The second objective of the TV programming scheme is supporting international co-production and cooperation, which is reflected in the evaluation criterion that calls for a European dimension in the financing of the project and in the requirement that only productions with participation of at least three broadcasters in three countries are eligible for support. The five countries which receive most of the TV programming scheme’s grants are also the most avid European participants in co-productions beyond the linguistic regions. Together they account for nearly 60% of the non-linguistic co-productions of 2-13 episode series in the EU.

In fact, the five countries have strong co-production and co-funding relationships among each other. Through Nordvision, the Nordic countries have an institutionalized co-production relationship. The German co-funding has been instrumental in boosting the production value of Danish and Swedish crime dramas as well as for their international distribution. As a result, Nordic-German co-production is found in more than 25% of the fiction titles supported by the TV programming scheme, in which way collaboration between at least three broadcasters become instrumental in accessing funding from the TV programme.

The dominance of public service broadcasters in the region also contributes to the affinity between the partners, but cases like *Gidseltagningen* (DK/DE 2017-19) show that the public-private threshold is also being crossed following the (commercial) success of the Nordic/German co-produced shows. Yet, the TV programming scheme has also supported co-production activities between less common partners, e.g. Sweden and France in *Midnight Sun* (2018) or Denmark and France in *DNA* (2019). In the light of these cases, it can be argued that the TV Programming scheme has helped to strengthen as well as instigate cooperation between the five main beneficiaries.

### **4. Supporting production beyond the North-West of Europe**

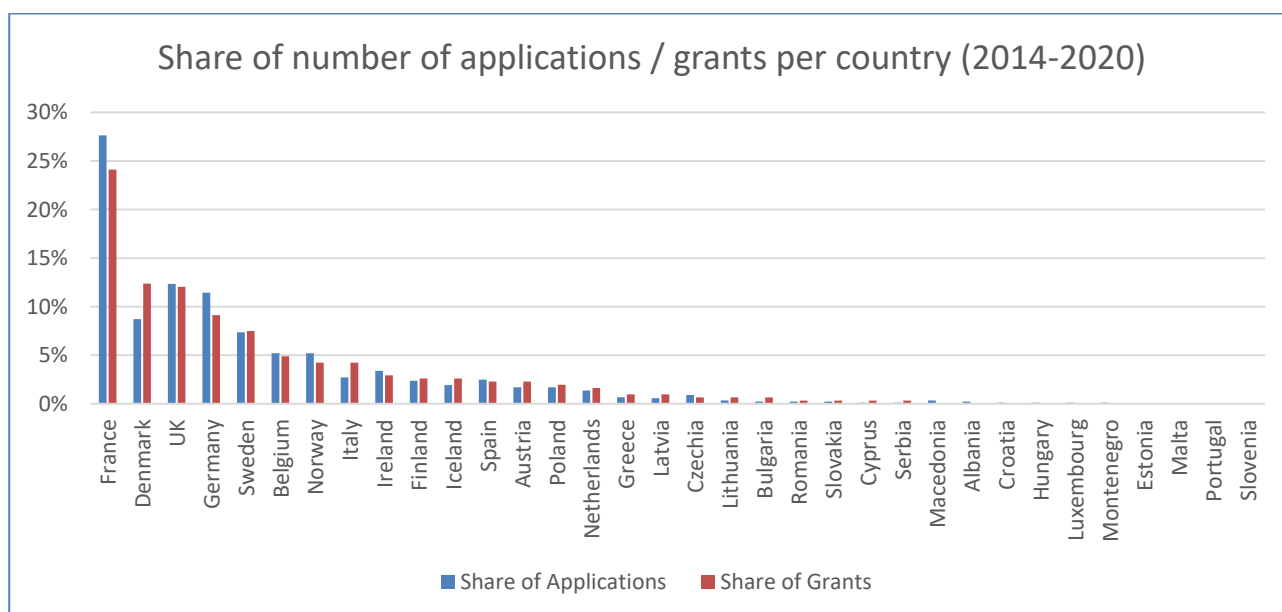
While the TV programming scheme is successfully supporting fiction production in small Northern European markets, it is not reaching the countries with limited production capacities in South-Eastern Europe, which are neither as well networked as the small Northern nations nor as sought-after on the global television market as productions from Spain and Italy. Among the fiction productions supported by the TV programming scheme, none of the applying beneficiary production companies is located in Eastern Europe. The case of Poland shows that this is not necessarily due to limited fiction production. In fact, Poland produces more fiction titles than Spain and also has a growth in the “high-end” 3-13 series format. The volume of fiction production in the other Eastern European markets is comparable to the small Nordic nations. In contrast to the Nordic countries, the Eastern European TV producers do not benefit from international appeal like that of “Nordic Noir”, however, other reasons can be found in media-systemic differences. While the North-Western TV markets are mostly dominated by public service broadcasters, which tend to commission more fiction, the high-end series market in Eastern Europe is privately dominated. Services like HBO Europe have played an

