

**EUROPE**  
**IN**  
**SYNCH**



Synch Market Profile  
**Denmark**

Authors

**Alice Kattago & Virgo Sillamaa**

Design

**Thomas Jarmer | trikoo**

This report was created as part of the „Europe in Synch“ project, co-funded by the European Commission.



# Table of Contents

<b>Preface</b>	<b>4</b>
<b>Introduction</b>	<b>5</b>
<b>1. Music economy in Denmark</b>	<b>5</b>
<b>2. Copyright &amp; Licensing</b>	<b>8</b>
2.1. Copyright Law in Denmark	8
2.2. Collective Management Organisations	10
2.3. The Role of Collective Management	11
2.4. Synch revenue from collective licensing	14
<b>3. Rightsholder &amp; Music Providers</b>	<b>15</b>
3.1. Music publishing	16
3.2. Recorded Music	17
3.3. Production Music Libraries	18
3.4. Composers	21
<b>4. Synch and Supervision</b>	<b>22</b>
4.1. Brief history and sector overview	22
4.2. The role of a music supervisor in Denmark	23
4.3. Music supervision and its challenges in the film sector	24
4.4. Changes in the market and sector – streaming platforms and production music	25
4.5. Challenges and outlook	26
<b>5. Music Users &amp; client industries</b>	<b>28</b>
5.1. The Film Industry	31
5.2. TV and Video-on-Demand	38
5.3. The Advertising Industry	41
5.4. The Game Development Industry	43
<b>6. Main Challenges</b>	<b>47</b>
6.1. Challenges	48
6.2. Towards Solutions	49
<b>References</b>	<b>51</b>



## Preface

The main aim of the report is to provide insights into the Danish synch market and sectors. Especially into the practices and challenges of music supervisors as they appear in 2025.

### What is synch?

In the music industry, synch or synchronisation refers to **licensing** a piece of music for use in an audiovisual work, such as a film, TV series, advertisement, or video game, etc. That “piece” of music usually consists of a particular musical work and a particular recording of a performance of that work. All three are protected under copyright law and therefore a license is needed to use, or in other words, “synch”, this piece of music in an audiovisual project. Such a license is usually referred to as a synch license.

Synch can also refer to the creative professional practice of synch agents and music supervisors who, in addition to dealing with the legal side of licensing and the technical side of providing the track and metadata, also have a creative role as a music curator for finding and selecting the most suitable music for a given project.

### Methodology

The report is most importantly based on individual video interviews with Danish music supervisors, music publishers, composers and other professionals. These interviews were conducted over the period of 2024-2025. In addition, the report makes use of available sources on the Danish music economy as well as the audiovisual media sectors. All sources have been listed in the references section at the end. In the case of reports and sources in Danish, machine translation has been used.

The authors would like to thank Nis Bøgvad, a founding member of the “Europe in Synch” project, for his help with contacts and initial suggestions. Also, the interviewees for granting their time and insights: Andreas Hemmeth (Autor), Anna Lidell, Anne Louise Holsøe (KODA), Christian Svenningsen (GL Music), Christoffer Magdalus (Goodvibes Studio), Emilie Skovgaard (Glue Supervision), Gina Rosland Eide (Knus Music), Jeppe Kaltoft (Upright Music), Jesper Gadeberg, Jesper Hansen (UnderScore), Jesper Mardahl (Promus), Jesper Reginal (Crunchy Frog), Leslie Ming, Lone Nyhuus (DFMC), Mette Zähringer (Iceberg Music), Mikkel Maltha, Nis Bøgvad, Ole Dreyer (Nordic Music), Steven Tallamy (Wise Music/EWH), Torsten Cubel (Trucks Music Publishing).

Finally, the authors would also like to thank representatives from The Danish Film Institute, Danish Producers’ Association and others who either provided us further information or directed us towards sources and contacts.

## Introduction

Denmark, a country of about 6 million people, has a well-developed music industry that is integrated into the Nordic region, but is also open and active in European and international music markets. Despite a venerable film and TV production sector and a fast-growing gaming sector, synch and music supervision in Denmark have only been professionalising over the past 15 years, since the 2010s.

This report delves into the practices, challenges, and opportunities of this evolving landscape, synthesising insights from Danish music supervisors, music publishers and other professionals. The findings reveal a market grappling with complex issues, including a legacy of informal practices and challenges with establishing viable careers in highly specific areas such as music supervision – typical for smaller markets. In Denmark, as elsewhere, the tensions between complex and often not well-streamlined legacy practices of music licensing and the newer, more cost-efficient business models of production music libraries can be felt. These are likely to grow with the looming impact of AI technologies that could significantly disrupt music creation and licensing for audiovisual media. The broader digitalisation, as well as being open to global competition to large markets, creates economic pressures that shape both the Danish music industry as well as the “client” industries for synch – film, TV, advertising and game development. The so-called streaming freeze in 2022 due to unresolved negotiations between the Danish film sector representatives and large streaming platforms is a case in point.

A core finding of this report is the ongoing struggle to professionalise the sync sector and establish the value of music in productions. Unlike larger markets, Denmark still has a fragile tradition of music supervision, with many productions still trying to handle music clearance internally, often with unsatisfactory results, bringing supervisors in too late in the process, and chronically underbudgeting for music.

However, there are also signs of growth and optimism. The entry of major streaming platforms like Netflix and HBO has introduced a new level of professional standards for music clearance, often mandating the use of a music supervisor. This has created a growing demand for expertise and has, at times, helped to re-establish the importance of music in the production workflow. This report also explores the challenges faced by composers and artists, from navigating a small, close-knit industry to competing with an over-reliance on older, well-known hits. Ultimately, while the market is complex and faces significant headwinds, the future of sync in Denmark will depend on improving collaboration, simplifying licensing, and a renewed commitment to valuing the creative power of music.

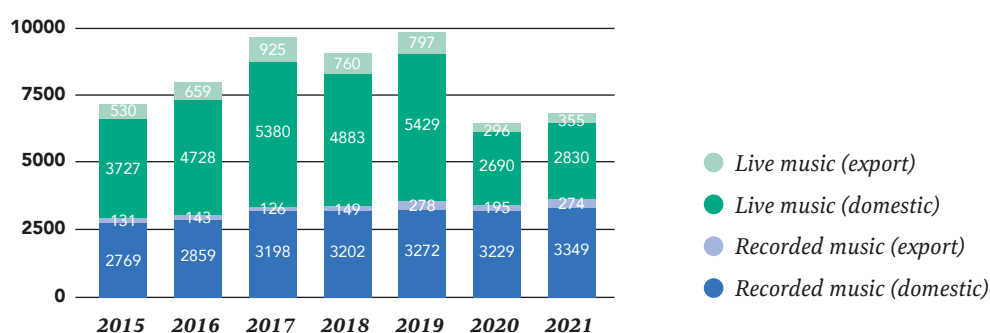
# 1. Music economy in Denmark

According to a recent report by HBS Economics<sup>1</sup>, the overall estimated direct revenue of the Danish music industry in 2023 was around DKK 12.4 bln (€1.6 bln). Roughly DKK 7.3 bln, or 59%, comes from live music, DKK 4.7 bln, or 38% from recorded music and DKK 0.4 billion from “brand and image”.

Unfortunately, comparisons with previous years are made difficult as the latest report uses a different methodology than the series of reports „Dansk Musikomsætning” by Rambøll Management Consulting, with the latest report providing figures for 2021.<sup>2</sup> To provide a trend view, the figures below and tables are therefore based on these earlier reports and provide data up to 2021.

The „Dansk Musikomsætning” reports provided an overall assessment of the revenues generated by the Danish music industry at the point of sale.<sup>3</sup> The total revenue in 2021 was nearly 6.8 bln DKK (ca €833 mln). This is less than the nearly 7.6 bln DKK (ca €930 mln) in 2015 and an even bigger drop from the nearly 9.8 bln DKK (€1.27 bln) in 2019. The reason for the slump is clearly the drastic drop in live music revenues due to the COVID-19 crisis, from which the industry and market had not yet recovered by 2021 (Figure 1).

The report breaks all revenues down into two main groups, live and recorded music sectors and provides an export share for each. Authors and music publishers earn a share of the revenues from both live and recorded music sides. It is notable that the music publishing rights revenue from recorded music is 20 times larger than that from live music (Figure and Table 1). The export share of music publishing revenues is not provided.



**Figure 1**  
The domestic and export shares of live and recorded music revenues in Denmark, 2015-2021, mln DKK.  
Source: Rambøll Management Consulting, 2021, own calculations.

1/ HBS Economics (2025). „Musikindustriens bidrag til dansk økonomi”, page 24.

2/ Rambøll Management Consulting (2023) Dansk Musikomsætning

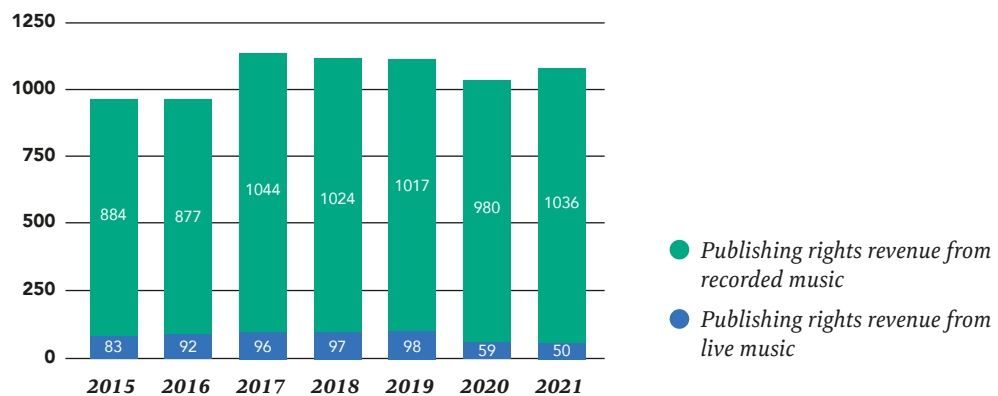
3/ In contrast to many music industry reports, including the IFPI standard, which provides the trade value of the revenues, this report estimates added costs (i.e. retailers markup, taxes, etc.) to arrive at the revenue at the point of sale. In other words, what the consumer or business purchaser is paying for it. The figures provided in the report thus are higher than what the music industry (music companies, authors, artists) earns. While the report also relies on data from IFPI Denmark, the figures between the two reports differ significantly, more than can be explained by different points of accounting. As no further information was available, this remains unexplained.

	2015	2016	2017	2018	2019	2020	2021
Recorded music (domestic)	2769	2859	3198	3202	3272	3229	3349
Recorded music (export)	131	143	126	149	278	195	274
<b>Recorded music total</b>	<b>2900</b>	<b>3002</b>	<b>3324</b>	<b>3351</b>	<b>3550</b>	<b>3424</b>	<b>3623</b>
Live music (domestic)	3727	4278	5380	4883	5429	2690	2830
Live music (export)	530	659	925	760	797	296	355
<b>Live music total</b>	<b>4257</b>	<b>4937</b>	<b>6305</b>	<b>5643</b>	<b>6226</b>	<b>2986</b>	<b>3185</b>
<b>TOTAL</b>	<b>7157</b>	<b>7939</b>	<b>9629</b>	<b>8994</b>	<b>9776</b>	<b>6410</b>	<b>6808</b>

**Table 1**

The domestic and export shares of live and recorded music revenues in Denmark, 2015-2021, mln DKK.

Source: Rambøll Management Consulting, 2021, own calculations.



**Figure 2**

Music publishing revenues from live and recorded music in Denmark, 2015-2021, mln DKK. Source:

Rambøll Management Consulting, 2021, own calculations.

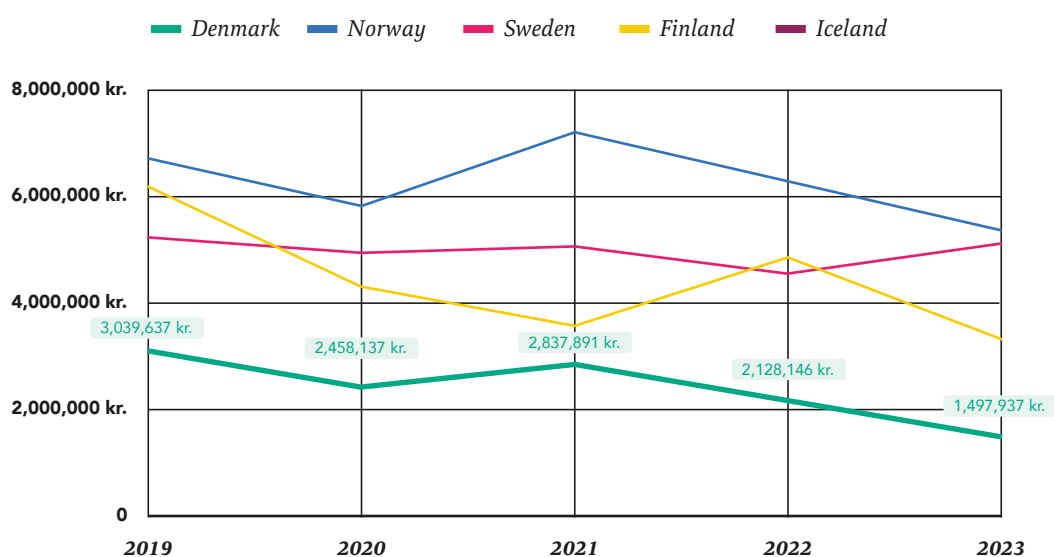
	2015	2016	2017	2018	2019	2020	2021	YoY 20/21
Pub rights revenue from live music	83	92	96	97	98	59	50	-15%
Pub rights revenue from rec music	884	877	1044	1024	1017	980	1036	6%
<b>TOTAL</b>	<b>1000</b>	<b>999</b>	<b>1163</b>	<b>1134</b>	<b>1119</b>	<b>1039</b>	<b>1066</b>	<b>3%</b>
% of pub rights in total live music	1.9%	1.9%	1.5%	1.7%	1.6%	2.0%	1.6%	
% of pub rights in total rec music	30.5%	29.2%	31.4%	30.6%	28.6%	28.6%	28.6%	

**Table 2**

„Value of the work” or revenues from music publishing, 2015-2021, mln DKK.

Source: Rambøll Management Consulting, 2021.

Less is known specifically about synch revenues from direct licensing. Synch revenues, consisting of both individual and collective license fees, form some part of publishing and recorded music revenue, usually equally split between the two sets of rights holders. The overall synch revenue for the Danish authors and artists, music publishers and producers is not available.<sup>4</sup> The revenues from collective licensing for music publishers (via NCB) have been between DKK 200 000 - 300 000, but fell to about DKK 150 000 in 2023 (see figure 3). It's important to keep in mind that NCB only collects license fees in the Nordics, while those Danish music companies for whom synch is an important revenue stream earn most of it from international markets (see more about NCB in chapter 2).



**Figure 3**  
NCB synch fees in the Nordic countries, 2019-2023, in DKK. Source: NCB transparency reports.

## 2. Copyright & Licensing

### 2.1. Copyright Law in Denmark

In Denmark, copyright, related rights, and the collective management of rights are primarily regulated by the [Danish Copyright Act](#), last amended in 2023. Denmark is a signatory to the Berne Convention and WIPO Copyright and Performances and Phonograms Treaties. As a member of the European Union, Danish copyright law is largely harmonised with copyright law across the EU, though some specific national characteristics remain.

<sup>4</sup> The trade associations IFPI Denmark, MPA Denmark and DUP, for example, do collect revenue data from their members, but this is not publicly available.



Danish copyright law, like other European copyright laws, recognises both economic and moral rights of authors and performers. In §3 the Danish Copyright Act outlines moral rights, which include the right to be named as the author, and the right to object to alterations or derogatory treatment of their work. These **moral rights** can be relevant for synchronisation, where music use may involve adaptation or specific contextual placement.

Authors are also granted exclusive **economic rights**, outlined in §2 of the Danish Copyright Act. These include the exclusive right to reproduce (in whatsoever form), adapt, make available to the public (including selling, renting, distributing works, displaying and performing them in public), transmit and make works available online.

The Danish Copyright Act also regulates **related (neighbouring) rights**, including performers and the producers of sound recordings (chapter 5). **Performers** are granted both moral and economic rights (§65). The moral rights include the right to be named as the performer and the right to object to any distortion, mutilation or other modification of the performance, while economic rights include the exclusive right to record a performance, reproduce recordings, distribute recordings, and make recordings available to the public.

