

TBI

Television Business International



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EDITOR'S NOTE

STEWART CLARKE



There is change in (or should that be on) the air with some of the biggest shows on US TV fading out and others wobbling in the ratings. Fox has canned its version of *The X Factor* and is 'winding down' *American Idol*. Meanwhile the new season of reality series *Duck Dynasty* pulled in big numbers, but down on those from a season before, and its star Phil Robertson has made headlines for airing controversial views. Ratings ebb and flow but when shows as big as these go away or fail to perform to expected levels the industry starts asking questions, such as whether ob-doc series on crazy personalities and wild jobs are on the wane and if there is viewer fatigue when it comes to talent shows.

As two talent franchises move out of view, Fox's new reality boss Simon Andreae has ordered *Utopia* and *Release the Hounds*. The former could be seen as a *Big Brother* for this decade although is grander in scale and its ambition – creating a new society. We speak to Talpa about its potential in this issue. The latter format, in which contestants must evade a pack of seemingly bloodthirsty dogs, refuses to be categorised – unless competitive-horror-reality-gameshow is a new genre. As execs bemoan the lack of new ideas, both are at least breaking new ground.

Joking about the preponderance of '*Swamp Masters*' and '*Clam Finders*', Nat Geo boss Howard Owens is also looking away from tried and tested (and maybe tired) ob docs. In Nat Geo's case, 'brainy' programming is in vogue, as we report. Nat Geo and Fox are also in the vanguard of the latest wave of space programming and we examine the new shows looking at – and in some cases broadcasting live from – space.

Discovery is also attempting to push the boundaries on its nets with recently appointed Charlie Foley apparently facing the daunting task of reinventing the natural history category and helping create new content to replace that lost as Discovery's longstanding copro deal with the BBC lapses. As Discovery's international arm hits 25 we talk to the executives that have shaped the business thus far and the people that will be running it as it enters its next era.

One territory synonymous with innovation is Israel – that's no longer news – but we talk to Israeli producers and distributors about the next global hits in the making and how content makers are getting these projects into international markets, often before they have an Israeli home.

Elsewhere, with questions being asked about the viability of the entertainment end of the factual programming spectrum we look at the 'classic docs' launching at MIPTV in April. Our Hot Picks range from projects about the world wars, the Battle of Bannockburn and the Arab Spring to the latest 3D scanning techniques and Mary Poppins.

And we have the obligatory Netflix story. Amid the great numbers (not that Netflix feels like sharing) for the latest *House of Cards* TBI looks at the challenges the company faces as competition for content increases.

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VIEWPOINT

GARY LICO



Guess what? Everyone was right

Sorry for the old school rant here, but everything industry pundits said would happen a couple dozen years ago has happened. All those pesky rules that curtailed media cross-ownership, studio ownership, channel ownership and just plain global domination have gone away.

These were big issues as recently as the 1980s; the theory was that if media companies got too big it could stifle other voices and inhibit the public's right to multiple voices, because the public, after all, "owned" the air that the broadcast waves passed through. You could only own so many channels, couldn't own a newspaper in the same city... stuff like that. Well, the air just isn't what it used to be: hard-wired cable, satellites and broadband are all confusing what it means to be a broadcaster.

But the big, well, they got bigger – REAL bigger. Full disclosure: I sell to many of these nets all over the globe. They are not just good customers, many there are good friends. That doesn't make the job any easier if you're on the outside looking in.

The toughest part, and I know this from the too recent experience of closing down a company somewhat related to the issue, is that their growth model includes owning the content outright and having the global network footprint to use it. Third-party rights, if available at all, are becoming expensive and difficult to recoup when the programme has already aired in multiple territories.

Dial in the M&A of formerly-indie producers such as All3Media, and local channel groups

like SBS getting bought by Discovery and the sizes are more formidable than ever.

Business Insider reported in 2012 that NBCUniversal (then GE), News Corp (now 21st Century Fox), Disney, Viacom, Time Warner and CBS pretty much "control 90% of American media". Globally, there are more: A+E, Discovery, Scripps, Sony and Bertelsmann come to mind. Then, the more production-oriented business: Endemol, FremantleMedia... you get the idea. It ain't going backwards.

