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October/November 2017 MIPCOM Issue

Distribution in 2017

What's on the mind of the international industry?



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TBI Kids

The Moomin's make a comeback; a diversity focus at Cartoon Forum; Dennis the Menace gets a new look; and exclusive data on top children's shows in Europe

TBI Formats

The best new formats listed; pitching in the US; and a comeback by *The Crystal Maze*



EDITOR'S NOTE



JESSE WHITTOCK

Who's actually in control in the new world of international television content? Is it the US studios, with their massive channel, production and distribution infrastructure and years of sitting pretty at the top of the tree?

Is it Netflix, Amazon and the cadre of upstart subscription video-on-demand services that are seemingly beating those same titans to every hot new script in Hollywood?

Is it the telecommunications giants that own the pipes of distribution, and are increasingly keen to consolidate their customer bases by commissioning high-end dramas and factual shows that their rivals cannot offer?

Or is the tech behemoths that probably don't even consider themselves content or entertainment companies? Apple, Google and Facebook have decided they are players in the original programming game and all are building teams of top TV executives to spend billions of dollars on digital programming.

Whoever is in charge, the international market needs some answers, and soon. The TV biz is actually a relatively small industry – certainly compared to the telecoms and tech worlds – and its future is often not in its own hands. However, the fact that television has reacted so positively to digital disruption gives it an

opportunity that many other entertainment industries have already missed and won't get the chance to exploit again.

In this bumper issue, we once again conduct an industry-wide survey of the sector's leading distribution companies to get some insight into how the big issues in TV are affecting the spread of top class programming around the world.

The results are both comforting and surprising. I can say with certainty that international television is in rude health, and that the smarts of the people running distribution is second to none. However, it is also true that the number of decisions and problems facing them has never been as great or complex before.

The race for control is on, but TV looks well set whatever the outcome. The TBI gang will see you on the Croisette to get your take.

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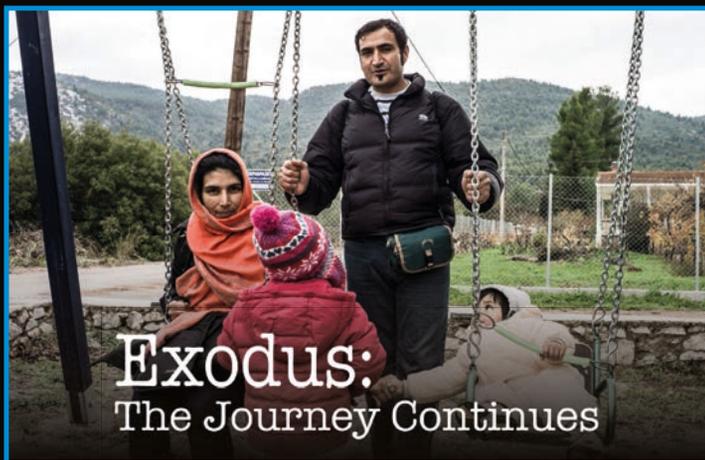
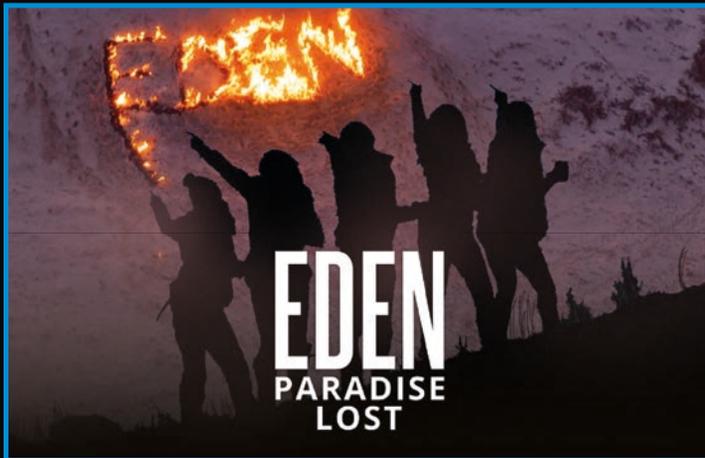
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VIEWPOINT



CHRISTOPHE RIANDEE

Luck and judgement

Making it in the US requires luck as well as judgment. And we admit we've been lucky.

Gaumont arrived in the States at the right time – back in 2010, at more or less the same time as an upstart streaming service called Netflix began to attract attention. Netflix quickly moved forwards with our horror series *Hemlock Grove*, with acclaimed horror feature film director Eli Roth on board as an executive producer; and we had a standout drama in the shape of Bryan Fuller's extraordinary psychological thriller *Hannibal*, which broke the mould by going straight-to-series on NBC.

We have a parent company that has been around for 120 years and understands the importance of taking the long view, both commercially and creatively. Plus, we hit the market just as the curtain went up on the 'golden age of television drama'. As I say, lucky.

Once you've had one big show in the US, doors open more easily. The challenge then becomes what to do as an encore. Again, the timing was right and along came *Narcos*, followed by *F is For Family*, both originals for Netflix and both exceptional shows in very different ways. *Narcos*, in particular, has performed beyond all

expectation. We always knew it was a powerful drama, but in honesty, nobody expected it to become as successful as it is.

While luck was on our side in terms of timing, it worked because we approached the series business in a new way. We took a model that has worked well for us in Europe and applied it to the US, which was a leap of faith in some respects, but the only way we felt an outsider like Gaumont would be able to cut through the competition. We introduced, and successfully applied, the straight-to-series business and profit-sharing models of film to television production – otherwise we'd have been lost before we'd been found.

There are a few key areas in which Gaumont's approach has helped us operate in the US market. First and foremost, we invest an enormous amount of money, time and energy in development. There's no cheap way to create high-end drama.

At the moment, we have more than 20 projects in development, many with Academy Award-winning talent. For example, we're working with Charles Randolph, who is writing the scripts for a sci-fi copro with Ivanhoe Pictures called *Red Rush*, and we've just signed a first-look deal with Christopher McQuarrie to write, direct and produce multiple scripted drama projects.

We are also in development on a Stephen King project based on his novella, *N*, with David F. Sandberg attached to direct the pilot. A pipeline of in-development projects of this calibre easily costs several million dollars a year.

We also go after the best talent in the world, from all corners of the world. We look for industry veterans to join our executive team such as Gene Stein, our president of US television, who is highly regarded by the creative community and who is responsible for our current slate.

We put together creative teams that consist not only of exceptional writers, directors, and actors, but people who can work together to break through borders. The US may still be the most important TV territory in terms of scale and impact, but today's drama market is truly global, as Netflix has so clearly demonstrated. Our view is that you need a global network of brilliant people to create drama for our new borderless TV universe.

Another difference, which is equally important, lies in the DNA of Gaumont. We are the oldest film company in the world and can bring our expertise to all production formats and genres.

In the end, a great story is a great story, and there's no real difference between a great American story and a great French one. What makes the difference is how and with whom you tell that story, and how much you're prepared to invest in it.

Certainly, the appetite for high-end drama shows no sign of abating, with Netflix increasing its 2018 budget to US\$7 billion, and Amazon, Apple, Google and Facebook now piling into the market. There are more buyers than ever out there, all looking for original content with which to differentiate their channels and platforms. That's good luck not only for Gaumont, but for all us involved in the creation of high-end drama. **TBI**

While luck has been on our side, we approached the series business in a different way. We took a successful European model and applied it to the US, which was a leap of faith, but the only way an outsider could cut through

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SHORTLISTED

Five to meet

Who should you be meeting at MIPCOM – TBI profiles the execs to know



Name: Charlotte Walls

Company: Catalyst Global Media

London-based Catalyst Global Media heads to MIPCOM as a shining example of how the film and television financing worlds are merging into one fluid and evolving business.

Co-founder and CEO Charlotte Walls had worked to produce and finance movies such as *Killing Bono* and *The Wind That Shakes the Barley* before launching Catalyst with private equity money in 2015.

At at Matador Films, she had positive experiences seeing Kew Media Group (formerly known as Content Media Corp) repackage feature film *Streetfighter: Assassin's Fist* as a web series for Machinima's YouTube channel and dystopian drama *Residue* as a three-parter for Netflix. To Walls, it was an opportunity emerging.

"That was a really interesting eye opener," she says. "Suddenly there was this visible portal where people were consuming content, and it all sold in different formats, which made it lucrative as a business proposal."

Catalyst has since secured its first commission, UK broadcaster ITV's Peter Pan remix *Peter and Wendy*, and Walls is now heading to Cannes with a projects including neo-noir crime drama *Cognition*, which is a copro with *Mission Impossible II* director John Woo.

"It is a big, broad and bilingual show set in the US and the Far East," says Walls. "It's definitely going to be global production structure, so for us MIPCOM makes an enormous amount of sense."



Name: Sumi Connock

Company: BBC Worldwide

Sumi Connock was just days into her new role at BBC Worldwide (BBCWW) when TBI interviewed her at the BBC commercial division's Liverpool Showcase event in February.

Now bedded in with a clear sense of the mammoth BBCWW formats library, the former ITV unscripted creative chief is heading to MIPFormats and MIPCOM to drum up

interest in a slate of new intellectual property.

"Since I came in, I've been focusing on factual entertainment for primetime – shows like *Bake Off* that are authentic and feel-good," says

BBCWW's creative director of formats. "Audiences don't want to feel the hand of the producer."

Bake Off in particular has been a standout performer, with a 26th format deal set for announcement at MIPCOM, while others such as *Toughest Job in the Universe* (see Formats Hot Picks), *Meet the Humans* and *Stupid Man*, *Smart Phone* are attracting attention.

BBCWW is working on new shiny-floor, Saturday night formats following a string of BBC entertainment shows that have not significantly broken through this year; and also is taking *Born to Kill*, *Hepburn*, *Broken* and *Starling* as potential scripted formats.

For producers looking for representation, MIPCOM offers a chance to sit down with Connock and BBCWW's head of acquisitions for formats and factual entertainment, Nicki McDermott. "We absolutely want to hear from them," says Connock.





Name: David Mortimer
Company: Tinopolis

Former NBCUniversal International unscripted chief David Mortimer heads into his first MIPCOM with transatlantic production and distribution company Tinopolis Group with mechanised robots on his mind.

Tinopolis's sales division, Passion Distribution, has significant expectations BBC Two tech combat series *Robot Wars* is about to go truly international after its return to British screens.

The series, which relaunched on the BBC in 2016 after a period of twelve years off air, has sold into 75 territories as a finished programme, but hasn't yet scored format deals. "Networks are inherently conservative these days, so they want to see at least a couple of seasons of strong ratings to get commercial broadcasters interested," says Mortimer, Tinopolis's director of content.

Ratings on the BBC have been strong over the first two seasons, with Mortimer noting it has attracted the same young adult audience as that other BBC Two factual entertainment giant, *Top Gear*.

In fact, the Mentorn Scotland-produced series is the Corporation's youngest-skewing non-children's series, according to its annual report. Some 33% of its audience is from the lucrative 16-34 demographic, and it is understood to have landed an improved slot time as a result.

Formats deals are now in the offing. Banijay Group-owned producer Mastiff has secured pan-Scandinavian rights, with local broadcasters set to join the remake, and Mortimer says deals with broadcasters in Australia and France are also set to complete.

In order to entice further buyers, Mentorn's Glasgow battle arena is offered as part of a format package, reducing the sizeable costs. "Tinopolis always envisaged it as a production hub," says Mortimer.

Name: Katie O'Connell Marsh
Company: Platform One Media



Liberty Global's push into original content has been one of the more notable narratives in international scripted circles in the past year. Having first entered the original content market through a 50% stake in All3Media, it has now partnered with Texas-based TPG Growth to launch LA-based studio Platform One Media.

Former Gaumont television chief Katie O'Connell Marsh has been drafted in to run the business, which also comprises executives such as her ex-colleagues Erik Pack and Elisa Ellis; and a number of executives from the TPG-backed Slingshot Global Media, which has been acquired and absorbed into the Platform One business.

"Market conditions have changed since I came up with the business plan to launch Gaumont's TV business," says O'Connell Marsh, "but the core business is the same: international series that have global appeal."

At MIPCOM, Platform One will be in town to find intellectual property, coproduction partners and third party content (the firm will also be an independent distributor) that both have that international appeal and can also be monetised in new ways.

O'Connell Marsh – who brought *Narcos* to Netflix and executive produced the Pablo Escobar drama – says she is looking for drama, comedy, limited series and acquisitions to create "a broad slate that is not deep bench".

Tonally, Platform One is after content that is either "escapist, 'PG TV' or confrontational projects". "We really want a slate of content that plays across the board," adds O'Connell Marsh.



Name: Katrina Neylon
Company: FremantleMedia International

Katrina Neylon joined FremantleMedia International (FMI) as global content head in September after two years at Studiocanal, in effect replacing former Shine International colleague Georgia Brown, who left for Amazon Studios over the summer.

Neylon joined the company four weeks before MIPCOM, an unenviable task when working for a distributor with such a large catalogue of various genres.

"Since the announcement I've had so many meeting requests," she says. "In terms of MIPCOM I'll have to think about the producers that I've worked with previously, and also about meeting new producers."

Neylon adds she is keen on formulating relationships with new third party producers that FMI doesn't yet deal with, and will be focusing on such meetings in Cannes. The idea is to "bring more talent and creative into the company", she says.

At the moment, Neylon says Fremantle is doing an excellent job in pushing into high-end drama through shows such as *American Gods*, and believes the focus now needs to be more on premium factual content with international appeal.

Neylon has worked in a range of international roles from Shine International to The Walt Disney Company, so finds it hard to pick a favoured genre, but says she is partial to factual and reality.

"The reason I joined FMI is because it has such an impressive reputation and is one of leading creators, producers and distributors of television brands in the world," she says.

"To be working for a company like that that has the highest rated shows, for me that is a dream come true and literally is a company that I've wanted to pursue and work for, for a long time." **TBI**

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Netflix and Amazon's content investments have rocked the television business to its foundations, but can the real titans of tech – Facebook, Apple and their kin – usurp them and win the war for audiences of the future? TBI reports

Twenty-eighteen will provide the backdrop to an onslaught into the international content business. While Netflix and Amazon Prime Video were the first to disrupt the power bases of TV commissioners around the world, these SVOD giants now face the might of social technology's true behemoths, as Facebook, Apple, Snap Inc and Google rally the troops ahead of their own programming expeditions.

"We are at pivotal point in TV for sure, as Apple, Facebook, and Google and YouTube have indicated that they want to be serious players," says Vanessa Shapiro, Gaumont's president of worldwide distribution and coproduction. "These companies have deep pockets, which is bound to lead to an even more competitive market."

Some say we've heard these sorts of stories before, and that it is the traditional studios and broadcasters that ultimately keep the business

going. The difference this time is Facebook and Apple are hiring key programming executives from these exact players.

Facebook began its move into content, which is said to include a US\$1 billion investment into original shows for the new Watch platform, by hiring CollegeHumor co-founder Ricky van Veen. He'll be keynoting at MIPCOM, explaining to a roomful of potential friends and enemies why he's since hired ex-MTV scripted chief Mina Lefevre and what Mark Zuckerberg truly means when he says video will be Facebook's "primary driver" in coming years.

Apple, meanwhile, prised Zack van Amburg and Jamie Erlicht away from their co-president posts at Sony Pictures Television to become joint heads of video to lead worldwide programming efforts.

"There is also a tendency for technology firms to underestimate the challenges and risks of producing great entertainment, so

I'm encouraged when they hire entertainment industry veterans to shepherd their investments," says Ed Barton, chief analyst of entertainment at media and technology analysis firm Ovum.

Ex-Syfy programming chief Matt Cherniss and other former Sony execs, including head of current Ken Rozenfeld, have also joined Apple.

This apes the moves Netflix made bringing in former studio execs such as Scott Stuber and Bela Bajaria, and Amazon when it brought in FremantleMedia's Georgia Brown as European originals chief.

Apple is also reportedly copying Netflix on the Los Angeles real estate front – just as the SVOD giant opened an office in the Hollywood Hills that literally looks down on the studios, Apple is believed to be close to buying the famous Culver Studios, literally walking distance from Sony.

Snap Inc, the parent of Snapchat, has also been engaging the content business, with VP of content Nick Bell recently saying that it

would not be long before the Gen Z-skewing social platform commissioned its first scripted programming.

In August, Facebook unveiled its first batch of originals, some it funded and some it didn't, with the likes of A&E, A. Smith & Co and National Geographic debuting shows.

"It feels like being in the Wild West at the start of the Gold Rush," says one producer with direct knowledge of Facebook's strategy. However, the social media giant that claims to want to connect the entire world through its newsfeed is not planning to continue to fund shows forever, and is planning to eventually revert to a revenue share model.

"Facebook is going through what Netflix and Amazon went through to or three years ago – they know what they want, but don't know how to do it," the producer adds.

Furthermore, there's no guarantee audiences really want to watch programming from Facebook, (though its recent *Humans of New York* doc series has drawn in an average 4.5 million views per episode at press time).

Apple, meanwhile, hasn't even got a distribution platform for its shows yet.

"It is much easier to spend US\$1 billion on making shows than it is to get one million people to watch them," says Ovum analyst Barton. "The challenge facing emerging video platforms is in helping audiences discover and watch shows on platforms which many aren't accustomed to watching long-form content on."

Google-owned YouTube certainly believes millennial and even Generation Z audiences prefer the over-the-top route to the traditional channels. It has been ordering original shows for YouTube Red since February last year, and appears to be all in on the SVOD service. Last month, it scrapped its premium channels business, which had allowed producers and content owners to offer paid-for networks, saying it had "never achieved popularity".

Barton predicts an intensified fight for the best content is coming – or it could be already here, in fact. Facebook has secured a multi-million dollar deal for NFL content, while Amazon won an auction for ATP tennis rights. Many believe pay TV models will truly come under intense scrutiny when premium sports are no longer purely theirs to fight over.

Ultimately, the advent of the digital giant



Zack van Amburg and Jamie Erlicht

could be a huge benefit for producers and consumers. "Hopefully, Snap and Facebook use some of the unique qualities of their respective platforms to inspire some new and innovative content and also give their talent enough time to really understand their platforms and audiences," says Barton.

Maybe, just maybe, the tech giants hold the upper hand in the war ahead. **TBI**



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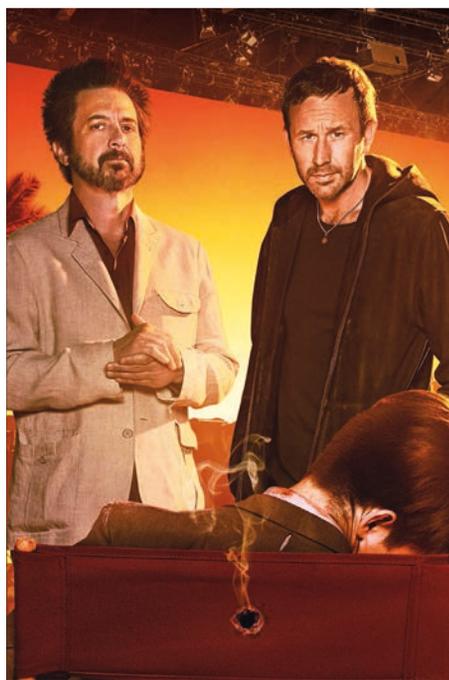
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GET SHORTY

Type: TV series **Genre:** Dark Comedy

Running time: 20 x 60' **Availability:** Now

Miles Daly works for a murderous crime ring in Nevada. For the sake of his daughter, he attempts to change professions and become a movie producer, laundering money through a Hollywood film. But instead of leaving the criminal world behind, he accidentally brings it with him to Hollywood.