**Producers** (of sound recordings) are granted exclusive economic rights (§66), including exclusive rights of reproduction, distribution, and making available to the public. To record performances, producers typically require the prior consent of the performers. The specific details of these agreements can vary, and it is important to ensure that all necessary performer rights are cleared, especially when dealing with older recordings or recordings from less established sources. While performers' personal rights cannot be fully assigned, contracts can and should include clauses that address how the performance will be used and what limitations exist.

The Danish Copyright Act includes provisions that facilitate the **transfer of copyright** from certain authors to **film producers**, specifically within the context of film production agreements. §58 outlines that an agreement to participate in the filming of a film implies that the author cannot object to copies of the film being made and distributed to the public, the film being shown publicly and provided with subtitles or speech in another language. However, there are **exceptions** to this with regard to **music rights holders** – this assumed transfer does not apply to already existing works nor musical works produced for the purpose of making the film.

Essentially, there are no explicit **synch rights** in the Danish Copyright Law, but synch is fully covered by the broader exclusive rights of reproduction, adaptation, distribution, communication and making available to the public. In some cases, synch rights of authors are managed collectively via NCB (see 2.3.), but these do not include moral rights that need to be secured directly if there is a risk of offensive use.

As the NCB does not handle moral rights, it can only, at best, advise the film production companies seeking licences. In theory, the threshold is very low, as any kind of use of a piece of music in a TV show or a film can be considered an adaptation (it is cut for length). In practice, it's the situations where the use of music might be offensive to the author(s) or is perhaps politically charged. In those cases, the NCB advises the producers to ask the author's permission directly. While in practice moral rights almost never cause any issues, however, it does create a legal uncertainty which makes the use of commercially available music more risky for producers, especially for TV production where the pace is very fast.

While the copyright legislation might be robust, similarly to many smaller European countries, the enforcement can be weak. According to professionals, there is a tendency in Denmark for copyright disputes and trials to result in the acknowledgment that the infringing party did not have bad will. This means they end up paying more or less the same fee they should've to begin with. This is a weak incentive to avoid infringement.

## 2.2. Collective Management Organisations

There are two main collective management organisations in Denmark for music - **KODA**, which manages the rights of songwriters, composers, and music publishers; and **Gramex**, which manages producers' and performers' rights. In certain clearly defined cases, KODA and **Gramex** use other organisations to collect royalties: **Copydan**, an umbrella for four different collective management organisations. Important for music rights holders in KODA and Gramex are **Copydan Verdens TV**, collecting royalties related to the distribution and retransmission of TV and radio broadcasts, which include music; and **Copydan KulturPlus**, collecting levies on storage media, which serve as compensation for private copying of music and other content.

### KODA

KODA is the Danish collective management organisation protecting authors and music publishers and their rights. The organisation handles the licensing of public performance (jointly with GRAMEX) and mechanical rights (through NCB) for composers, songwriters, and music publishers. KODA doesn't directly provide sync licenses. For certain types of synch, the rights of authors and publishers can be licensed through NCB or otherwise directly. However, KODA does license the use of musical works on platforms such as YouTube and TikTok, where music is attached to short videos, sometimes referred to as micro-synch.

---

1/ Based on interviews and conversations conducted by Virgo Sillamaa in 2018-2019 with the Estonian game developers community; and interviews with Jari-Pekka Kaleva and Konsta Klemetti in 2023.

## Gramex

Gramex manages neighbouring rights, representing the interests of performers and producers by collecting royalties for the public performance of recorded music (jointly with KODA), such as when a recording is broadcast or played in a venue. They distribute the royalties received from TV and radio broadcasting, as well as public performance, to their members. Gramex doesn't license synch uses.

## Nordic Copyright Bureau (NCB)

The Nordic Copyright Bureau was created jointly by the five Nordic author's societies (Koda, STEF, STIM, Teosto and TONO) to collectively manage mechanical reproduction rights, including the licensing of music that is physically or digitally reproduced, such as in CDs, vinyl, or digital downloads; as well as synchronisation of music for TV production, documentaries and short films for non-theatrical release. NCB also represented Estonian, Latvian and Lithuanian authors' rights associations until 2020. Until 2012, NCB had offices in all five Nordic countries, with the organisation having around 60 people on staff. Following the significant contraction of the mechanical rights market from the production of physical CDs, NCB has decreased in size and in 2017, the back-office of NCB was integrated into KODA and is now based in Copenhagen.

### 2.3. The Role of Collective Management

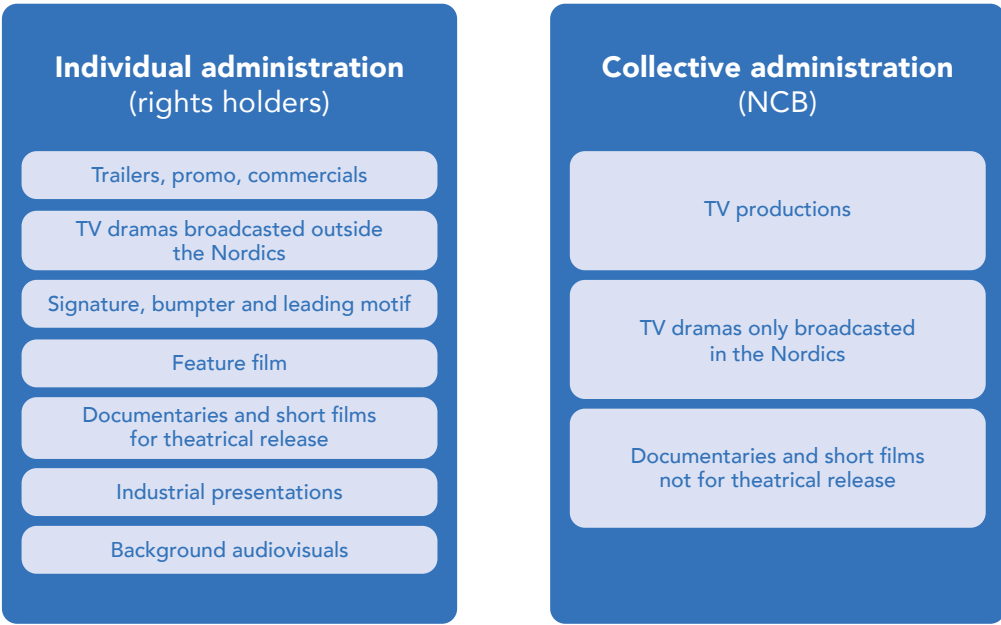
In contrast to the US industry standard, where synch is licensed individually, it is common in many European countries to license the use of music to certain types of film and TV production collectively with set tariffs. The main reason is that in many smaller European countries, the budgets to produce TV shows, short films, and documentaries are severely limited and often largely publicly supported. The producers would not be able to afford the higher prices of music, nor the uncertainty and burden of having to constantly engage in individual negotiations to acquire music licences. A lot of these productions serve mostly cultural purposes and have marginal commercial potential. By providing them with a clear, reliable and easy collective licensing option, original and commercially available music can still be used, while otherwise they would have to turn to cheaper and perhaps lower quality options. The music rights holders have little to lose with this system, as they would not be able to negotiate substantially bigger fees from it. By delegating these types of uses to be licensed collectively, they instead save time.

---

5/ Country specific price lists and a calculator can be found at the NCB website: <https://www.ncb.dk/index.php/using-music/>.

There are certain uses of music in audiovisual media productions that are licensed collectively in Denmark. NCB was created for this and represents the Nordic repertoire for global use and all the local and international repertoire represented by its parent societies in the Nordic countries. The use of recordings for synch is licensed individually by the producers (see table 3 below for the full overview of collective vs individual management of rights in Denmark).

The practices of collective licensing in synch in the Nordic countries varied widely. In 2012, NCB started to harmonise its approach and tariffs to synch licensing, and in 2015, it created the so-called Nordic Sync Model (see figure 4) to ensure approximately the same level of pricing across the different territories and currencies for all commercially available music. According to this model, licensing to feature films and advertisements is individually administered by the publishers, while licensing to TV production, documentaries and short films without theatrical release is licensed collectively through NCB.



**Figure 4**  
*The Nordic Sync Model. Source: NCB.*

The **TV dramas** have been an area of some changes, but in the current model, the system is that NCB licenses the distribution only in Nordic countries, while for international distribution, the film producers have to negotiate directly with music rights holders. International distribution is commercially more interesting for music publishers as it usually means a more ambitious or simply after-the-fact more successful TV drama where the licence fees can, therefore, vary considerably.

The **signature** music, as well as (mostly)<sup>6</sup> **TV trailers** for a TV show, are licensed individually by the music rights holders, whereas the **background** music within the show is licensed by NCB. The signature, defined as the repeated use of a piece of music in the beginning or the end of a TV production, i.e. a theme song, is more visible and more valuable for the music rights holders. Not least, because the visibility of the music and the connection it creates with that particular production can lower the likelihood of that track being used for other synch uses, such as advertisements.

**Commissioned music** for films or other productions is not covered by the Nordic Sync Model because the practices in the different Nordic countries are too different. In Sweden, for example, the agreements between the composer and the production company are entirely individually negotiated, whereas in Norway and Denmark, there have been framework agreements between the composer organisations and the film producers' associations that regulate certain tariffs. NCB still follows these different traditions, not collectively representing composers in Sweden, while keeping the old pricing for Denmark and Norway. However, the composers in the latter countries retain the right to go into direct agreements with the producer and not use NCB's representation. Conversely, in Sweden, if the composer so chooses, they can ask NCB to represent them and administer on their behalf the agreements for music commission with the film producer.

As soon as the music is composed, recorded and synchronised, it can be considered as any other existing music recording and be further used as agreed between the composer and the producer. For example, the composer might keep the right to release and distribute the audio version of the music or not.

The **tariffs for licenses** are set by NCB, but this is not done often. For the commissioned music, they were set a long time ago through framework agreements with producer associations and are only changed in correlation with the price index. The current tariffs for commercially available music were defined in 2015 after collecting information about how the production companies across all the Nordic countries work. NCB is specifically not allowed and does not consult the music rights holders (music publishers) in setting the tariffs, as this could be seen as a potential cartel agreement.

In the last few years, NCB has developed a simplified approach to **licensing broadcasters** in order to counter the trend of using more and more libraries. The new NCB licence covers both the use of music in-house as well as external productions for the broadcasters. It also includes the licence to use the music in TV show trailers, which is not generally part of the Nordic Sync Model. Before, the broadcasters faced high uncertainty with regard to how much and what kind of music the external productions would use and would, therefore, be very conservative with budgets. The

---

<sup>6</sup>/ See the new broadcaster agreement model below.

new agreement mitigates this and makes it safer and easier for the broadcasters, and hopefully increases the use of commercially available music in their production.

USAGE	AUTHOR'S RIGHTS (KODA or NCB)	NEIGHBOURING RIGHTS (GRAMEX)
<b>Public performance (secondary collection)</b>	Collective (KODA)	Collective (KODA) <sup>7</sup>
<b>Broadcasting in radio and TV</b>	Collective (KODA)	Collective
<b>Reproduction and distribution (physical)</b>	Collective (NCB)	Individual, except certain cases.
<b>Making available online</b>	Collective (KODA)	Individual
<b>Licensing to film production</b>	Individual for feature films and all other films with theatrical release) Collective (NCB) documentaries and short films with non-theatrical release	Individual
<b>Licensing to TV production</b>	Individual for international distribution of TV series and for theme (signature) music. Collective (NCB) for distribution of TV series in the Nordic countries.	Individual
<b>Licensing to advertisements</b>	Individual	Individual
<b>Licensing to video games production</b>	Individual	Individual
<b>Private copying</b>	Collective: KODA via Copydan KulturPlus	Collective: Gramex via Copydan KulturPlus

**Table 3**

*Individual and collective licensing for different types of music usage in Denmark.*

*Source: KODA, Gramex, NCB.*

## 2.4. Synch revenue from collective licensing

Synch rights are collectively managed by NCB only for the authors and music publishers. In their annual transparency reports, data for collection and distribution for all five Nordic countries is provided (see table 4 below and also figure 3 above). For Danish authors and music publishers, nearly DKK 1.5 million (ca €200 000) was collected in 2023, making up about 21% of all collections for Denmark. It's a declining rate when compared to previous years. The reasons for this are unstated, but a plausible cause is that the broadcasters increasingly use library music that is not licensed through NCB. This does not include revenue from outside of the five Nordic markets.<sup>8</sup> NCB charges an 18% administrative fee for AV synch. In addition to NCB, KODA has, in recent years, introduced a synch revenue in their annual transparency

<sup>7</sup> In Denmark KODA and GRAMEX collaborate in licensing the use of recorded music for public performance. Licensing agreements and collection are done by KODA and then shared with GRAMEX.

<sup>8</sup> It's an overall lump sum of DKK 49 mln for all five countries, the breakdown is not provided for collection.

	2019	2020	2021	2022	2023
<b>Denmark</b>	3,039,637 kr.	2,458,137 kr.	2,837,891 kr.	2,128,146 kr.	1,497,937 kr.
<b>Norway</b>	6,580,884 kr.	5,758,452 kr.	7,084,783 kr.	6,167,772 kr.	5,293,576 kr.
<b>Sweden</b>	5,157,408 kr.	4,855,968 kr.	4,984,456 kr.	4,508,129 kr.	5,033,651 kr.
<b>Finland</b>	6,156,537 kr.	4,249,742 kr.	3,530,371 kr.	4,788,367 kr.	3,302,613 kr.
<b>Iceland</b>	26,608 kr.	0 kr.	2,550 kr.	0 kr.	17,026 kr.
<b>TOTAL</b>	<b>20,961,074 kr.</b>	<b>17,322,299 kr.</b>	<b>18,440,051 kr.</b>	<b>17,592,414 kr.</b>	<b>15,144,803 kr.</b>

**Table 4**

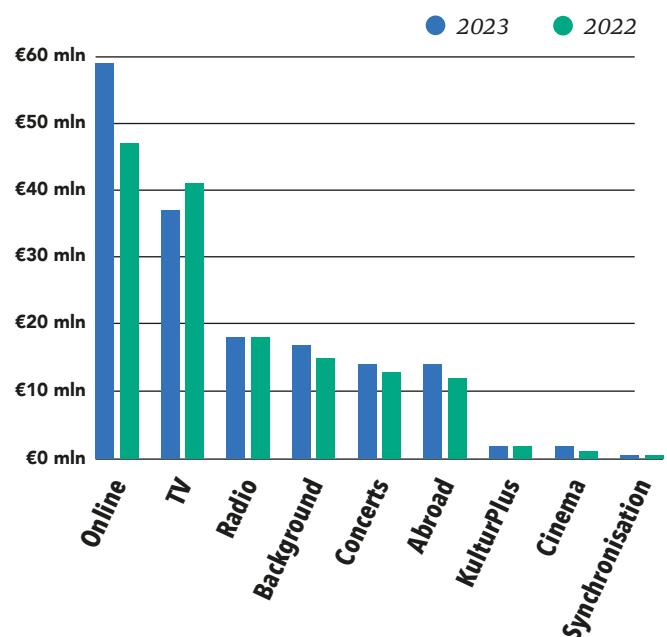
NCB „Work by work video“ (AV synch) in Nordic countries, in DKK. Source: NCB transparency reports (2019-2023). Available online: <https://www.ncb.dk/index.php/about-ncb/>.

reports. In 2022, the total revenue generated from synchronisation was DKK 2.8 mln (€377 000), and in 2023, it was €409 000 (KODA, 2023). It's not clarified, but can be assumed to be revenue for licensing music for user-generated content platforms such as YouTube and TikTok, where music is available in pre-cleared catalogues and can be added to short videos, technically a synch and often referred to as micro-synch. In 2023, online revenues (€59 mln, increased by 26% YoY) became KODA's largest revenue source (36% of total) for the first time, outpacing TV and radio combined.

