

<CN>Chapter 1</CN> <CT>Introduction</CT>

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<NP>This collection is based on a three-year research project, Success in the Film and Television Industries (SiFTI) funded by the Norwegian Research Council. The project had two basic purposes: 1) To illuminate the operations of sustainable and successful film and television companies in Norway, Denmark, the Netherlands and the United Kingdom; investigating their histories and evolution, the particular challenges they face and how they deal with them, the people who work for them and the men and women who run them; 2) To compare and contrast these companies in order to find out if there were common elements in how they conduct their business that might explain why they had been able to survive and also thrive. In contradistinction to the conventional focus on media conglomerates (Chan 2005; Fitzgerald 2012; Kunz 2007) or large-scale institutions such as Hollywood studios (Bordwell et al. 1985; Caldwell 2008; Dangcil 2007) or public service broadcasters such as the BBC (Bloomfield 2008; Born 2004; Davies 2001; Küng-Shankleman 2000), the focus of this collection is on micro-, small- and medium-sized companies (MSMEs), which the European Commission (2015: 3) calls the ‘engine of the European economy’.¹ The collection’s focus on European companies is also a departure from the main trajectory of media industry studies that have usually analysed American businesses (e.g. Gitlin 1983). It is therefore a contribution to the increasing academic attention that is now being given to European media production (see for instance, Bondebjerg et al. 2015; Meir 2016; Szczepanik and Vonderau 2013).² However, even within studies of European media, this volume’s comparative, cross-national approach makes it distinctive from the bulk of cultural/creative industries studies.</NP>

<TEXT> MSMEs are not only economically important, but also culturally significant. They are thought by cultural policy advisers to counteract media imperialism by providing a crucial contribution to democracy through enabling a multitude of different voices to be heard (see

Curran 2011; Paterson et al. 2015). Often regarded by policymakers as more flexible, creative and innovative than their larger counterparts, MSMEs are perceived as a viable economic model in the shift from the Fordist period of mass production to a post-Fordist one in which niche markets are targeted and profits can accumulate through the 'long tail' (Anderson 2009). When MSMEs are concentrated in one locality – as part of 'creative clusters' or 'cultural hubs' – they have been seen as important to regional and urban development as potential replacements for dying industries (e.g. Florida 2004).³ Although our research is connected to these broader issues, it recognizes that the audio-visual industries are a special case and therefore that investigation and analysis need to attend to the particularities of film and television production. And, as the authors in this collection contend, despite the arguments about cultural 'convergence' and a 'networking' culture in which companies are increasingly interdependent, there remain clear differences between these two industries and therefore analysis should focus on the specific conditions of production that obtains within each, as well as their common challenges and interrelations.

The companies discussed in this book were selected on the basis of two criteria for success: they have survived for over five years, and they have produced film or television programmes that have received critical acclaim and/or been popular with audiences. This admittedly wide and basic definition of success includes two very common business criteria; profitability and the ability to remain economically viable over time. However, some of the companies have experienced periods of considerable financial uncertainty because of the project-based character of film and television production. The definition also implies customer satisfaction and cultural capital in the form of peer recognition and awards.

Success is a complex concept and other less tangible but equally significant measures come into play in media management. These can include keeping your employees happy and content, making a meaningful contribution to the community, campaigning for social or environmental issues and developing audio-visual media as artistic expressions. There are also what can be termed subjective or personal success criteria, which include making a living from doing something one loves, using one's talents, achieving personal goals, meeting interesting people or simply being happy and content in one's work. A recent study of over 150 Dutch SME owners showed that most placed personal satisfaction and good relationships above commercial criteria. It showed that success criteria varied and were

derived from the values owners held, often evolved over time and differed according to the age and size of the firm (Gorgievski et al. 2011).