THE HANDMAID'S TALE

Type: Series **Genre:** Drama

Running time: 23 x 60' **Availability:** Now

The Handmaid's Tale, based on Margaret Atwood's classic novel, is the story of a young woman's struggle to survive in a futuristic society where women are forced into surrogate motherhood.



DEATH WISH

Type: Theatrical Film **Genre:** Suspense/Action

Running time: 120' **Availability:** Now

Dr. Paul Kersey is an experienced trauma surgeon, a man who has spent his life saving lives. After an attack on his family, Paul must embark on his own mission of justice.



shows from the Spike TV channel it replaces, including *Lip Sync Battle*, and premium original dramas such as Kevin Costner family drama *Yellowstone* and female-focused TV Land pair *Heathers* and *American Woman*.

The rationale is simple, says Kevin Kay, president of Paramount Network, who also oversees TV Land and CMT. "It goes back to what Viacom is all about: different channels for different audiences," he explains.

"What we did not have in that package of channels was a general entertainment channel with broad appeal, to both audiences and advertisers."

Kay, a natural pessimist by his own estimation, says he is reticent to overplay the position of the channel before it launches on January 18, 2018, but admits, "It is starting to come together in a big way".

"There's been a lot of preparation and thinking behind the creative since this decision to launch was made back in February," he adds.

A big part of that is marketing the network. Spike, which Kay has led since 2007 when it was known as TNN, will cease its life as a US channel (though international networks with the branding will remain), and a key perception challenge is attracting women that would reject that channel brand, with its MMA fighting programmes and blokey thrillers.

"The heritage of Spike is still male," says Kay. "That's part of the fun and the challenge of what we're doing; we

Paramount importance

The US's newest general entertainment station, the Paramount Network, launches in January 2018. Jesse Whittock hears how channel president Kevin Kay plans to change cable with premium originals and unscripted hits for a broad audience

There's no better way to better encapsulate Viacom's strategy change under Bob Bakish than to look at the creation and launch of the Paramount Network.

When Bakish left his post as Viacom's international business head and took control of the company at the turn of the year, he made it clear to shareholders the big missed opportunity had been the approach to its major brands.

Therefore the siloed approach that underpinned Philippe Dauman's reign was out and an age of cooperation was ushered in. Most resources would now go on six brands: MTV, Nickelodeon, Nick Jr., Comedy Central, BET and Paramount, with the latter gaining a new identity on US: the Paramount Network.

Separate to the movie-focused, international Paramount Channel, the new proposition will include hit unscripted

are trying to get more women to Paramount Network, and *American Woman* and *Heathers* will do that."

Alicia Silverstone- and Mena Suvari-starring sitcom *American Woman* comes from John Wells Productions and Warner Bros., and is based on the life of *The Real Housewives of Beverly Hills* star Kyle Richard, while *Heathers* is an adaptation of the dark high school comedy from 1988, with Lakeshore Entertainment attached.

"Then *Waco* will skew a lot more male," says Kay of the big budget Weinstein Television limited drama that will launch the channel. The series is based on the 51-day standoff between government agents and The Branch Davidians that ended in a deadly fire, with Taylor Kitsch playing cult leader David Koresh, John Leguizamo playing an ATF agent and Michael Shannon as FBI negotiator Gary Noesner.

While *Waco* broaches a tough topic, Kay says Paramount Network drama is likely to skew a little lighter than

rivals such as FX and the premium pay outlets. “It’s not criticism of FX, as I love what they do, but why would we want to go there and do the same?” he questions. “*Yellowstone* is an edgier version of *Dallas*, but it still lives in that place of optimism.”

Kay says there is also the challenge of convincing viewers Paramount Network is not a movie channel, pointing to internal research proving many think just that. “There has to be a strong message there is original programming along with movies, and we have to reach out to women to let them know there is programming for them,” he adds. “It’s a new day here.”

Lip Sync Battle, which began life on Spike and launches the channel in January, will be another key driver in positioning Paramount Network as a general entertainment proposition, as will sister unscripted shows *Ink Master* and *Bar Rescue*. “We need another non-scripted hit behind the three coming over from Spike,” says Kay.

He is on the lookout for another fun, celebrity-driven series, as this goes to the core of the classic Paramount studio brand. “Stars are part of the legacy of Paramount – the original logo had 24 stars to represent the 24 stars on the books at the time,” he says.

In a practical sense, he adds: “The amount of star power *Lip Sync Battle* generates is huge, and we are going to want to generate conversations in that way, using star talent both in front of and behind the camera.”



Kay has also looked at factual entertainment formats from Viacom-owned UK terrestrial Channel 5 (C5), including the well-received *Rich House, Poor House*, which he says defies expectations of the title. “What Ben Frow at Channel 5 has done is just brilliant – and how does he come up with those show names?” says Kay.

Also in development is *First Wives Club*, a show that exemplifies the new world of cooperation within the Viacom group. The series comes through Amy Powell’s Paramount Television division, and was initially a pilot for TV Land. “There is constantly dialogue between our president of development, Keith Cox, and Amy,” says Kay. “It’s about exploiting IP we own, and then being able to control the international and SVOD rights and share the content on all platforms.”

Those silos truly do seem to be breaking down. **TBI**

PARAMOUNT CHANNEL INTERNATIONAL

Paramount Channel launched outside the US in 2012, and is now in 118 territories, with more planned as Viacom attempts to get its penetration closer to the levels of Comedy Central and Nickelodeon.

Jill Offman, who oversaw the most recent international expansion of Comedy Central, is now in charge of the next chapter for Paramount’s overseas escapades as executive vice president. She is enthused by the plan in the US, and sees it as something that will be replicated internationally.

“I love Bob Bakish’s energy for this channel,” she says. “It’s about ambitiously wanting to make a difference in linear TV. What they’re trying to do in the US, and which is a huge opportunity internationally, is premium-popular.

“It’s premium content for really vast audiences, and that means it is a little more accessible, but with the same cinematographic values that Paramount is known for.”

Ultimately, the plan is to have a pipeline of Paramount Network shows on international feeds, though this won’t be possible for all premium series as securing them in the US has, initially at least, meant being flexible with rights.

Offman says Spain and Italy have been the most successful Paramount Channels to date, and sees



“We’ve got 118 channels and we’re going to bring them into alignment with the US”
Jill Offman

opportunity in the UK, Latin America and Eastern European territories such as Poland and Hungary, which have taken to Comedy Central.

With Bakish so keen on group synergies, it is likely Paramount Channel will ultimately become Paramount Network internationally too, though this will be a time-consuming and expensive process should it come to pass.

“We’ve got these 118 channels, and at a certain point we’re going to bring them into alignment with the US, and that raises the question of whether they would have the same name,” says Offman.

“As a Viacom person, I can say the closer they are, the better, so I’m hoping they have the same name. I imagine the channel we will see in 18 months to two years will be much further along the road than we can see now.”

Nat Geo at 20: Monroe's masterplan

National Geographic took its flagship channel international 20 years ago. Courtney Monroe, global CEO of the natural history- and science-focused pay TV network, tells Jesse Whittock about her vision to align the brand with big-ticket dramas rooted in fact and noisy, urgent documentaries

Twenty years ago, TBI interviewed Sandy McGovern as she oversaw the launch of National Geographic Channels internationally. On debut, the operation was a joint venture with NBC in the UK and Ireland, the Nordics and Australia, with programming mainly comprising acquisitions.

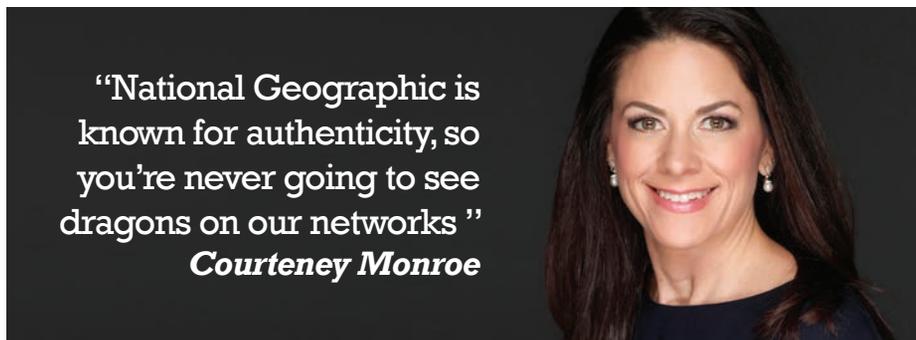
Two decades later, National Geographic Global Networks is now a majority-owned 21st Century Fox business in 171 territories and 45 languages with former HBO marketing guru Courtney Monroe in charge worldwide. Speaking to TBI at the Edinburgh International Television Festival, she says the strategy is to think bigger and more brand-defining than ever before.

"When I first joined I felt there was a disconnect in the content we were making and what I believed the expectation and promise of the brand are and should be," she says.

As a leading marketing expert by trade, Monroe knew Nat Geo scored extremely highly on public awareness and perception tests, but did not believe it was delivering on that reputation. "Transitioning to a job where I could oversee the storytelling was about syncing up the programming strategy with the brand," she says.

Monroe had been promoted from her role as chief exec of Nat Geo Channels US upon the November 2015 creation of Nat Geo Global Networks and National Geographic Partners, which combines the resources of the Fox TV business and the National Geographic Society's research and education, magazine, digital, books and travel expedition assets.

The changes weren't without pain, as the restructuring came at the cost of around 180 staff, mostly from the editorial side of the Society, many of whom headed to social media platforms to criticise Fox and voice fears that its business-



minded owners, the Murdoch family, would damage the image of the famous Yellow Border.

"Transition takes a long time," says Monroe. "We had no doubt of Fox's love in the brand. There were some naysayers, but James and Lachlan Murdoch, [then Fox Networks Group boss] Peter Rice and [Nat Geo Society chief exec] Gary Knell did a masterful job of reassuring everyone it was not going to be Fox News.

"We launched Leonardo DiCaprio's doc *Before the Flood* soon after, and if anyone needed convincing we were not changing that was it. It was, in fact, just the opposite."

Monroe had joined Nat Geo from HBO in 2012 as head of marketing, and has since led a strategy revolution focused on international commissions of scale such as DiCaprio's campaigning climate change doc, which was distributed free across the world and social media platforms, and upcoming natural history series *One Strange Rock*, and even scripted shows such as drama-doc hybrid *Mars* and anthology series *Genius*.

"We wouldn't have a prayer of competing in this market if we weren't pursuing the strategy that we are," says Monroe. "You really can't break through if you're not aiming for creatively ambitious projects with major talent attached. "The good news for us is

that people love the brand and there is a badge of honour that comes with being part of National Geographic."

To achieve these goals, National Geographic Documentary Films was created in order re-establish the business as a major player in the feature docs space that Monroe says "for some reason we had abandoned".

Endemol Shine Studios' Carolyn Berstein was drafted in lead scripted to establish Nat Geo as a name in Hollywood. "Scripted really is such a different animal, and you need someone really plugged in to Hollywood who knows how to tell narrative stories," says Monroe.

However, she warns: "We are never going to be an all-scripted network, or even majority-scripted – we'll have around three projects a year. We are being very selective and curatorial about the stories we tell.

"The first bar to meet is it needs to be, if not entirely fact-based, fact-inspired. Nat Geo is known for authenticity, so you're never going to see dragons in the networks, even though I love *Game of Thrones*."

Unscripted programming, which Tim Pastore leads from Washington and Hamish Mykura below him heads up in London, needs to be big in aspiration and design.

"We want ambitious, bold and different ideas that make sense to our brand – science and exploration," says Monroe. "We want provocative, urgent ideas about global issues. We're being very selective because we're making fewer shows overall, so when I greenlight I want to be able to say 'hell yeah, nobody else is able to do this'. **TBI**



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Starz vehicle

Chris Albrecht tells Jesse Whittock about the new look Starz business following its merger with North American studio Lionsgate, about his relationship with cable king John Malone and how OTT is making international business more viable



Chris Albrecht has a proponent of entertainment media consolidation in today's market, which is why he was a driving force behind North American studio Lionsgate's US\$4.4 billion takeover of US premium programmer Starz.

"What drove the deal was programming," he tells TBI. "We want as many talented people as possible to focus on bringing their best projects to us, and Lionsgate will mean more of them come."

Albrecht and his programming chief, Carmi Zlotnik, both point to the amount of material Lionsgate has access to as a studio, plus the company's knowledge of worldwide content trends. This, they say, will help Starz take on a more international profile.

Further to that, merging the Starz Worldwide Distribution team with Lionsgate's international sales operation offers upside.

"It is a huge library," says Albrecht. Lionsgate sales chief Jim Packer carries "a much bigger briefcase" than Starz did in the past, and moving top Starz execs such as Gene George into the Lionsgate fold means a deeper bench doing more business.

"We have more leverage in deals and are talking to new partners in new territories around the world," says Albrecht. "That's a real step up in terms of what we can do now. Scale allows us more opportunity to hold and monetise rights."

In turn, the increased scale will mean Starz takes a more aggressive position in terms of rights retention. "In the past, we've stepped aside to avoid the associated costs with taking more rights," says Albrecht. "Lionsgate gives us more opportunity."

Rumours of the Liberty deal first arose in 2014, a year after Starz span out of US cable business Liberty Media. With competition rising and SVOD players pushing up costs, attention turned to Liberty chief and veteran cable dealmaker John Malone, Starz's main shareholder.

In 2015, he acted, triggering an equity swap deal that placed him on the Lionsgate board. He then acquired a 3.4% stake in Lionsgate through Liberty Global, his international cable business, and a further 3.4% through his stakeholdings in Discovery Communications.

This all set the scene for *Orange is the New Black* producer Lionsgate to move for Starz, which remained on the block. In late-July 2016, Lionsgate announced the US\$4.4 billion acquisitions of Starz, whose international reputation had grown through original dramas such as *Power* and *Outlander*.

"Listening to John Malone is like listening to one of the great teachers," says Albrecht, who joined Starz in 2010 after making a name for himself running programmes at HBO. "He is the kind of leader who puts management in place that he believes in and lets them get on with running it, though he likes to keep a close eye on everything."

STARZ PUTS 'THE NEW JAMES BOND' INTO TRAINING

Carmi Zlotnik is putting a lot of pressure on the US premium network's newest series, *Black Samurai*. "We're trying to invent a whole new James Bond," says the Starz president of programming.

Black Samurai (WT) will see actor and hip-hop star Common playing US Army super soldier Robert Sand, who trains under a samurai master. After the sensei and other samurai warriors are murdered, Sand sets off on a worldwide revenge journey.

The highly stylised show will see Common and the Wu Tang Clan providing music, with action producer Jerry Bruckheimer overseeing production.

RZA, the martial arts-obsessed Wu Tang rapper, is producing through his Wu Films imprint, with Common producing through Freedom Road Production along with Jerry Bruckheimer Television and Andre Gaines (*Bill Nye: Science Guy*) of Cinemation.

It's not a production set up you might naturally expect to see, but Zlotnik says it is entirely representative of today's drama production process. "That's the modern world of television – everybody is running around with a little piece of the puzzle trying to find the piece that



matches to make a big picture," he adds.

The show is based on Mark Olden's novel series and a 1977 movie adaptation, with the plan to bring together art, drama, music and mysticism.

"I can't wait to dig into this character and the martial arts worlds of gun-fu, kung-fu, jujitsu and more," Common said upon its announcement in August.

Albrecht says entertainment is in an unprecedented period of disruption, something the famously media-shy Malone is keen to exploit.

"There's lots of disruption in the business, and linear companies have the hardest time with that, but we're in an interesting space: disruption equals opportunity," says Albrecht. "John is very interested in many different areas of US TV, plus he has many investments. He has been here for a very long time, and has been massively successful. He is very interested in the OTT space."

The new Starz-Liberty media empire is summed up nicely in the recently announced spy thriller drama *The Rook*. The series will air on Starz in the US next year, and at the same time, Liberty Global will feature the series exclusively on-demand across Europe, Latin America and the Caribbean on pay TV platforms such as Virgin Media UK. Lionsgate will distribute the series worldwide.

"The opportunity to build international scale is now entirely possible, and Lionsgate makes that even more possible," says Albrecht of the potential of the merged business.

In practice, Albrecht plans to expand the Starz brand through a mixture of distribution devices, including new launches for the SVOD service Starz Play and using Lionsgate's smaller subscription on-demand nets, which include the Kevin Hart-programmed *Laugh Out Loud*.

"The programme strategy has been targeting underserved audiences in the US, whether they are

African Americans, Latinos or the LGBTQ community," he says. "While maybe just one of those individually isn't enough of a business opportunity outside the US, there are millennials in the middle of the Venn diagram. If we can aggregate with great programming, there are plenty of possibilities." **TBI**

ALBRECHT ON...

Coproduction: Coproduction will still be an important part of what we do at Starz. We are good at it and we like it, and there are lots of opportunities to partner. However, they will involve more rights ownership going forwards.

Programme acquisitions: They give us the chance to fill in space on our 'plex' channels and adds tonnage. We're going to get more strategic in this space in future.

Starz's originals slate: We are going to ramp up as we see the opportunity on things available and things that are ready. The strategy is great for acquiring subscribers and then keeping them in the tent. We're going to need more than one every four weeks, which is roughly where we are now; be that hours or half-hours. We have to keep satisfying the demographic groups. We have to keep them at the centre and then continue to invest in growing the businesses.

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DISTRIBUTORS SURVEY 2017

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TBI has once again asked the world's top distribution companies to share their views on the issues that define their business today. In the following pages, we reveal how companies big and small feel about the major issues in the international sales industry

FINANCING: THE BIG ISSUE

Money is the big issue in international distribution right now. Nearly half of all those polled in our survey say financing and investment issues are the most pressing issue facing them and their businesses, regardless of their size and business model.

“The challenge is to acquire high quality content with less resources than the major distributors, in a heavily consolidated marketplace,” says Andrea Jackson of UK-based unscripted distributor Magnify Media, while independent distributor Damaso V. Santana adds: “It is difficult for a small company like mine to obtain financing.”

There is an exponential number of new platforms and, as a result, buyers on the market. This means negotiating terms, prices and payment methods has become more complex than ever before. With linear commissioners still slow to react to new projects, producers are increasingly looking to new markets and SVOD services such as



Netflix for commissions. The problem is this can mean signing over all international rights and cutting out the distributor altogether.

“Sometimes it feels like we have gone backwards,” says Karen Young, founder of specialist UK indie Orange Smarty, one of the fastest growing new distributors on the scene.

“PACT fought hard for production companies to retain their rights and now producers can be forced to give them away as they look to gain commissions from alternative platforms.”

“We are getting involved in the development and financing of content at an earlier stage so as to retain more control and rights exploitation options for the producer,” says Chris Bonney, CEO of rights at Cineflix Media, commenting on one solution to the IP acquisition.