	2022	2023
<b>Online</b>	€47 mln	€59 mln
<b>TV</b>	€41 mln	€37 mln
<b>Radio</b>	€18 mln	€18 mln
<b>Background</b>	€15 mln	€17 mln
<b>Concerts</b>	€13 mln	€14 mln
<b>Abroad</b>	€12 mln	€14 mln
<b>KulturPlus</b>	€2 mln	€2 mln
<b>Cinema</b>	€1 mln	€2 mln
<b>Synchronisation</b>	€0.40 mln	€0.37 mln

**Figure 5**

Source: KODA. Transparency Report 2023





### 3. Rightsholder & Music Providers

Denmark is a relatively small music market but has an overall well-developed music industry. On the music rights holder side, quite a few music publishing companies exist, many of which are members of the Danish Music Publishers' Association (MPA, [Musikforlaeggerne](#)). About half of the 36 MPA members are also active in synch. Additionally, there are many record labels in Denmark, including the 36 members of [IFPI Denmark](#) and the over 200 members of [DUP](#), the association for independent labels. It is notable that while the three major labels have offices in Copenhagen, the major publishing companies work out of their regional headquarters based in Stockholm.

Synch and music supervision is a relatively new field in Denmark. While the Danish film and TV production scene has been highly accomplished and music has naturally always been used, synch and music supervision as a service has been notably professionalising only since the 2010s. This has resulted in a small number of proactive music publishers with dedicated synch staff actively pitching their repertoire. Most other record labels and publishers work on synch passively, i.e., clearing rights when an incoming request is received.

Given the fairly small market, it's understandable that only a few independent music supervisors work in the Danish synch scene, mainly on film, TV, and advertising, with less activity in gaming. Several independent publishers also work actively on music supervision. In addition, production music libraries are increasingly successful in providing streamlined and often well-priced alternatives to more tailor-made supervision or simply less efficient clearing processes with traditional publishers and labels. As referred to above, NCB has recently started to provide a simplified approach to licensing to keep pace with the market competition.

Denmark has many accomplished film music composers, but the scene is highly competitive, and access to opportunities for emerging talent is limited.

#### 3.1. Music publishing

Denmark has a fairly developed independent music publishing scene. Out of the 36 members of MPA Denmark, about 14 are actively focused on synch licensing. However, only around 5-6 of these have dedicated staff working exclusively with music supervisors, including some of the largest companies [Edition Wilhelm Hansen](#) ([Wise Music Group](#)) and [GL Music](#). The rest integrate synch into their broader publishing activities.

*“Any publisher should be working in synch, but a few don’t—like those focused on classical music and sheet music.” - Music Publisher.*



Most publishers in Denmark are actively engaged in creating and licensing music rather than solely monetising existing catalogues. Only a handful focus mainly on catalogue maintenance, though even these companies actively seek opportunities for synch placements, re-recordings, and print licensing. However, the financial returns from synch licensing on the Danish market remain modest. The few music companies actively focusing on synch as one of the main revenue streams note that the share of domestic synch revenue is marginal. To overcome these limitations, many publishers and labels are setting their focus on other territories, such as the US, UK, France, and, more recently, Asia.

*“I think MPA members get around 200 000€ from NCB, but that is nothing compared to what they earn internationally.” - Music Publisher.*

Significantly, none of the major publishers – Universal Music Publishing, Warner Chappell Music, Sony/ATV, and Kobalt – have a very active presence in Denmark, while they do sign and represent Danish authors. About 15 years ago, they decided that the Scandinavian markets were sufficiently similar to be overseen from regional offices, currently all located in Stockholm. While representatives occasionally visit to scout talent and sign Danish artists, their absence from the local market means they are less involved in nurturing emerging talent. This gives independent music publishers a stronger foothold.

*“If they are not present, they don’t feel the pulse of the Danish business. They don’t develop talents—they pick up already developed talents.” - Music Publisher.*

#### INDEPENDENT PUBLISHERS

*A full list of the members of the MPA Denmark can be found [here](#). Below are just a few of them who also work actively with music licensing and synchronisation.*

**GL Music** is one of the two biggest independent music publishers in Denmark. GL Music offers a range of support, from rights management and licensing to co-writing sessions and music placement in media. The company’s catalogue spans various genres and has been featured in international synchs, including commercials, films, and TV shows. GL Music has strong international ties and works on promoting its artists and songwriters internationally.

***Iceberg Music Group*** is another well-known music publisher, label and synch agency in Denmark, offering a wide range of services in music publishing, licensing, and artist development. The company represents a diverse roster of songwriters, producers, and composers, focusing on both local talent and international collaborations. Iceberg Music Group is actively involved in securing synch opportunities for its artists across various media platforms, including film, TV, advertising, and gaming.

***Nordic Music Partners*** is a Danish music publisher dedicated to representing songwriters and composers across a range of musical genres. The company focuses on music publishing, copyright management, and licensing. With a strong network in both local and international markets, Nordic Music Partners works to secure synch opportunities in film, TV, advertising, and other media.

***Edition Wilhem Hansen*** is the Danish branch of the global Wise Music Group who are present in 14 countries and own a total of around 600 000-700 000 copyrights worldwide. EWH offers a range of services in music licensing, synchronisation, and rights management. They have a diverse music catalogue that spans multiple genres and a strong focus on securing placements in film, TV, advertisements, and other media projects. EWH also takes on various music supervision work in advertising, TV and film. Their roster includes around 60-70 Danish composers and songwriters, 50 of whom are active and 20 of whom are retired, well-known composers.

***Stereo Royal*** is a Danish music publisher founded in 2010, focused on providing music for the sync industry globally. Their roster includes more than 30 Danish composers and have over the years made placements in numerous productions across advertising, film, documentaries and TV-series.

***Spanra*** is an agency specialising in licensing, publishing, and artist management. They offer synch services for advertising, film, and TV, and help match the right music with audiovisual productions.

***Trucks Music Publishing*** is an Aarhus-based music publishing house who focus on composing for trailers, TV promos and advertising campaigns.

### 3.2. Recorded Music

Denmark has a mix of both major and independent record labels and a well-established infrastructure for music distribution and licensing. All three of the “big three” major record labels — [Universal Music Group](#), [Sony Music Entertainment](#), and [Warner Music Group](#) - have a presence in Denmark, with their headquarters in Copenhagen. Major labels in Denmark engage in licensing for film, television, advertisements, and other audiovisual sectors, and they often collaborate with Danish and Scandinavian artists.

Denmark is also home to a range of independent labels, from well-established mid-sized labels to smaller boutique and niche labels. A list of them can be found by viewing the Danish [IFPI members](#) or the [members of the Danish Independent Record Label Association](#) (DUP).

#### MUSIC PRODUCERS / RECORD LABELS

*Some independent labels that also have a large focus on synch include:*

**Crunchy Frog** is an independent record label and publisher that have been operating since 1994. They are known for their high-quality, unique indie catalogue of around 2000 tracks. Crunchy Frog were one of the first companies to be active in the synch scene, starting in the late ‘90s and early 2000s. Currently, synch is still a large part of their revenue and an important part of their business, with them averaging around 60-80 placements per year. They mainly work outside of Denmark in markets like the US, the UK, Germany, France and Australia and mostly in advertising and trailers, though they do have some placements in films, TV shows and games as well.

### 3.3. Production Music Libraries

Production music, also known as library music, is a specialised form of music created for synchronisation with audio-visual media, such as films, television shows, advertisements, and online content. Unlike commercially released music, its primary purpose is not to top charts but to provide readily available, easily licensable soundtracks. Production music is used quite widely in Denmark due to its affordable prices and accessibility. The most popular companies include the Danish-owned [Upright Music](#), as well as Universal Production Music, [Epidemic Sound](#) (SE), [Artlist](#) (IL) and [Audio Network](#) (UK).

As mentioned above, there are some critical views and worried voices among the traditional music publishing communities towards the production music providers. This has been accentuated in the past decades by digital innovation that continues to drive towards more effective and efficient ways of licensing while potentially eroding traditional revenue streams from copyright exploitation. Given the complexity of licensing commercially released music, there is room for disruption. There are differing views, however, on the artistic and creative price of achieving efficiency and whether that serves the music creators well in the long term. This tension can also be felt to some degree in Denmark, perhaps especially because the [DR](#) (Danish Broadcasting Corporation) is using a lot of production music, whereas some feel that using more commercially released music by Danish artists would be more fitting with their mission.

Production music is not a new phenomenon in the media music sphere, with its origins tracing back to the early 20th century. [De Wolfe Music](#), the world's oldest production music library, arose from the need to catalogue and repurpose unused musical material. In the 1960s and 70s, skilled studio musicians in hubs like London, France, and Germany began creating music specifically for broadcasters. The digital revolution, while disruptive to traditional music industries, fuelled the growth of production music. As the demand for content surged, so did the need for accessible, affordable soundtracks.

The core concept of production music revolves around consolidated rights. Such music is created purposefully for a company so that all the rights are in one place. This streamlined ownership simplifies licensing, a stark contrast to commercially released music, where multiple stakeholders (composers, publishers, performers, producers) can complicate the process. The pre-cleared licensing approach allows for speed and efficiency, leading to convenience, predictability, and lower costs in terms of service. An important element in the value offer is the vast number of tracks in searchable catalogues ready to be licensed.

A lot of the criticism towards production music is framed in terms of lower quality as the necessary trade-off for convenience. First, this is about the perceived authenticity of commercially released music, as this is what “real” artists have created, drawing on their artistic vision and not delivering a functional product. There is a widely shared view among many music creators, producers, publishers and music supervisors that “real” music in the above sense has more depth and – if placed skillfully – can provide uniqueness to the audiovisual work as well. However, without necessarily contradicting this, it can also be argued that not all occasions require music with an equally unique artistic signature. There are many cases where a track from a production music library will suffice, or will work better, because it is tailor-made for synch and for enhancing audio-visual storytelling.

Furthermore, libraries these days can provide a wide array of different music, from generic stock tracks, which in the future can possibly be generated by AI, to music created by composers and producers who have specialised in this type of work and have an artistic signature of their own. Many of the music supervisors we spoke to confirmed that music libraries have made their way into everyday use in audiovisual sectors, including advertising, film, TV and games. Some music supervisors occasionally use library music themselves when the occasion calls for it.

In contrast to widely shared assumptions, production music companies operate on a variety of business models, and libraries vary significantly in size, quality, and genre coverage. Direct licensing versus subscription models offer different levels of flexibility and cost structures and are, in turn, based on what the company owns and what the agreements with the music providers are like.

*“The most popular music libraries in the Nordics - Upright Music, Apollo Music<sup>9</sup> and Universal Production Music - licence music directly for synch, but are still members of the local PROs. Epidemic Sound, however, does not collect from public performance through the PROs at all.” - Music Copyright Expert.*

Upright Music, originally started out as a music supervision agency in 1999 within commercial music and music clearance, has over the years expanded and build a division within production music and is now one of the leading providers of production music in Denmark and more broadly, for example, provides fully cleared (master and publishing side) music for audiovisual productions, but the composers retain their copyright. Their works are registered with a PRO, so they can also earn royalties from public performances later. Other companies, such as Epidemic Sounds, operate on a buyout model where the music cannot be registered with any PROs. In all cases, however, the authors need to accept that they cannot cherry-pick later which projects their works can be used in.

### **Production Music in Denmark**

Based on conversations with industry professionals, production music tends to dominate mainly in advertising, though it also has a place in film and TV series. Particularly when it comes to finding background music.

*“We also work with libraries. We find what’s necessary for the film. Sometimes libraries are good. Sometimes you need a song that sounds cheaply produced, like a dentist’s waiting room scene. - Music Supervisor.*

---

<sup>9</sup> Apollo Music has recently rebranded itself as [AM Usualsuspects](#). However, according to some experts interviewed they have not been that active in Denmark in the last years.

Since licensing the traditional way can be cumbersome, expensive and time-consuming, the pull towards library music from the client side makes sense.

*“I also understand the motivation that they need to make it easy. The publishers make it so complicated that they miss some opportunities. - Music Supervisor.*

*“Convenience is key and even more important than price. Also, the safety aspect is important. Knowing, for example, that the same music can be used for both the trailer as well as the show itself is very convenient for the producer”. - Music Copyright Expert.*

The founder of Upright Music, Jeppe Kaltoft, originally started out as a music supervisor within commercial music. Due to the complexities in licensing with many different stakeholders he spotted this market gap some 20+ years ago. This led to Upright Music starting to sign production music catalogues and representing them in Denmark and the Nordics. However, it wasn't until the 2010s that production music really took off in Denmark.

*Within the last 15-20 years, there have been massive changes in the media and music industry. The digital transformation has expanded the number of media channels and platforms enormously, developing a big demand for more content and therefore also an increased need of music that easily can be licensed. At the same time there's been a big pool of talent (also coming from the commercial music industry) that has made their way into production music, which has made a huge and positive impact on the quality levels in production music in general. Quality-wise there was a golden age in production music in the 60s and 70s (with a “deroute” in the 80s, 90s and 00s) and in a way it seems like the “golden age” returned in the 2010s and 2020s. Today we work with and represent music from many talented Danish and international composers (ie. Kaspar Kaae, Brian Batz, Josefine Skov, Ennio Morricone, Brian Eno, Dalia Derbyshire etc.) - Jeppe Kaltoft (Upright Music).*

In recent years, there has also been more of a demand for content with an increased number of TV shows, advertising campaigns, etc, being produced. This surge in demand, coupled with the dramatic changes in the media landscape due to digitalisation, has expanded the need for content and, consequently, for easily licensable music at reasonable rates. As a result, production music has become increasingly prevalent as an alternative to commercially released music, which often involves numerous stakeholders and complex licensing procedures.

## PRODUCTION MUSIC LIBRARIES

*Upright Music*, founded in 1999 is music supervision and licensing company with a division within production music. Upright Music is today one of the leading production music providers in the Nordics, the Baltics and Poland that has been operating for more than 25 years. They offer an extensive catalogue that spans all genres, from original Italian vintage film scores, authentic 60s & 70s rock recordings, orchestral pieces, electronic music, hip-hip, contemporary pop to larger than life Hollywood trailer music. Upright Music caters to both local and international clients, providing licensing services as well as custom music solutions for commercials, films, and TV shows. They have quite a large market share in Denmark and have a licensing deal with the DR (Danish Broadcasting Corporation).

*AM Usualsuspects* (previously Apollo Music) offers production music, sound design, and music clearance services. Their digital library, „Findthetune,“ was one of the first in the world, providing easily accessible music for creatives, marketing teams, and video producers. The company has expanded its reach beyond Denmark to other regions, including the Baltics and Poland, where they hold a considerable market share, all the while their activity in Denmark appears to have been decreased in the past years.

As becomes clear from the previous chapters, in addition to the above two Danish companies, there are other international production music providers active on the Danish market, including Universal Production Music, Audionetwork and Epidemic Sounds.

### 3.4. Composers

Denmark has a community of composers and music producers specialising in scoring and music production for various audiovisual formats, including film, television, advertisements, and video games. It is difficult to give an exact estimate as to how many composers work in this space actively, especially given that this work is often done as part of a broader portfolio career. However, the *Danish Film & Media Composers*, a branch organisation of Koda, has about 150 members.

As elsewhere in Europe, becoming a film composer is challenging, as opportunities are only rarely open for emerging talent. Scoring a film is creatively risky and professionally demanding. Most producers and directors prefer to work with composers



they have worked with previously. Creating a track record and personal connections is crucial, yet hard. The most consistent way is by studying together with film producers and directors. Relationships formed and projects done during that time can become the foundation for a future career. Another option could be to shift from supervising the music in a film to creating it. In fact, several music supervisors also – or even mainly – compose music for films and series, such as Mikkel Maltha and Leslie Ming.

In terms of formal education opportunities, [The National Film School of Denmark](#) has a [Sound Editing](#) course, and the Danish Academy of Music also offers a Master's Degree in [Film Composing](#).

In Denmark, composers are supported by several unions and associations that provide resources, advocate for rights, and facilitate networking within the industry. The most important ones are:

- [Danish Composers' Society](#) (Dansk Komponist Forening, or DKF) represents a broad range of composers, from classical to contemporary, including those working in film, TV, and media. Additionally, they advocate for composers' rights and organise events, workshops, and conferences to support members' professional growth.
- [Danish Professional Songwriters and Producers](#) (Danske Populær Autorer, or DPA) represents songwriters, producers, composers, and writers within the popular music genres. DPA was established in 1918 and was one of the founding members of KODA (in 1926), still maintaining a seat on its board. Membership in the DPA requires the author to also be a member of KODA.
- [Autor](#) (formerly DJBFA) is the largest association for composers and songwriters in Denmark, working with a wide range of music genres.
- [Danish Film & Media Composers, DFMC](#) (Brancheklubben for Film og Medie komponister, BFM) is an association for members of Koda with about 125 composers writing music for film and for the media. The main goal of DFMC is to “increase the focus on film and other cultural manifestations in the Nordic countries and on film music as an art form”.