Our focus on 'success' might be considered unduly celebratory and that we are '[a]cting as temporary partisans of media organizations' (Hesmondhalgh 2007: 48; Hesmondhalgh 2014). Our sympathetic attitude, while far from uncritical, is partly the result of the collection's focus on MSMEs. The companies discussed in this volume can be collectively identified as struggling entrepreneurs that contribute to media diversity rather than being dominant or predatory players in the media marketplace; their success contributes to the general cultural health of the media. We will return to a discussion of the diverse meanings of success in our concluding chapter, where the comparative dimension of our analysis is discussed at length. We argue for a family resemblance between these successful companies. They are unique and different in many respects, but at the same time connected by several overlapping similarities.

One common contextual factor, particularly for European media, is the range and importance of the various international collaborations, partnerships and co-productions in which media companies engage – see, inter alia, Chalaby (2016), Finney (2010), Fontaine and Kevin (2016), Goldsmith and O'Regan (2005), Guback (1969), Hilmes (2014), Moran (2013), Morawetz et al. (2007), Steemers (2014), Weismann (2012) and Wheeler (2004). However, we argue that operations of the smaller film and television companies in this study make most sense in relation to the *specific national contexts* in which they are embedded. Hence this volume is organized into separate sections about each of the four nations studied by the SiFTI project, all of which begin with an overview chapter that explains the general organization and characteristics of the film and television industries in each of the selected countries.</TEXT>

<H1>Theoretical approach</H1>

<NP>This collection is a contribution to the rapidly expanding field of media industry and media production studies (for overviews see Banks et al. 2016; Cottle 2003; Havens and Lotz 2011; Holt and Perren 2009; Mayer et al. 2009; McDonald 2013; Paterson et al. 2015).⁴ Studies of media industries/media production draw on a broad range of disciplines and analytical approaches (Freeman 2016; Hesmondhalgh 2009, 2010, 2013; Paterson et al.

2015) and have a long, if not always acknowledged, history (Mayer et al. 2009; Wasko 2015). One of the most influential approaches has been political economy, defined as ‘the study of the social relations, particularly the power relations that mutually constitute the production, distribution, and consumption of resources’ (Mosco 2009: 2) and which focuses on the ‘fundamental forces and processes at work in the marketplace’ (2009: 24). This view informed Richard Caves’ *Creative Industries* (2000) and its persuasive concept of unstable and conflicted ‘contracts’ between art and commerce.⁵ With its interest in macro processes and underpinning structures, political economy has been described as the ‘jet plane view’ of the media (Havens et al. 2009).

This collection is indebted to political economy studies in its emphasis on how the various national film and television industries are shaped by overarching political, economic, social and cultural factors, including how national media regulations and policies influence the operations of the companies. However, in this approach the detailed characteristics of their actions remain unanalysed. In addressing this issue, this collection is indebted to work in cultural studies, which understands culture as a site of struggle, negotiations and attempts to achieve hegemony. Cultural studies provide a ‘helicopter view’ that highlights the details and complexities not visible from the jet plane view of political economy (Havens et al. 2009: 239). In doing so, this approach challenges a monolithic view of the media industries by foregrounding the role of individual agents within larger media structures, both high-placed managers and ‘below the line’ workers (Bennett and Strange 2015; Caldwell 2008; Havens et al. 2009; Holt and Perren 2009; Johnson et al. 2015; Mayer 2011). This collection employs a granular attention to detail to give a concrete sense of the actual working practices of specific companies and to foreground the role played by particular agents in their organization.

However, the SiFTI project’s interest in company success and survival sets it apart from the cultural studies tradition with its basically Marxist concentration on the political dynamics of cultural life and its potentially subversive or suppressive practices. The research that this book is based upon has taken a more anthropological cast (Schlesinger 2015), characterized by close-textured ‘thick descriptions’ (Geertz [1973] 1993) of specific instances derived from detailed, qualitative interviews and observations. However, as Georgina Born has argued, this does not mean ‘going native’ and adopting the position of the informants, but

maintaining a 'critical analytical distance', achieving a 'kind of double consciousness – *both* empathy *and* distance' that focuses on 'individual and collective agency'. She argues that such close-grained attention is 'a particularly good way of learning about the complexities of the object. It is also a good method for interrogating and reworking the structural readings of macro process that can be derived from political-economic analysis' (Born 2000: 409, original emphasis). Contributors to this volume have attempted to achieve this 'double consciousness', a point that will be discussed further in the section on methodology.</TEXT>