The changing nature of broadcaster budgets is a worry to distributors

across the board. A worrying 31% say buyers’ budgets are worse than ever, with just 5.6% saying they are better. Continued ratings fragmentation and the corresponding drop in levels of lucrative advertising revenue is one explanation.

“Falling advertising revenues at commercial networks and pay TV are destabilising traditional primetime slots and by extension acquisition budgets,” says Passion Distribution CEO Emmanuelle Namiech. “Coupled with the migration of viewership to non-linear platforms, this has created a conservative, cautious environment.”

“Falling ad revenues at networks ultimately reduce the license fees for content,” adds Ian Lambur, consultant at The Jim Henson Company.

However, virtually all sales houses surveyed say having unique, premium content can solve almost every problem.

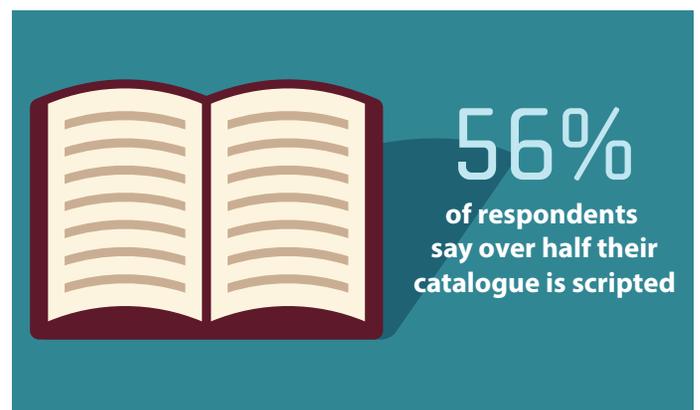
DRAMA’S GOLDEN AGE CONTINUES

Just as drama budgets have continued to rise, so has its growth as a distribution genre. Some 38% of our respondents say the genre had witnessed the greatest growth in the period between February 2016 and August 2017.

This was up 1% on the 2015 number and was 13% higher than the second-most popular genre this year, factual. When added to scripted comedy (7%), scripted content makes up almost half the votes.

Formats, including scripted and unscripted, remain steady at 11%, virtually the same as the year before, with those seeing growth in kids TV (live-action and animation) dropping from 21% to 19%.

The popularity of scripted programming and rising associated costs are leading to new market conditions that favour big investors. FremantleMedia COO Bob McCourt says: “With the rise in content costs, in particular in the drama space, there is no middle ground anymore.”



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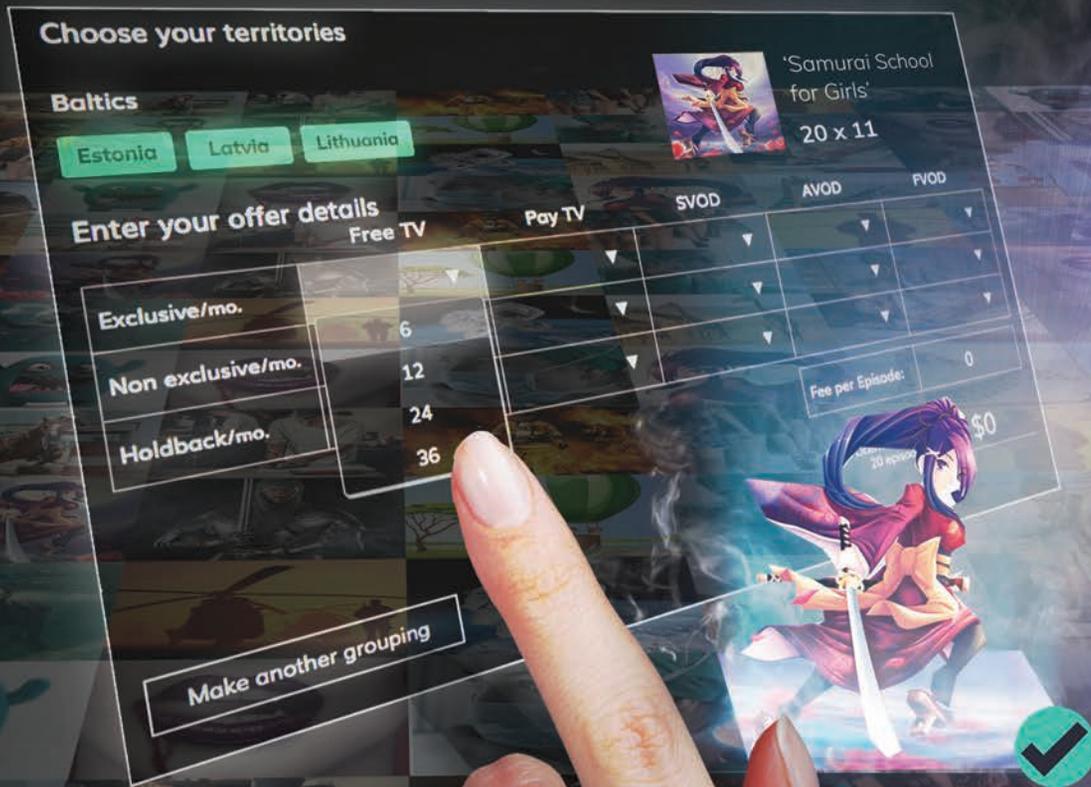
Free TV Pay TV SVOD AVOD FVOD

	Free TV	Pay TV	SVOD	AVOD	FVOD
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	36				

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THE UNENDING RISE OF SVOD

There is perhaps no single line of business making more of a change to distributors' business than subscription VOD services. This is the first time TBI had tallied responses from them since both Netflix and Amazon began offering global services, which has added a game-changing new option to sales houses' business models – the all-territory deal.

Some 42% see the rise of SVOD players are having had the biggest impact on international distribution, with many having different reasons for that. For Marie Conge at French kids TV distributor Go-N

82%

say SVOD services have been a positive influence on their business

International, sales houses are presented with a tricky choice. “With the rise of SVOD players, a distributor has now to decide whether and when it makes sense to sign a global deal with Netflix versus parcelling content out to local partners,” she says.

“This has increased competition for premium drama content, with an increase in prices paid in certain territories and platforms,” says Jane Millichip, managing director of Sky Vision.

FremantleMedia COO McCourt says windowing has become more complex “with linear channels wanting to hold on to SVOD rights” and “SVOD platforms are looking for longer holdbacks”.

Keshet International's COO and president of distribution, Keren Shahar, says SVOD is a double-edged sword: “On the one hand it's very positive, as the SVOD platforms create new sales opportunities for non-English series. On the other, this also creates an additional consideration on terms of a sales strategy and windowing.”

Despite the various issues thrown up the changing dynamics, an overwhelming number of respondents say SVOD services have been a positive influence on their business.

For Flame Distribution's Fiona Gilroy, SVOD buyers have “created new opportunities”, while Jonathan Tuovinen of Finnish formats company

Rabbit Films says it simply means plenty of new clients and new business.

Paul Dempsey, president of global markets at BBC Worldwide, says: “The rise of SVOD players has not only created a new home for content beyond traditional television, undoubtedly a good thing for us as our catalogue is much sought after, but their move into commissioning also creates new opportunities for content creators.”

Avalon Television's director of distribution, Isobel Hughes, points to another area of business from the subscription service players. “SVOD services have opened up new outlets for finished programme sales, which benefits distribution generally, but the downside is they have more or less killed the DVD market,” she says.

“Furthermore, SVOD services – namely Netflix and Amazon – have become more global, adding another windowing opportunity to individual territory sales.”

THE DATA DEBATE

Tension remains over SVOD players' steadfast refusal to release viewing, even to their production and distribution partners – they deal in subscriber numbers, which isn't much use to vendors.

With more and more services cropping up, many distributors and acquisitions executives are finding it tough to make informed decisions. However, this is creating something of a data-driven cottage industry around the world, as buyers and sellers look to double-down on effective content and get rid of that which doesn't.

Tech and new media companies such as Parrot Analytics and Prodera Networks are finding ways of tracking internet traffic and programme demand, and their influence is becoming more widely felt as a result.

Overall, half of our respondents say they are using a more data-driven approach to their sales strategy, with only 2.9% suggesting they use technology less than in the past to aid deal making.

51%

are using a more data-driven approach to their sales strategy



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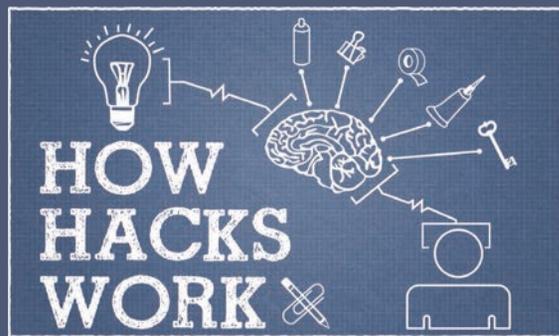
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HOLDBACKS HEADACHES

Netflix and Amazon are becoming increasingly bold in terms of their demands for original programming. With both now operating around 200 territories, they want significant holdbacks in order to greenlit shows.

Linear channels, meanwhile, want more and more episodes available stacked for their customers, and this is particularly true of the larger pay TV operators. Nearly three-quarters of our respondents say buyers want more stacking rights, with just 2.8% claiming they see less demand. Similarly, almost all say they've seen a marked increase in demand for on-demand rights in general.

"We must limit the rights granted, regardless of the demands we receive," says Maria Hernandez, director of international sales at Colombia's RCN. "SVOD rights clients want exclusivity, but do not want to pay the price for these holdbacks, and this presents a hurdle which on many occasions has been a deal breaker for many companies."

Keshet's Shahar sees similar developments. "Buyers are asking for more rights, both in SVOD and stacking, but are not yet necessarily willing to pay for them – they want more for the same money," she says. "With stacking rights growing, this has a direct effect on a potential second window SVOD deal."

Karen Young of Orange Smarty has had a different experience. "We have not seen an impact as they are paying more monies for these

additional rights," she says. "The key is retaining control of your rights and focusing on holdbacks."

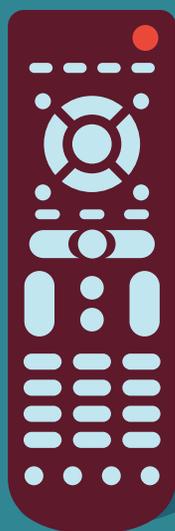
"Linear broadcasters are also developing their own SVOD platforms and wanting to retain more on-demand, SVOD and other consumer proposition rights for shows they own and buy," notes Entertainment One Television International president Stuart Baxter.

"We ensure we land the content we want by getting involved at an earlier stage with unattached producers, and invest as creative and financial partners, as well as through first-look deals and other strategic relationships."

For Belgium-based Studio100 Media, the battle is just beginning. "We have to find ways to keep these requests within a reasonable extent, especially in cases where stacking rights are not subject to an incremental license fee," a rep says.

"On-demand rights are highly significant on both sides of the equation," offers Passion chief Namiech. "The viability of windowing relies on the limitation of stacking, side loading, reverse EPG rights and more to give any single piece of content the longest lifespan."

However, the outlook is good, she adds: "There is a positive consequence of broadcasters' appetite for broader rights. By acquiring a variety of rights, the platform's investment is more significant and therefore so is its commitment to increase the profile of the show, with a view to build a brand or franchise."



89%
of buyers are
demanding
more
on-demand
rights



73%
of buyers are
demanding
more
stacking
rights

CONSOLIDATORS

The period we have surveyed (February 2016-August 2017) saw little in the way of major distributor consolidation. The previous year had seen the formation of the Endemol Shine Group and a deal to bring Zodiak Media Group and Banijay Group together. However, 83% still expect more market consolidation in the 2017/18 period.

A consolidated market sees fewer, but bigger players competing for content. However, boutique distributors claim it actually helps smaller businesses. "Market consolidation creates positive outcomes for smaller niche businesses," says Dominic Saville, CEO of factual-focused 3DD.

"You have to define your area of strength. As with any industry, if your content or IP is strong then you will have a good market share regardless of supermarket growth or consolidation. The goals are different for each: Market dominance verses content value."

Many pointed to a belief that the sitting in the middle of the market (classed as a company of 20-50 employees) puts distributors most at risk. "Smaller distributors have lower operating costs and can be nimble and diversify, while large distributors usually have the support of a broadcaster as a funder, and/or have many output deals," says David Hooper, founder of Espresso Media International. "However, mid-sized companies have neither the qualities of either and can be therefore very prone to cashflow issues."

Similarly, according to Lucas Bertrand of MoMedia, "The cost structures of medium-sized players make it difficult to compete with larger players and more nimble and low-cost smaller players. Mid-size players really need some hits to carry them through and avoid financing issues." Quintus Media's Gerrit Kemming adds: "The small ones are able to cooperate with the big ones. The mid size drowns."

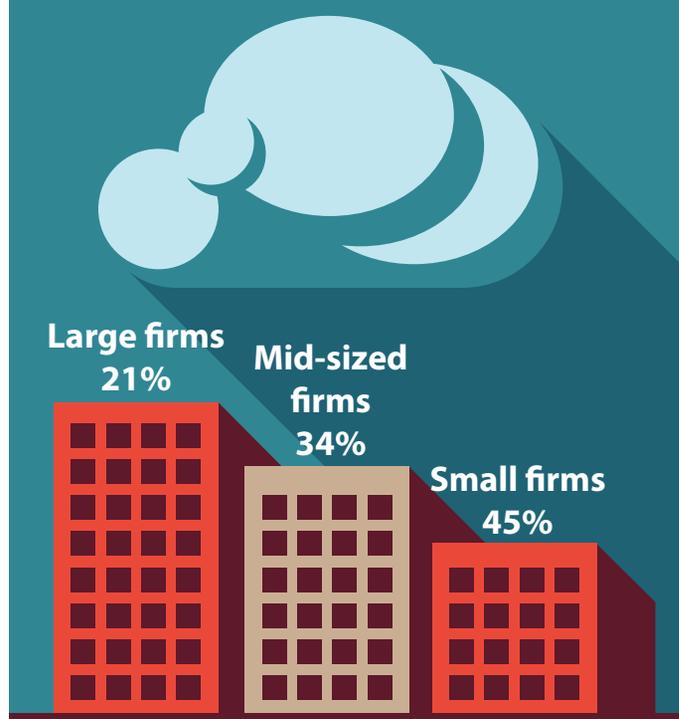
Cathy Payne, whose Endemol Shine International has one of the largest catalogues on the market, says: "Distribution is about the big and boutique, and no one wants to be in the middle ground where it is hard to compete. For a distributor to grow without any guaranteed product flow from in-house production companies is challenging."

Indeed, having associated prodcos can allow a distributor to bypass the rights fight and get their hands on content with much less risk. Among those polled, 61% are lucky enough to have production cousins in their stable, with the rest more reliant on third-party acquisitions.

Cineflix's Bonney offers a mid-market defence. "A minimum critical mass is required to manage the increasingly complex rights environment, to secure new content through deficit financing, and to have the necessary leverage with key global buyers such as Discovery and Netflix."

Despite all these threats to the middle ground, a majority believe small firms are most at risk from market conditions. A.P. Catarino from Brazil's Oca Animation says this is simply because "smaller means weaker".

WHICH DISTRIBUTORS ARE MOST AT THREAT FROM MARKET CONDITIONS?



Keshet's Shahar says: "It will become harder for small distributors to compete with the resources the large ones have to invest in content."

"It's important to be able to support shows with a substantial budget, and be able to mitigate risk by having the opportunity to invest in a large portfolio of shows," says eOne's Baxter. "Smaller firms have less ability to resist and stand up to the big SVOD players."

"Any distributor, from the smallest to largest, is at risk if they're not evolving to look beyond pure distribution, which is increasingly becoming a margin-challenged environment," says BBCWW's Paul Dempsey.

Tim Hegarty at the ACTF has a slightly different view. While he agrees all are threatened in different way, "The large distributors are arguably the most at risk if there's a downturn in the industry, purely because of the overheads involved".

John Kramer, CEO of LA's Rive Gauche Television, has a warning for all businesses. "All firms are at risk," he says. "Look at all the big mergers. Was that because all those companies were healthy?"

OFF TO MARKET

Results from our survey show just how important October's MIPCOM remains to the international TV market, with a whopping 97.2% saying it is a must-attend market. This is up from 75.8% in 2016.

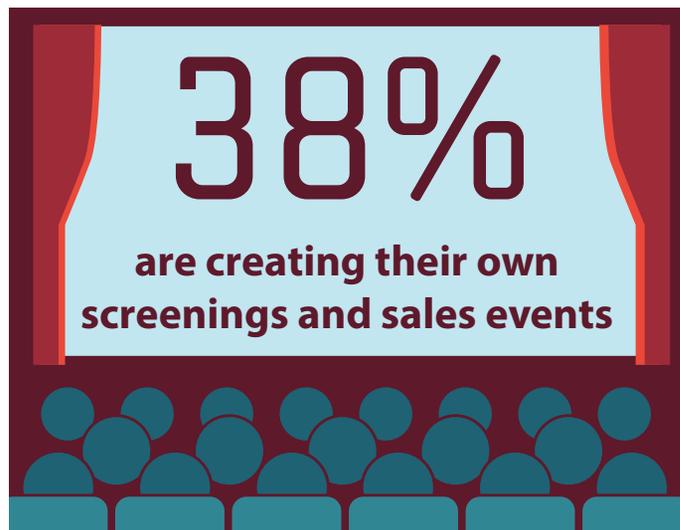
Interestingly, though many sources privately claim the need to attend the other Cannes market, MIPTV, is diminishing, there was slight year-on-year growth in favour of the event, up from 61.3% a year ago to 64.8%.

Few contributors say the need for face time with clients is any less important than in the past, and it will be interesting to see how the full launch of TRX's digital distribution platform affects the nature of dealmaking. For their part, the TRX chiefs have always positioned the innovative interface as a complement to markets, not a replacement.

"There's no substitute for the quality time that comes from face-to-face meetings with both broadcast and producer clients, and these markets produce a cost-efficient way to achieve this," says Cineflix's Bonney.

"MIPCOM remains a strong launch pad for Passion's portfolio for the following twelve months," says Passion's Namiech.

"MIPTV still works well for us, but its importance wanes as fewer buyers attend. Regional markets such as NATPE and Discop," one exec says.



Among the regional markets, NATPE Miami and the Asia Television Forum are both considered important, with the LA Screenings and Berlin International Film Festival also bringing in plenty of traffic.

Among the thematic events Kidscreen and Realscreen are the big markets, while the other noticeable trend is the number of companies launching their own screenings, with sales now considered a much more year-round process than the more cyclical nature of the past.