There are also initiatives such as the [Polyphonia Project](#), aiming to “elevate Danish women film and media composers by creating meaningful pathways into an industry where they remain underrepresented”.



Several Danish companies represent film and media composers and mediate their services, such as [Silverdrum](#) (a company affiliated with Upright Music),

### **Events for Film Composers and Music Producers**

Denmark hosts several events that cater to film composers, music producers, and those involved in music for media. These events provide networking, professional development, and collaboration opportunities:

- [Copenhagen Film Music Festival](#): *This annual event celebrates the art of film scoring and brings together composers, directors, and industry professionals for panels, workshops, and screenings.*
- [SoundTrack\\_Cologne x Nordisk Panorama](#): *A collaborative event between Sound-Track\_Cologne and Nordisk Panorama, it focuses on music for film and media with panels, discussions, and networking for Scandinavian composers and international industry members.*
- [SPOT Festival](#) (Aarhus): *Although it's primarily a music showcase festival, SPOT also has panels and workshops for music in media, including synchronisation and film scoring.*
- [THIS Music](#) (Aarhus): *THIS Music is part of a larger media and tech conference [THIS Festival](#) and focuses on music in films, series and games, as well as music technology.*

In addition, there are events for film music composers such as the [Nordic Film Music Days](#) and the [Film Music Day in Odense](#), organised by the Danish Film & Media Composers and OFF, Odense International Film Festival. The Nordic Film Music Days is an annual celebration hosted by the composers' organisations of Denmark, Finland, Iceland, Norway, and Sweden, held at the Nordische Botschaften in Berlin during the Berlinale Film Festival since 2016. This event, which began in 2010, serves as a platform for communication, collaboration, education, and networking, with a focus on showcasing Nordic film music and filmmaking. A key highlight is the HARPA Nordic Film Composers Award, presented each year to an outstanding Nordic composer, thereby spotlighting Nordic talent and craftsmanship.

## 4. Synch and Supervision

### 4.1. Brief history and sector overview

The professionalisation of music synchronisation is still relatively new in Denmark, although it is more developed than in many other European countries. While music has long been a feature in Danish films, the structured approach to synch licensing and use of music supervisors was largely absent before the 2010s. There are a few companies like Crunchy Frog and Iceberg Music who have been operating in the market for decades, however the idea of viewing synch as a viable source of revenue for artists, creators and rights holders is something that emerged largely in the 2010s during the recording industry's decline in physical sales, issues with piracy and transition to streaming platforms.

As of 2024, there are several companies that are actively involved in synch in Denmark, as well as a few freelancing music supervisors. Most others, however, are reactive, responding to incoming requests rather than doing a lot of pitching work. Several music supervisors also do part-time work in other fields to maintain a steady income. Conversations with industry professionals suggest there are around 6-7 music supervisors actively working in Denmark at the time of this report.

*“Making a living as a music supervisor in Denmark, as an independent, is very tough. There's not enough money in the market.” - Music Publisher.*

Despite the increased focus on synch, many feel that Denmark lags behind countries like Sweden in terms of professionalisation. There, every bigger company with a catalogue has someone hired just for synchs. Not so in Denmark. Instead, major labels and other music companies often assign synch requests to a single person who manages them alongside other responsibilities, limiting the level of specialisation. Those Danish music publishers and labels that understand and focus on the value of synch are good partners for music supervisors and also AV media production companies, but these are the same few companies over the past decade. Others don't seem to have recognised this as an opportunity.

Since 2013, Denmark has seen a growing effort to strengthen the synch sector through events and initiatives designed to connect music supervisors, publishers, and composers. Some examples include the „Meet the Music Supervisors“ speed meetings that took place at [SPOT Festival](#) for many years, Open Pitch Sessions for emer-

---

1| Based on interviews and conversations conducted by Virgo Sillamaa in 2018-2019 with the Estonian game developers community; and interviews with Jari-Pekka Kaleva and Konsta Klemetti in 2023.

ging talents, and Let's Talk Sync seminars. Also, synch drinks are organised every now and then for Danish synch professionals to come together and discuss issues and topics affecting the industry.

*“Every year since 2013, we’ve been doing focused sync activities in Denmark, Meet the Music Supervisors speed meeting, Open Pitch Session where young talents can present their music, Let’s talk Sync seminar, etc. That is again a thing where we have, in close collaboration with publishers, been working on supporting and enhancing the area within synch. A place to create a relationship and establish a network. A long process of creating a close personal relationship with these people.” - Music Consultant and Synch Event Coordinator.*

As of 2025, many of the synch-related events are now held at [THIS Music](#), a music, media, and tech conference that runs as part of the larger [THIS Festival](#).

#### **4.2. The role of a music supervisor in Denmark**

The role of a music supervisor in Denmark is slightly different from other countries, particularly the United States or the United Kingdom. Whereas in the US, music supervisors will often have a bit more leeway to choose the music, in Scandinavia, film directors tend to be more hands-on. It's a music supervisor's role to make sure the director is happy with the music for the production.

*“A music supervisor's role is, therefore, to guide them on what is realistic and what isn't and to come up with a solution for getting the music and to handle the budget.” - Music Supervisor.*

Many projects in Denmark are managed without the involvement of music supervisors and are handled by the directors or production companies themselves. They are then faced with the full complexity of licensing commercially available music to their productions. This can be, at times, challenging even for professional music supervisors, let alone film producers or directors. Faced with these complications, licensing music is often abandoned in favour of production music libraries, which are easier to use and typically cheaper.

*“Most projects are without a music supervisor and are handled by the production companies themselves or their directors. They might go with production music, and most use of commercial music is abandoned because they don't know how to license the rights and it's expensive.” - Music Publisher.*

Data or estimates for how many audiovisual projects are produced every year are not available, nor how many of them make use of a music supervisor. Those interviewed mostly work on around 3-4 projects at any given time and around 15-20 projects annually, including projects across different sectors, like ads, TV series and films. Projects are smaller and faster in advertising, with some music supervisors working on an average of 75 advertising projects per year. However, it is nearly impossible to determine how many advertisements are produced annually in Denmark.

For example, Emilie from Glue Supervision states that at the time of the interview, their team was working on 11 films and 4 series, though the scale of these projects varies—some films may be smaller, while series tend to be larger, more complex productions. Emilie notes that they are now taking on new projects each week, a sign that more producers are recognising the value of having a dedicated music supervisor involved early in the process. A typical project spans about a year, with music supervisors involved from the early stages of production.

*“We come into the projects before the film. We help with things they need in the filming phase, and in the end, we make sure everything is delivered with contracts, etc.” - Music Supervisor.*

**Artistic freedom** in film music supervision varies widely depending on the project and industry practices. Early involvement in a project is crucial since this allows music supervisors to shape the film’s musical landscape in alignment with its creative vision.

*“The reason why it’s good to enter the project early is that you can describe the tonality of the film.” - Music Supervisor.*

However, as mentioned earlier, the primary role of music supervisors in Denmark is to clear the rights and bring the director’s vision to life.

*“If we were only creative, then we would not get paid. They value that we deal with complex licenses. For us, it’s an add-on, like an extra good thing.” - Music Supervisor.*

*“You need to figure out which songs fit the budget puzzle. It is creative, but it’s not that they start with valuing the creative work, but it ends with a lot of creative work.” - Music Supervisor.*

---

1/ Based on interviews and conversations conducted by Virgo Sillamaa in 2018-2019 with the Estonian game developers community; and interviews with Jari-Pekka Kaleva and Konsta Klemetti in 2023.

### 4.3. Music supervision and its challenges in the film sector

With a few notable exceptions, most active music supervisors in Denmark do a lot of their work in film and television, with drama series providing the highest payouts. Still, it's often a challenge as budgets are constrained and music budgets tend to be very small. According to music supervisors interviewed, when music is valued, it's mostly about hiring a composer to create a score. The rest is then often expected to be fixed with little to no money.

The Danish film industry is characterised by a close-knit community of professionals, where informal, even personal connections often play a significant role. This small scale fosters collaboration but also presents challenges for the music rights holders and supervisors seeking to license music to films at reasonable prices for both the licenses as well as the service. Film producers sometimes rely on informal arrangements, such as using the services of friends or acquaintances at minimal or no cost.

The overall sentiment among the music industry is that the value of music in film productions is not fully appreciated. Given that there are also very few music supervisors, it's a challenge to achieve and maintain high-quality standards. Moreover, financial pressures on music supervisors are intensified by competition from international professionals who may offer their services at lower rates.

*„A lot of American supervisors are taking their work for a cheaper fee. It shouldn't be a race to the bottom. I'd rather see fewer productions with high quality and fair payment.“*  
- Music Publisher.

Despite increasing recognition, many Danish productions still make the mistake of bringing in music supervisors too late in the process, leading to last-minute licensing issues and inflated costs.

*“We tell producers that if they hire us from the beginning, it's going to be cheaper and better. They are learning that because we are telling them that. The next time they work with us, they should hire us from the script.”* - Music Supervisor.

*„I just had a case with a producer who should be very experienced, and they contacted me 10 days before they needed to shoot a scene with a song. Then, I have to stress the publishers, who stress the management. This is the aspect of the business I'm most tired of.“* - Music Supervisor.

---

1| Based on interviews and conversations conducted by Virgo Sillamaa in 2018-2019 with the Estonian game developers community; and interviews with Jari-Pekka Kaleva and Konsta Klemetti in 2023.

#### 4.4. Changes in the market and sector – streaming platforms and production music

The film and TV production industry have undergone changes as well in the past decade. Netflix and HBO started collaborating with Danish production studios to produce original content around 2019.<sup>10</sup> The structure of these productions typically involves local talent and is always done by a local production company, with, for example, Netflix either commissioning the series or purchasing it as original content. Also, streaming platforms like Netflix and Amazon often contribute funding to productions and recognise the necessity of hiring a music supervisor.

This brought along increased opportunities and renewed standards for licensing and music supervision. Large streamers have stricter requirements for music clearance, which made the role of a music supervisor necessary. Netflix, in particular, has made a music supervisor role for all its productions mandatory. If local supervisors are not available, then Netflix will often bring in their own supervisor from another region. This drives a growing demand for professionalised licensing services and expands opportunities for supervisors, particularly as Danish productions are now subject to strict international distributor requirements.

*“In the old days, producers were more laissez-faire. Now they have to professionalise because of Netflix and their very strict demands for music [rights].” - Music Supervisor.*

*“Netflix knows it makes a difference in terms of quality, and that’s been a difference on the Danish side.” “They want legal coverage to ensure that all the rights are correct” - Music Publisher.*

However, working with multinational companies has its challenges as well. In 2022, due to several actors’ strikes and tensions between the Danish production companies and the global streamers, there was a production freeze with Netflix and HBO in 2022, which heavily impacted the industry.<sup>11</sup>

*“...Denmark had a big actors’ strike due to the way the streamers pay for stuff. Actors and film crews get a royalty for cinema releases that they don’t get for streaming. That’s been a big battle that forced them to produce stuff without knowing what is what.” - Music Publisher.*

---

<sup>11</sup> See media coverage in English: Max Goldbart / Variety (23.09.2022). [“A Decimation Of Half The Industry Is Not Unrealistic”: Danish Producers Urge Netflix, Viaplay & Create Denmark Union To Return To Negotiating Table Or Risk \\$200M Loss](#); and By Wendy Mitchell / Screendaily (28.11.2022). [Netflix reaches landmark rights agreement with Create Denmark \(exclusive\)](#) | News | Screen.

*“This market has more or less collapsed since early 2023, with many productions moved out of Denmark.” - Music Publisher.*

As of 2025, though, Netflix has resumed production, and HBO is planning to do it. This will hopefully lead to the industry picking up pace again.

#### 4.5. Challenges and outlook

Beyond being small, the Danish domestic synch market has other **challenges**.

Many of the professionals interviewed expressed concerns over the increased use of **library music** as well as the rise of AI-generated music. This is especially true in advertising, where agencies tend to favour library music over licensed tracks unless they are major hits.

In order to tackle some of these **challenges**, the MPA developed a platform called *Nordic Sync*, designed to facilitate music licensing for audiovisual media production companies and broadcasters. The Chairman of the Board of head of MPA, Ole Dreyer, describes it as an open platform for record labels and publishers, aimed at increasing the use of Danish music in TV productions. The platform has been well-received by production companies. Nordic Sync provides a streamlined process, ensuring that music is pre-cleared by NCB and ready for use within Nordic countries. They also have agreements in place with the Danish public broadcaster DR, giving access to pre-approved music.

*“Now the production companies have the tool to search for music. It’s a very proactive tool that we put forward for our members.” - Ole Dreyer.*

Additionally, it can be challenges for artists to find opportunities in synch, especially if they are not well-known yet. The competition is also fierce.

*“My personal problem and challenge has been getting enough quality music, so I have something new to send out. It is also a challenge that more and more are doing synch. I can’t and won’t compete with libraries - if you don’t have a budget, there is no interest for me to go further. There is still good money in certain areas, and that’s where I’d focus.” - Record Label Owner.*

In sum, some in the industry are feeling sceptical about the sustainability of music supervision as a profession in Denmark due to naturally limited markets, precarious state of audiovisual media industries competing with multinational corporations, the busi-



ness model disruption from production music libraries, and the seemingly permanent undervaluing of music as a component in audiovisual productions. Still, some younger professionals see opportunities and even growth potential as the international producers import more stringent standards of legal certainty when it comes to clearing music.

## SYNCH AGENCIES

---

**GL Music** began as a production company founded by three songwriters and expanded into a publishing company in 2012. Today, it offers a broad range of services with a strong focus on publishing. They work with TV, film, and streaming giants like Netflix, HBO, Amazon, and Apple, providing music supervision and pitching tracks both from their own catalogue and external sources. Their one-stop synch catalogue contains over 250 titles, and they administer the copyrights of around 750 000 songs across the Nordics and Baltics.

**Edition Wilhelm Hansen** (Wise Music Creative) in Denmark is part of the global music publisher Wise Music Group who have a presence in 14 territories and control a total of 600 000-700 000 copyrights worldwide. Wise Music are also active in the fields of synch and music supervision, offering licensing solutions and bespoke compositions for film, TV, and ads. Their Danish catalogue includes 80 000-90 000 copyrights and they represent around 60-70 authors. Aside from just syncing their own catalogue, they also offer music supervision services for TV, film and advertisement independent of their catalogue.

**Iceberg Music Group** is a well-known music publisher, label and synch agency in Denmark, offering a wide range of services in music publishing, licensing, and artist development. They are actively involved in securing synch opportunities for their artists across various media platforms, including film, TV, advertising, and gaming.

**Scandinavian Sync** focuses on offering synch licensing across the Scandinavian region. They handle licensing for artists and bands and work on finding unique music for commercials, TV series, films, and video games. They also collaborate with a network of publishers and songwriters across the Nordics.

**TG Sync** is part of TG Management and specialises in music synchronisation services for film, TV, commercials, and more. They focus on licensing songs from their roster of talented Danish artists and songwriters for use in various media.



*Upright Music*, originally started out as a music supervision agency in 1999 focused on commercial music in advertising. Over the years the company has developed into all services within sync ie. music supervision, music clearance & licensing, bespoke music and have build a division within production music. Upright Music has over the past 15 years been developing a group of sister companies working mainly with Danish composers. Today Upright Music works mainly within TV, advertising, film and documentary across the Nordics, Baltics and Poland.

## MUSIC SUPERVISORS

*Glue Supervision* is a music supervision company run by two music supervisors, Cecilie Karpinski and Emilie Skovgaard Sørensen. Together, Cecilie and Emilie have worked on over 45 projects, including titles like *Ragnarok* and *Bytte, Bytte Barn* for Netflix, and many others. Their work focuses mainly on film and TV series, though they do occasionally work on advertisements as well.