<H1>Analysing companies' production/organization cultures</H1>

<NP>As already indicated, the particular focus of this collection is on analyses of micro-, small- and medium-sized film and television companies. Robert Picard argues persuasively for the importance of a close-grained study of individual media companies:</NP>

<EXT>A weak understanding of the theory of the firm has led numerous media observers who do not take a company perspective to make sweeping generalizations about how media companies operate, without discriminating between companies that make very different choices in pursuing profit and company values. These ignore many of the complexities of company organization and governance [...] assume a simplistic firm structure, operation, and performance, and present a deterministic view of the ability of managers to fully control firms and their performance.</EXT> <SRC> ([2002] 2011: 2)</SRC>

<NP>A key aspect in the understanding of how modern media firms operate in a more holistic and nuanced sense is the concept of *production cultures* that has informed all the chapters in this collection. Contributors have been particularly influenced by John T. Caldwell's analysis of the belief systems generated by the different occupational roles in the film and television industries in Los Angeles. Caldwell understands production cultures as an interpretive system informing self-reflexive processes:</NP>

<EXT>Film and television [...] do not simply produce mass or popular culture [...] but rather film/TV production communities themselves are cultural expressions and entities involving all of the symbolic processes and collective practices that other cultures use: to gain and

reinforce identity, to forge consensus and order, to perpetuate themselves and their interests, and to interpret the media *as* audience members.</EXT> <SRC>(2008: 2, original emphasis)</SRC>

<NP>Because Caldwell is not particularly interested in the operations of specific media companies, material drawn from organization, business and management studies has been equally important to contributors of this book. Edgar Schein's *Organizational Culture and Leadership* (2004) informs several chapters in this collection. Schein defines culture as:</NP>

<EXT>a pattern of shared basic assumption that a group learned as it solved its problems of external adaptation and internal integration, that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think and feel in relations to those problems.</EXT> <SRC>(2004: 17)</SRC>

<NP>Schein is interested in the underlying reasons that cause companies to pursue certain strategies, and his concept of culture as a shared pattern of assumptions is similar to Caldwell's concept of 'culture as an interpretive system'. Both definitions conceive culture as a set of learned ideas that form our perception of our surroundings. They also share the viewpoint that cultural analysis has to deploy a multiplicity of sources and methods (Drake 2014; Freeman 2016; Vonderau 2013) and not just rely on interviews of the social group in question and without taking the statements of the organization members at face value. Another common thread that we have found helpful is the analytical distinction between internal integration and external adaptation conceiving companies as dynamic entities, constantly changing and adapting to internal pressures and external forces. Schein argues:</NP>

<EXT>All group and organizational theories distinguish two major set of problems that all groups, no matter what their size, must deal with: (1) survival, growth and adaptation to the environment; and (2) internal integration that permits daily functioning and the ability to

adapt and learn. Both of these areas of group functioning will reflect that larger cultural context in which the group exists and from which are derived broader and deeper basic assumptions about the nature of reality, time, space, human nature, and human relationships. </EXT> <SRC>(2004: 18)</SRC>

<NP>The main difference between their approaches is that Schein's goal is instrumental, aiming to improve a company's efficiency, whereas Caldwell seeks to provide a critique of how such cultures operate. He is also more sceptical about the difficulties in analysing company cultures and the film and television industries in general.</NP>

<TEXT>In order to get to grips with the organization and operation of selected companies, the analyses in this collection also draw on studies of media management (Aris and Bugin 2009; Dal Zotto and Van Kranenburg 2008; Davis and Scase 2000; Deuze 2011; Küng 2017) and management in the creative industries (Bilton 2007, 2008; Bilton and Cummings 2014). These authors discuss how companies differ in terms of their leadership, visions, strategies and other business decisions and, to different degrees, review how macroeconomic and political factors affect the structures and operations of the firms. Contributors to this collection have also, on occasion, drawn on the extensive literature about cultural labour, which has focused on the specific pleasures, pressures and insecurities experienced by those working in the cultural industries and the growth of the 'precariat' (see, inter alia, Banks 2007; Banks et al. 2013; Gill and Pratt 2008; Hesmondhalgh and Baker 2011; McKinlay and Smith 2009; McRobbie 2015; Ross 2009; Standing 2014). However, there is little in this literature that roots itself in the analysis of particular companies, which is at the heart of this collection.</TEXT>