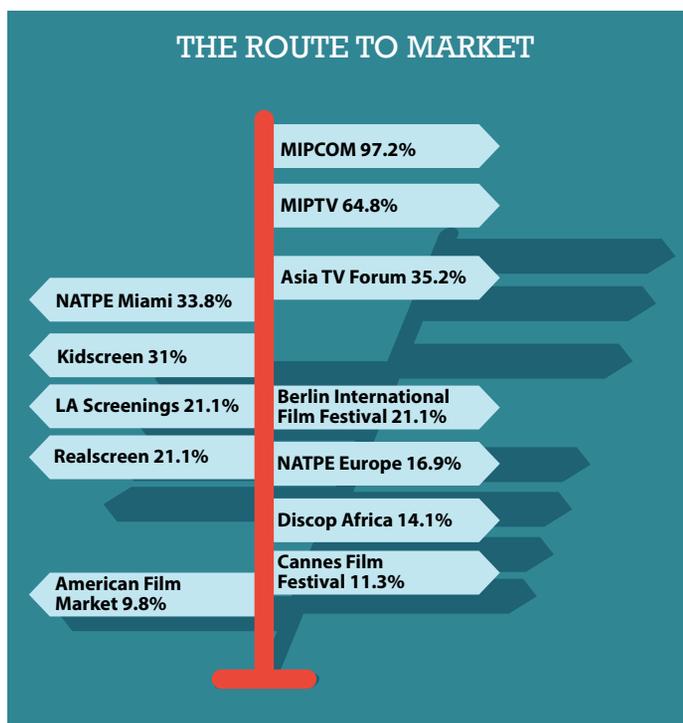
"We stage an annual Formats Festival in February, while we also hold drama screenings for buyers," says ITV Studios Global Entertainment managing director Ruth Berry.

"With our footprint of global offices, most of our discussions with buyers take place through out the year on an on-going basis, regardless of global events," says Luci Sanan, formats director at The Story Lab. "We do arrange events during the year for local and global market buyers to attend."

Henrik Pabst, managing director of Germany's Red Arrow International, makes the most of the company's local surroundings to a bid to entertain and entice acquisition execs. "We invite selected buyers to our annual Oktoberfest screenings, and run roadshows and territory-specific screenings and events throughout the year," he says.

Laurent Boissel of About Premium Content says his firm is holding "more screenings at new festivals", which ties in with the interest in Berlin and the Cannes Film Festival.

MIPTV organiser Reed MIDEM is hoping to tap into that trend with the launch of Cannes Series, the international drama series screening event that the city of Cannes is working with the events company to create, alongside investor Canal+.



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Interestingly, while the way distributors are approaching deals is clearly evolving, the more traditional routes to markets appear to remain the most important: free TV nets and pubcasters are cited as important



clients by most polled. The impact of subscription VOD players is again demonstrated, with 56.3% citing the likes of Amazon, Netflix and Hulu as key clients, but, surprisingly, thematic pay TV networks are a core focus for just 35.2%.

“We continue to sell to the clients we have worked with for many years,” says Julie Delaney of Starline Content. “We listen to their needs, resulting in repeat business.” For Tim Hegarty at the Australian Children’s Television Foundation, “Traditional TV still remains the most consistent and profitable option in the market”.

Dominic Gardiner of UK-based Jetpack Distribution is in agreement, saying traditional TV markets “still have the biggest budgets and robust measurement”. However, Reiner Moritz of Poorhouse International claims market conditions mean “windowing becomes more and more difficult as the public broadcast sector still holds out for exclusive territorial rights. Compromises are difficult to find and don’t work with pay services”.

Europe and Asia are providing distributors with the most business, with 32.4% identifying Western Europe as a fast growing region, 29.6% pointing to Central and Eastern Europe, 28.2% highlighting Southeast Asia and a whopping 47.9% seeing the combined China, Japan and South Korea area as a top buying region.

On the flipside, just 15.5% of respondents see North America as major growth region, with more (23.9%) identifying Latin America as a better market for new business. Central America, Southern Europe, and Russia and the CIS states are considered the least fruitful.

DISTRIBUTION IN 2018

Despite the challenges of an international market in flux, television programme distributors are mostly positive about the future of the business in the next twelve months. Nearly two-thirds expect an improvement in the market, with an overwhelming number understandably saying their own strategies will improve their lot.

Lots of distributors have invested heavily in IP ownership and expect to see this yield revenues, while Ruth Berry at ITVSGE also sees the local market expertise of her firm’s sales staff and agility as companies as increasingly important advantages.

Henrik Pabst points to Red Arrow making constant effort to “retune our internal workflows to mimic the reality of the market place”, while FremantleMedia’s McCourt says investing in a number of indie producers in recent years will make the difference.

Roger Persson of Sweden’s SunTower Entertainment and José Machado of Imagetica are among those aiming to draw more business from digital clients, while Jane Millichip of Sky Vision says having a strong slate of high-end drama and primetime entertainment will lead to increase sales.

Endemol Shine’s Payne says “distribution is a strong business for the right product”, while Shahar’s Keshet International is expecting a big rise in scripted programming, primetime entertainment and coproductions.

Smith at Orange Smarty says the future is bright thanks to early stage investments, but reality must also be considered. “There is still content available in the market, but some is overpriced and it’s about managing expectations and not over promising,” she says.

As for Chris Knight of Gusto Worldwide Media, well, he’s cutting out the middle man altogether. “We control all of our content and are pushing towards an over-the-top channel launch,” he says. “We will move into OTT and compete with our former customers.” **TBI**





DEAD AGAIN – A&E

Running time: 9 x 60' **Genre:** Reality

A true-crime series from iconic "Law & Order" producer Dick Wolf's Wolf Reality and Left/Right Productions, it's the compelling nonfiction A&E series about an elite team of detectives that re-investigates controversial/mysterious murder cases to confirm, or reject, the original verdict.



TOP 20 FUNNIEST – truTV 3rd Hit Season!

Running time: 49 x 60' **Genre:** Reality

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HELP! MY HOUSE IS HAUNTED! – UKTV *New!*

Running time: 12 x 60' **Genre:** Reality

From Zak Bagans, the creator and star of Ghost Adventures, the #1 paranormal show in the world, it's HELP! MY HOUSE IS HAUNTED!, the spine-tingling new series that focuses on everyday people who have encountered supernatural phenomena in their homes.

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TV's love affair with the People's Princess

Yearlong activities have taken place to mark the twentieth anniversary of Princess Diana's death, and the television industry has followed suit with a raft of documentaries and series to signify the landmark event. Kaltrina Bylykbashi reports on the ongoing influence of the late British royal



pic: Getty Images

Diana, Our Mother: Her Life and Legacy

A significant number of documentary shows covering almost every element of Princess Diana's life and death, from her relationship to her children to the conspiracies surrounding her untimely demise, were produced this year ahead of the twentieth anniversary of her passing on August 31.

Through this, the ongoing global appetite for the princess has proven strong, with territories worldwide choosing to purchase the programming throughout this year and viewership drawing significant audiences.

Universal appeal

The former Princess of Wales is undeniably one of the most recognised figures in the world. Audiences worldwide will not only remember where they were when news broke of her death, but also the sheer numbers that turned out to mourn her after her death, and the discussions and theories that have taken place on the topic since prove the fascination.

This universal appeal is what keeps Diana-themed content engaging decades after her death, according to Emily Elisha, head of factual at Banijay Rights, the distributor of *Diana's Death: The Search for the Truth*.

"Being such an icon, Diana's legacy remains as prevalent today as it was 20 years ago," she says. "The effect she had on so many people and the tragic way in which she died seems to have left an indelible mark on many of us. A public figure of this magnitude that seemingly died before her time will always attract media attention and public interest."

Global television markets certainly believe in her international appeal. *Diana, Our Mother: Her Life and Legacy* was one of the most watched programmes of the year in the UK, drawing in over seven million viewers for ITV on July 24. The show's distributor, London-based Drive, reported international sales on the eve of the launch to NDR in Germany, TV4 in Sweden, Mediaset in Italy and RTL in French-speaking Belgium.

Outside Europe, BBC Worldwide also acquired the doc for its BBC Lifestyle channel in Africa, as well as Poland. The territories were joined by Network Seven in Australia, Three in New Zealand and CBC in Canada.

"It's sold extensively to a range of territories," Lilla Hurst, Drive's co-founder, tells TBI. "It's a universal story. Everyone has heard of it and everyone has experienced the loss of somebody."

Diana, Our Mother...'s creators believe firmly that it's the universality of Diana's experiences that make programming around her appealing, more so than simply being a global figure.

Her story has captured themes that made her a relatable and affable character. She had relatable problems: affairs, single motherhood, difficult relationships with her in-laws and problems with self-image.

For Nick Kent, executive producer of *Diana, Our Mother...* her tale is mostly "a story of how you keep the memory alive of someone you've loved and lost".

When Kent's prodco, Oxford Film, got Diana's sons to discuss their journey of loss, it tapped into how the two British princes now celebrate their mother and also opened up discussions about how this memory is woven into their approaches to parenting, attitudes to work and daily motivations.

These themes appear to have helped to transcend borders when it comes to getting the doc viewed worldwide, and the sentiment is reflected across the gamut of producers and distributors currently working with a Diana doc (and there are many).

Cineflix Media distributed Finestripe Productions' *Diana: The Day the World Cried*. Chris Bonney, CEO of rights at Cineflix reports the programme had been pre-sold to the US, and has shopped to Australia, New Zealand, Sweden, Norway, across Asia, the Middle East and Africa.

Meanwhile, another distributor, Scorpion TV, sold Channel 4's *Diana: In Her Own Words* across 20 territories, including deals with NHK in Japan, Via 24 in South Africa and TVN in Chile. Many others have reported interest as well.

Opportunity for new audiences

A large part of the Diana doc audience will consist of those that were affected by the death of the former princess in their lifetime. However, a list of producers and those that have worked on these shows describe the intention and potential to also reach a new generation of viewers that may have never come across the story before.

"Twenty years is a large enough period of time for there to be more takeaways from her story and to tell her story to a whole generation of people who don't really know the full, remarkable life she lived," says Dan Wakeford, deputy editor at People Magazine.

He joins a string of individuals involved with a Diana doc that describe resurgence in appetite for the British royals in general. Hurst, for example, says that shows such as Netflix's *The Crown* have had particular influence in the recent growth of interest in the family among a younger audience.

People Magazine paired with US broadcaster ABC earlier this year to feature a four-hour documentary series, *The Story of Diana*, about the former princess. Wakeford says the show highlighted parallels from Diana's life with

today's obsession with celebrity, and that is why it's particularly relevant two decades on.

"Without Diana, many of the celebrities we cover now would not have evolved in the same way, whether that's Angelina Jolie or Kim Kardashian," he says.

This is the core of *The Story of Diana*, which explores the former Princess through the world's fixation with celebrity, and uses the combination of People and ABC's interviews, news footage and archival audio and video.

Cineflix's Bonney says that he has seen a high international demand in the market for commemorative documentaries in general, as they introduce millennials to topics they may not have experienced in their lifetimes.

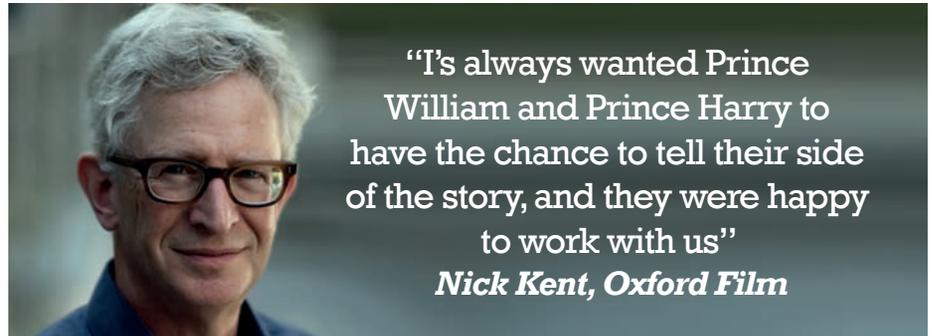
A crowded marketplace

While the benefits of creating Diana-related programming are clear, it means there are many productions taking place within a short space of time. Therefore, producers must find a fresh approach to the subject that goes beyond the obvious, which it has to ask questions and explore the topic in a novel way.

Despite this, when asked about the challenges of creating such programming, many producers and distributors refer to the natural pull of landmark titles, which they say often provides more of a competitive edge than regular programming despite many tackling a similar topic at once. "Landmark programming has a chance to stand out and can really bring

attention to a schedule because the subject is part of the national psyche and viewers have a built-in reason to tune in," says Elisha.

"Audiences often feel already invested in subjects they are familiar with and whether it's for reasons of nostalgia or to learn something new about it, the content is likely to have broad



appeal and potentially deliver higher ratings across a number of demographics."

It is why in 2017, like in many other years, a range of producers have created programming around landmark moments.

To commemorate 40 years since Elvis Presley's death, HBO has been working on a three-hour project named *Elvis Presley: The Searcher*, while NBC's Peacock Productions released *Elvis: Behind Closed Doors* and Rayday Media is selling Sky Arts show *The Seven Ages of Elvis*.

A&E's *L.A. Burning: The Riots 25 Years Later*, Showtime's *Burn, Motherf--er, Burn!*

and National Geographic's *L.A. 92* are among many in the US explore the anniversary of the LA riots 25 years ago. Then there is the BBC's 50-year celebration of The Beatles' Sgt Pepper album, a doc named *Sgt Pepper's Musical Revolution* with Howard Goodall, plus History is commemorating 80 years since the death

of American aviation pioneer Amelia Earhart with *Amelia Earhart: The Lost Evidence* and BBC Studios is making *Jane Austen: Behind Closed Doors* 200 years after the influential author's passing.

The fear of not standing out in the crowd certainly seems to be lost among these producers, and why shouldn't it when many have received such positive returns? Elisha says that was for the case of *Diana's Death: The Search for the Truth*.

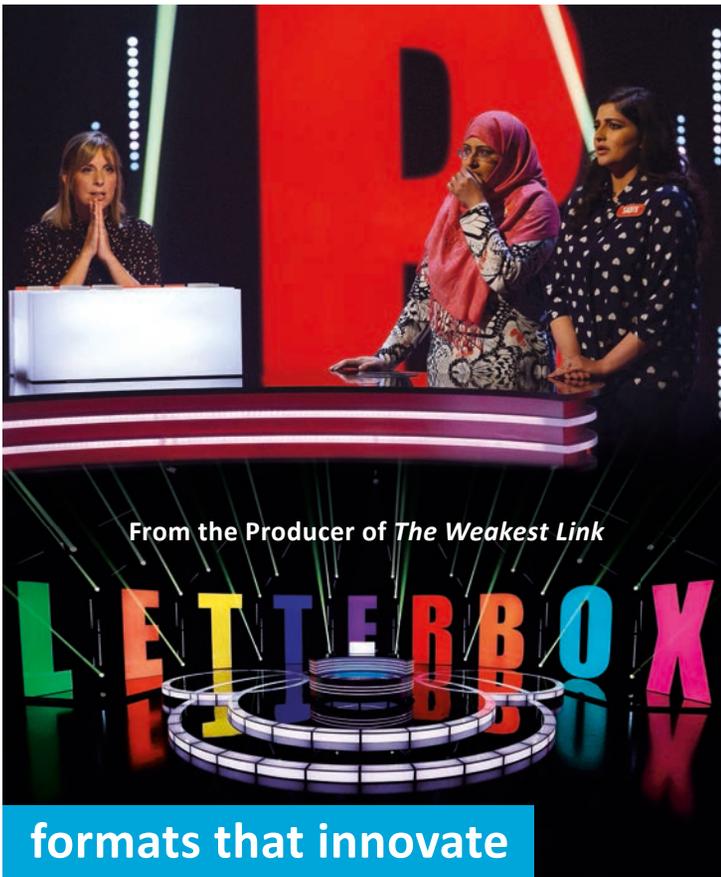
When it premiered on M6 in France, it attracted an audience of 3.5 million viewers, outperforming the channel's factual share by over 30% above its average.

Channel 4's *Diana: In Her Own Words* was one of its best performing shows of the year in the UK, drawing in 3.5 million viewers during its premier on August 6. The programme was also the broadcaster's best performing documentary in three years, according to UK-based distributor Scorpion TV.

Lorraine MeKechnie, who helped produce *Inside Dior* for Channel 4 this spring as well as *Diana: The Day the World Cried*, *The Day Kennedy Died* and *The Day John Lennon Died*, says pegging a TV proposal to an anniversary is not a passport to a commission, "But it gives potential financiers something to grasp and sell all around the world and in turn help to attract an audience too".

"The trick for us before embarking on any anniversary project is to get in early – both in pitching to financiers and approaching contributors," she adds.



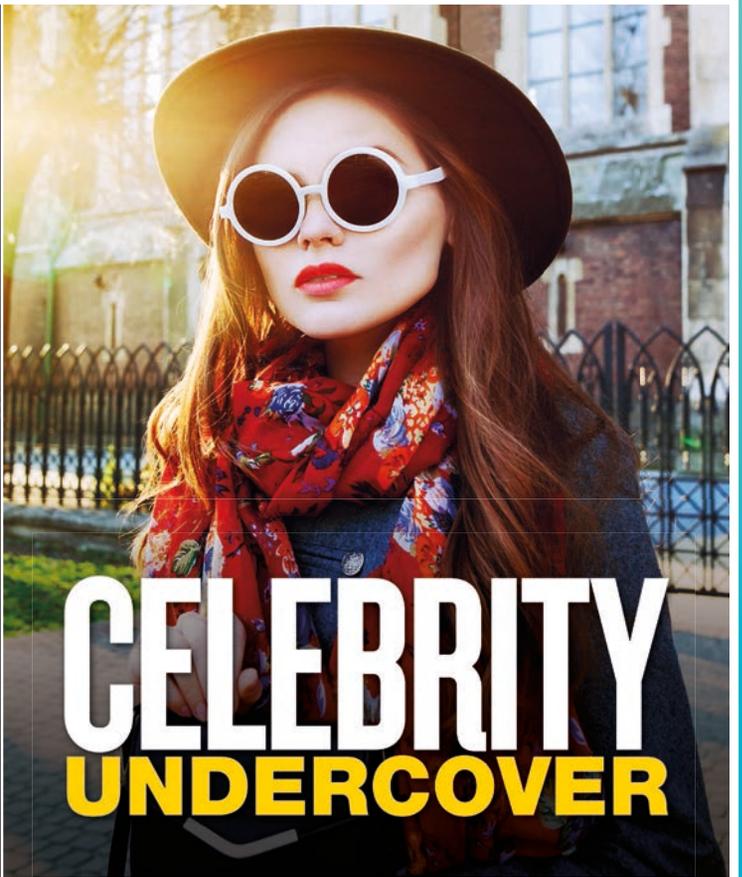


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The many faces of Diana

Part of the reason Diana documentaries have been so popular is the varied stories they can tell only after time has passed and the story moves on. Docs focusing on newly revealed footage, photographs and interviews have been particularly prevalent.

National Geographic's *Diana: In Her Own Words* uses recorded tapes of the Princess to tell her story, as does Channel 4's title of the same name, while PBS's *Diana – Her Story* combines interviews, archival material and 'rarely seen', filmed conversations.

Many other themes have arisen. Finestripe's *Diana: The Day Britain Cried* focuses on the day of her funeral and those that organised it. The prodco was joined by Smithsonian Channel's *Diana: The Day We Said Goodbye*, which also follows up on how the Royal family was treated post-funeral.

Another Smithsonian doc, *Diana and the Paparazzi*, explores the role the press took in her tragic death, while ABC's two-part series with People Magazine explores her role as



Diana, Our Mother: Her Life and Legacy

'the most photographed woman in the world'. Others have taken a dramatic take on her life. TLC's *Princess Diana: Tragedy or Treason* delves into the conspiracy surrounding Diana's death

and *Princess Diana's 'Wicked' Stepmother* looks at the strained relationship between Diana and Raine Spencer, the second wife of the Princess's father, Lord Spencer.