I've worked for big companies (Sony), I ran a mid-sized one (the late, great CABLEready) and now am the proprietor of a one-man band, for now, Lil'olMe.TV. I'd like to think I have the vantage point of being a beneficiary of the consolidation and to an extent one caught in the complexities of it all. Please note: the word "victim" was purposely not used.

Here is my theory: much like the issue of income inequality and the squeeze on the middle class in America and elsewhere, the content (fka television) business is becoming one of big and small, the haves and the wannabes. Mid-sizers are forced to sell so as to have more working capital, leverage and product, or risk being crunched. A few former small to midsize operations, like Tinopolis and Lefffield, have their own designs on growth.

January's RealScreen Summit was filled with this kind of talk, powered by the ever-present forces of greed and fear. But there was good news: the same biggies that make us sweat are also reaching out to independent producers to be the first stop for new ideas. A+E, in particular, has had contests and workshops for

development assistance and encouragement.

At the same event, though, A+E's Rob Sharenow lamented the lack of "creative energy" and "boring" reality programmes. One can easily point to a sameness caused by networks scrambling for the 'General Entertainment' spot on the EPG. What used to distinguish Discovery from Weather Channel is now a very fine line.

The "new voices", new ideas, new producers that nets desire are out there, but the challenge is how to get noticed. Shoving a pitch in a buyer's face after a panel session is a proven failure. The same could be said of trying to get in the door without any connection. Cutting through the noise is tough, and so is having the patience to deal with the constant input from nets. This isn't me talking, by the way, its FremantleMedia North America CEO Thom Beers.

Believe me, if I knew the secrets to success, I (might) share them. I do know the weapons the arsenal of the independents remain the same as they ever were. Here are some of the must-haves: Unique access, characters, books, new information and an obvious story arc that will carry a series over many years – only the big major events or blue-chip docs stand a chance of being one-offs.

You need an agent, representative or distributor that knows the players. You should pitch to the bigger production companies, to get a Godfather, mentor or experienced showrunner. And you have to know the damn network. (As an aside why is this still an issue?).

You'll have to have a great pitch reel – nets say they can judge talent via Skype, but it's a fallback, not a strategy – show your stuff. You also need passion, and know how to focus it.

The good news is that if anyone else knew a sure-fire recipe for success, they'd be using it all the time: for every FX, there is a MySpace. It all brings to mind *All the President's Men* writer William Goldman's view of Hollywood: "Nobody knows anything". **TBI**

"Much like the issue of income inequality and the squeeze on the middle class in America and elsewhere, the content business is becoming one of big and small, the haves and the wannabes"

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ON THE MOVE

TBI takes a look at the latest comings and goings in the international television business and reports on who's moving where

Fox International Channels has upped **ADAM THEILER** to executive VP of its Southern Europe & Africa unit. Within that regional group **Yadigar Belbuken** has been elevated to VP and deputy general manager of the Turkish operation and **Mehmet Icagasioglu** has been upped from ad sales manager in Turkey to VP, ad sales, Africa and deputy general manager of FIC Turkey



Eyeworks founder **Reinout Oerlemans** is leaving the company after Warner Bros. finalised a €200 million (US\$273.3 million) for the international producer and distributor. Oerlemans will move to LA and be chairman of Eyeworks USA, which is not part of the deal

JANICE HADLOW is stepping down as controller of UK channels BBC Two and BBC Four. She will move into a newly created role as controller, special projects and seasons the UK pubcaster developing formats for BBC One, Two and Four across different genres. Several names have been touted as her replacement, including a number of top BBC factual execs

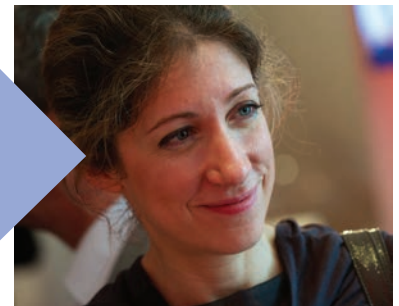


Former WB Network boss and Generate CEO **Jordan Levin** has joined Xbox Entertainment Studios. He has become executive VP and will be responsible for developing and producing original content, reporting to former CBS Entertainment boss **Nany Tellem**, who is president of the Microsoft-owned studio. Levin was most recently president of Alloy Digital