*Jesper Gadeberg* is a well-known music supervisor based in Denmark, but working across the world, who focuses on finding and styling music for advertisements. He has worked in the field for more than 25 years, including with brands like Adidas, Squarespace, Mercedes, Heineken, Burberry, Ikea, Rolex, Magnum, Volvo, Honda, and Playstation, and he has won several awards for his work, such as at Ciclope, Lions, D&AD and ADC.

*Leslie Ming* is a music supervisor and composer who has worked on numerous films with fellow music supervisor and composer Mikkel Maltha and the film production company *Zentropa* since 2017. She is now a freelancer working independently on a variety of audiovisual projects. Some of her credits include films like *The Riders of Justice* (2020), *Triangle of Sadness* (2022), and *Another Round* (2020).

*Mikkel Maltha* is a prominent music supervisor and composer in Denmark, who is particularly well-known in the film industry. He has worked on numerous films and TV series including *Triangle of Sadness* (2022), *Melancholia* (2011), *Antichrist* (2009), *Another Round* (2020), *Journal 64* (2018), and *A Storm Foretold* (2023), among many others.

**Nis Bøgvad** is a Danish music supervisor with over thirty years of experience in the industry. Nis has worked on over 150 feature films, commercials and TV series and is the founder of the music supervision company Copenhagen Film Music and co-founder of the Europe in Synch project. Some of his credits include *The Bridge*, *The Killing*, *The Wife*, *Speak No Evil*, and *Love Is All You Need*, among others.

**Upright Music** founded in 1999 has been working as a music supervision agency and been involved with numerous productions within advertising, TV and film for the past 25+ years. Credits include campaigns for IKEA, Danske Spil, Han Kjøbenhavn, Reserved, TV-series/film “The Best Years” (2024), “Bordertown” (2016-2020), “Helsinki Syndrome” (2022-24), “Rose” (2022), “Pound For Pound” (2017).

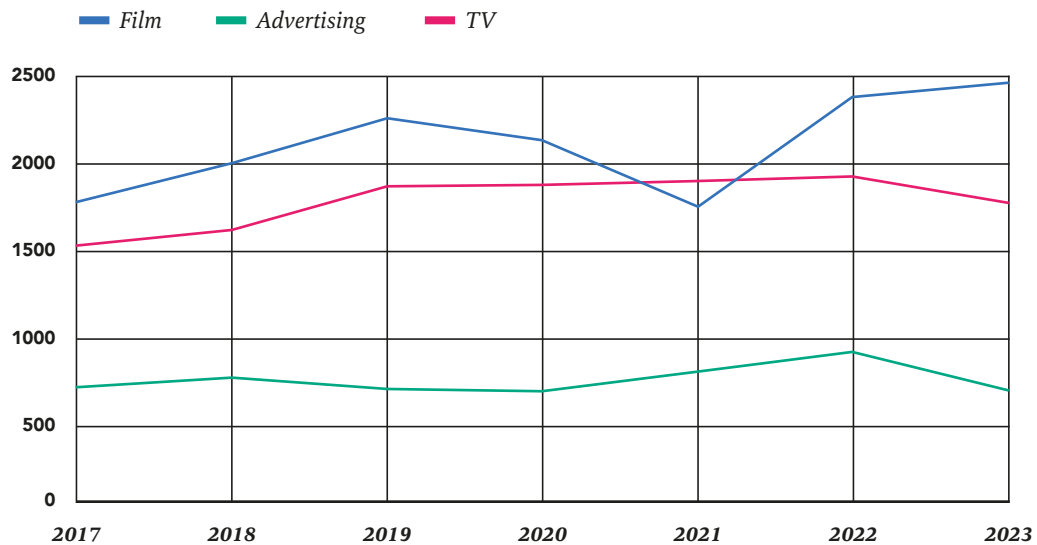
## 5. Music Users & client industries

Different sectors of audiovisual media production use music, including film, advertising, game development, television and video-on-demand. Opportunities for licensing or composing original music for these productions depend on basic metrics such as the number of projects produced each year, but also on the so-called social capital of professional networks, track record and reputation of artists, composers, supervisors, publishers and other professionals. Finally, in audiovisual media production, the initiative and decision-making power of licensing music lies with the producers and directors, not with artists, composers and even music supervisors who, granted, at times can also shape the artistic dimension. Proactive music publishers and music supervisors can, to some degree, influence the decisions, but in general, music providers are always at the receiving end of requests. Therefore, a basic understanding of the audiovisual media production industries can be useful. However, given the fragmentation and limits to accessing data, it is also difficult to achieve.

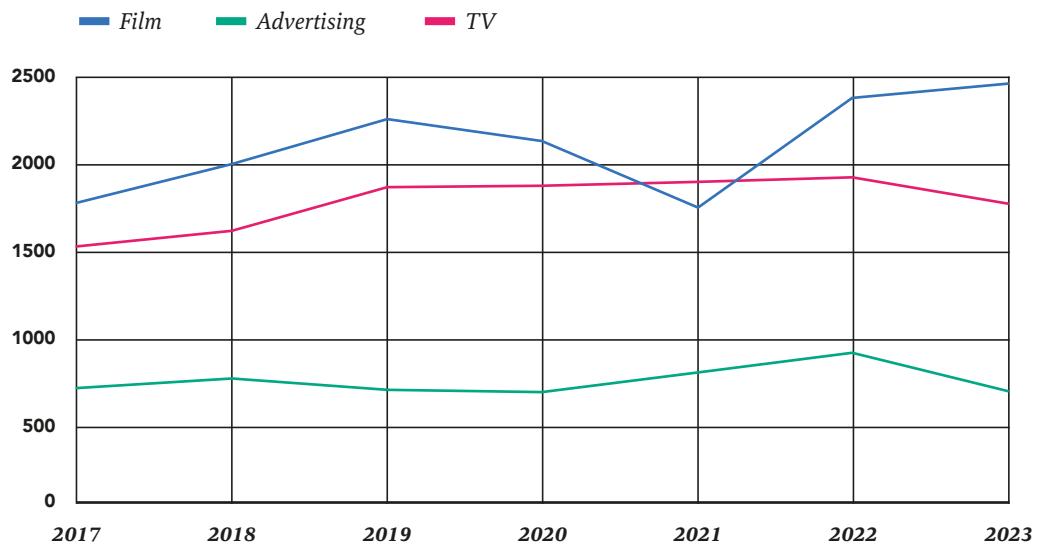
The Danish Producers' Association has gathered and published statistics on these synch “client sectors”<sup>12</sup> (it doesn't unfortunately, include specific figures on music use). Figures 6 and 7 show the overall and export revenues of the film, advertising and TV industries, with the latter two in decline. Meanwhile, based on the latest data from 2022, the games sector was growing fast.

---

<sup>12</sup> The DPA reports until 2024 (featuring 2022 data) included also “games” and “interactive” as categories, but since the last report, covering 2023 data, these are no longer included.



**Figure 6**  
Revenue of the Danish film, TV and advertising industries 2017-2023 (in DKK, millions)  
Source: [Analysis](#) by the Danish Producers' Association (2024).



**Figure 7**  
Export revenue of the Danish film, TV and advertising industries 2017-2023 (in DKK, millions)  
Source: [Analysis](#) by the Danish Producers' Association (2024).

Many of the professionals working with these industries noted that while opportunities for synch exist, the market may not be as big and lucrative as it is sometimes made out to be. The audiovisual media production markets are undergoing significant changes in recent years, with key sectors like film, television and advertising having to adapt to new economic pressures. This naturally impacts synch opportunities as well.

*“A major part of the market is blanket TV, the major one being DR (Danish Broadcasting Company), which also delivers a widespread market for documentaries.” - Record Label Owner*

Danish music supervisors spoke about the prevalence of advertising agencies and production firms opting for popular, well-known international songs, scores or library music, with only limited opportunities left for more obscure and adventurous tracks from lesser-known artists, making it challenging for them to see synch as a viable revenue source in Denmark. Many music supervisors confirmed that, sadly, placing a lesser-known artist in a major campaign is something that rarely happens, although they can recall individual cases.

*“The advertising market is mainly based on known hits or very low prices for not-so-well-known music. Advertising budgets for including protected music have gone down significantly in the past 24 months.” - Music Publisher.*

*“It’s still mostly the big international songs and the songs from the 60s, 70s and 80s that are generating the vast majority of the synch business” - Music Publisher.*

*“The same 50 songs are being licensed again and again”. “The ones who control music libraries, the few good composers, probably have a decent living here in Denmark; for anyone else, it’s tough.” - Music Supervisor.*

*“It has been a long time since we saw a newly written song for a TV series or TV show that has turned into a regular hit like we experienced in the golden era of Nordic Noir / DR Drama. The last one must have been “What A Night” for Oscar Winner “Another Round (Druk)” in 2020.” - Music Publisher.*

Furthermore, as mentioned above, across all synch licensing avenues — ads, TV, film, and streaming — production music has become a dominant choice due to its accessibility and affordability. For example, Upright Music and Universal Production Music have a strong position in the Danish market, especially when it comes to use in broadcast TV and in advertising.

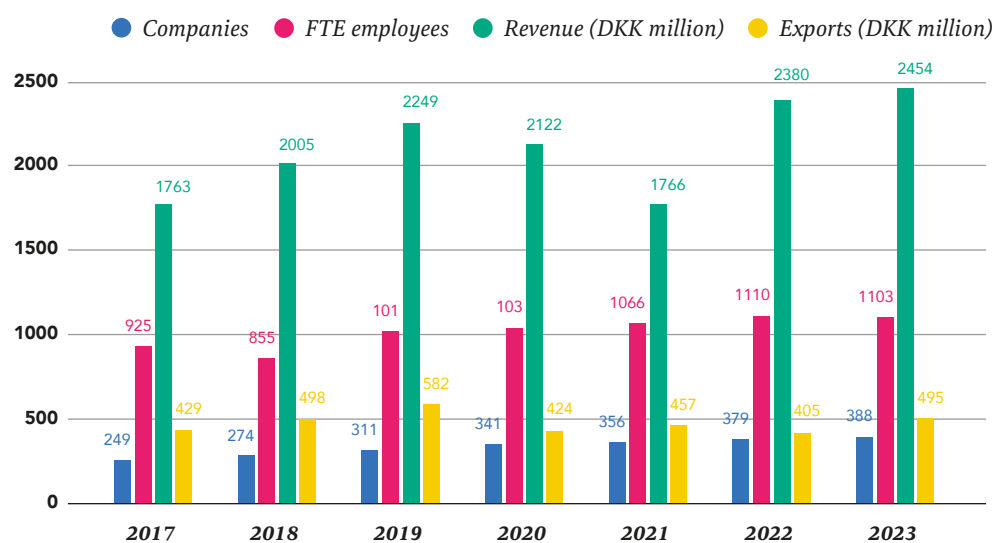
Nevertheless, some professionals still remained cautiously optimistic, seeing as every now and then, life-changing synch deals do happen.

## 5.1. The Film Industry

Known for its high-quality productions and unique storytelling, the Danish film industry has earned international acclaim with films like *The Hunt* and *A Royal Affair*, which received nominations and awards at festivals like Cannes and the Academy Awards. The industry is sustained by a mix of public and private funding; public sources include mainly the Danish Film Institute (DFI) and regional film funds; and private sources include private investments, including production companies and international co-productions. While the exact number of films produced annually is difficult to pinpoint, estimates from music supervisors and publishers suggest it may be around 100 across various genres.

In 2022, Danish cinema rebounded strongly from the pandemic, with a turnover of DKK 2.38 billion (approx. €310 million) and exports of DKK 405 million (€53 million). Despite a general downturn in the audiovisual sector in 2023, the film industry remained resilient, with revenues slightly increasing to DKK 2.45 billion (€319 million) and exports rising to DKK 495 million (€64 million).<sup>13</sup>

Following the pandemic recovery, cinema admissions in Denmark have seen a gradual decline. Domestic films sold 3 million tickets in 2022, but this fell to 2.5 million in 2023 and 2.2 million in 2024. Total admissions also dropped from 10 million in 2022 to 9.4 million in 2024. Although the market share of Danish films remains exceptionally high for Europe, it has also declined from 30% in 2022 to 24% in 2024. This trend, while reflecting the enduring appeal of the cinema experience, raises concerns about the scarcity of private funding and inconsistent support from multinational streaming services, which could pose a threat to the industry's long-term sustainability.<sup>14</sup>



**Figure 8**  
Revenue, exports, number of companies and full-time equivalent of employees in the Danish film industry 2017-2023. Source: [Analysis](#) by the Danish Producers' Association (2024).

<sup>13</sup> Danish Producers' Association (2024). [Analysis](#).

<sup>14</sup> Danish Film Institute (2023). [Facts & Figures 2023](#).

In a strategic response to the financial pressures and declining advertising revenues of traditional broadcasters, in 2023, the Danish government introduced a new **Media Agreement for 2023-2026**. This agreement establishes a new **Cultural Contribution Act** that mandates streaming services operating in Denmark to financially support local productions. The law requires a minimum 2% levy on their revenues, with an additional 3% imposed on services that invest less than 5% of their local revenue into new Danish content. A portion of these funds (20%) is specifically earmarked for the Public Service Fund, a key source of financing for Danish TV series and documentaries. Furthermore, the agreement obligates public broadcasters like DR and TV2 to increase their investments in Danish content, creating a stable and diversified funding framework to counteract the industry's financial challenges.<sup>15</sup>

The Danish film industry has several **trade associations** and **organisations**, including the [Danish Producers Association](#) and the [Danish Film Academy](#). These bodies work to promote the interests of film professionals, provide resources, and gather industry data. [The Danish Film Institute](#) supports the development and production of Danish films to strengthen the medium's cultural impact and nourish the film industry in Denmark. Funding also goes to the development of cross-media projects that innovatively exploit technology and platforms. DFI also publishes statistics related to production and employment in the film sector, as well as having a [database](#) of all Danish films they've funded. Likewise, they've also got a [list of publications](#), which includes research on gender in Danish film, as well as studies on ethnic and social diversity.

Denmark has several prominent **film schools**, most notably the [National Film School of Denmark](#). It offers programs in directing, screenwriting, and production, as well as sound design. There is also the [Copenhagen Film School](#) and the [European Film College](#). Studying film composing can help young composers make valuable connections with aspiring directors while at school.

*The directors from the film school will also typically use composers from the conservatory for their projects. One good way of getting your foot in the door is by looking up emerging directors and contacting them.” - Film Composer.*

Denmark hosts various **film festivals**, with the [Copenhagen International Documentary Film Festival](#) (CPH) and the [Odense International Film Festival](#) among the most recognised. Additionally, there is an annual awards show called [BODIL](#), where an award for best score or soundtrack is also given out in some years.

---

<sup>15</sup> Annika Pham (15 June, 2023) [Danish Media Agreement, including min. 2% streamers levy gets overall industry favour](#). Nordisk Film & TV Fond.

The figures for 2023 in the Danish Producers' Association's annual industry reports showed around 388 film production companies that at that time employed a total of 1103 professionals (full-time equivalent). The average size of production companies tends to be small to medium, with many firms operating as independent producers.<sup>16</sup>

Many of the projects in Denmark are international co-productions, often with Sweden or Norway. Overall, there is a lot of cooperation happening between Scandinavian countries, particularly when it comes to the production of big TV series and large-budget feature films.

The projects that are Danish or have a Danish lead will typically also have a Danish music supervisor. Most rights negotiations for well-known songs are with the major labels and publishers and typically go through their headquarters in Stockholm.

The Danish film industry has weathered **several crises** in recent years. The COVID-19 pandemic delivered a severe blow with production halts and financial uncertainty shaking the sector's foundations. This was followed up with another crisis in 2022: a production freeze by major players like Netflix, HBO, TV2 and Viaplay. This crisis forced professionals to accept unpaid work to keep projects afloat. However, signs of recovery have emerged. Netflix has resumed collaborations, and the industry is cautiously optimistic about revitalisation.

*„The film business is in a deep crisis. They played with Netflix, HBO, etc., and they lost. There was a complete freeze for a while. Now, they are slowly coming back. COVID made the film industry suffer. They are back in business but still suffering. A lot of people work for free in the business or for nothing.“ - Music Publisher.*

As among the last to do so in Europe, the Danish government has introduced a 25% production incentive, launching in 2026, aimed at rejuvenating film production, aligning with strategies seen in other countries. Yet, challenges remain. High production costs continue to squeeze budgets, with music often the first area to face cuts.