Diana, Our Mother... highlights why it was best to tackle the Diana topic decades on. Having already worked with the Royal Family on two major productions, including ITV's *Our Queen* in 2013, Oxford Films had built a trusting relationship with the family, which ultimately set them up to get Princes William and Harry on board exclusively for a conversation about their mother.

Our Queen at 90, which was based around the monarch's Diamond Jubilee and was one of the highest rated shows of 2016 for ITV with 7.1 million views on the night it aired, gave the prodco a chance to do unique interviews with the family, including Princess Catherine (Kate Middleton)'s first televised interview.

Kent says: "Later on, we had a meeting with everyone and during the course of that the subject of Diana came up. I'd always looked for an opportunity for the two princes to tell their side of the story and when we met up they seemed happy to work with us."

This ultimately led to a personal portrayal of the 'People's Princess' in a way that audiences had never seen before. It was from the direct perspective of her sons, included rare interviews, commentary from friends and never-seen-before photographs and videos coming directly from those closest to her. **TBI**

2017's landmark docs

Inside Dior

Event: Marking 70 years since fashion designer Christian Dior's death

Producer: Finestripe

Distributor: Channel 4

USP: The producers were granted exclusive access to Dior, a brand that guards its reputation and image fiercely, to film for six months

Insight: Halfway through filming, Dior appointed its new creative director, Maria Grazia Chiuri – the first female to head the company.

The Seven Ages of Elvis

Event: Marking 40 years since Elvis' death

Producer: Raydar Media/Fireball TV

Distributor: Raydar Media

USP: Uses Shakespeare's *Seven Ages of Man* to recount the life of a pop culture legend and explores how Elvis was shaped by his times and the world he lived in

Insight: Enables the viewer to enjoy the nostalgia of Elvis's life and music while also seeing it in the context of history

Jane Austen: Behind Closed Doors

Event: Marking 200 years since Austen's death

Producer: BBC Studios

Channel: BBC Two

USP: The show traces the houses Jane Austen lived in to show how much they influenced her work

Insight: Beginning her expedition at Stoneleigh Abbey, Warwickshire, presenter Lucy Worsley sets the scene by recreating a carriage journey the cash-strapped Austens completed to visit a recently widowed relative

The Nineties

Event: The fourth CNN edition of the franchise that looks at pop-culture and major news stories in ten-year increments

Producer: CNN, Playtone

Channel: CNN

USP: The show looks at decade-defining events that took place, including the explosion of the internet and Bill Clinton's impeachment

Insight: Tom Hanks and Gary Goetzman produced the series

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Vien's viewpoint

A+E Networks International executive managing director Patrick Vien tells TBI about the local and global opportunities for the US content group, which operates the History, A&E and C+I brands



There have been a number of management changes at A+E in the past year. What's the feeling like within the company? We are an industry going through transforming times and Nancy Dubuc heads the leadership team remarkably. The calibre of leadership required in a period of transformation raises the bar of expectation in terms of adjusting business plans, being nimble enough in the market place, and creatively being a magnet in the international market place so people bring their projects to you.

As someone who worked in music industry for a long time, I know we will be working through the climate and the bar of what it takes to move from one ocean to another for some time, but I can tell you the mood is excited, prepared and makes for a very stimulating environment.

Has the TV industry reacted better to digital disruption than the music business?

The music industry was hit by a digital tsunami, whereas the video content industry is being confronted by it, but at a pace that gives us an opportunity to manage the change. As much as people talk about cord cutting, our pay TV business is still absolutely vibrant. People have added other opportunities on the digital and SVOD side, and that has had an impact,

but it's not as though we're dealing with an industry that's upside down.

To be fair to my former colleagues in the music industry, the context is somewhat different. Although piracy remains a serious concern for us around the world, the speed that the audio file could be traded around the world was quite shocking. It came so quickly.

Are you looking at D2C offerings for the international market?

We are looking at the environment very carefully. We continue to mine our existing business very carefully with very strong success, but there is no question we are looking at how we can reach our audiences on a D2C basis. However, the jury is still out on how many D2C subscriptions consumers will tolerate.

On the linear side, launching the male-skewed Blaze network in the UK was an interesting move. How has that worked out?

It's a really strong, unapologetic and clean male factual brand, and you need that to survive. It has a wonderful irreverence and humour to the way it's being branded. If we stay true to the mission, Blaze is not an alternative play, but a strong British broadcasting voice. The team is doing a great job of that so far. It will take time, but we're very excited about it.

It also launched in Italy as a pay service in partnership with Sky, which was looking for a male brand. That's emblematic of the industry in 2017: something that's got an interesting voice in free in one area, pay in another, and who knows, maybe digital in another territory.

A+E has been consolidating international assets under Sean Cohan. Where are you in that process?

We've made good progress. Taking control of the business in Germany is a recent example of that. Is there more to do? Potentially. We're interested in operating businesses, but we have to be careful not to make that a unilateral statement because where we have remarkable partnerships that door is not closed.

What are the key projects you're pushing at MIPCOM and further down the line from your production arm, A+E Studios and other prodcos?

We've got a strong breadth of offering in premium content. We have TV movies, and we are a global leader in that category working with remarkable global talent; scripted television – we're in season two of *Six* with Olivia Munn joining the cast, *UnReal* is continuing, and *Knightfall* is launching of the History channel in the US; and we are launching *Blue Book*, which has Robert Zemeckis attached to it, at MIPCOM.

On the unscripted side in the US, A&E has been driving the creative momentum towards raising the bar towards interesting factual programming. The industry is watching what we've done with *Live PD* because it's on three hours on Friday and Saturday, and the excitement around that show has brought A&E to the number one slot in true crime during those times. **TBI**



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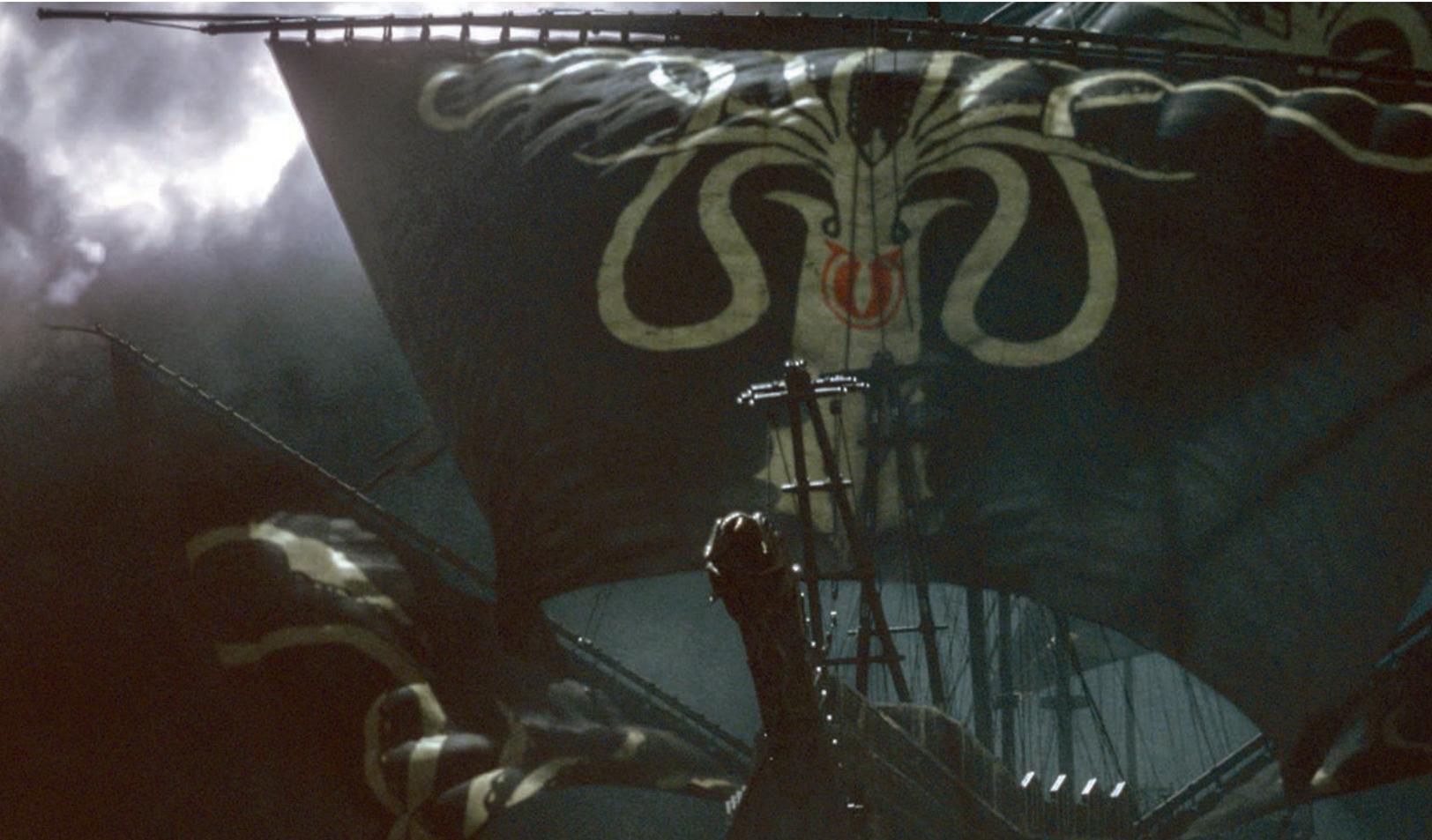
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Fighting the pirates

Illegal downloads and streams are directly impacting the TV business, but how far are they changing the distribution models of tomorrow, and what can be done to stop the flow? Robert Shepherd reports

The global TV industry has always faced major challenges. Whether it was uncertainty surrounding digital switchover, the ongoing lack of diversity on and off-screen, the amount of shows exceeding any individual's ability to watch them, or broadcasters having to fight for viewers' attention across multiple platforms, things have never been easy.

Then there is piracy – the art of making valuable content available for little money or nothing. Of course, it's nothing new, piracy has

been going on for years. Back in the eighties, it was commonplace for schoolchildren to obtain and swap Betamax and VHS tapes of the latest movie releases. The difference today is we are no longer talking about a handful of videotapes and DVDs of questionable quality doing the rounds. We are seeing links to pretty much any TV show you care to watch and in HD to boot.

To put this into context, every member of the supply chain is now haemorrhaging money like never before. The pirating of film and TV cost France €1.35 billion (US\$1.6 billion) in 2016 alone, according to a study by the French

branch of global consultancy and accountancy group EY.

“In the ‘old days’, piracy of content was focused more on physical [hard] goods and was facilitated primarily by mafia and other organised crime groups,” says Marianne Grant, a UK-based rep from the Motion Picture Association of America (MPAA).

“Today, things are different – mainly because of the internet. The sophistication, scale and continuing involvement of organised criminals, as well as the behaviour and preferences of general consumers, require that



Game of Thrones

we address piracy and work towards the goal of a responsible and safe internet using a variety of different tools and techniques. There is no single solution.”

Quite simply, anyone with internet access can visit a rogue site or use a perfectly legal device and download all sorts of high-quality content. Gone are the days of grainy footage and buffering. The end user is now even spared unwanted pop-up ads, and the interfaces are unashamedly slick.

“The new challenge is Kodi add-ons,” says Mark Nakano, senior director product



Dexter

marketing and partnerships at content protection company NexGuard. “People used to watch downloaded content on laptops and PCs, but the experience wasn’t great.

“Kodi add-ons are available through the Kodi application that can be run on a variety of OTT boxes such as Apple TV and Amazon Fire TV. The OTT boxes allow you to watch content on a big screen TV, and you can watch whatever you want and it’s good quality.”

David Briggs, chairman and co-founder of geo-data verification solutions and services provider GeoGuard agrees and says that what “astonishes” him is that a service like free and open-source media player software application Kodi, with its add-ons, is now very established for watching pirated content.

“Some data indicates that 15% of all UK households in January 2017 had access to a so-called Kodi box [from a December 2016 Redburn Research report] and in the US, it was 9% [according to a Sandvine Internet Phenomena report from this year],” he says.

“The implication of that research was that the 15% figure was effectively zero just twelve months before, so not only have we gone from zero to 15% household penetration, but one of the analyst reports said it made Kodi the most successful digital roll out in British TV history – something the industry wouldn’t want on its gravestone.”

Needless to say, not all TV genres are prone to piracy. In fact, it’s only live sport and TV shows, particularly big budget (and mainly

US-produced) dramas that have been targeted. The same was true back in 2010, when ABC drama *Lost* was reportedly the world’s most pirated show with approximately 5.94 million downloads. NBC sci-fi drama *Heroes*, Showtime’s *Dexter*, CBS sitcom *The Big Bang Theory* and Fox medical drama *House* helped make up the top five.

Still, some progress has been made in the piracy arena. England’s High Court issued a blocking order over the summer, which effectively criminalised the live streaming of English Premier League football. It’s now incumbent upon all internet service providers to shut down illegal links.

So why haven’t the courts meted out the same level of justice to other genres of TV? “The difference with live sport is that traditional TV is always being shown for free somewhere around the world,” Nakano says. “This makes it hard to completely restrict rights when it’s shown for free somewhere. With football, for example, it’s essential for leagues to protect the rights to the games.”

Ingrid Silver, media and entertainment partner lawyer at law firm Reed Smith, agrees and says that the issue is more about the difference in genres and the related logistics. “Sport is primarily of value in real time, so you are really aiming to target piracy at a particular point in time and around a specific event, which whilst being challenging, is at least a realistic aspiration,” she says. “Trying to deal with other TV genres and illegal downloads in particular,

is a lot more like playing ‘whack-a-mole’ – you can devote the resource and time to shutting one pirate source down, but that simply won’t stop others popping up.”

The current title holder for the most illegally-downloaded show, which has held the unwanted distinction for past five years, is HBO juggernaut *Game of Thrones*, owing to its popularity on peer-to-peer file sharing protocol BitTorrent and Kodi. Incredibly, its seventh season pirated more than one billion times.

The problem is also two-fold. Not only do the pirates have the freedom to post what they want and hide in the shadows, IP cloaking and virtual private networks (VPNs) make the end user all but uncatchable. Still, the authorities are more interested in catching the perpetrators than the consumers. So, while the industry chases it tail, producers through to distributors are taking a hit.

According to Lucas Bertrand, CEO of digital distributor MoMedia TV, producers are hit the hardest because they miss out on the most revenue, due to the nature of distribution deals and percentages.

“The more popular your show is, the more illegal distribution and consumption will occur,” he says. “This is both a problem of distribution and consumption. We all agree that if there is ubiquitous access at fair prices then consumption shifts from piracy to legal access.

“Therefore, those wishing to reduce access will see increased illegal competition, which can hurt producers and to a lesser extent distributor and legal platforms who have paid the fees for the programme.”

Nevertheless, Bertrand argues “on the flip side” it’s possible to use piracy data to help sell and value content where it is not available, but is being illegally downloaded or streamed.

An interesting point, but still it gets worse. Not only are the rights holders bearing the brunt of it, Nakano says piracy is also impacting creativity, and he points to evidence that some producers are starting to slow down.

“Carnegie Mellon University has published a study which looks at how piracy impacts creativity,” he says, “It shows that in parts of the US and the rest of the world where piracy is common, we see a correlation with the local

decrease in creation of original content. So, if you’re in a high piracy area, you might see fewer new shows.”

It is certainly impacting the UK indie sector, with some ‘stolen’ shows even appearing on more august platforms. Barry Ryan, founder of Free@Last TV and executive producer of Sky 1 comedy-drama *Agatha Raisin and the Quiche of Death*, says his shows are constantly being uploaded in full on YouTube as well as on numerous torrent sites.

“We can’t police the internet single-handedly,” he says. “Put up a paywall and the people will find some way of penetrating it – it comes with the territory. It’s like standing on every street corner in 1999 trying to intercept DVD sellers: it’s not going to happen. Make a show that people are happy to pay for, then invent another one. That’s the game.”

Ryan adds that platforms and channels either have a business model or they don’t. “They can’t expect producers to take the hit for their leakages,” he says. “Shape up or shift off.”

While millions of people around the world stream premium content for free, they probably



Orange is the New Black



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1: Download the 2017 Pay-TV Innovation Forum Report "[The Global Pay-TV Innovation Landscape: Industry Perspectives on a Year of Change](https://www.dtv.nagra.com/paytvif)" on [dtv.nagra.com/paytvif](https://www.dtv.nagra.com/paytvif)



do so thinking nobody is getting hurt. After all, pay TV broadcasters make huge sums of money from both subscriptions and advertising, so it could be argued they will not miss a few dollars here and there.

Quite the opposite says Alice Skeats, director of communications at British intellectual property protection organisation FACT, who says the problem is piracy is often thought of as a victimless crime. "From set designers, to make up artists, from producers to runners; the creative industries in the UK support more than 1.8 million jobs," she says. "These are people and their livelihoods at risk.

"Moreover, if content is pirated and made readily available online, it loses its value and production and distribution will find it increasingly hard to then sell the content to countries where it originally did not air."

What are the main players doing to stop piracy? Nakano admits it will take time, but says the industry is adding watermarking to identify where the leak is. "Studios are using it and it's a key part of the piracy tool chest," he says. "Combined with anti-piracy solutions, it can close all illegal streams. While we know you can never stop all pirates, you can force them into a corner."

FREDERIC GUITARD, VP OF ANTI-PIRACY SERVICES AT TV TECHNOLOGY FIRM NAGRA

As broadband and mobile internet becomes ubiquitous, the focus of piracy has shifted from signal theft to content sharing, taking a huge toll on rights holders and service provider revenues. In the digital world, content can be acquired from live broadcast streams or even from hacks into production servers, and the damage to potential revenues is tremendous. NAGRA estimates that pay TV providers alone collectively lose up to US\$7 billion per year because of content sharing.

Advanced cyberattacks that include ransomware attacks and stolen files being held for ransom have already affected media companies like Netflix, and most recently HBO, and although Netflix's production subcontractor paid the requested amount, the hackers leaked the content anyway. Leaked content, whether through hacking or piracy, erodes the overall value of the entire content production and distribution chain. These threats are extremely serious and must be countered.

However, Bertrand points to the lack of effective anti-piracy solutions across TV content distributors. "This is driven by a lack of understanding of what can be done to reduce illegal competition and a lack of pressure on distributors by producers."

There are other problems associated with piracy too, like when networks try to license their content when it's already available for free. Nakano says this has already become a problem.

"How do you compete with free?" he questions. "For example, if a US content owner is trying to license to Sky, why would Sky pay the content owner US\$1 billion when the show can be found for free on Kodi boxes? It makes

"If a US content owner is trying to license to Sky, why would Sky pay the content owner US\$1bn when the show can be found on Kodi boxes?"

Mark Nakano, NexGuard



it much harder for content owners to get a premium for their content."

Bertrand cites the BBC as a good example. Even though it is free-to-air in the UK, the content appears in the US on paid networks, who are in a position to ask how much the show is really worth if it is available for free. "It's also an example of how it hurts broadcasters, because the BBC will want to licence abroad and make money," he adds.

Amazon, Google and Apple all offering similar access and pricing to new and library content."