The distribution arm of 21st Century Fox has recruited **MATTHEW ROBINSON** for a senior sales role. Robinson will be senior VP, international television at Twentieth Century Fox Television Distribution. He joins from rival studio Warner Bros. where he worked for 16 years, most recently he was VP, international sales planning

David Michel has followed Vincent Chalvin-Demersay out the door at Zodiak-owned Marathon Media, the company they cofounded 13 years ago. Michel was general manager at Marathon and will leave on March 31, leaving COO **Ambroise Delorme** and chief creative officer **Eryk Casemiro** in charge of day-to-day activities



CLAIRE TAVERNIER has become interim managing director of Shine Group-owned online multichannel network ChannelFlip. She steps in as cofounders **Justin Gayner** and **Wil Harris** leave the firm. Tavernier was previously head of FremantleMedia's FMX digital division

Jessica Bennetts has left her role as head of sales for UK-based distributor TVF International and joined BBC World's Miami sales office. She has been named BBCWW's content sales manager for Latin America and Hispanic US, reporting to VP, integrated sales **Alejandra Olea**, and be responsible for format, finished tape and affiliate distribution

Former FremantleMedia boss **DAVID ELLENDER** will run his own television content business in LA. Backed by US-based financier TPG Group, Slingshot Global Media will focus on creating scripted shows for the US and international markets. Ellender exited his role as CEO of FremantleMedia Enterprises last year in the wake a broad company restructure



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Talpa seeks *Utopia* in reality

Coming from *Big Brother* and *The Voice* creator John de Mol and his Talpa Media imprint, new format *Utopia* has been catching the eye of buyers as the reality guru attempts to recreate the successes of those big hits, reports Huw Fullerton

It's an elimination reality format featuring a cross section of society but Maarten Meijs, managing director of Talpa International, is emphatic that *Utopia* is much more than 2014's *Big Brother*. "I find it difficult to compare because if you look at it, it feels completely different.

"If you look at [reality TV stalwarts] *Survivor* or *Big Brother* they have assignments [and] they need to do their weekly games. Here it's not about that; it's not about producer against contestants. The spirit of the show is that we try to create a new society together."

That new society is being created on SBS6 in the Netherlands from a barn on a piece of undeveloped land outside Amsterdam by 15 strangers, aged 20-53 and from a variety of backgrounds – all while being followed by hundreds of cameras over the course of a year.

They are provided with limited amounts of money, power and livestock and are forced to make tough choices about what they need to create their perfect world – or just survive.

Like *Big Brother*, contestants nominate one another for elimination. Producer Talpa is keen to foster a sense of online community around the project, and viewers can pay €2.50 (US\$3.42) per month for a subscription, aka their '*Utopia* Passport'.

This gives access to four continuous HD live streams without ads, two self-serve 360 degree cameras, a live chat and a host of videos, as well as allowing passport holders to vote on eliminations and choose replacement residents. Without the passport the live streams are lower quality and limited to 30 minutes with ads and minimal interaction or control.

In the Netherlands 100,000 people downloaded the app after the first broadcast –



THE SHOW: *Utopia*

THE DISTRIBUTOR: Talpa International

THE PRODUCER: Talpa Media

THE BROADCASTERS: SBS6 (Netherlands), Fox (US), Nordisk Film TV (Norway, production rights)

THE CONCEPT: Reality TV as a social experiment, as 15 strangers struggle with minimal resources to create a new society

but in more traditional realms, the show is doing well too. *Utopia* premiered on Monday 6 January on Dutch channel SBS 6, drawing 1.6 million viewers – by comparison, the average for that slot is 300,000. It briefly dipped below a million on January 23 but rose above the million mark again the next day, which coincidentally was the same day the format became Simon Andreae's first major unscripted commission since taking on the unscripted gig at US broadcaster Fox.

Creator John de Mol claimed ratings could have fallen due to huge popularity of the live streams. Ratings are now back around a million in any case, and Meijs says the numbers in Holland have "sparked" further interest in around 15 territories, including Germany, where a format deal with RTL is understood to be close to completion and Norway, where Nordisk Film TV has rights through a pre-existing distribution deal with Talpa and is pitching it to broadcasters.