*„The films are struggling a bit because of high expenses. They need to cut the budget somewhere because everything has become so expensive, and they often start with the music. Now the Danish government has started tax breaks like other countries, and they're also giving more money for films. So there are solutions right now.“ - Music Supervisor.*

---

<sup>16</sup> Danish Producers' Association (2024) [Analysis](#).

<sup>17</sup> Ulrik Bolt Jørgensen (11th June, 2025) [Denmark introduces 25% production incentive](#). Nordisk Film & TV Fond.

### 5.1.1 Main Actors in the Film Industry for Synch

#### FILM PRODUCTION COMPANIES

**Nordisk Film** – founded in 1906, it's one of the oldest continuously operating film companies in the world. The company produces and distributes feature films, TV programs, commercials, and animated content across the Nordic region. Nordisk Film has contributed to the Danish film industry's global reputation, with notable works including local hits and international collaborations. The company also manages Nordisk Film Cinemas, owns a significant library of titles and is a subsidiary of Egmont Group.<sup>18</sup> They have their own in-house music licensing person who works on clearing the rights to any music utilised in their projects.<sup>19</sup>

**Zentropa** – Established in 1992 by Lars von Trier and Peter Aalbæk Jensen, **Zentropa** is known for its bold and innovative contributions to Danish and international cinema. Zentropa has produced award-winning films like *Breaking the Waves* (1996) and *Dancer in the Dark* (2000), earning global acclaim at major film festivals. The studio is celebrated for its creative risk-taking and its ability to bring Danish storytelling to the world stage.

**Nimbus Film** – founded in 1993, is another significant Danish production company. Known for films such as *The Celebration* (1998), the first Dogme 95 film, and the *Clash of Egos* (2006), a comedy, Nimbus focuses on character-driven narratives and socially relevant themes. The studio also produces content for younger audiences and has played a key role in shaping modern Danish cinema.

**SF Studios** (Swedish) – established in 1919 - is a leading Nordic film and TV production and distribution company. They create and nurture acclaimed productions with top Nordic talent, distributing films and series across the Nordic countries. Known for high-profile projects like *Triangle of Sadness* and *Snabba Cash*, SF Studios combines creative storytelling with industry leadership. They actively engage in industry initiatives like #SilenceAction and continue to expand their global presence.

<sup>18</sup> | <https://www.nordiskfilm.com>

<sup>19</sup> | Information from interviews



**Miso Film** – a Fremantle company - is a Danish production company renowned for creating compelling films and TV series. They focus on high-quality storytelling across genres, including crime, drama, comedy, and romance, with acclaimed projects like *The Rain* and *The Investigation*. Miso Film combines creative vision with industry expertise, delivering content that resonates with audiences both in Denmark and internationally.

**ASA Film Production** – founded in 1936 - is one of Denmark's oldest film production companies. Known for balancing artistic integrity with commercial success, ASA Film has produced a diverse range of films, including the popular *Morten Korch* series and *Far til fire*. The company aims to create high-quality content that appeals to wide audiences while fostering innovation in storytelling.

### 5.1.2 Film Production and Market Opportunities

It's challenging to determine the exact number of films produced in Denmark each year, as well as how many of them utilise a music supervisor. The Danish Film Institute reports that it funds an average of 20 Danish feature films and 21 documentaries annually. This funding includes both fully Danish productions and international co-productions. In 2022, for example, there were theatrical releases of 30 feature films, 2 documentaries, and 7 minor co-productions.

Despite these numbers, music supervisors estimate that around 100 films are produced in Denmark each year. However, only a small portion of these films use their services. Many independent directors lack the budget to hire a music supervisor and handle music clearance themselves. Additionally, Nordisk Film, one of the largest production studios in the country, has its own in-house music licensing professional.

	2019	2020	2021	2022	2023
Feature films supported for production	20	25	23	22	20
Short and documentary films supported for production	32	30	30	26	28
Minor feature films supported for production	9	8	9	8	8
Minor short and documentary films supported for production	6	6	5	5	6
<b>TOTAL</b>	<b>67</b>	<b>69</b>	<b>67</b>	<b>61</b>	<b>62</b>
The average production budget for a Danish feature film	€ 4.1m	€2.4m	€2.5m	€2.9m	€2.9m
Average DFI-subsidy allocation to a Danish feature film	35%	45%	51%	43%	54%

**Figure 9**

Source: *Facts & Figures 2023. The Danish Film Institute report. p. 13 Facts & Figures 2023.*<sup>20</sup>

<sup>20</sup> The DFI website provides figures for 2023 as well, but these are differently structured and with less detail.

While it can vary widely and depends on the project, music supervisors estimate that there are around 10 songs that make it into a standard film on average, and each project might have an average of 8-10 cues (number of scenes that require music). There are some Netflix series that might have many more cues, and in some films, there are none and just a score of original music. Based on the above average estimates, a back-of-the-napkin math suggests that every year perhaps up to a thousand tracks get licensed into film productions, though only some of them from commercially released catalogues and only some via music supervisors.

Another relevant parameter is how many of those songs licensed are new vs from older catalogues; and how many are hits vs tracks from emerging or lesser-known artists. Given that these categories are fuzzy and there is no consistent data, only very broad estimates are possible. For example, Steven Tallamy from Wise Music estimates that they license around 200 songs a year for films. Roughly 60 of them would be what he would describe as being modern, relevant, and fairly new. The rest would be well-known older copyrights. However, in terms of income, those 60 songs would most likely generate less than 10% of the total income. Hence, most of the income still comes from big copyrights. Well-known songs will always be more expensive.

This trend towards licensing well-known, recognisable songs, and hence making it hard for indie artists to break in, is confirmed by most professionals interviewed.

*“It’s still mostly the big international songs and the songs from the 60s, 70s and 80s that are generating the vast majority of the synch business. In general, it tends to follow the age of the people that are making the decisions more so than the demographic of who they are meant to be aiming for with their projects,” - Music Publisher.*

Many of the key decision-makers are in their 40s or 50s and will subconsciously gravitate towards the music that made an emotional impact on them when they were teenagers. Additionally, many TV shows and films are set in the past and thus utilise music as a tool to set an atmosphere and let the audience know what time period they are in.

*“Every time something’s set in 1998 or ‘86 or ‘72, they’re immediately looking for factors which influence the audience to understand when that’s set without having to write in the script: “We’ll know that we’re in 1972”, you know. They want indicators.” - Music Publisher.*

Despite what many conference panels on synch might suggest, it is also rare for an unknown artist or unknown song to break out through synch. Typically, when a project is looking for a lesser-known, more obscure piece of music just to set the tone or a mood for a scene, it is easier for them to search via a music library than to scout for an unknown artist or track.

Overall, it seems that films can be divided into smaller productions that handle the music supervision themselves, productions by Nordisk Film who do their music clearance in-house, and films requiring music supervision. It is not uncommon for directors to try to handle the music clearance themselves, only to discover at the last minute that they actually do need help. Music supervisors, then, get a last-minute call and are asked for help during the final stage of the project.

*“As a music supervisor, you tend to be brought into the project two times - really, really early or really really late.” - Music Publisher.*

Due to the financing incentives in the Nordic countries, it's quite common for two or three Nordic countries to co-produce a film. This means that the film might use a music supervisor and/or composer from another country, as part of the co-production requirements. Likewise, it can also present opportunities for Danish music supervisors and composers to work on co-productions from other countries.

*“A Norwegian film might contact us because we've got a score composer who they think is good, but equally importantly, he or she is from Denmark, and in order to secure the funding they need certain key positions to be Danish.” - Music Publisher.*

### **Synch Fees in Denmark**

Synch fees are highly dependent on many factors, such as the budget of the film and the cultural status of the song, and therefore one must be careful to talk about typical fees – one of the reasons that makes this market so difficult. Still, based on decades of experience, some estimates can be made for Denmark. For example, as a music publisher suggests:

*“For a mid-budget, mid-level Danish film, where the rights are for the world but the film is in Danish (so the expectation is that it won't do much outside), that is going to be shown in the cinemas, but at that point has no guaranteed streaming partner, so it's not definitely going on Netflix or anything, and it's an average scene of average length and a fairly big song from the 80s, it would be around 70 000 Danish kroner (ca 9300€).”*

Then again, in most cases, budgets are very limited.

*“An average budget for a feature film is 50 000kr, of which 6000kr is for music supervision.”*

As one music supervisor emphasises, the documentary film industry is often more interested in using different types of music; however, their budgets are even smaller.

### **5.1.3 Getting Music Into Films – practical insights**

Scoring for films is a highly competitive market in Denmark, as everywhere else. As one composer notes, there are only a few feature films per year, but hundreds of composers. The opportunities are also distributed in a highly asymmetric manner. There are a handful of film composers in Denmark who are very established and do most of the work. It's because the working relationship between the director and composer is very personal and fraught with creative risks. Once a director finds a composer they like, they often stick with them for a long period.

*“Directors generally have a good idea of who they want to work with, around 90% of the time,” “For directors, it's not so much about how good the composer is but rather it's about trust, safety and delivery - as well as proving how you deal with stressful situations, etc.” –Composer*

As a film composer looking for opportunities to enter the sector, any kind of previous success will make directors more receptive towards working with a new composer. However, most relationships between composers and directors often begin already in film school.

*“You need to get in contact with directors while they are still in film school and work for free to prove your worth, hoping they bring you along for their first feature,” – Composer.*

Establishing trust and building relationships is also vital in the music **licensing space**.

*“I don't reach out to ad companies asking if they need music. The proactive part of that is building relationships so that they call me when they need a song, to clear a song, or have a question.” – Music Publisher.*

As described above, the trend is to license older or current hit songs rather than take creative risks with unknown songs. It can be hard for Danish music supervisors to convince directors to choose songs by Danish artists, especially less well-known ones. However, many music supervisors note that they do try, and sometimes it works.

*“I think it’s always interesting to work with emerging artists, both from a licensing point of view, and it’s interesting to see someone develop and help an artist develop. It can be difficult to persuade the director, but if the music is strong, it’s possible.” – Music Supervisor.*

In terms of navigating the **legal complexities of copyright and licensing**, there has been a shift toward streamlining agreements.

*“There is a tendency now, especially from the majors, to standardise the templates in a way that is better suited to a smaller production company so that they don’t need a lawyer to read through it.” - Music Supervisor.*

Promotional use, particularly “in context,” is typically included in the license fee, ensuring that specific scenes can be used in marketing materials without requiring renegotiation.

Internationally, licensing agreements are often a point of contention, especially with major streamers like Netflix.

*“There is a fight going on between the big streamers and the rightsholders. Netflix has their own templates, and then I need to be rigorous with rightsholders about certain points, which can be challenging.” - Music Supervisor.*

For composed work, the debate between single-use licenses and multi-project licenses is especially pronounced. Sometimes, the film or TV producers want composers to also be tied to sequels, prequels, etc. However, when it comes to existing music, single-project licenses are the norm.

The Nordic Copyright Bureau (NCB) has also had a role in simplifying licensing processes. Their tariff system, for example, eliminates the need to negotiate directly with major labels. NCB primarily handles non-drama TV licensing in its territories, with recent agreements easing tariffs for certain TV uses in collaboration with KODA and GRAMEX.

Secondary royalties play a significant role for rights holders since composers receive royalties when a film is shown in cinemas as well as from advertising on TV.

## 5.2. TV and Video-on-Demand

Danish TV productions, such as *Borgen* (2010-2022), *The Bridge* (2011-2018), and *The Rain* (2018-2020), have gained international acclaim, and in general, the industry has been growing in the past decades. 2022 was a temporary culmination for Danish content production of film, TV and games, setting new records for exports, employment and turnover, reaching DKK 10 billion. 2023, however, saw declining numbers for the TV production sector, and it's likely to continue.<sup>21</sup>

The Danish TV and VOD industry consists of around 200 production companies, ranging from small independent firms to larger, well-established entities. Among these, 128 companies focus on TV production, employing 1211 full-time employees in 2023, with a turnover of DKK 1.76 billion (ca € 230 million) and exports totalling DKK 233 million (ca € 30 million). Most companies employ relatively few staff, often fewer than 20. In all figures, there has been a notable decline from 2022, with revenue falling 8% and exports nearly 17%.<sup>22</sup>

In general, the Danish TV market is facing significant financial challenges as traditional TV and print advertising revenues dropped by 16% in 2023. This decline, which was not offset by increases in digital advertising, has led to a „cascade of cut-backs“ and redundancies across commercial media.<sup>23</sup> This shift has undermined traditional TV stations' ability to fund new Danish productions as their advertising revenue declines.

*“We have a big crisis in Denmark right now due to budget cuts. Production houses are struggling. There are areas in synch that can appear quite dim and not so bright. What I hear is that there are budget cuts in production, challenges in AI, and production music, rather than if you are an emerging artist or an established artist. As a producer, you have to insist on using recorded music, not a library,” - Music Consultant and Synch Event Coordinator*

The new Danish Media Agreement (2023-2026), mentioned earlier, is a direct response to the financial pressures on the TV industry. It introduces a levy on streaming services to boost investments in Danish content, with a portion of the funds specifically allocated to the Public Service Fund for TV series and documentaries. Additionally, the agreement mandates that public broadcasters, DR and TV2, increase their own investments in Danish content.

---

<sup>21</sup>| Danish Producers Association (2024). [Rekordstor dansk indholdsproduktion.](#)

<sup>21</sup>| Danish Producers Association (2024). [Analysis.](#)

<sup>21</sup>| Kim Christian Schröder (17th June 2024). [Denmark.](#)

### 5.2.1. Main Actors in the TV and VOD Sector

The TV and VOD sector can be divided into two main categories: local broadcasting stations and their programming, and international streaming giants like Netflix and HBO, which collaborate with Danish production houses to create content for their platforms.

**Streaming services** such as Netflix, HBO, and Viaplay produce original content across the Scandinavian region, including in Denmark. This has naturally created numerous opportunities for Danish production studios, filmmakers, and composers. However, as previously mentioned, there have been some disputes between the local industry and multinational companies. As of 2025, Netflix resumed producing Danish content already in November 2022, while recent reports indicate that HBO also plans to do so.<sup>24</sup>

When producing original local content, platforms like Netflix and HBO partner with local film production companies and professionals. Some notable TV series produced by Netflix and HBO in Denmark include *Borgen*, *Equinox*, *The Chestnut Man*, *The Rain*, and *Kamikaze*.

- **Netflix:** *The Chestnut Man*, *Equinox*, *The Nurse*, *The Rain* (a co-production), *Elves*, and *Copenhagen Cowboy*. Netflix also co-produces and acquires rights to Danish series like the fourth season of *Borgen*.
- **HBO:** *Kamikaze* was the first original series for HBO Max.

With regards to **local broadcasters**, the Danish TV and VOD sector is anchored by a number of local players that are central to the production of original Danish content. The main public broadcasters, **DR** (Danish Broadcasting Corporation) and **TV 2**, are key actors in commissioning and producing original series. DR, for instance, is renowned for producing globally acclaimed series such as *Borgen*, *The Killing*, and *The Bridge*.

Furthermore, a dynamic ecosystem of independent production companies works with both local and international partners. Prominent examples include Nordisk Film Production, Miso Film (partly owned by Fremantle), SAM Productions, and Mastiff TV (part of the international Banijay Group).

### 5.2.2 TV and VOD Production and Market Opportunities

The Danish television production industry is divided into two distinct categories for music licensing: broadcast television and series produced for VOD platforms. For broadcast television on national channels like DR, music licensing is often handled

---

<sup>24</sup>| Ritzau Bureau (11. June 2025). *HBO Max to produce Danish fiction and documentaries again*.



through blanket agreements with collecting societies such as KODA and NCB. However, according to interviewees, DR also holds an internal agreement with music libraries like Universal Music and Upright Music. This has led to a situation where producers must actively insist on using commercially released music, with some independent publishers raising concerns about a perceived monopoly on library music on national TV.

In contrast, music licensing for series produced for VOD platforms operates more like the film industry. Due to their longer running times, TV series often require more music, which presents more opportunities for publishers, labels, and artists. As is common for feature films, major streaming companies typically require their productions to have a music supervisor involved in clearing songs.

The entry of streaming services like Netflix and HBO initially fueled a significant boom in the industry, leading many new companies to emerge. However, the “streaming freeze” in 2022 caused many smaller companies to close, but the market is now showing signs of recovery.