<H1>Methodology</H1>

<H2>*The use of case studies*</H2>

<NP>The overview chapters that survey the film and television industries in each of the four countries take a political economy approach that reviews the 'production, distribution and consumption of resources' and the 'fundamental forces and processes at work in the marketplace' that Mosco advocates. They are based on assembling quantitative data that is

often difficult to locate and is derived from a range of sources. This material is placed within an interpretative framework that analyses how political, economic, social, cultural and historical factors have shaped the overall characteristics of these two industries in all four countries and provides an analysis of the general context in which the particular evolution and operation of individual companies may be understood.</NP>

<TEXT>The individual case studies of specific film and television companies are based on a qualitative research methodology. The aim of the collection is not to produce general theories; rather, it is 'to create historically situated tales that include both highly focused portraits of what identifiable people in particular places at certain times are doing and a reasoned interpretation' of their actions (Van Maanen 1999: xi–xii). This approach is as interested in exceptions as in typicality and its basic methodological framework is the detailed exploratory case study, understood as the best way through which to apprehend the rich specificity of the phenomena being analysed (see Eisenhardt 1989; Yin 2013). As Havens et al. argue:</TEXT>

<EXT>The media are concrete entities with specific interests and, therefore, abstract philosophies or high theory does not bring us any closer to understanding their centrality as meaning-making institutions. This is not to minimize the significance of theory-building, but rather to stress the imperative of case study methods that shed light on the ways in which members of media industries define the conventions of production and distribution based on their assumptions of the prevailing cultural values and issues of the time.</EXT> <SRC>(2009: 249–50)</SRC>

<NP>The case studies in this collection are based on the usual protocols and procedures of qualitative, empirical research that locates and scrutinizes as wide a range of relevant material as possible. These include what Schein (2004: 25) refers to as 'artefacts'; any visible manifestations of the organization under scrutiny, including logos, websites, promotional materials and press releases about the company or its products, accounts in the trade press

or specialist journals, in newspaper articles, publicly available interviews with company personnel including chat shows and Q&As at screenings. Analysis also encompasses aesthetic and cultural analysis of selected products for which the company is responsible, though there was little room in a book of this length for detailed interpretation. The case studies also argue for the importance of providing a *cultural history* of the companies discussed without which it is often impossible to understand their priorities and underlying values.</NP>

<TEXT>The SiFTI project did not have the resources to enable researchers to seek access to companies' archives or records, or to organize longer-term ethnographic studies. However, although the opportunity was not available to spend extended periods with the companies in situ, the authors often made a number of site visits and were thus able to observe and analyse another element, often neglected in organization studies, the nature of a company's office spaces and its working environment. As several chapters show, this is not only an important component in the company's internal organization of its workforce but also a significant aspect of its identity, a component in how the company projects its public image, its values and aspirations. This concern meshed with a focus on the importance of place. The significance for particular companies of either a metropolitan or a regional location comes through strongly in several chapters.</TEXT>

<H2>Using interviews</H2>

<NP>A core component of the case studies is extended qualitative interviews with company personnel. They proved to be crucial to the detailed scrutiny we wished to provide and enabled us to probe values, attitudes and assumptions not available in other sources. Because of their importance, it is necessary to reflect here on the use of qualitative interviews – that is, ones that had a series of open-ended questions – as a methodology. Certainly, the authors were clear that they were socially and historically situated discourses that had a strong element of what Caldwell calls 'cultural self-performances' that are carefully staged and managed (2008: 4–7). Media professionals are highly adept at giving interviews and often use these as the opportunity to present a version of themselves or events and a reconstruction of past happenings that create a particular view of the nature of

their involvement and thus of their career trajectory. This may not be a deliberate act of misrepresentation but a version of events they have come to believe is true, usually placing themselves in a favourable position.</NP>