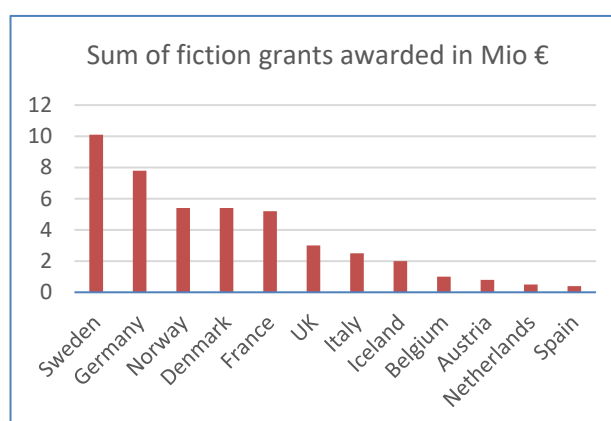
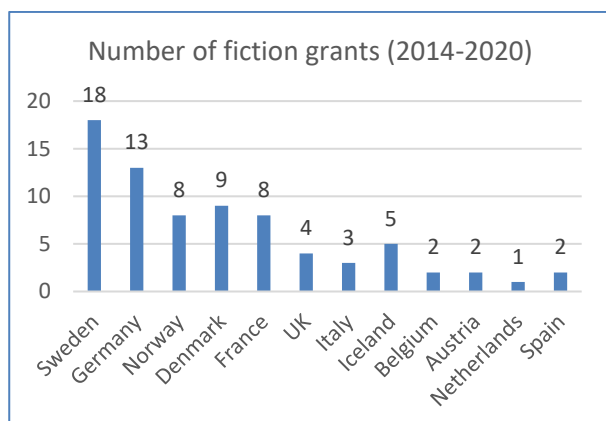
important role in supporting the production of Eastern European series that follow trends like Nordic Noir and have the potential to travel, not least within the networks of the globally operating services.

Still, Eastern European countries are present in the productions supported by the TV programming scheme as production services, locations or settings. The Danish-French *DNA* or the German *Das Boot* (2018-), for example, have partly been filmed in the Czech Republic. Yet, as is often the case for Eastern European locations, they are used as substitute locations for other cities or landscapes in Western Europe. Thereby, co-production with partners in the Czech Republic becomes a means to access cheap production resources on location or additional funding e.g. through the Czech tax incentive which supported productions like *Shadowplay* (DE/FR/CAN 2020-). While such funding constellations are in line with the TV programming scheme's evaluation criterion of a European dimension in the funding, they are nonetheless problematic. First, the use of Eastern European locations as substitutions for other places means that there is no recognisability that can be translated in follow-on business like screen tourism. More importantly though, there is a risk that the TV programming scheme is missing the opportunity to support stories from the South-East of Europe, which is currently on the rise not only as a filming location but also as a setting for crime stories like *Mamon* (CZ 2015), *Valea mută* (RO 2016) or *Aranyélet* (HU 2015-18). These examples, examined in DETECT's report on *Location marketing and cultural tourism* (2020), integrate narrative and aesthetic traits from the internationally successful Nordic Noir stories but transpose them for locations, societies and cultures of Eastern Europe. These HBO stories have the potential to expand and diversify the narratives of Europe.

## 5. Summary

The data and findings presented here clearly expose a geographical imbalance in the support for high-end TV production through the TV programming scheme. This imbalance is, in part, due to the lack of applications from production companies in the South-East of Europe, but at the same time, it is also due to a dilemma at the heart of the programming scheme. The scheme seeks to support international co-productions with the potential to circulate in order to foster the distribution and visibility of high-end European TV fiction. Production companies in North-Western Europe have several advantages for making their case in applications for the TV programming scheme. The countries they are based in are already embedded in strong co-production networks that have already gained a track record in internationally successful drama. This track record helps to make the case that the dramas will travel well, while past experiences in successfully marketing and selling the dramas abroad help create credibility. Hence, awarding support from the TV programming scheme to production companies in France, Germany, the UK, Denmark and Sweden has strong potential to yield good results, i.e. dramas that travel well across and beyond Europe. At the same time, production companies in other regions are currently missing out on the opportunities for increasing budgets, visibility and sales potential that comes with the EU funding.