*“When Netflix and HBO started in Denmark, Viaplay said they’d do like 40 series a year. A lot of new companies came up, and producers who worked at big companies started their own companies. Suddenly they pulled the plug in 2022, and a lot of those new companies did not survive. Viaplay also said they are going to stop doing fiction. Sometimes, they just stop productions.” - Music Supervisor.*

*“Despite a boom when Netflix entered the market, there’s been a dip, but the film and TV market is now showing signs of recovery and continued growth.” - Music Publisher.*

### 5.3. The Advertising Industry

There are several trade associations and organisations supporting the Danish advertising industry. The Danish Advertising Association ([Dansk Annoncørforening](#)) represents advertisers and provides its members with valuable industry analysis services on specific themes, such as brand awareness and attitudes, customer loyalty, etc. The Danish Media Association ([Danske Medier](#)) also plays a role in advocating for media companies and carries out regular studies on the advertising market in terms of viewership, readership, print figures, etc. Additionally, organisations like the Danish Digital Association ([Dansk Erhverv](#)) focus on promoting digital advertising practices and provide resources for businesses navigating the digital landscape.



There is no good basis to estimate how many agencies and production companies are working in the advertising industry in Denmark and what share of them regularly work with licensing music for their productions. One indication is that the Danish Advertising Association has more than 3000 members, but their profiles and structures are not publicly visible.<sup>25</sup>

Advertising can be a difficult industry to synch music in since many brands tend to use library music, have their own in-house composer or just want big international songs. Many professionals spoken to stated that ad agencies typically do not want to spend a lot of money on music unless it is on a hit song, hence why they utilise music libraries so frequently. Paradoxically, compared to other Scandinavian countries, there is little money in the Danish ad agencies for music. However, some professionals expressed hope that the use of commercially released music could grow in the future, particularly for social media ad campaigns.

*“The advertising market is mainly based on known hits or very low prices for not-so-well-known music. Advertising budgets for including protected music have gone down significantly in the past 24 months.” - Music Publisher.*

*“It’s still mostly the big international songs and the songs from the 60s, 70s and 80s that are generating the vast majority of the synch business”. - Music Publisher.*

### **5.3.1. Ad Production and Market Opportunities**

There is no publicly available data on the number of campaigns produced per year in Denmark that require music, nor about the licensing fees, which vary widely based on the brand, campaign and song used. Based on the conversations with music supervisors, publishers, composers and synch agents in Denmark, the advertising industry tends to favour getting music for a lower price from music libraries, making it a tough market for synching music from artists. The budget allocated for music in a campaign tends to be rather small, and advertisers tend to want music quickly and cheaply. This all works more in favour of music libraries and production music, like Upright Music, as opposed to licensing commercially-released music from publishers, labels, and artists. This phenomenon appears to be rather unique to Denmark, as it’s not the case in other Scandinavian markets.

Due to the challenges and specificities of the advertising market in Denmark, few music supervisors operate in this landscape. Jesper Gadeberg is the leading music supervisor for ad production in Denmark, working with global ad agencies and brands.

---

<sup>25</sup> Source: Danish Media Association website <https://www.xn--danskannoncforening-lcc.dk/medlemskab/>

Gadeberg stated that he works on an average of 75 campaigns per year, each lasting 2-3 weeks from start to finish. Additionally, Steven Tallamy from Wise Music/EWH also report that around half of their synch revenue comes from placements in adverts. Both state that this is primarily from placing larger, more well-known songs.

Indeed, the interviews indicated that Danish advertisers tend to either opt for the budget-friendly and accessible music from music libraries or want to license large, well-known songs. According to Gadeberg, it does tend to be the same well-known songs that get licensed over and over. Danish advertisers tend to be rather risk-averse and prefer to play it safe when it comes to music. However, occasionally, Gadeberg works with a brand that licenses a song that's more "out of the box".

Some music companies in Denmark do work in the advertising space, but mostly license to ad productions in other countries. The label Crunchy Frog, for example, is uniquely focused on exports and has found it far more profitable to predominantly focus on markets like the US, the UK, France, Germany and Australia, among others. Licensing music to advertising makes up at least half to 2/3s of their synch revenue, but that is mostly from international projects.

*The Danish ad agencies in the 90s started doing more in-house productions instead of going to production houses. They also hired people who do versions or copies of popular music. We had a case where they used a "cover" of our song. That is something that is quite normal in Denmark. This kind of took the bottom out of the market in terms of what people will spend. – Record Label Owner.*

### **5.3.2. Getting Music Into Advertisements**

As explained previously, while there are several brands that operate in the Danish advertising industry, coming across genuine music placements is rare. As are the original placements of songs in Danish ads that are not yet well-known. Nevertheless, occasionally, an emerging artist can get placed in an advertisement. Jesper Gadeberg has a few examples of emerging artists he managed to place in successful commercials, including the Swedish artist Flora Cash's song 'You're Somebody Else', which he placed in a Mexican ad and has thus been streamed quite a bit in Mexico. This placement also led to a record deal with RCA for the artist. Additionally, his placement of the artist Rumpistol Aurolac on a global Illy commercial was quite successful.

As a music supervisor, Jesper likes to keep an eye out for Danish talent and to place them where possible.

*"I also feel like being Danish, I feel a little obliged to keep an extra eye on my own market because I know I have the power to influence my international clients to choose a Danish one. I don't always do it, but I just keep my attention there."*

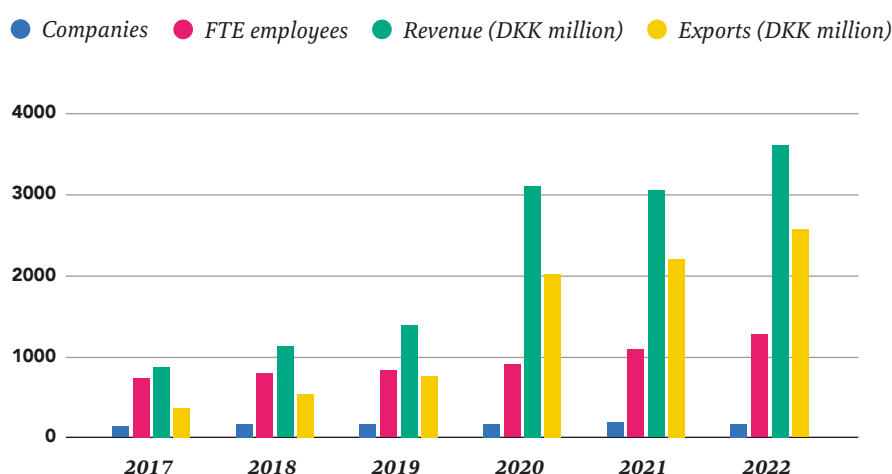
*“In my career, there have been lulls and then times when really interesting projects have been happening. For example, I got to place Nick Cave in a Danish ad. There have been times when it has been really interesting, and it’s paid off with awards.” - Jesper Gadeberg.*

Jesper “Yebo” Reginal from Crunchy Frog states that there is an element of luck involved when it comes to getting music into ads. A lot of the success also comes down to networking and getting their name out there, as well as providing an air of credibility and quality. They have been working on expanding their network for decades and nurturing relationships and partnerships regularly with in-person meetings and by keeping in touch.

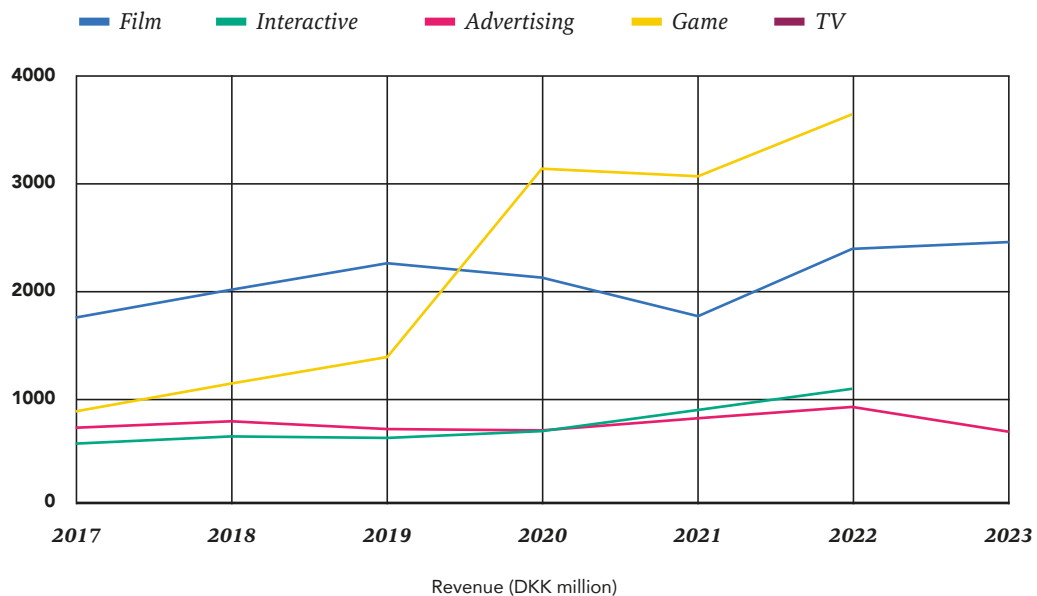
*“It’s word of mouth in the synch industry as well, where people speak to each other.”*  
*“We always try to get in touch directly with music supervisors, to put them in our network, so that we keep servicing them with music. So, in other words you can do a lot to optimise your chances for getting lucky.” - Jesper Reginal (Crunchy Frog)*

#### 5.4. The Game Development Industry

The Danish gaming industry has grown significantly in recent years. In 2022, the industry generated approximately DKK 3.6 billion (ca €480 million) in revenue, reflecting a robust development trajectory (Figure 10), especially in comparison to other audiovisual media sectors (Figure 11). Danish games like *Hitman* and *Inside* have received international acclaim.



**Figure 10**  
 Revenue, exports, number of companies and full-time equivalent of employees in the Danish games industry 2017-2022. Source: [Analysis of 2022 data](#) by the Danish Producers’ Association (2024).



**Figure 11**  
Revenues of film, TV, ads, interactive and games industries in Denmark 2017-2022(23).  
Source: [Analysis of 2022](#) data by the Danish Producers' Association (2024).

The Danish gaming industry is represented by several trade associations and organisations, including the Danish Games Industry (DI), [Game Hub Denmark](#), Game Producers Association, and [Games Denmark](#). The Danish Film Institute also supports game developers, acknowledging the intersection between games and interactive storytelling. Industry reports from organisations such as DI and the Danish Business Authority provide insights into market trends, employment statistics, and economic impact.

As of 2022, the Danish gaming industry consisted of 164 game development companies, ranging from small independent studios to larger companies. The average size of these studios tends to be small to medium, with many employing fewer than 20 people. The total number of people employed full-time in games amounted to 1281 in 2022.<sup>26</sup>

The Game Producers Association is known for their annual awards - the Danish Union of Players. The categories where nominations can be incurred change each year, but there is a specific award for game audio. Game audio, in this case, encompasses the game score as well as sound design, special effects and other game audio components.

There currently are no dedicated game composing education programmes in Denmark; however, there are plenty of more general audio design and composition courses. Another path is to study film composing, as there is a film composition course in Denmark and a significant overlap between composing for film and for games. Oftentimes, composers who work on films and games are now called media composers—i.e. composers composing for any audiovisual medium.

<sup>26</sup> Danish Producers' Association (2023) [Rekordstor dansk indholdsproduktion](#).

Other sources

- [European Game Development Federation](#)
- [Study on the Danish Videogame Industry](#)

#### 5.4.1 Main Actors in the Game Development Industry

##### GAME DEVELOPMENT COMPANIES

**Tactile Games** is a prominent Danish game development studio headquartered in Copenhagen. Founded in 2008, the company specialises in creating narratively rich and engaging casual puzzle games. Over the years, Tactile Games has gained recognition for successful titles such as *Lily's Garden*, *Penny & Flo*, and *Makeover Match*. These games emphasise storytelling and interactive gameplay, appealing to a global audience.

**IO Interactive** (IOI) is a Danish game development studio renowned for its *Hitman* series and other critically acclaimed titles. Committed to creating world-class entertainment, IOI focuses on innovative storytelling and immersive gameplay. The studio operates across multiple locations, including Copenhagen, Malmö, Barcelona, Istanbul, and Brighton, fostering a collaborative and creative work environment.

**BetaDwarf** is a Danish game development studio focused on creating cooperative games that foster friendship and community. Founded in Copenhagen, the company gained recognition with its successful titles *FORCED* and *Minion Masters*, selling over 500 000 copies and reaching millions of players. BetaDwarf aims to tackle loneliness through engaging co-op gameplay, backed by investors like London Venture Partners and Makers Fund.

**3D Realms** is a renowned game development company recognised for its action-packed, adrenaline-fueled titles. The studio focuses on creating high-quality, immersive gaming experiences with a distinct attitude and style. Known for games like *RIPOUT*, *Graven*, and *Wrath: Aeon of Ruin*, 3D Realms continues to push the boundaries of the AAA gaming landscape.

*Die Gute Fabrik* is a Danish game development studio known for its narrative-driven games like *Saltsea Chronicles* and *Sportsfriends*. The studio focuses on unique storytelling and immersive experiences, blending artistic design with engaging gameplay. Recently, Die Gute Fabrik announced a halt in production, aiming to support their team during this transition.

*Ghost Ship Games* is a Copenhagen-based game development studio, founded in 2016 by six veteran developers. The studio is best known for *Deep Rock Galactic*, a co-op FPS featuring destructible environments and procedural caves, with over 4 million copies sold. Ghost Ship Games focuses on agility, smart work processes, and delivering high-quality gaming experiences.

Other companies include

- *Investigate North*
- *PlayDead*
- *SlipGate IronWorks*
- *SYBO*

List of companies part of the *Danish Game Hub*.

#### 5.4.2. Game Production and Market Opportunities

The gaming industry in Denmark, like in many other countries, typically operates quite independently from the music industry. Due to the nature of games, existing songs are rarely licensed; instead, game developers usually rely on composers to create bespoke scores tailored to each game. These composers may work in-house, particularly at larger companies, or be outsourced, which is more common for smaller studios. This does not mean that existing songs are never licensed for games, but rather that games predominantly depend on original compositions. However, the use of licensed songs is more common in game trailers.

According to the professionals interviewed, there are a handful of game composers working in Denmark, though many of them also work on other mediums besides games. It's common to see people from the game development world, including developers and programmers, work on the audio component of games themselves.

There is also a small union of media composers who meet up every now and then and discuss issues related to the industry. Likewise, the industry association, Game Hub Denmark, also hosts relevant networking events.

Game development companies in Denmark typically do not have a dedicated in-house composer or someone solely responsible for music. More often, a team member with some knowledge of music will oversee the collaboration with the composer.

*“There is this tendency where one person is in charge of audio, and that sometimes overlaps with choosing music—a strange grey zone.” It’s far removed from synch practices and placing licensed music, etc.” - Games Composer.*

### **5.4.3. Getting Music Into Video Games**

Getting into the gaming industry as an outsider can be a bit challenging since it is quite separate from the music business and is mainly run by and catered to programmers, managers, graphic designers, and gamers. Some industry professionals even refer to it as the „Wild West,“ since there is no clear or standardised path into the field. Often, people get their foot in the door through sheer luck and by being in the right place at the right time.

*“There are many talented people who may have gotten in by a stroke of luck and stayed due to doing good work.” - Games Composer.*

The licenses for games in Denmark are typically not managed by the collective management society, KODA. In fact, KODA has introduced a special opt-out clause, meaning they do not handle rights, royalties, or registrations for music used in games.

The most common form of **payment** for the work of a game composer is a one-off payment or a buy-out, which is the case for most projects. The specific deals and contracts can vary from company to company and can include different clauses. This lack of standardisation has become a source of discussion amongst composers and professionals in the gaming industry, and many would welcome more formalisation and standardisation of contracts and deals.

Overall, the gaming industry offers an exciting new space for composers. Since it is still relatively new, there is also room for considerable artistic freedom.

*“From a musical perspective, I find it more interesting and novel than just doing commercials or even film music....I enjoy the fresh set of opportunities that games offer, as it is such a new and wild west-like industry.” - Games Composer.*

Being at the frontier of an industry naturally also comes with its own set of **challenges**. For example, due to the prevalence of buy-outs, composers will not usually receive royalties from their work, even if the game becomes a huge hit.