"Of course we would like to do it in as many places as possible," Meijs says. "Due to the size of the project, I think that not every country would be able to it. At least, that's what I say at this stage – we might be able to come up with mini-*Utopias*."

And yet he disagrees the format is costly – while not wishing to state the budget, he says it is no more than the average reality show, especially considering the fact that the costs are spread over the year-long broadcast.

This unusual length is, according to Meijs, necessary for the show's format (it's hard to build Rome – or *Utopia* – in a day) but he also believes it might yield other advantages. "Other reality shows stop after 13 weeks, and most of the time then they hit their highest ratings. Why stop if it's a success? This project offers the possibility to continue."

Meijs also notes that there is room for scheduling flexibility, despite the ambitious length of the series.

The format could be stretched across the schedules nightly, as it is on SBS6, or could be spread out weekly depending on the broadcaster's needs and scheduling approaches, he explains.

Fundamentally, amid a flooded reality TV show market, Meijs defines *Utopia* as, "a very bold idea. It has elements of reality shows, but it also has values such as creating, and the daily problems that you encounter in building up this society. Really, it looks at reality television from a different perspective". **TBI**



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Is Nat Geo's brainwave a smart bet?

National Geographic is on the hunt for more brainy and interactive projects following its recent success with *Brain Games* and a range of smart shows



Nat Geo Channels president Howard T. Owens has outlined what his nets are after and the watchwords are 'brainy', 'smart' and 'interactive', meaning 'Smartertainment' is a key focus for his programming teams. Traditional natural history fare will still play on the Nat Geo Wild channel, Owens said during a NATPE presentation, but "engage your brain programming" is the order of the day on Nat Geo.

Owens added his challenge, upon joining the 21st Century Fox and Nat Geo Ventures-owned channel operator in November 2011, was breaking new ground in factual TV and the move to brain-related shows is in part borne out of that challenge. With ratings for key observational doc series less stellar of late Nat Geo is clearly looking to the next evolution of factual and hoping shows that challenge the grey matter will translate into thought-provoking hikes in ratings.

"In the internet age showing people new things has become more difficult so we have got into metaphysical exploration – exploration

of the mind," Owens said. "*Brain Games* is the beacon that separates us from the competition."

"It's not an 'Ice Road' or a 'Clam Finder' or a 'Swamp Master' or 'Ginseng Hunter' shows," he added, highlighting that the brainy shows perform a useful function in separating Nat Geo's schedule from that of other factual channels' grids, which are largely comprise character-led ob-docs.

In-house produced *Brain Games* started out as a three-parter in 2011 and has subsequently spawned two full-length series. In the show, the host Jason Silver – who Owens describes as an "ideas DJ" – runs brain games and experiments, many of which encourage the viewer to participate.

Owens revealed: "We've got twenty more episodes of *Brain Games* coming, it's the number one series for us."

The interactive element attracts huge social media activity and, Owens said, it is building Nat Geo's profile unlike other types of show where "people tweet but don't even know what

channel the programme is on".

Buoyed by *Brain Games'* success a numerical spin-off, *The Numbers Game*, was greenlit. Like its predecessor it was a three-episode show that went on to get a full series run, this time a 12-episode run.

Other shows designed to stretch the grey matter include *Duck Quacks Don't Echo* (pictured), originated by Magnum Media in the UK, and GRB-produced *Showdown of the Unbeatables*, which has inventors and entrepreneurs facing off and pitching their inventions against one another – the makers of a bomb proof door versus the makers of a military cutting tool, for example.

National Geographic Channels International has also ordered a series and four specials about the human mind from a range of UK producers. Renegade Pictures is making two-part special *Street Smart*, which will be a companion piece to *Brain Games*. It will use experiments to quiz people's critical thinking faculties.

Elsewhere, Blink Films is making three-part series *Ape Man* about human's most basic instincts and their roots in the primate world, while one-hour doc *Blow Your Mind* will be made by UK producer Twofour and uses experiments and stunts will show how much the unconscious parts of our brains control our bodies.

Furthermore, Windfall Films and So Shoot Me TV are making *Card Shark*, in which professional magician Drummond Money-Coutts looks at how playing cards can be used to play with our perceptions.

In Miami, Owens said – mindful of all the above mentioned series and specials – Nat Geo is looking for even more brain-stretching 'smartertainment'.