## POLICY IMPLICATIONS AND RECOMMENDATIONS

With its support for high-quality fiction production in the small television markets of Northern Europe, the TV Programming scheme (2014-2020) has actively contributed to and benefited from the international popularity of Nordic Noir TV Drama, which is now visible in the wide circulation of Nordic TV series on broadcast and European VoD platforms. Some of the series supported by the scheme have even circulated far beyond Europe. Furthermore, the TV Programming scheme has built on existing co-production and exchange networks within North-Western Europe and has helped to motivate co-production constellation beyond neighbouring nations. This indicates that the policy goals of supporting productions with the potential for wide circulation and the goal of fostering transnational co-productions may have been achieved by way of this policy instrument.

The main shortcoming of the TV programming scheme, evident from the evaluation of its fiction funding decisions, is the geographical imbalance that is favouring of production companies in North-Western Europe, a region characterized by mostly well-funded, well-connected, public-service dominated TV markets which are now also benefitting from growing local productions by VoD services. TV producers in the South of Europe have hardly benefited from the scheme's budget-boost, increased distribution potential and support for transnational cooperation, while fiction producers in the East of Europe have not directly benefited from the programme at all. To redress these imbalances, we propose three measures for implementation within a new generation of the TV programming scheme in Creative Europe Media 2021-27.

### 1. Promoting the scheme in underrepresented territories

Increased promotion of the programming scheme is necessary among producers in the regions that are underrepresented in the awards statistics of the programme's run during Creative Europe 2014-2020. Creative Europe has set up local desks in 38 countries, which provide the necessary infrastructure, although the lack of applications from some countries may indicate a scarce visibility of the local desks. An increased visibility of local Creative Europe desks and closer relationships with local official film institutes may result in qualified support for application development, a factor that may explain the success rate of e.g. Danish applications for the programme.

This measure is expected to help with increasing the share of suitable applications from particularly Italy and Spain, which are already among the countries with high AV production capacities and enjoy increasing popularity on the global distribution market. Poland and the Czech Republic already have a well-developed production landscape that can be reached through increased promotional efforts among local production companies. Increasing the visibility of the TV Programming Support scheme in Europe overall will increase the competitiveness of the scheme, which can contribute to a rise in quality of proposals.



## 2. Extension of the points system

In its current form, the evaluation criteria of the TV programming scheme seek to redress the power imbalance between the big and the smaller TV markets of Europe by awarding 5 extra points in the score to projects from countries with low and medium production capacity. The high success rates and funding sums awarded to the small Northern nations indicate that this measure contributes to levelling the playing field for the smaller countries. Therefore, we propose a similar measure to address the geographical imbalance in European support for Programmes, by creating a tiered, progressive system of extra points among the countries with medium and low production capacities that takes into account their funding success in the previous round.

Evaluation System (2014-2020)		Proposed Evaluation System (2021-2027)	
No additional points	France, Germany, Italy, Spain, UK	Tier 0 No additional points	France, Germany, Spain, Italy, UK
5 additional points	Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Greece, Hungary, Ireland, Iceland, Liechtenstein, Latvia, Lithuania, Luxembourg, Malta, Norway, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Sweden, Switzerland.	Tier 5 10 additional points	Greece, Latvia, Czech Republic, Lithuania, Bulgaria, Romania, Slovakia, Bosnia and Herzegovina, Cyprus, Serbia, Macedonia, Albania, Croatia, Hungary, Luxembourg, Montenegro, Estonia, Malta, Portugal, Slovenia, Switzerland, Liechtenstein
		Tier 4 8 additional points	Austria, Poland, Netherlands
		Tier 3 6 additional points	Ireland, Iceland, Finland
		Tier 2 4 additional points	Belgium, Norway
		Tier 1 2 additional points	Sweden, Denmark

Additionally, we propose that productions, which at the point of application can already evidence the commitment of one or more co-production partners, secure the extra points of their partner country/countries. For example, a German production company applying for funding with a co-production partner in Poland would score an additional 8 points.