You could argue this already exists to a lesser extent, with SVOD services provided by the likes of Amazon, Netflix and soon to be

launched international OTT offerings from Disney and CBS.

Yet while the reasonable and simple pricing these services offer are a challenge to big pay TV broadcasters, the OTT services are being pirated themselves.

Indeed, Briggs says now that Netflix is in content ownership, it takes piracy more seriously – it recently became part of new media congloms coalition ACE (the Alliance for Creativity and Entertainment).

Netflix declined to put forward an official to talk about piracy, but a spokeswoman says the service's push to secure global rights and release all originals simultaneously to global members will help address piracy.

"There's been a notable reduction in piracy in countries where we operate such as the US and Canada where we have been the longest," she adds, referring to Sandvine Internet Phenomena reports on BitTorrent.

Still, Briggs says the current pay TV model has to change or face consequences. "For the studios, it's better if somebody is paying something, but they make around half of their money from content being sold exclusively," he says.

"Once you erode that exclusivity, you depress content prices. Sky is struggling maintaining its subscriber numbers, and if people are choosing to watch Premier League football and other content on Hotstar in India for US\$3 a month, or sign up to HBO Go from another territory, it's all going to amount to the same thing."

As the old adage goes, the pirates are always one step ahead – but their current modus operandi is redefining the pay TV model as we know it. Can the TV industry respond? **TBI**

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VOD – the story so far



UK-based Content Research Company recently updated The VOD Directory, a guide that provides analysis on more than 600 OTT services in nearly 200 territories. Here, advisor John Morris offers exclusive new insight into those driving the on-demand market, the models they're using, and how these vary by geography and genre

Three years after The VOD Directory first launched, its data shows the number of VOD services significantly spiking in three distinct years: 2007, 2011 and 2016. It's likely these spurts were underpinned by technical innovations.

Until 2007, Netflix subscribers ordered DVDs online, which were then sent out by post. In January 2007, the company offered customers the chance to stream 1,000 (of their 70,000) film titles online for the first time. VOD streaming had existed previously, but slow download speeds had produced interminable buffering and made it unattractive for consumers.

Netflix used their own version of a technology (HTTP adaptive

streaming) developed by others, which overcame these issues and prompted its 2007 VOD launch, which in turn became one of a clutch of other streaming services.

In the second peak year, 2011, the industry was about to agree a new standard for improving the picture and sound quality of VOD-carried content and in 2016 better broadband services and uptake of connected devices such as smart TVs led to a third spike.

Sliced another way, the data gives insight into how multi-system operators (MSOs), the pre-VOD suppliers of paid-for linear content to the home, reacted when the pure-OTT platforms appeared.

While both MSO-owned and pure OTT service launches peaked

in key years of technical advance, MSO VOD lagged behind, and was launched in smaller numbers, than its pure-OTT rivals.

This is not surprising, since MSO businesses were based on their own cable, satellite, or fibre delivery networks, and TV was only one part of a multi-play deal for consumers that leveraged operators' fixed assets (their delivery and customer management systems).

At the same time, these multi-play deals bound MSO customers to twelve month-plus subscription contracts – based mainly on a pay TV model rather than VOD.

Pure OTT operators, free of legacy network investments and with no expensive long-standing content supply deals, could offer monthly SVOD or no-contract transactional VOD as their business model from the start, providing consumers with a much more flexible and cost-effective alternative. As a result, millions cut the cord.

Subsequently MSOs have fought back by launching their own VOD services to deal with the flexibility challenge, and leveraged their ability to outbid OTT services for high-value rights (mainly sports and premium first-run movies) to stem the flow of cord cutters.

Counter-intuitively, some MSOs also now offer pure OTT services themselves such as Sky's Now TV service to leverage their investment in rights and to keep customers loyal to the overall brand, even if they do cord cut. The lag of MSO VOD behind OTT is therefore explained by a legacy business having to react to a start-up challenge.

Numerically, most VOD services around the world are pure or primarily OTT as opposed to MSO-distributed, with the US, UK, Germany and France leading (in the US, 96% of VOD services are OTT).

The only region to buck this trend is Central and Eastern Europe, where 60% are MSO-distributed services. There may be various explanations for this, including that the MSOs learned from the experience of more developed markets and (re)acted more quickly. Or it could be that consumer inertia may have been stronger, or there may be a less favourable entrepreneurial or regulatory environment in this region.

Who owns VOD?

The ownership of VOD services around the world is almost evenly split between the traditional providers of TV to the home (studios, telcos, and media conglomerates) and a host of new entrants, who have benefitted from the lower costs of entry to market.

These newer entrants include VOD-only brands such as the UK drama-focused Cirkus; kids content offers Hopster, Kinderkino, Azoomie and Ketchup; world cinema-themed Filmatique; horror service Screambox; producers or distributors such as Cinedigm's Docurama, Filmotech from the Spanish film producers' association, Balaji Film's Alt Balaji in India, and Docplay from Australia's Madman Entertainment; tech groups like Apple, Facebook, Baidu and Tencent; festivals including Comic-Con; and retailers like Fnac, Walmart, and Apple Mediamarkt; and of course, Netflix.

The economics of OTT VOD has also made it possible for public bodies, educational institutions, and publishers to launch their own services. Those to have done so include the Argentinian Institute of Cinema and Audiovisual Arts (CINE.AR Play), British Film Institute (BFI Player), Houghton Mifflin Harcourt (Curious World) and Axel Springer (One Net).

Still, the traditional suppliers of linear TV own some 54% of named VOD services. These include media conglomerates like Time Warner, Comcast

and its entertainment arm NBCUniversal, Sony Pictures Entertainment, The Walt Disney Company, Viacom, Sanoma, Bonnier, Egmont, Tata, Wanda and Astro; broadcast groups including Bertelsmann, Modern Times Group and HBO; and telcoms groups including Liberty Global, Vodafone, Com Hem, Telefonica, TDC and Singtel.

What's the business model?

Subscription VOD is the dominant type of service across all territories and genres, and a large proportion of these suppliers also offer TVOD too. Advertiser-funded VOD and free VOD are the least common forms of business model, though there are some regional and genre variations.

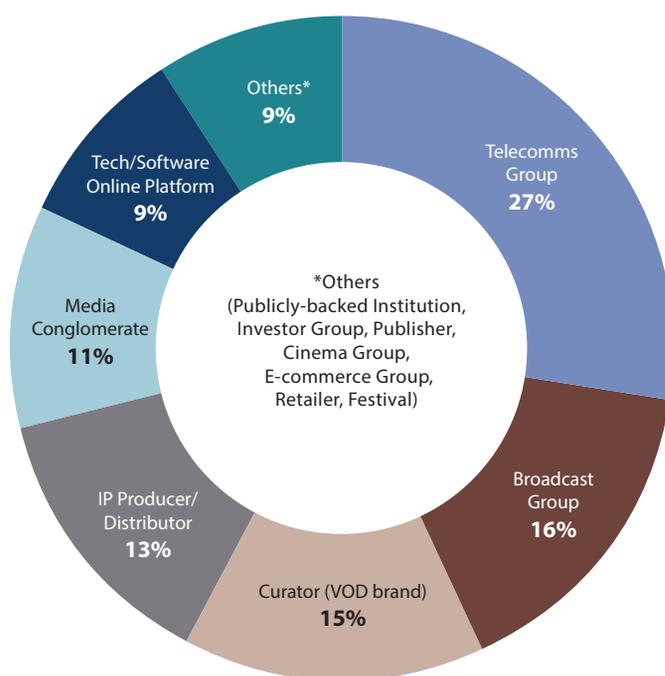
In North America pure SVOD offerings constitute 43% of all offers, but in Western Europe only 19%; and in Western Europe 30% of services are TVOD-only offers compared with 11% in North America.

This is probably because almost all of VOD in North America is OTT compared with 28% in Western Europe, where MSO-owned VOD dominates, and that European MSOs are in a better position to obtain and exploit sell-through rights due to their historic rights contracts and existing technical and customer-management infrastructure.

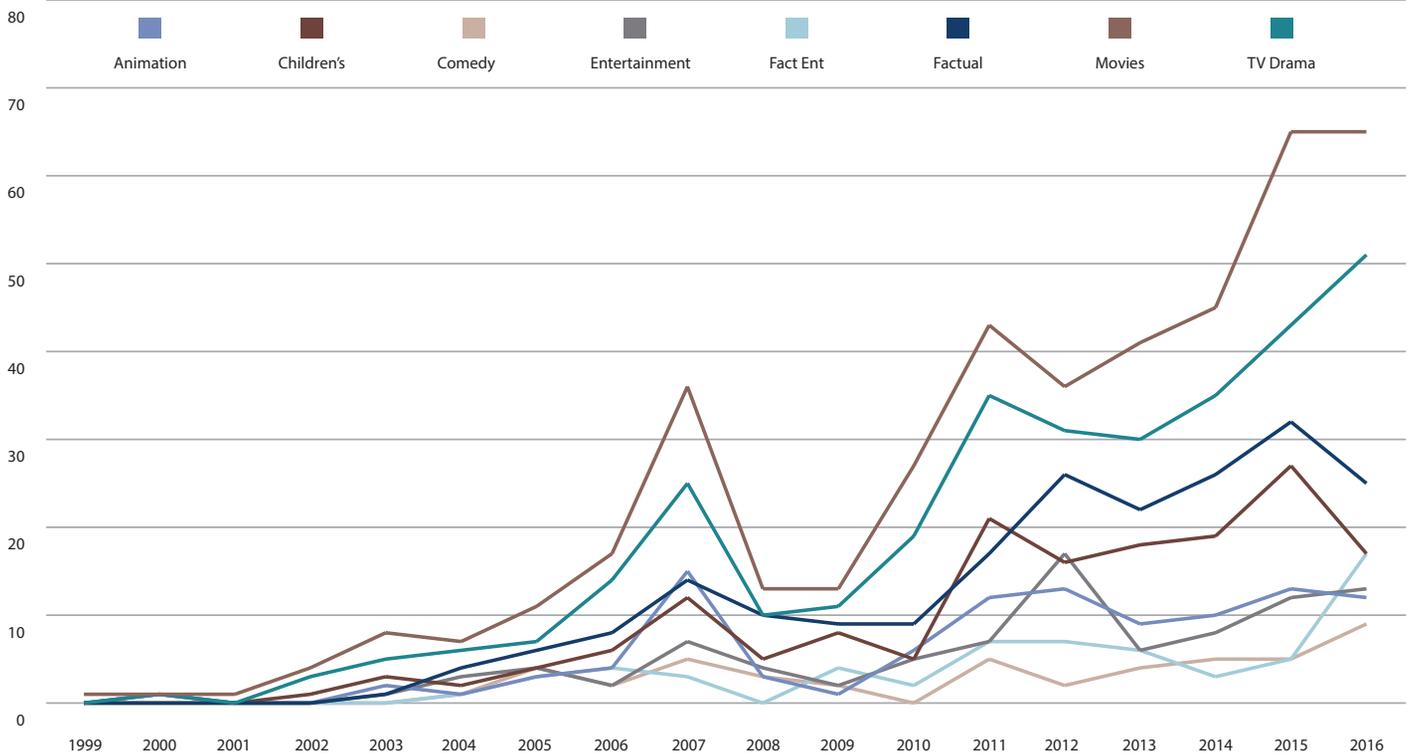
Free VOD, the least common type, tends to be offered by publicly-backed services such as the BBC iPlayer in the UK, or within a freemium model where simple sign-up gives access to a limited library (as a sample or loss leader), with the full inventory made available for payment of a subscription or one-off purchase fee.

There are also patterns by genre. Factual, comedy and factual entertainment are more likely to be offered as AVOD or FVOD than are movies or drama, pointing to consumer perceptions regarding value by content type.

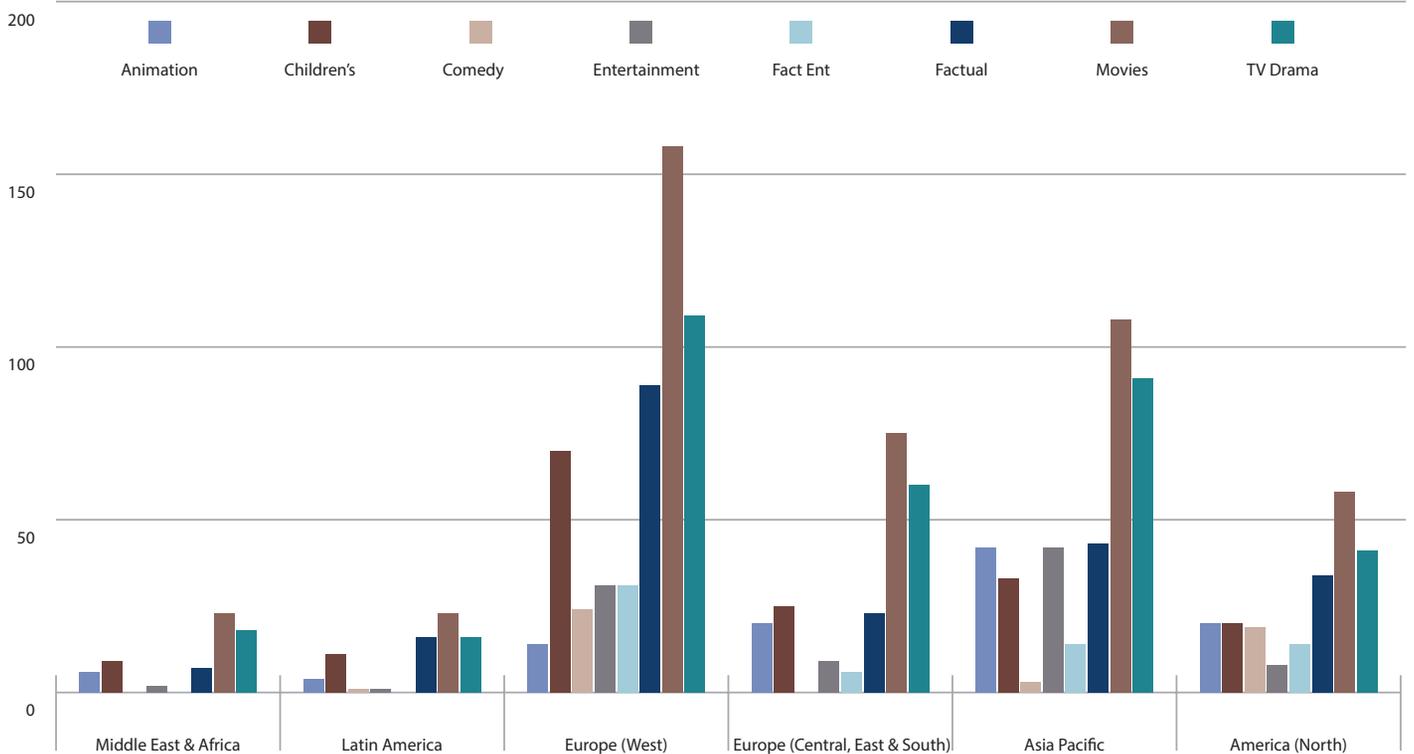
VOD SERVICES BY OWNERSHIP TYPE



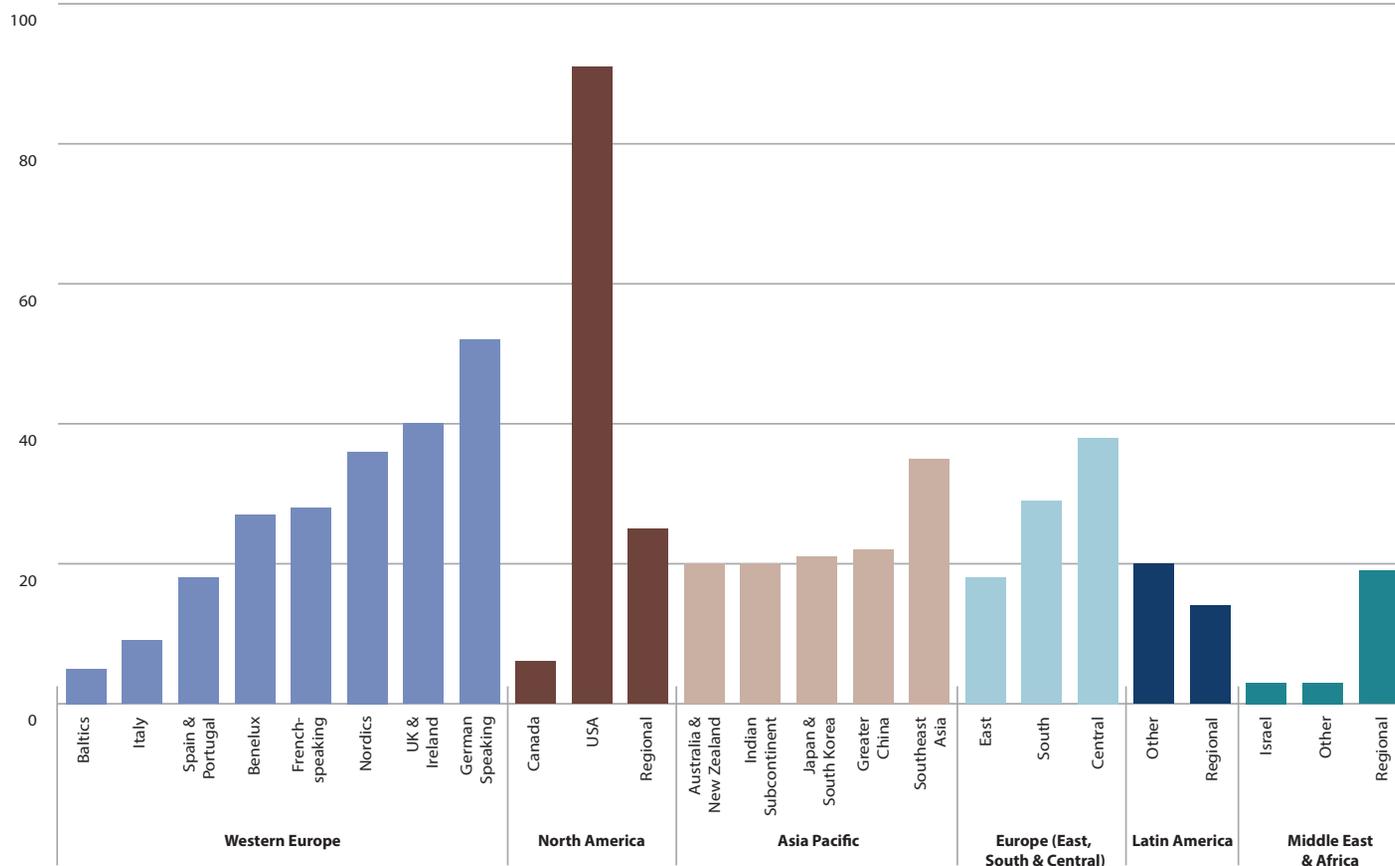
GENRES OFFERED BY YEAR OF SERVICE LAUNCH



GENRES OFFERED BY REGION



VOD SERVICES BY TERRITORY



Geographical spread

Western Europe has the most VOD services globally (36%) followed by North America (20%) and Asia Pacific (20%). The US leads in terms of services in a single country (15%), with the UK a distant second (7%).