<TEXT>Christine Cornea has identified an academic reluctance to engage in interviewing, which is judged the province of journalists. This is accompanied, she argues, by a 'fear of losing critical distance' (2008: 118), of becoming too close to or too closely identified with the interviewee and thus not preserving the rigorous objectivity that should be a core component of disinterested research. However, Cornea articulates succinctly the value of interviews as a research methodology because, although they 'generate material that is both true and false, skewed by memory or wish fulfilment', it is both 'interpretative and richly interpretable. This is why they can provide such resonant, irreplaceable materials for film and television studies, and why they need all our scepticism and intelligence to make their way into an academic afterlife' (2008: 134). As we found, interviews are often hard won and precious and become themselves an important historical record of the ideas and values held by industry practitioners at a moment in time. But their critical interpretation focuses attention on the reasons why those knowledges and opinions came into being and how they were constructed.

In an illuminating recent discussion, specifically about the use of interviews in media production studies, Hanna Bruun argues that the interviewees are typically chosen from an elite deemed to possess the wide-ranging expert knowledge the researcher needs to validate the quality of her or his research and lend it both breadth and depth. This is because 'elite interviewees' are ones who have the power to make strategic decisions and thus exert a major influence over the companies they 'represent' (2015: 132–33; see also Bogner et al. 2009; Herzog and Ali 2015; Mikecz 2012). Bruun prefers the term 'exclusive informants' to describe this group of potential interviewees who possess 'irreplaceable' knowledge that is not publicly available (Bruun 2015: 134–35). The key to conducting successful interviews, she contends, is to establish trust and mutual respect through posing critically astute questions based on extensive background knowledge. Such questions allow the interviewee to engage in a conversation very different from ones typically created by journalists (who want information or opinion) and which encompasses reflection on deeper

issues. However, Bruun, like Caldwell, cautions that researchers need to recognize that 'exclusive informants' have agendas and take these into account when making their interpretations of the interview material. Because our principal focus is on those in a position to provide an overview of their company's history and how its strategy has developed over time, our selection has concentrated on these 'exclusive informants', often company founders which is sometimes referred to as 'studying up'. What we seek is access to professional knowledge rather than the lifeworld of the interviewee, the characteristic focus of 'studying down' where the informants are often 'below the line' workers. However, we have also sought the voices of lower status employees or freelancers on occasions to provide a different perspective.

Bruun also raises questions about confidentiality, anonymity and the interviewees' rights over published material. As she notes, the world of elite media professionals is a small one and the testimony would be instantly recognizable even if the person were not named. Thus we have named our sources, who were happy for us to do so and to be quoted. Ethically, this entailed giving them the opportunity to check the citations for accuracy. Some of the authors have given the interviewees access to their finished chapters to comment on what they perceive to be distortions or misrepresentations and to ask for any material they felt uncomfortable about to be removed. There is a gatekeeping element (Mills 2008) to this latter practice, and a possible compromise of the objectivity and validity of the research produced, but our experience has been of very minimal interventions or else a very positive post-interview dialogue that re-engages with the issues broached in the encounter.</TEXT>

<H1>Undertaking qualitative cross-national research</H1>

<NP>A crucial dimension of the SiFTI project was to conduct cross-national research and thus to illuminate a broader spectrum of company practices than could be provided by focusing on only one nation, despite the challenges (Livingston 2003). It also provided the opportunity to search for any common patterns that might explain the sustainability and success of the selected companies across the four different countries. Despite their important differences, notably the size of the United Kingdom and the scale of its media industries, these four countries also share significant similarities to make the comparison