"We have a new suite of shows that are smart, fun and, even if in a small way, interactive," Owens explained. "With so many channels out there, being able to get the audience to dial in is something that is good for us. We don't want it to be 'educational'; we don't want it to be anything but entertainment.

"But we do want it to be smart." **TBI**

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Bingeing brings healthy returns

Netflix's much-debated binge viewing model looks to be working, while more money is being set aside for programming. However, the OTT firm is facing some big challenges this year

Netflix's original content policy is paying off, at least if the latest numbers from broadband analytics firm Procera Networks are anything to go by.

The streaming service was feeling the love from a huge spike in subscribers watching its drama *House of Cards* as its second season launched on Valentines Day – Friday, February 14 – earlier this month.

Netflix doesn't release viewing figures but Procera has found a way to extrapolate estimates by monitoring traffic on the platform. This showed more than 16% of Netflix subs on one unnamed web service from an unspecified major US cable provider watched at least one episode of the show on launch day.

In comparison, only 2% of subs on a similar sized cable provider watched an episode of the first season last year over its debut weekend. Procera called this a "massive" difference and added there had been a "huge uptick" in viewing.

Furthermore, 6% of Netflix subs watched at least an episode through an unnamed Scandinavian broadband network, which Procera termed as "very impressive" and showed that the series had "international appeal". (Sony Pictures Television might claim the numerous TV sales it has scored already suggests this.)

Procera's VP, global marketing Cam Cullen wrote in a blog post that the numbers recorded this month showed "clear signs of binge watching" – which will leave a sweet taste in the mouth of Reed Hastings and Ted Sarandos at



Feeling flush: 'Clear signs' of viewers binge watching *House of Cards* are emerging

Netflix's Los Gatos, California corporate HQ.

So, with a batch of Marvel Universe original dramas coming and pushes into kids and documentary fare well under way, Netflix looks set for even more love from its bingeing customer base across this year. Indeed, it is currently raising US\$400 million in long-term debt in order to fund a new, "significant" increase in original content spending. Interestingly, original commission will still only account for about 10% of Netflix's overall programming spend.

However, there are challenges afoot. TV and digital media specialists at TBI publisher Informa Telecoms & Media forecast 2014 will be the year "the content rights pendulum will swing away from Netflix" as "traditional TV operators and new OTT entrants redouble their efforts to gain rights to key properties".

"More competition means more revenues, so [producers and distributors] have little interest in seeing Netflix become the all-conquering force some have predicted it will," ITM's analysts added. "If the OTT firm doesn't play its cards right, it could end up looking less like the future of TV and more like just another TV network, albeit one that operates over the internet."

This all comes as Netflix gears up for what's been termed as a major push into Europe. Already operating in the UK, Ireland, Scandinavia and the Netherlands, sources at major content suppliers indicate France, Germany and Belgium are set to be the next Netflix launches.

However, France in particular will pose major hurdles as the country's fierce protection of local programme production quotas may mean Netflix will need to begin commissioning French-targeted content, and to this point its programme strategy has been internationally-focused. Culture Minister Aur"lie Filipetti said in January Netflix must support local content creation if it gets a Gallic launch.

Furthermore, the bosses of TFi, Canal+ and M6 have written to the minister to seek further protection from Netflix and other web-TV services eyeing the territory.

No doubt, there will be plenty bingeing on the story as it plays out this year. **TBI**

NETFLIX BY THE NUMBERS

10.93 million international subscribers as of Q4 2013
US\$200 million – the reported cost of *House of Cards*
US\$439.49 record company share price on Feb 13
US\$3 billion set aside for new content in 2014
76,897 recorded Netflix microgenres

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Journey of Discovery

As Discovery Networks International hits 25 David Zaslav, JB Perrette, Mark Hollinger, Dee Forbes and Luis Silberwasser tell Stewart Clarke about the story so far and what lies ahead

“In the last 25 years the company has solidified its presence as the number one non-fiction television company globally and I think if you look at the next, certainly 25 and much more like five-to-ten or two-to-five years, it’s about taking some of the digital experience I have and trying to transform DNI into the number one non-fiction video company across all screens,” says JB Perrette of the next chapter in the life of Discovery Networks International. He is perhaps the best qualified person to make that call as the incoming president of DNI, having been elevated from chief digital officer in January.