Concentrations of services are also found in certain regions with a common or similar language, including German-speaking territories which has 9% of all services worldwide. The Nordic countries, which have providers such as Viaplay that tend to buy content centrally, contains 6% of the total.

Similarly, Spanish-speaking Latin America, where services normally cover more than one country in the region, has 34 providers.

What's on VOD?

VOD's programming backbone has always been movies, which have dominated since VOD pioneer Cinema Now's 1999 launch. Three-quarters of all VOD services offer movies, and over half carry TV drama.

Factual (35%) and children's (28%) have lagged behind, but have seen fast growth compared to animation/anime (18%), factual entertainment (11%), entertainment (16%) and comedy (8%).

As a reflection of consumer preferences this clearly points to the

relative value of certain genres above others. The studios and other owners of movie libraries and drama inventories have been the biggest gainers as VOD has developed, although they have also been faced with the dilemma of whether to license to third party VOD services or launch their own. Many have moved to the latter position as Disney's planned service and withdrawal of content from Netflix illustrates.

Geographically, Asia Pacific leads in entertainment and animation as a proportion of all genres offered on VOD in a region, while factual makes up a larger share of genres offered in North America (especially Canada), and Western Europe (especially the UK).

Latin America is also proportionately high in factual offerings and is the only region where it equals the number of TV drama services. Benelux has the highest proportion of movie offerings, with the Nordics, Southeast Asia, the UK, German-speaking territories and the US being the territories with the highest absolute numbers of movie offers (together representing 61% of movie offers worldwide).

German-speaking territories and the Nordics have the largest number of children's VOD services and the former also ranks highest in factual with 26 offers.

Further insights into this high-growth business, unlocked by data in the VOD Directory, are available from Content Research Company. www.contentresearchcompany.com **TBI**

Overseeing RTL



RTL managing director Frank Hoffmann tells Dieter Brockmeyer how Germany's largest commercial network has lasered in on original programming and where the opportunities lie

It's an interesting time for Germany's RTL channel, especially in regards to scripted programming. There will be six premieres of domestic series this autumn, a number that has rarely been hit before.

"It's an exceptional situation," says Frank Hoffmann, managing director of RTL and programme chief at Germany's largest commercial TV channel. However, it is likely to become a more common occurrence following a strategic decision in 2014 to invest in significantly more original content, including drama and comedy.

The channel remains at the top of German linear ratings charts, taking an average 11.5% overall share, ahead of Sat.1 (8.3%) and ZDF (8.2%). The likes of ARD, ProSieben and RTL II are further back still.

With this in mind, Hoffmann says that RTL has been developing closer ties to industry talent behind and in front of the camera. A series of recent workshops were scheduled under the monikers 'produced by', which was geared towards producers; 'created by', for writers; and 'presented by' for talent agencies. There were also several major pitches conducted in parallel.

As a result, RTL is in a position to go into production with tried and tested concepts. “We know what we are doing and hope our audience will react like our test audiences,” says Hoffman.

As noted, this season there will be a total of six premieres, including a new sitcom, *Beste Schwestern*, produced by Warner Bros. International Television Production Germany. Another new series is *Sankt Maik*, a series about a small-time criminal who by chance happens to become a priest. It is produced in cooperation with RTL Group-owned UFA Fiction.

There will also be the lawyer drama *Beck is Back*, about a single father who must return to work, and *Jenny, Echt Gerech*, following a strong woman who, without any knowledge of the law, causes a stir in a legal office.

Together with Sony Pictures, which is already producing RTL's successful series *Der Lehrer*, the channel is working on *Lifelines* (WT), which is about a paramedic who served in Afghanistan that now uses quirky and surprising techniques at work in a civilian hospital.

Hoffmann says it has been difficult to find an equivalent to the long-running action series *Alarm für Cobra 11*. “The series has a very special audience that's difficult to reach, but with *Bad Cop* [a new original action drama launching this autumn] we are giving it another try,” he adds.

Hoffmann believes that a good number of these launches will make it to a second season. However, he warns against being overconfident – just because *Der Lehrer* or *Magda Macht das Schon*, another recent RTL series success in the 14-49 demographic, performed well, it cannot be taken for granted that new shows will work from the start. “It took *Der Lehrer* five years to become the success it is now,” says Hoffman.

The new projects will require patience, therefore, with RTL strategically tied to significantly increasing the share of original programmes. “We are already working on scripts for new projects, but we are also well aware of the fact that failure is also an integral part of our creative business,” says Hoffman.

Two years ago, the UFA-produced event series *Deutschland 83* was a massive success internationally – in the UK it became the highest rated foreign-language show of all time. However, for RTL, audience shares were less than stunning. The new season, titled *Deutschland 86*, is premiering on SVOD service Amazon as an original.

Hoffmann stresses that RTL retains the right to air it exclusively on German free TV. He says there are various reasons the show, a coproduction with SundanceTV, didn't work as well on RTL, with one being that it was not scheduled in the best time slot in the pre-Christmas season.

The series was also intended as a project to boost RTL's reputation within the creative industry, and was seen by many local commentators as rather more suited for a public broadcaster. In that sense, “*Deutschland 83* was still a success for us”, says Hoffman.

“We are really looking forward to the second season, and there will be occasions when a second season in a different slot might well be a greater success than the first,” he adds.

Elsewhere, RTL is currently producing two projects based on the books of bestseller author Sebastian Fitzek, *Passenger 23* and *Joshua Profil*, both of which have scripted format potential.

The increased investment in local originals does not mean RTL is abandoning the international market, however, and series from overseas will retain a significant role in RTL schedules. “We are also open for coproduction partners,” says Hoffman.

On the flipside, event programming isn't a focus. Hoffmann says that a regular series that generates stable viewership is sometimes better than highly expensive one-time successes. “However, now it is more important to come up with good ideas and to build brands,” he adds.

RTL is also performing reasonably well in unscripted. “The entertainment show *The Wall* was a success and may have the potential to improve,” Hoffmann says. *Ninja Warrior Germany* did also extremely good numbers, to the extent they surprised of the entire industry.

Ratings for *Ninja Warrior's* current, second season during its difficult Saturday primetime slot are on par with major RTL shows that attract viewing shares of 20% in the highly competitive young adult target group demo.

RTL execs also believe they can create more surprises in unscripted, for example with the trendy athletic challenge format adopted from the international market, *Big Bounce*.

There was a time not too long ago when there were complaints about a lack of creativity, both locally and internationally, Hoffman says.

Today, he sees lots of new ideas and formats, citing the likes of NBC as well as Mike Darnell at Warner Horizon Television as driving development. “Everybody is striving to pitch and bring forward fresh ideas in order to come up with new shows that will launch no later than 2019,” he adds.

RTL brands still going strong include entertainment classics *Pop Idol* and *Got Talent*, even though some of their counterparts in other territories have passed their prime. Both shows come from FremantleMedia, which RTL owns as part of the Bertelsmann organisation.

Elsewhere on the schedule, age-old daily soap *Gute Zeiten, Schlechte Zeiten* (or *GZSZ* for short), which launched together with the channel back in the late 1980s, “is still performing strongly” says Hoffman, who adds its continued success is related to intense communication and hard work between RTL and the UFA production house.

“UFA management does a great job and the team is actually increasing the audience share of *GZSZ* after 25 years, and that's outstanding,” says Hoffman.

A linear TV soap upping its audience share in 2017. These are interesting times indeed. **TBI**



No other Latin American TV market has generated stronger international interest in its high-end TV drama production than Argentina in recent years. Emiliano de Pablos reports

Argentina is a recognised talent factory, and has taken advantage of the global migration of filmmakers to TV drama production. It boasts some of the most creative TV production companies in the Latin American region and highly qualified technical personnel, but a

limited market has traditionally forced producers to look abroad for business opportunities.

Mystery thriller *Epitafios*, a milestone hit series produced in 2004 by Buenos Aires' Pol-ka Producciones for HBO Latin America, paved the way for Argentine fiction and set the gold standard for the region's premium TV drama released on a pan-regional basis.

More recently, Argentine high-end TV dramas have taken centre stage internationally. Sebastián Ortega's *El Marginal*, a 13-episode drama coproduced by Ortega's Underground Producciones and broadcaster TV Pública Argentina, won a Series Mania award. Dori Media Distribution sold it to 30 territories, including Netflix in the US and Canal+ in France.

The growing international presence of Argentine talent explains why Brazilian TV giant Globo last year tapped Oficina Burman's founder Daniel Burman as showrunner of the pan-regional version of high-profile drama *Supermax*, Globo's first original production for the international market.

Suspense miniseries *La Casa del Mar*, produced by Nacho Viale at Buenos Aires' Storylab, became AT&T-owned OnDirecTV's first Latin American original series a year before that.

At the first edition of Spanish-language TV series coproduction forum Conecta Fiction in Galicia's Santiago de Compostela earlier this year, Argentina was the guest country, which was hardly surprising.

"The Argentine TV market is super-active when it comes to exporting content," says Geraldine Gonard, Conecta Fiction director. "Its producers have a coproduction culture, knowing fully well how to create high-end series that is closer to European TV fiction than the traditional Latin American telenovela."

"Its TV drama is bold and contemporary," says Jimena Hernández, head of content at Mediapro Argentina, pointing to local TV producers' "great ability to cover the entire demographic spectrum of the country, from children's content to premium fiction, through formats with a large audience impact".

"Argentina has great artistic talent, including very creative writers capable of adapting stories to different styles and tones," adds Michal Nashiv at Dori Media Group, which has been locally active in the territory for many years.

"In addition, the look of the cast is very universal, which allows for the sale not only of the format, but also of canned series worldwide."

According to research from The Wit, Argentina, with 52 fiction format series sold for international adaptation, represents the world's third biggest exporter of concepts, behind the UK and the US.

With 43.6 million inhabitants and 12.3 million TV households, Argentina's TV advertising market has fluctuated in recent years between 32% and 34% of the country's total ad investment, as the market continues to suffer the effects of the country's economic turbulence.

According to media intelligence firm Magna Global, the Argentine economy contracted last year by 2.3%, due to the devaluation of the peso and the rise of interest rates.

New developments

Viacom's US\$345 million purchase of top Argentine broadcaster Telefe from Spanish telco giant Telefonica in November 2016, forms part of the international media giant's global strategy – it also runs free-to-air operations in the UK (Channel 5) and India (Colors). That strategy is now to expand the footprint in Latin America.

Telefe has topped national free-to-air TV audience rankings over the last five years. In 2016, its 33.7% audience leadership share was propelled by Brazilian telenovela *Moisés y los Diez Mandamientos* and Underground-coproduced daily comedy *Educando a Nina*.

Telefe's main rival, El Trece, owned by media conglomerate Grupo Clarin, ranked second last year, with a 32% audience share, driven by Marcelo Tinelli's long-running variety show, *ShowMatch*.

The arrival of Viacom in Telefe is bringing new impetus to coproduction and distribution activities, sectors in which the company considers it has room for growth.

Early synergies include musical series *Kally's MashUp*, currently in production, a partnership of Telefe, Nickelodeon Latin America, Glee producer Adam Anders and 360 Powwow.

Having re-defined itself as a multiplatform producer, Telefe has faced up to the Argentine TV market's size limitations. As a producer, however, Telefe's roof is the world, so the company is focusing on the international

market for growth. "Coproduction has become a strategic need," says Guillermo Borensztein, international business director at Telefe, who aims to generate 180-240 hours annually in scripted copros.

El Regreso de Lucas, a suspense 'super-series' produced in Peru last year as a coproduction with local broadcaster America TV, became a sales hit in Latin America, and was acquired by Univision for the US Hispanic market.

"We are already working on our second project in Peru for 2018, *12 Segundos*, again teaming with America TV," says Borensztein. "In the same way, we are taking our first coproduction steps in Ecuador with *El Infierno de Eva*, a new super-series with Ecuavisa."

Borensztein says the strategy is to work with "leading local partners" similar to Telefe, as "we complement each other in the process".

"There is a shared bet to assume risks and raise the bar by generating original stories, with the right balance between melodrama and action, developed on location, and integrating two or more TV screens from the very beginning," he adds.

Miniseries seems to be the format that best suits Argentine producers when it comes to boarding more ambitious TV drama projects, in both artistic and budgetary terms.

"This is a format which, for several factors such as story, direction and realisation, allows for free-to-air TV to raise the bar," says Borensztein. "Also, it enables us to tell other types of stories and integrate other audiences that today



El Jardín de Bronce

consume this content on other platforms. They are projects that challenge us to go further with investment and take risks at this critical moment of transition in the industry.

“Hence the new business models with innovative window schemes that integrate cable TV, free-to-air TV and digital platforms.”



“The miniseries is a format which, for several factors such as story, direction and realisation, allows for free-to-air TV to raise the bar”
Guillermo Borensztein, *Telefe*

A current example is Sebastian Ortega-produced mini-series *Un Gallo para Esculapio*, a *Telefe* coproduction with Underground, Turner, Boga Bogana and pay TV operator Cablevision. The show, backed by the Argentine INCAA film institute, has become a huge TV audience and critical success in Argentina.

Directed by Bruno Stagnaro (*Pizza, Birra, Faso*), *Un Gallo para Esculapio* follows a man who comes to Buenos Aires from the province of Misiones to look for his brother, who was last heard of working for a criminal gang. He infiltrates a criminal organisation, hoping to find out more about his sibling’s fate.

Turner’s Latin American pay TV channel TNT released an episode of miniseries’ nine each Tuesday from August 15, with *Telefe* broadcasting them in Argentina on Wednesdays. The series is entirely available on Cablevision’s SVOD service, Flow.

Joint TV drama projects bringing together free-to-air, pay TV and SVOD operators, something which could not have been imagined a few years ago, has propelled the budget of premium Argentine TV series north of US\$300,000 per episode.

“There is complementarity in the product and rivalries [among coproducers] now take second place,” says Diego Andrasnik, production director at Pol-ka, a long-term driving force behind the Argentina film and TV production sector.

The new business model “helps [networks] to minimise risks and pay less for higher quality scripted TV products,” says Argentine

producer Juan Parodi, who launched TV drama venture *The Magic Eye* in 2016 by teaming with Telefilms, the most powerful independent film distributor in Latin America.

The *Magic Eye* coproduces *Telefe* bio-series *Sandro de América*, which is one of the most keenly awaited Spanish-language TV drama

such as *Hasta que te Conocí*, a Disney Media Distribution Latin America coproduction about Mexican singer Juan Gabriel.

“Since there was very strong prior interest in Latin America in *Sandro*, we risked preparing a product for the whole region,” says Parodi.

Last year, Argentina’s INCAA invested about US\$20 million to boost local TV production, including high-profile dramas. *Sandro* was given around 20% of its budget by the film institute in return for digital window rights in Argentina for four years after the series’ release. INCAA’s commitment to the Argentine TV sector covers up to 80% of some project’s budgets (in the case of web-series).

The newfound compatibility among key TV operators allows for bigger budgets and new partnerships. Grupo Clarín network El Trece, Turner, and sister companies Cablevision and Pol-ka sealed a long-term agreement to coproduce at least two high-profile TV dramas per year in May.

“Our coproduction plan dates back several years, but we did not want to do it before our SVOD service Flow launched [in November], in order to offer this content in the best ways that are more aligned to the new trends,” says Cablevisión COO Gonzalo Hita.

Miguel Cohan’s thriller miniseries *La Fragilidad de los Cuerpos*, which is about a young

series of 2018. Helmed by *El Marginal* director Israel Adrián Caetano the 13-chapter mini-series tells the story of the life of Argentine singer Roberto Sánchez, better known as Sandro, one of the early icons of modern Latin music. *Telefe* has free-to-air rights.

Sandro, scheduled to launch on the broadcaster in March, will potentially join a pantheon of hit bio-series produced by top Latin American TV players in recent times



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ICEX



Sandro de América

Argentine journalist who investigates the death of a train driver, kicked off the pact. Airing from June 7 on El Trece, *La Fragilidad* nabbed a 10.5 average rating and a 31% audience share before becoming available on Flow. It then screened on TNT across Latin America.

A second instalment from the deal, the twelve-episode miniseries *El Maestro*, debuted September 13 on El Trece, with a 13.5 rating. It focuses on a retired ballet dancer who continues teaching in a small neighbourhood school, and his relationship with his son and grandson.

Pol-ka, founded in 1994 by Argentine film and TV star and El Trece programming manager Adrián Suar, represents one of Argentina's most dynamic film and TV production houses, having partnered with Disney to produce hit teen series *Violetta*, which was broadcast in over 140 territories, and *Soy Luna*. It's also coproducing *Love, Divina*, featuring Argentine pop icon Laura Esquivel (*Patito Feo*), with Mexican TV giant Televisa and France's Federation Kids & Family.

Pol-ka's high-end TV drama *El Jardín de Bronce*, a missing-daughter procedural starring Joaquín Furriel, has become HBO Latin America's most watched scripted series in 2017. "Fortunately," says Pol-ka's Diego Andrasnik, "HBO welcomed us and gave all its support to this production which, to be told as it is, was one that couldn't skimp on resources."

A significant feature of the Argentine TV market is the strong penetration of pay TV services (81%), compared to the wider Latin American market (51%). One of the largest cable TV networks in the region, Cablevisión, controls 40% of the local market share, with 3.5 million subscribers. DirecTV has a 29% share.

"Generally speaking, cable has been very strong in the country," says Erik Brannon, analyst at IHS Markit Technology. "However, in the first two quarters of this year, there were noticeable declines in video subscription."

"In the recent history of Argentina we may be seeing something similar to what happened in the US in 2009: the recession forced many households to adopt lower-priced home entertainment alternatives as they had less money to spend on entertainment," he adds.

IHS Markit forecasts 1.74 million SVOD subscribers at the end of the year, and up to 2.76 million by the end of 2021.

Competition for premium content is heating up in Latin America's pay TV market, including Argentina, fired up in part by broadcasters' response to Netflix, which launched in the region in September 2011.

Edha, a 13-part fiction created by Daniel Burman, is Netflix's first original series in Argentina. Currently in production, the dramatic thriller is set in Argentina's fashion, modelling and music worlds.

Since last February, Burman's outfit, Oficina Burman, has formed part of Spanish TV giant Grupo Mediapro, also owner of Argentinian prodco Promofilm, which is reportedly returning to TV drama production.

"From Argentina we can tell globally relevant stories, local stories capable of touching people's hearts and moving the region," says José D'Amato, head of Mediapro in South America. "Differentiating in terms of technical, artistic quality and storytelling is the biggest challenge."

Action thriller *Estocolmo, Identidad Perdida*, coproduced by Storylab and Kapow, was the first TV drama acquired by Netflix in Argentina.

Storylab's Nacho Viale and Diego Palacio, the team behind *Estocolmo* and International Emmy Award nominated *La Casa del Mar*, are now developing new drama series *El Robo Imperfecto*, after entering an exclusive partnership with Echo Rights.

The ten-part crime thriller follows a detective on a transatlantic investigation, discovering the sinister backdrop to a series of curious thefts. For Laura Miñaro, Echo Rights' director of coproduction and scripted, *El Robo Imperfecto* is a "natural coproduction between Argentina and Europe".

Echo Rights, a Scandinavia-based distributor whose current catalogue has a large number of Turkish telenovelas, is currently opening to more TV genres. "In Europe we are interested in producers like Storylab, which has the capacity to generate pan-regional interest in Latin America," Miñarro adds.