meaningful. All four are situated in north-western Europe and are fairly affluent, technologically advanced social democracies with strong welfare states that regard film and particularly television as cultural organizations rather than simply businesses, as reflected in the strong traditions of public service broadcasting that have developed in each. With the partial exception of the United Kingdom, which relies on an indiscriminate tax relief scheme in which foreign firms also profit, all have well-developed state support mechanisms that provide a degree of protection and assistance for both the film and television industries. In addition, Denmark and the Netherlands enjoy further support as members of the European Union. Although Norway is not a member, Norwegian companies are also subject to EU regulations (Television without Frontiers, Audiovisual Media Service) and are eligible for EU support schemes (MEDIA programme, Creative Europe) due to Norway's EEA (European Economic Area) membership. The nature of the United Kingdom's relationship to Europe is in the process of being redefined following the 'Brexit' referendum in 2016 when a narrow majority voted to leave the European Union. However, this occurred after the empirical data used in this book was collected. Members of the two Nordic countries can also apply for money from the Nordisk Film & TV Fond.</NP>

<TEXT>The media industries in all four countries face major challenges. Globalization includes the necessity of dealing with multinational and multi-ethnic audiences as well as the possibility of being bought by multinational corporations. These corporations include not only the giants of the past – the Hollywood studios that have always dominated the film industry – but also the new television behemoths, the 'super indies' and 'mega indies' such as the EndemolShine group that now consists of 120 companies across more than 30 markets. These developments can be regarded as both a threat to independence and also an opportunity for smaller companies to achieve greater or more financial stability. Film and television companies in these four countries, as elsewhere, are also struggling to adapt to the major changes created by digitalization, which has had a profound impact on the production and distribution of media in general and how media are consumed (see, inter alia, Gripsrud 2010). In addition, all four countries are, to different degrees, affected by the deregulation of the audio-visual market causing increased competition.</TEXT>

<H1>Introducing the chapters</H1>

<H1>Norway</H2>

<NP>Jo Sondre Moseng's overview of the Norwegian audio-visual sector argues that there has been a period of considerable growth and professionalization from roughly 2000 onwards. Compared to earlier periods, domestic films and television drama have proved popular with national, and increasingly international, audiences. However, there are considerable differences between the film and television sectors. The film production companies are small, independent and highly reliant on public funding. Their production is centred around individual film projects with very variable results in terms of both profit and critical acclaim. The major television companies, on the other hand, are part of transnational entertainment groups, whose economy of scale provides them with content, a professionalized administration and financial backing. Thus, these television companies are characterized by their greater stability and higher volume of production than their film production counterparts.</NP>

<TEXT>Eva Bakøy analyses leadership in the Norwegian film industry based on case studies of three Norwegian film companies – Motlys, Paradox and Cinenord. She argues that the three companies are lifestyle businesses where the entrepreneurs seek to generate an adequate income while doing what they love. They are motivated by their personal fascination for the film medium and their freedom to choose their own projects and identify themselves as film producers rather than company managers. In terms of external tactics, all leaders design film projects that can be described as a meeting place between their own film preferences or ones they believe in, the support systems of the Norwegian Film Institute (NFI) and the interests of the distributors, while also catering to the interests of other private investors. This of course limits the creative possibilities for Norwegian filmmaking. In terms of internal tactics, they attempt to create a working space characterized by an easy-going family atmosphere with informal and open lines of communication and flexible work routines.

Vilde Schanke Sundet's chapter addresses new production and distribution models in Nordic television drama by analysing a particularly successful Norwegian series, *Lilyhammer* (2012–14). This series broke new ground in terms of its high audience ratings, suitability for

international export and its innovative partnership between several players: Rubicon, a Norwegian production company with international owners; NRK, the dominant Norwegian public service broadcaster; Netflix, an international streaming service; an international star actor with his own management company (Steven Van Zandt); and Red Arrow, an international distributor. Sundet argues that the success of *Lilyhammer* also created problems for the stakeholders, which finally drove them apart. The tensions included issues such as production budget, publishing strategies and, perhaps most profoundly, the identity of the series itself.