*“This can make it challenging to engage with the success of a game because you’re not necessarily part of that success.” - Games Composer.*

## 6. Main Challenges

The Danish synchronisation and music licensing sector has been developing and professionalising since the 2010s, but faces significant challenges that impact artists, music supervisors, publishers, and production houses alike. In 2020, the Danish Music Publishers Association issued a report<sup>27</sup> which outlined some key challenges. These have been complemented with learnings from interviews with industry professionals for this report. Several key obstacles came to light, ranging from budget constraints to the rise of AI and the difficulties of competing with production music.

### 6.1. Challenges

#### 6.1.1. Budget Cuts and Production Challenges

One of the most pressing concerns in Denmark is the reduction in budgets for audiovisual productions. This has several reasons, international market competition among them. Some are worried that the pre-arranged agreements the Danish broadcasters, such as DR, have with production music companies can narrow the opportunities for composers and independent artists, making it harder for new music to be placed in productions. This can happen, though composers willing to focus on creating music specifically for audiovisual media can just as easily find opportunities within production music as in the commercial world. In sum, though, this trend can limit the space for synching commercially released music and while some synch projects still offer good money, many audiovisual productions do not allocate enough budget to justify the effort of licensing original music.

---

<sup>27</sup>/ Seismonaut (2020). *Musikforlæggerne - bindeledet mellem sangskrivere, komponister og marked. Analyse af forretning, værdiskabelse og udviklingsmuligheder.*



### **6.1.2. The Impact of AI and Production Music**

The sync landscape is being reshaped by the prevalence of production music and the rise of AI-generated music. Production music companies and music libraries have introduced significant market efficiencies by offering various types of streamlined and cost-effective solutions. For many productions with limited budgets or tight deadlines, this convenience is a major advantage, as it simplifies the process of finding and licensing music.

However, this competitive shift poses a significant challenge to independent music publishers, artists, and composers seeking to work in the more traditional licensing paradigm. As the quality of production music improves, it becomes a more viable alternative for projects that might have otherwise sought commercially released repertoire. This puts pressure on traditional publishers to actively demonstrate the unique value of their catalogues and convince producers that original, commercially released music can bring a high level of quality and a distinct artistic identity to a production.

In this evolving market, flexibility and transparency have become crucial competitive factors. To remain attractive to producers, traditional publishers must streamline the rights clearance process and become more transparent regarding payments, adapting to the efficiency-focused value offer that production music libraries have brought to the market. Initiatives such as Nordic Music Synch are steps towards this.

### **6.1.3. Challenges with the Legal Framework**

The Danish sync market faces its own legal challenges. The enforcement of copyright can be weak, as legal disputes often result in the infringing party paying a fee that provides a „weak incentive to avoid infringement.“ Additionally, the issue of moral rights creates a legal uncertainty for producers, particularly in the fast-paced TV production sector, as any use of a song can technically be seen as an adaptation.

### **6.1.4. Lack of Music Supervision Tradition and Industry Collaboration**

Unlike in larger markets, Denmark has a weaker tradition of music supervision. Music is often an afterthought in productions, leading to last-minute licensing requests and inflated costs. This lack of foresight is exacerbated by a disconnect between the music and film industries, making it difficult for professionals to collaborate effectively. Many music professionals believe more initiatives are needed to educate film producers on the value of using music supervisors and the potential of music.

### 6.1.5. International Competition and Market Consolidation

The Danish music publishing industry faces structural challenges. As also noted in the MPA report,<sup>28</sup> Danish publishers often lack the capital and export networks to compete with international majors. This is worsened by a trend where successful Danish companies are sold to foreign players, resulting in a loss of skills, networks, and visibility for Danish music catalogues, which can „drown in the crowd“ of larger international collections. The absence of a strong local presence from major publishers, who instead operate from Stockholm, also means they are less involved in nurturing emerging Danish talent.

### 6.1.6. Shrinking Opportunities for Artists

For artists looking to get into synch, opportunities are becoming scarcer, especially in sectors like advertising and film. The advertising market is heavily dominated by well-known, older hits or low-cost library music, with one professional noting that the „same 50 songs are being licensed again and again“. This makes it challenging for emerging or lesser-known artists to get placements.

Some music supervisors advised artists to think beyond a single track placement and come up with alternate strategies, such as creating multiple versions of a track to increase its synch licensing potential. However, perhaps most importantly, artists should focus on making music that is unique and original.

## 6.2. Towards Solutions

Music professionals in Denmark have several ideas on how to address challenges in the industry. Their suggestions focus on creating a more collaborative and better organised environment for music licensing and use that includes improved communication with the client sectors of film, TV, ads and games development.

**Facilitating collaboration and improving education** – professionals believe the music industry should take a more proactive and organised role in connecting with clients and educating them on the value of music. This includes building professional communities across the industry divides to provide music for local content and showing users, like ad agencies, that licensing music isn't (that) complicated, but a valuable opportunity.

**Simplifying the licensing process** – the current licensing process is often seen as too difficult, leading clients to either turn to better streamlined music libraries or find other, often less professional, ways to get music. Music publishers need to make

---

<sup>28</sup> Ibid, p 7.

it easier for users to license music, ensuring that music catalogues are “synch ready,” with all rights information and files properly organised. Simplifying these logistics can help overcome the perception that music is too difficult to license and should be provided for promotion. A good example is the Nordic Sync initiative.

**Tapping into opportunities for lesser-known talent** – despite the challenges, sync licensing is seen as an opportunity, even to some degree, for emerging artists. Unlike other areas of the music industry, success in sync doesn’t always depend on being an established act; even the odds are against the lesser-known artists in most cases. If a song is a good fit for a project, it has a chance to be placed. The key is to make music easily accessible and ready for use.

In sum, improving the situation and outlook for the synch sector in Denmark will still have to rely on approaches that are simple in principle: more education about the legal complexities and technicalities of licensing and awareness of the potential of music for making audiovisual productions more unique. More collaboration within the music industry to make joint efforts to develop more strategic connections across the music and audiovisual media industry lines. Getting one’s music synched will always be hard, as artists and composers sit at the “wrong” end of the decision-making funnel. However, by making sure that the catalogues are “synch-ready” improves the odds. Given the potential challenges ahead for the film and TV industries due to the rising AI technologies and also shifts in consumer behaviour, it remains to be seen how these developments affect placing music in films and series, ads and games in Denmark.

## References

Danish Film Institute. (2023). Facts & figures 2023.

<https://www.dfi.dk/english/facts-figures-2023>

Danish Media Association. (2025). Et medlemskab til vækst - og netværk til dig!

Available at:

<https://www.xn--danskannoncrforening-lcc.dk/medlemskab/>

GRAMEX. (2025). Homepage. Available at:

<https://gramex.dk/english/>

IFPI Denmark. (2024). Musikselskaber 2023.

<http://www.ifpi.dk/sites/default/files/2024-04/Musikselskaber2023.pdf>

Jørgensen, Ulrik Bolt. (2025). Denmark introduces 25% production incentive. Nordisk Film & TV Fond. Available at:

<https://nordiskfilmogtvfond.com/news/stories/denmark-introduces-25-production-incentive>

KODA. (2025). Homepage. Available at:

<https://www.koda.dk/eng>

KODA. (2024). KODA's Transparency Report 2023. Available at:

<https://koda.dk/en/about-koda/koda-dramatik/about-koda-dramatik>

KODA. (2023). KODA's Transparency Report 2022. Available at:

<https://koda.dk/en/about-koda/koda-dramatik/about-koda-dramatik>

Musikforlæggerne. (2023). Musikforlæggere: Final report for web publication.

[https://musikforlaeggerne.dk/wp-content/uploads/2023/08/musikforlaeggere\\_FI-NAL20\\_til20web.pdf](https://musikforlaeggerne.dk/wp-content/uploads/2023/08/musikforlaeggere_FI-NAL20_til20web.pdf)

Musikforlæggerne. (2023). Dansk musikomsætning 2021. <https://musikforlaeggerne.dk/wp-content/uploads/2023/08/dansk-musikomsatning-2021.pdf>

NCB. (2025). Homepage. Available at:

<https://www.ncb.dk/index.php>

NCB. (2023). Transparency Report. Available at:  
<https://www.ncb.dk/pdf/TransparencyReport-2018.pdf>

NCB. (2025). Using Music. Available at:  
<https://www.ncb.dk/index.php/using-music/>

Nordisk Film. (2025). Homepage. Available at:  
<https://www.nordiskfilm.com/>

Pham, Annika. (2023). Danish Media Agreement, including min. 2% streamers levy gets overall industry favour. Nordisk Film & TV Fond. Available at:  
<https://nordiskfilmogtvfond.com/news/stories/danish-media-agreement-including-min-2-streamers-levy-gets-overall-industry-favour>

Producentforeningen. (2023). Omsætning og eksport steg i 2022.  
<https://pro-f.dk/analyse/omsaetning-og-eksport-steg-i-2022>

Producentforeningen. (2024a). Rekordstor dansk indholdsproduktion.  
<https://pro-f.dk/analyse/rekordstor-dansk-indholdsproduktion>

Producentforeningen. (2024b). Danske Indholdsproducenter 2024. Available at:  
<https://pro-f.dk/analyse/danske-indholdsproducenter-2024-0>

Rambøll Management Consulting. (2021). Calculations.

Retsinformation. (2023). Danish Copyright Act. Lovtidende A 2023.1093.  
<https://www.retsinformation.dk/eli/lta/2023/1093>

Ritzau Bureau. (2025). HBO Max to produce Danish fiction and documentaries again. Available at: <https://danishnews.ritzau.com/article/43ad58c6-75d8-4f78-8104-f4469b0c4289#:~:text=Danish%20streaming%20service%20Max%20will%20soon%20change,the%20end%20of%20the%20year%2C%20says%20Christina.>

Schrøder, Kim Christian. (2024). Denmark. Reuters Institute. Available at:  
<https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2024/denmark>

**Seismonaut. (2020).** Musikforlæggerne - bindeleddet mellem sangskrivere, komponister og marked. Analyse af forretning, værdiskabelse og udviklingsmuligheder. Musikforlæggerne. Available at:

[https://musikforlaeggerne.dk/wp-content/uploads/2023/08/musikforlaeggere\\_FI-NAL20\\_til20web.pdf](https://musikforlaeggerne.dk/wp-content/uploads/2023/08/musikforlaeggere_FI-NAL20_til20web.pdf)

## Annex

FILM NAME	COMPOSER	MUSIC SUPERVISOR	PRODUCTION FIRM
A Storm Foretold (2023)	Mikkel Maltha, Anthony Lledo, Flemming Nordkrog, August Grau	N/A	Guldbrandsen Film
Another Round (2020)	N/A	Mikkel Maltha, Leslie Ming	Zentropa Entertainments, co-production with others
Antichrist (2009)	Kristian Eidnes Andersen	Mikkel Maltha	Zentropa Entertainments, co-production with others
Borgen (2010-2022)	Halfdan E, August Fenger	Christian Fløe Svenningsen	SAM Productions for DR Danish Broadcasting Corporation
Breaking the Waves (1996)	Joachim Holbek, Ray Williams	N/A	Zentropa Entertainments, co-production with others
Bytte, Bytte Barn (2024)	Mikkel Maltha, Kasper Soderlund	Cecilie Karpinski	SF Studios
Clash of Egos (2006)	Jeppe Kaas	N/A	Nordisk Film, Nimbus Film
Copenhagen Cowboy (2022-2023)	Peter Kyed, Cliff Martinez, Peter Peter, Julian Winding	Mikkel Maltha, Leslie Ming	byNWR; Space Rocket Nation / NWR Film Productions
Dancer in the Dark (2000)	Björk	N/A	Zentropa Entertainments, co-production with others
Elves (2021)	Anthony Lledo, Mikkel Maltha	Leslie Ming	Miso Film
Equinox (2020)	Kristian Leth, Fridolin Nordsø	N/A	Apple Tree Productions
Far til fire (2012)	Jeppe Kaas	N/A	Nordisk Film, ASA Film Production
Journal (64) (2018)	Mikkel Maltha, Anthony Lledo	N/A	Zentropa Entertainments, co-production with others
Kamikaze (2021)	Flemming Nordkrog	Mikkel Maltha, Leslie Ming	DR and Nordisk Film, Profile Pictures (for HBO Max)
Love is All You Need (2012)	Johan Söderqvist	Nis Bøgvad, Pernille Bech Christensen, Susan Jacobs, Mikkel Maltha	Zentropa Entertainments; Zentropa Sweden

Madam Ida (2024)	Christian Balvig, Kaspar Kaae	Mikkel Maltha	Zentropa Entertainments, Nordisk Film
Melancholia (2011)	Nikolaj Hess, Jens Bjørnkjær, Kristian Eidnes Andersen	Mikkel Maltha, Brooke Wentz	Zentropa Entertainments, co-production with others
Ragnarok (2020-2023)	Halfdan E, Jonas Struck, August Fenger	Anders-Peter Andreasen, Jan Thielsen, Ataberk Özturan, Cecilie Karpinski, Christian Fløe Svenningsen	SAM Productions for Netflix
Snabba Cash (2021-)	Erik Enocksson, Patrick Kendrick-Smith (trailer score)	Rasmus Thord, Fatima Ornette Lutti	SF Studios
Speak No Evil (2022)	Sune Kølster	Nis Bøgvad	Profile Pictures; Oak Motion Pictures (NL)
The Absent One (2014)	Patrik Andrén, Uno Helmersson, Johan Söderqvist	Mikkel Maltha	Zentropa Entertainments
The Bridge (2011-2018)	Patrik Andrén, Uno Helmersson, Johan Söderqvist	Adriano Aponte	Filmlance International (SE) & Nimbus Film (DK)
The Celebration (1998)	Lars Bo Jensen	N/A	Nimbus Film
The Chestnut Man (2021-)	Kristian Eidnes Andersen	Anders-Peter Andreasen	SAM Productions for Netflix
The Investigation (2020)	Rune Tønsgaard Sørensen	Steve Tallamy	Miso Film
The Killing (2007-2012)	Frans Bak, Michael Brake	N/A	DR (in co-production with ZDF Enterprises)
The Nurse (2023)	Jeppe Kaas	N/A	Nordisk Film
The Promised Land (2023)	Dan Romer	Mikkel Maltha	Zentropa Entertainments, Nordisk Film
The Rain (2018-2020)	Av Av Av	Lynn Fainchtein, Ignacio Burgoa	Miso Film for netflix
The Riders of Justice (2020)	Jeppe Kaas	Mikkel Maltha, Leslie Ming	Zentropa Entertainments; Zentropa Sweden
Triangle of Sadness (2022)	N/A	Mikkel Maltha, Leslie Ming	Zentropa Entertainments, co-production with others

### **Annex 1**

*A list of films and TV series mentioned in the report, including the credited composers and music supervisors.*

PRODUCTION TYPE	TYPE OF MUSIC	SYNC FEE
TV Production	Existing Bespoke	16.25 DKK per second 6 DKK per second
Fiction Series (Nordic region only)	Existing Bespoke	40 DKK per second (minimum 2000 DKK per song) 6 DKK per second
Fiction Series (streamed worldwide)	Existing and Bespoke	Negotiate directly with rightsholders
Trailer	Existing and Bespoke	Negotiate directly with rightsholders
Theme Songs	Existing Bespoke	Negotiate directly with rightsholders 1850 DKK per episode
Transition Music Between Commercial Breaks on TV	Existing Bespoke	Negotiate directly with rightsholders 1850 DKK per episode
TV Advertisements	Existing and Bespoke	Negotiate directly with rightsholders
Feature Film	Existing Bespoke	Negotiate directly with rightsholders Viewing in Nordics - Under 30 min: 15 000 DKK - 31-60 min: 25 000 DKK - Over 60 min: 35 000 Showing in Europe +10 000 DKK to fee Worldwide +14 000 DKK to fee
Short Film or Documentary with a cinema screening	Existing Bespoke	Negotiate directly with rightsholders 6 DKK per second
Short Film or Documentary shown in festivals, online, TV	Existing Bespoke	16,25 DKK per second 6 DKK per second
Advertising	Existing and Bespoke	Negotiate directly

## Annex 2

Price list from the NCB for licensing music. Source: NCB Pricelist