## 3. A policy instrument for development support

In contrast to Italy, Spain and the North-Western countries which have benefitted from the first generation of the TV programming scheme, the smaller TV markets in the South and East of Europe face the additional disadvantage that there are only low production levels of the 3-13 episodes TV series that are internationally sought after. Furthermore, productions from these territories do not yet enjoy the same global visibility.

Therefore, we propose to use the seven-year run of the upcoming Creative Europe Media Programme to support the development – rather than production or distribution – of high-end fiction production in the proposed Tier 5 countries. The aim is to develop viable projects that are eligible and suitable for the TV Programming scheme with a production company from a Tier 5 country as the main applicant. Essentially, we propose to include financial development support in the policy instrument, but earmark these specific funds in the TV programme for specific Tier 5 territories.

The methodology of this policy brief consists of a combination of quantitative and qualitative data analysis. The policy brief evaluates the complete duration of the Creative Europe programme since 2014 except for the second funding round of 2020.

Quantitative data on Creative Europe TV fiction funding was collected through EACEA's website (Education, Audiovisual and Culture Executive Agency). The funding scheme has two annual rounds of application, which means that the main dataset for the policy brief consists of a) 13 lists of "applications received by country" and b) 13 "lists of selected projects", all freely available online. Alongside this information, the success rate of applications received from each country was calculated. This compilation of data consisted of data on all TV programming co-funded by the Creative Europe programme, including factual programmes.

Qualitative methods were used to annotate and evaluate the selected projects data. For a closer inspection of the DETECT research focus, a second dataset was made consisting of only titles of fiction. Each programme was qualitatively evaluated according to available information regarding genre, nationality of the applying production company, co-producing countries and primary locations derived from credits and the *Internet Movie Database* (IMDb). This method avoided the fact that many titles would not be locally available as well as the influence of personal genre judgment. Regarding genre, online user-generated genre qualifications may even come closer to a collectively agreeable genre evaluation. Yet, information regarding co-funding and locations on IMDb may be incomplete, which is why samples of the IMDb-derived data were amended by additional research for each programme. The data was amended further by information on original broadcasters.

To contextualize the data from the TV Programming applications and awards statistics, various reports from the European Audiovisual Observatory (EAO) were employed. In order to evaluate the potential influence of the countries' media systemic differences, the local audience share of national public service institutions was listed, based on data from the report *The Internationalization of TV Audience Markets in Europe* (The European Audiovisual Observatory 2019). EAO reports (on TV fiction production and the presence of European TV in VoD catalogues) provided the basis for evaluating how aligned the production landscapes and distribution patterns of the countries receiving most grants are with the TV Programming scheme's evaluation criteria. Data on the presence of European fiction in linear television is not freely available to the same degree of comparability and actuality, but findings from other academic research projects enable shining a spotlight on a few trends.

The third foundation of the insights and recommendations in this report are the findings from individual case studies and data collections assembled by the DETECT consortium, e.g. deliverables on *Location marketing and cultural tourism* (D4.1) and *Research transcultural identity I: production perspectives* (D4.2).

The complete dataset was evaluated through media policy analysis and location studies. Media policy analysis, in the approach applied in this policy brief, studies media policies through document analysis, and measures to what extent the intentions behind the policies are realized. Location studies reads the economic, political, aesthetic and practical circumstances regarding the place of producers, productions and broadcasters. This evaluation also entails representative cases with special attention towards the funding scheme and the international collaboration between co-producing and co-financing partners.

## PROJECT IDENTITY

**PROJECT NAME** Detecting Transcultural Identities in European Popular Crime Narratives (DETECT).

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**DURATION** April 2018 – July 2021 (40 months) – extended until October 2021.

**BUDGET** EU contribution: €2.518.443,75.

**WEBSITE** <http://www.detect-project.eu/>.

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**FURTHER READING** Bengesser, C., Hansen, K.T., and Gemzøe L.S. (eds.), (2020). *Location marketing and cultural tourism*. Research report for DETECT (deliverable 4.1). Available at [http://www.detect-project.eu/wp-content/uploads/2020/02/COMPLETE\\_d4.1\\_final2.pdf](http://www.detect-project.eu/wp-content/uploads/2020/02/COMPLETE_d4.1_final2.pdf).  
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