Stine Sand Eira examines how place affects film and television companies situated in the Norwegian regions. She argues that this is an important issue because the Norwegian government supports regional film based on the premise that filmmaking in different places will generate more variety. She argues that the companies have a holistic approach to place. Particular locations are advantageous because they give companies access to regional funding, and also provide creative benefits, such as access to local talents, scenery and stories. Her analysis also shows that the companies contribute to greater diversity when it comes to the deployment of geographical locations and also through their use of local film workers and, to a certain degree, producing different kinds of stories, thereby legitimizing the government's funding of regional film.</TEXT>

<H2>Denmark</H2>

<NP>Heidi Philipsen and Roel Puijk's overview of Danish film and television highlights the importance of strong, internationally recognized brands – Dogme 95 and 'Nordic Noir' – to its current success. They also demonstrate the significance of a well-developed infrastructure of state support, both direct and through public service broadcasters, and of a particular form of production culture – the 'Danish model' – that is writer-dominated and combines arresting storylines with social and ethical themes. However, the Danish film and television industries face significant challenges, spearheaded by Netflix and HBO Nordic, which are pioneering new forms of distribution and transmedia dramas that use multiple platforms, and which challenge the ability of a nation state to influence production practices.</NP>

<TEXT>Philipsen's chapter on Zentropa investigates how such a highly distinctive film company led by two mavericks, the auteur director Lars Von Trier and the charismatic producer Peter Aalbæk, manages to be so successful, able to thrive on crises, controversy and even scandals. She locates a contradictory but apparently functional production culture in which employees are both inspired – encouraged to engage in creative, risk-taking and 'alternative' filmmaking – and exploited: asked to observe strict discipline and work long hours. It is a model, she argues, that is peculiar to Zentropa and could not be replicated by another firm.

Søren Birkvad's also discerns contradictions, what he characterizes as 'competing truths', in his analysis of STV, the longest surviving and most successful of the shrinking group of independent television companies in Denmark. Birkvad argues persuasively that researchers should not necessarily look for a coherent strategic vision but focus on paradoxes, tensions and apparent inconsistencies, especially during a period in which companies have to adapt to the shift from individual productions to formats and advertiser-funded programming, and from a market defined by national public service broadcasters to a highly competitive transnational one.</TEXT>

<H2>*The Netherlands*</H2>

<NP>In their overview chapter, Eggo Müller and Daisy van de Zande argue that the Dutch audio-visual sector has become increasingly international. Although the number of Dutch film produced each year has increased over the last decade, only a few companies produce more than four films every year. As in the Scandinavian countries, film is subsidized but there has been a shift to using public money, including tax incentives, to boost mainstream productions that have a more assured national appeal than art house productions. In addition, the production of children's films and co-productions has increased, while several productions companies have also developed television drama series. In the television sector, Müller and van der Zande note that the deregulated market since the 1990s supports a large and diverse production landscape. Several Dutch companies have been successful in developing television formats that are exported internationally and increasingly they have become a part of global media conglomerates. Although the sector has become more

professionalized and internationally integrated, this success has not resulted in an increase in employment. Müller and van de Zande argue that this 'success' is primarily shaped by neo-liberal doctrines in which fewer employees and a growing number of freelancers produce more predictable mainstream output.</NP>

<TEXT>In their analysis of innovation in two medium-sized film production companies, Rinkel Film and Column Film, Willemien Sanders and Roel Puijk argue that most innovations in these companies occur in the field of financing. Both companies prefer to produce distinctive films rather than ones that have an obvious commercial potential. Sanders and Puijk observe that although there were a few attempts to innovate by means of digital technology, more attention was given to finding models that made investing in their productions more attractive and on facilitating co-productions. They also note that the two companies have varying experiences with co-productions and their strategies in how to finance the films they want to make differ. Rinkel film co-produces most of its films and prefers true stories for a broad audience; Column Film combines trademark films with more popular literary adaptations.