Volume turned down

Challenges still remain for the Argentine TV market. "There is a boom in the quality of our scripted TV, but the production volume has fallen around 30%," laments Magic Eye's Parodi.

"We still have a lot to do in terms of competitiveness, finding intelligent solutions to the new dynamics of the TV market," adds Pol-ka's Andrasnik. "The industry actors – networks, producers, unions – must not eat each other up."

A new law approved by the Mauricio Macri government will enable all telecommunications companies to offer cable TV services in Argentina from January next year. This could help to boost local TV market investment, tapping powerful players such as Telefonica's Movistar or Carlos Slim's Claro.

Perhaps telcos will provide a new boost for Argentina's growing talent factory. **TBI**

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Contacts: Beth Stevenson, Founder; Leslie Miller, Head of International Distribution; Stan Hum, VP of Business Development; Philip Karlberg, International Sales Manager



Ponysitters Club Episodes 20x22'
Genre Kids/Family **Synopsis** A live-action tale of compassion, animal care and friendship, Ponysitters Club explores the intersection of life on a horse rescue ranch with modern kid life.



A Witches' Ball Episodes 1x90' **Genre** Halloween/Kids/Family **Synopsis** Follows 12 year old Beatrix as she becomes an official witch. Spooky adventure A Witches' Ball promises jealousy, friendship and magical enchantment.



Santa's Castle Episodes 1x90' **Genre** Kids/Family **Synopsis** Based on L. Frank Baum's collection of Christmas tales, Santa's Castle is a playful festive treat involving the kidnap and rescue of Santa by mythical creatures.

HOT PROPERTY PLUS: Q&A WITH BETH STEVENSON

Tell us about Christmas telemovie *Santa's Castle*, and what makes it an interesting acquisition for buyers.

The fun, race-against-the-clock narrative of *Santa's Castle* (1 x 90') fuels the film with adventure and excitement, while the efforts of Santa's team to rescue him and deliver presents for Christmas bolsters the story with warmth and joy, making it essential viewing for the festive season.

Where do you expect the series to land and what rights do you have for distribution?

We hold worldwide distribution rights for *Santa's Castle*, and with family telemovies being a staple of Christmastime viewing, we look forward to bringing the festive fun to broadcasters at MIPCOM 2017.

How are family telemovies performing for your clients?

Family content has been working very well on the new digital services. It's led to a much higher demand for kids' movies, especially ones that the whole family can sit down and enjoy.

What other shows will you be promoting at MIPJunior and MIPCOM?

We also bring the brand new animal-loving series *The Ponysitters Club* (20 x 22'), which follows the adventure of five kids who help care for rescue horses at a ranch, as well as fun-filled Halloween film *A Witches' Ball* (1 x 90'), which is set to launch on Discovery Family across the US and Latin America in October 2017.



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One World Kitchen Episodes 82x30'
Genre Food Series, 4K, UHD **Synopsis** With 320+ webisodes, delicious recipes, and stunning photography, this series explores international cuisine: Italian, Indian, Thai, Argentinian, Japanese, Cantonese, Lebanese, and Greek.



Flour Power Episodes 13x30' **Genre** Food Series, 4K, UHD **Synopsis** Set in a retro-style kitchen, the lovely host inspires viewers with simple to extravagant baked treats. Accompanied by 39 recipes, webisodes, and food photography.



The Urban Vegetarian Episodes 15x30' **Genre** Food Series, 4K, UHD **Synopsis** An entertaining and stylish series about vegetarian cuisine. This series is accompanied by 45+ recipes, webisodes and beautiful food photography.

HOT PROPERTY PLUS: Q&A WITH CHRIS KNIGHT

How is Gusto uniquely positioning itself in the lifestyle market?

Gusto owns over 500 hours of quality programming and we're producing about 100 hours of original 4k content per year. We offer a turnkey acquisition package for all 4K programs, which includes formatted episodes, exclusive webisodes and original recipes with digital artwork.

You continue to see success with *One World Kitchen*. What's the secret ingredient?

Food is the one true global language, and that's what *One World Kitchen* celebrates. It showcases cuisines from nine different countries, presented by engaging and knowledgeable hosts. And recipe redemption on our digital platforms is extremely high – which means viewers are downloading recipes, creating a powerful long-term relationship.

Why set *Flour Power* in a retro kitchen?

Flour Power is all about the joy of baking, and we wanted to do a baking show where that really comes across. That's why the whole look, from the set, to host Jessica's wardrobe and hair, to the butter dishes, is super-stylish, colourful, and full of whimsy.

How does *The Urban Vegetarian* capture the zeitgeist around vegetarianism?

The Urban Vegetarian isn't about trying to convince anyone to be vegetarian. You'll notice that our fashionable host Desiree never says the word "vegetarian." It's about highlighting beautiful, delicious plant-based dishes that everyone – even carnivores – want to eat. And we've set it in a stylish and urban environment.



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The Private Lives of the Monarchs
Episodes 5x60' **Genre** History
Synopsis The Kings and Queens of history were just human beings with the same ticks, foibles, bad habits, weaknesses and needs as the rest of us.



How Hacks Work **Episodes** 30x30'
Genre Science & Technology **Synopsis**
 This fun factual series looks at the best, worst and weirdest ways to solve your problems, using footage from the internet.



Murder Made Me Famous **55**
Episodes 6x60' **Genre** Crime & Investigation **Synopsis** Documentary series that examines killers who gained notoriety when their crimes generated intense media coverage and made them household names.

HOT PROPERTY PLUS: Q&A WITH PAUL HEANEY

What makes Private Lives of Monarchs a series that networks should consider?
 This series taps into our fascination with Royal History and lifts the lid on the sometimes not so glamorous day to day lives of some of history's most famous monarchs. The minutiae of their lives can be more fascinating than the big important stuff! Ratings appear to be strong for regal programming, perhaps boosted by Netflix' *The Crown*. Our own 8 parter on The Queen, *Elizabeth* launches at MIPCOM and will be the 'definitive guide'.

You have an expanded history slate – has there been an uptick in demand for the genre?
 The demand for history programming remains constant but the most successful series find a unique way in. *Hitler's World: The Post War Plan*, for example, investigates the very real plans the Nazis had for a Nazi ruled world whilst *Wartime Crime* looks at how some of the most sinister criminals profited from the chaos of a world at war.

Tell us about your popular science slate for MIPCOM
 The common themes of all of our science series is connected by broad appeal. The subject matter needs to be universal. *How Hacks Work* for example takes inspiration from the online world and *World's Wildest Weather* uses UGC and experts to explain the science behind the world's most extreme weather. *World's Wildest Flights* taps into other obvious universal fears

TCB has done well with true crime series. How is the genre holding up and what are you launching in Cannes?
 We are building our true crime slate with returning series such as *Murder Made Me Famous* (now 30x60) as well as new titles such as *Confessions of a Serial Killer*, using actual voice recordings to approach subjects in a different way. The crime tv viewing public is very discerning so we have to respect their wishes for content to be real and well made.



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Story of a Girl **Episodes** 1x120' **Genre** Movie **Synopsis** When an explicit sex video of a 13-year-old hits the internet, her teenage life is changed forever in a coming-of-age drama about the power of "story."



Michael Jackson: Searching for Neverland **Episodes** 1x120' **Genre** Movie **Synopsis** What really happened to the King of Pop? Who better to ask than two men who never left his side during his final days – his bodyguards – whose book is the basis for this movie.



Cocaine Godmother **Episodes** 1x120' **Genre** Movie **Synopsis** Catherine Zeta-Jones stars in this true story about the twisted life of Griselda Blanco, who was known as the "Cocaine Godmother" and was a mentor to protégé Pablo Escobar.



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Stand: PC.130



Liar **Episodes** 6x60' **Genre** Drama/Thriller **Synopsis** A six-episode psychological thriller that follows Laura and Andrew as their seemingly innocent date unravels into a complex web of deceit that neither could foresee.



Escape **Episodes** 4x60' **Genre** Factual Entertainment **Synopsis** Highly skilled engineers are put into a catastrophic scene and left to find a way out. They must generate their own power and make their own shelter – but they can't just survive, they must ESCAPE.



The Undateables **Episodes** 5x60' **Genre** Factual Entertainment **Synopsis** This award-winning series follows singletons with a disability looking for love, exploring the realities of dating in an image obsessed world with snap judgements and first impressions.



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Deadly Australians Episodes 4x60' 4K & HD **Genre** Nature, Wildlife **Synopsis** Take an up close and personal look at the secret lives of Australia's most notorious killers, including the world's most venomous snakes, deadly jellyfish and monster crocs.



Crazy Beautiful Weddings Episodes 10x30' HD **Genre** Lifestyle **Synopsis** Your love story isn't the same as anyone else's. Why should your wedding be? Lynzie Kent—the "anti-wedding" wedding planner—creates unique and jaw-dropping celebrations.



Broke and Famous Episodes 10x60' HD **Genre** Factual Entertainment **Synopsis** From Michael Jackson to Johnny Depp, the extraordinary stories of stars who made - and lost - fortunes beyond their wildest dreams.



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Burden of Truth (CBC) Episodes 10x60' New **Genre** Drama **Synopsis** Starring Kristin Kreuk (Smallville) as ruthless big city lawyer who returns to her hometown for a mysterious case that will change her life forever.



The Other Guy (STAN) Episodes 6x30' New **Genre** Comedy Drama **Synopsis** Created by and starring award-winning comedian Matt Okine as AJ, a newly single man, navigating the complexities of modern dating.



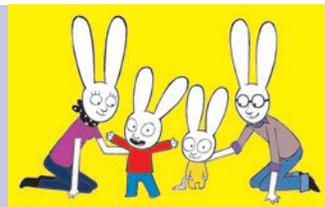
ICE S2 (AT&T Audience Network) Episodes S1: 10x60'; S2:10x60' **Genre** Crime Drama **Synopsis** Follows the Green brothers into the underground LA diamond trade. In S2, the discovery of a magnificent rough diamond could put the brothers back on top.



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Tib & TumTum Episodes 52x13' **Genre** Adventure/Comedy **Synopsis** The incredible adventures of a boy and a dinosaur in prehistoric times: friendship, complicity, overcoming challenges... you are stronger with a T-Rex pal!



Simon Episodes 52x5' **Genre** Animation/Pre-school **Synopsis** Simon is a new modern classic for preschoolers: an adorable little rabbit, who exudes all the vitality of childhood (based on Stephanie Blake' bestsellers).



Zip Zip Episodes 52x11' **Genre** Cartoon comedy **Synopsis** A group of wild animals of the forest move to the city and dress up as pets in order to live a comfortable life, but they have to keep their secret.



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The City & The City Episodes 4x60' or 5x45' **Genre** Drama **Synopsis** The City and the City is a distinct and compelling thriller that will bend the mind as well as the senses.



Next of Kin Episodes 6x60' **Genre** Drama **Synopsis** This drama is at the heart of a family in London left grief-stricken when Mona Shirani's brother is murdered whilst working for a charity overseas.



Love Island Episodes S1: 28x60', 4x75', 2x90'; S2: 2x90', 2x75', 39x60'; S3: 44x60', 4x75', 2x90' **Genre** Format (Reality and Entertainment) **Synopsis** Fun and romance in the most talked about dating show, as twelve singles spend six weeks in a luxury villa looking for romance.

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Frankie Drake Mysteries Episodes 11x60' **Genre** Detective Drama
Synopsis Set in the 1920s, Frankie Drake Mysteries follows Toronto's only female private detectives. Detectives for a new world; is the world ready for them?



Crawford Episodes 12x30' **Genre** Comedy
Synopsis When raccoons invade the world's most functioning dysfunctional family's home, they help breathe life and new meaning into the odd behaviours of the family.



Rolling Stone Magazine: Stories from the Edge Episodes 6x60' **Genre** Documentary
Synopsis Chronicling the last 50 years of American music, politics and popular culture through the story of the magazine that understood rock'n'roll was more than just music.



MARVISTA ENTERTAINMENT

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Mr Christmas Episodes 1x90' **Genre** Holiday
Synopsis A man falls in love with his friend's girlfriend and is torn between his heart and his best friend.



Eruption LA Episodes 1x90' **Genre** Disaster
Synopsis Facing a catastrophic natural disaster, a struggling screenwriter works with his sister, colleagues and renowned seismologists to save Los Angeles and its inhabitants.



My Teacher, My Obsession Episodes 1x90' **Genre** Thriller
Synopsis A teen tries to seduce her English teacher to start a twisted new life with him.



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The Class Next Door Episodes 4x60' & Format **Genre** Factual Entertainment
Synopsis A brilliantly funny and warm series which features parents dusting off their school uniforms to see how they fare against their kids at school.



Japandemonium Episodes 6x30' & Format **Genre** Entertainment
Synopsis A fast-paced, action-packed series celebrating the very best and funniest clips from Japan's iconic game shows.



Pompeii: The Countdown To Disaster Episodes 3x60' **Genre** Documentary Series
Synopsis Historian Dr Bettany Hughes, Archaeologist Raksha Dave and John Sergeant present a countdown through the final days of life in Pompeii.

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Buying Blind Genre Reality Format
Synopsis The radical new reality format that sees a family who can't decide what house to buy, put their life-savings in the hands of experts to purchase them a home – without ever having seen it!



Stella Blómkvist Episodes 6x60' or 3x120' **Genre** Scripted Series/Crime Drama
Synopsis Heida Reed ("Poldark") stars as quick-witted lawyer Stella Blómkvist, in this stylish neo-noir crime drama that's as sexy as it is dangerous.



The Spouse House Genre Reality Format
Synopsis A smash-hit on TLC in the US, "The Spouse House" is a bold new reality format that sees 14 single people desperately searching for the love of their lives, move in to the Spouse House in the hope of leaving married.

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Project Dad Episodes 7x60' **Genre** Reality **Synopsis** The responsibilities of parenthood are no joke. Follow Donnell Rawlings (*Chappelle's Show*), Daniel Cosgrove (*Days of Our Lives*), and DJ Skribble (world-ranked DJ, MTV's TRL) as they step into the role of Mr. Mom.



Jury Room Episodes 6x60' **Genre** Crime **Synopsis** Re-examines murder cases where convicted killers have always maintained their innocence. Each episode offers new evidence which has never been put before a jury.



Genius Factory Episodes 1x90' **Genre** Documentary **Synopsis** In the 1980s, eccentric billionaire, Robert Graham set about creating the world's smartest kids by funding the largest legal genetic experiment in history. Today, 30 years later, those children are adults.



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All Star Driving School Episodes 20x30' **Genre** Reality **Synopsis** Celebrities learn to drive in the most extreme, nerve shredding way: on an intensive week-long course, joined by their family and friends as backseat drivers.



Don't Say It Bring It! Episodes 20x30' **Genre** Entertainment **Synopsis** An urban Gameshow where contestants are forbidden from answering questions with words. They need to bring the object that best answers the question to win.



Game of Clones Episodes 20x30' **Genre** Reality **Synopsis** One singleton creates an avatar of their ideal partner, before we find them eight dates who look exactly the same. Which clone wins their heart?



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Change Your Tune Episodes 6x60' **Genre** Entertainment/Format **Synopsis** Twofour's latest 'time travel' format is a new singing game show where unlikely singers are hoping to 'change their tune', and turn from awful singer to polished performer and win an amazing prize.



Extreme Cake Makers Episodes 30x30' **Genre** Factual Entertainment **Synopsis** New series shows the successes and failures of a crazy and creative group who produce the most delicious and breathtaking creations, turning cakes into works of art.



Sink Holes: Deadly Drops Episodes 3x60' **Genre** Factual **Synopsis** In a dramatic new series using real life footage, people share their incredible stories of survival from these terrifying natural phenomena which swallow up whole streets, homes and even lives.



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Mr Magoo Episodes 78x7' **Genre** Slapstick Comedy **Synopsis** Mr. Magoo. You haven't seen anything yet. Neither has he!



A New Kind Of Magic Episodes 52x13' **Genre** Comedy **Synopsis** A family of Fairytale characters has to emigrate from Fairyland and to settle in the Real world. And boy are they unprepared!



Paprika Episodes 78x7' **Genre** Comedy - Preschool **Synopsis** Every adventure gets tastier with a pinch of Paprika!

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LAST WORD



ASH ATALLA

Where are the comedies hiding?

Ladies and gentleman, we have lost the middle bit. Not just any middle, but the comedy middle bit. The middle bit that travelled the planet and made itself comfortable in everybody's house: the sitcoms that were all things to everyone.

They conquered the world and brought families together from Beijing to Brighton, but suddenly the rules changed. By the time you get to the end of this article the rules may have changed again.

I may have to write a new piece later today, as this one will be looking as current as a Betamax video. This world is on the move, and it's brutal and sexy and exciting all at once.

The international sitcom. The global hit. *Friends*, *Frasier*, *Seinfeld*. The power, the money and the glory. I've sat in rooms for the last 20 years thinking what the next one might be. After all, if I get it right I could afford a plane, and I really want a plane. A red one I think.

Lately though, comedy producers haven't bought any planes. The international hits that paid for them are harder to come by. The shows with shiny groups of friends living in New York with complicated love lives are tanking. The idea that a single show will sweep the world is looking old fashioned. The whole family sitting around a television laughing at the same thing is a postcard from the 90s.

In this world of infinite choice, it's getting harder to even have a hit in your own country, let alone planet Earth. It's not even easy to make your friends laugh in the pub anymore.

Instead, the juggernaut hit is being replaced by a hundred tiny ones. The niche show, with the credible reviews and the average ratings is where the cool kids go to play these days. Because whatever your sense of humour, you'll be able to find the show that was made just for you. It may be from another country, that doesn't matter because it's just a click away. The point is your perfect show is out there and you don't need to settle for anything less. The average, the middle, is not welcome at the party anymore.

My company, Roughcut TV, produces a show in the UK called *People Just Do Nothing*. It's about a group of friends who run a pirate radio station. They think they are kings of the world, but in reality are bit-part losers.

The show started on YouTube and when we made it for the BBC it came out to very quiet applause. Nobody really cared. It was a niche show about a music sub-culture and it would only ever appeal to a small

audience. However, this April we were lucky enough to collect the BAFTA for best sitcom.

So what happened? Well, it grew up, but very slowly. It began with a small but loyal fan base that evolved over time. It's still a niche show, but it's at the top of its niche. It is the king of its tiny jungle – specific, well regarded, but a million miles away from an international hit. Word of mouth, not huge press launches. Credibility. Slowly, slowly.

We are not alone, because there are hundreds of shows on cable and VOD that are like it, that collectively make up the new global



comedy elite. It's better to start small and try to build than to take a big swing and be pulled off air for disappointing ratings. Be authentic and let people come to you.

I'm not saying there will be no more juggernaut sitcoms; of course there will. But they will be fewer, harder to find, because these days it's better to try and make a few people laugh really hard than try to make everyone laugh a little bit and miss.

There are so many outlets that the audience gets exactly what they want and everyone wins. Except of course the plane shop owners. They're just sitting indoors watching reruns of *Roseanne* and crying for the old days. Haha, poor, poor them. **TBI**

There will be juggernaut sitcoms in the future, of course, but these days it's better to try and make a few people laugh really hard than try to make everyone laugh a little bit and miss

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