In their chapter on television, Sanders and Puijk compare two production companies, JVtv and Blazhoffski, which started out in a similar fashion. Both were established by two former employees from public service television and made children's programmes. During the 20 years of their existence, they followed different paths. Sanders and Puijk use Schein's theory on organizational culture to characterize the differences in terms of the companies' underlying assumptions (Schein 2004). JVtv's more collective ethos and individuality, relying on established contacts rather than on pitching and developing formats for new investors, sustained what can be seen as a family enterprise. By contrast, Blazhoffski can be characterized as a highly networked company, expanding on the basis of promoting several formats that they own. These formats were the reason why Blazhoffski currently – like most television companies – is part of an international media conglomerate, which enables it to expand further. Sanders and Puijk note that these companies' success criteria vary according to the situation in which they find themselves.</TEXT>

<H2>*The United Kingdom*</H2>

<NP>Steve Presence's overview reveals a clear disparity between the United Kingdom's film and television industries. Film, long considered entertainment rather than art, has suffered from low levels of public funding, and the major incentive – tax relief – favours large-scale American productions rather than indigenous ones. By contrast, television, regarded as a public service, has enjoyed far greater financial support and has been globally successful. However, here too SMEs struggle and, if successful, are vulnerable to takeover by 'super indies', global entities driven by commercial logic. Presence argues for a critique of the narrow concept of economic success that permeates both these industries and to press for a policy rethink that will encourage them to be more culturally ambitious, innovative and diverse.</NP>

<TEXT>Audun Engelstad focuses on three UK film companies – Origin Pictures, Number 9 Films and Warp Films – asking how they have managed to be both critically and commercially successful in such a challenging marketplace. He identifies several common factors. Each benefits from forms of public subsidy, or public service broadcasters; each is artist-driven, dependent on the strong network of relationships with creative talent forged by their founders who continue to lead each company; and all three target their productions at niche, mainly European markets that enable them to be distinctive and to retain artistic integrity. He discerns an increasing orientation towards 'high-end' television production, a 'telenomics', in which the economic structures of the television industry are used to stabilize and circumvent some of the key problems of film production.

The last of the individual case studies is Andrew Spicer's chapter exploring how creativity is managed by Aardman Animations, one of the most successful independent UK film and television companies, whose vision is to forge an artists' 'studio' rather than simply a business. This aspiration, he argues, can only be achieved by imaginative leadership that affords employees some creative autonomy, guided by an overarching strategy that grasps the creative possibilities of commercial constraints, including the opportunities provided by the proliferation of online platforms. In this way, Spicer argues, Aardman has kept pace with a changing animation industry now orientated to the creation and exploitation of a portfolio

of copyrighted projects and the development of an international brand, rather than single programmes.</TEXT>

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<H1>Notes</H1>

¹ According to the European Commission the main factors determining whether an enterprise is an MSME are: staff headcount, turnover and financial status. However, if a small enterprise has access to significant additional resources (e.g. because it is owned by, linked to or partnered with a larger enterprise), it might not be eligible for MSME status.

Company category Staff headcount Turnover or Balance sheet total

Medium-sized	< 250	≤ € 50 m	≤ € 43 m
Small	< 50	≤ € 10 m	≤ € 10 m
Micro	< 10	≤ € 2 m	≤ € 2 m

² One can also cite the Media Cultural Encounters through European Screens (MeCETES) project (<http://mecetes.co.uk/>) from which Bondebjerg et al.'s book arose. Also relevant is Media Experiences led by Professor Annette Hill: <http://mediaexperiences.blogg.lu.se/>.

³ Richard Florida's work has been subjected to severe critique – see, inter alia, Peck (2005). See also Porter (2000), Power and Scott (2011), Scott (2000).

⁴ One can adduce as evidence not only the volume of publications, but also the establishment of media industry subgroups in several of the main academic associations: the International Association of Media and Communication Researchers (IAMCR); the European Communication Research and Education Association (ECREA); the International Communication Association (ICA) and the Society for Cinema and Media (SCMS). In December 2016, Spicer and Presence (with Jack Newsinger) established a Special Interest Group in Screen Industry Studies for the British Association of Film, Television and Screen Studies (BAFTSS). In 2014, the *Media Industries Journal*, an open-access, peer-reviewed online publication, was launched. Its first issue contained several overviews of the field.

⁵ See also Lampel et al. (2006), Wasko et al. (2013), Winseck and Jin (2011).