Outgoing president and CEO Mark Hollinger – a 20-plus year Discovery veteran – sums up Perrette’s task thusly: “More pay TV markets are maturing, there is a lot of consolidation among operators and the challenge is to continue to have strong offerings in the traditional business and to be as ambitious and entrepreneurial as we have been in the past few years in looking for growth outside of traditional factual pay TV.”

The maturation of some pay TV markets comes as DNI itself hits its mid-twenties. Its history is inextricably intertwined with that of the wider pay TV business as one of the first cable channels of note in the US and then one of the first to make international moves – initially with a one channel service and now with a business that comprises 44 channel brands in 224 countries and a reach, the company says, of 1.6 billion viewers.

Looking ahead, international will be the major driver of growth at Nasdaq-listed Discovery Communications. In the twelve months to end-December the international networks recorded revenues of US\$2.5 billion, a 51% increase on the previous year. The US nets generated US\$2.9 billion across the same period and registered 7% growth.

Discovery claims to have become the world’s most widely distributed television brand in 2001 and was already a strong global business when David Zaslav took the reins in early 2007.

“The great opportunity I saw was to expand and diversify our portfolio outside the US even further,” he says, citing the TLC roll out, expansion of Discovery Kids and launch of OWN programming blocks. With the goal in the US now winning market share of a fully distributed pay TV world, the Discovery chief is clear that international offers the wider company a good growth story.

The Discovery Communications president and CEO says: “In addition to launching new

channel operators are scrapping for EPG positions with new offerings, Discovery has a hunk of channels real estate built since the 1989 launch of Discovery in the UK and Scandinavia and then regional roll outs in Asia, Latin America, the Middle East and Africa five years later. The ‘89-to-’95 period was crucial in terms of building a distribution base and, having hit a critical mass of channels, DNI has repositioned and rebranded them along the way. TLC first launched outside the US in 2009 in Norway

“The great opportunity I saw was to expand and diversify our portfolio outside the US even further”

David Zaslav, president & CEO, Discovery Communications



brands and increasing distribution, we’ve found ways to diversify into the free-to-air space, and now sports. It’s a very exciting time for us in the international market, and I do see a significant share of our future growth coming from there.”

Hollinger adds that the lower margin and complex international business will not generate more profit than the US for some time, but his sign-off year could see the balance of sales tip in international’s favour. “From a revenue point of view and assuming the Eurosport transaction is closed in the spring, 2014 could very well be the year the company makes more revenue outside the US than inside, which would be a huge milestone for international.”

Being an early entrant and placing a sizable bet on international pay TV has given Discovery an advantage it still enjoys today – an unmatched distribution footprint. While other

replacing Travel & Living. Discovery was then able to replace some of the Home & Leisure and Real Time channels with TLC and it is now DNI’s second most widely distributed service reaching 336 million homes.

As Perrette puts his plan to dominate all screens into action, the huge channels footprint will be invaluable. “It provides an incredible laboratory for testing, understanding and watching consumer habits,” he says, noting that in Latin America, the CEE, Middle East and Africa regions the core business of pay TV still offers plenty of room for growth.

With distribution in place and mindful of existing long-term relationships with platform operators, DNI does not need to chase carriage on all-new platforms. Fledgling OTT services in international markets rarely have the heft to attract Discovery channels or content.

Hollinger says: “If you look now at

international territories there is a different dynamic [to the US] in that almost all of them don't have established OTT players with giant subs bases so there haven't been big revenue opportunities. The operator community is also still very resistant to the idea of programmers providing content to OTT services. The balance in international markets is firmly in favour of sticking with pay TV operators and waiting to see how OTT develops." A near-term solution is to get content on the existing pay TV giants' online delivered services such as Sky's NOW and Sky Italia's soon-to-launch River.

Discovery has then won the battle to attain distribution dominance, but the shifting sands of the content business have thrown up a new challenge. The pay TV business reaching maturity in several Western European markets means the historic levels of year-on-year growth cannot be sustained without DNI widening the scope of its activities.

Those imperatives spurred the acquisition, completed last April, of SBS Nordic from Germany's ProSiebenSat.1 Group for US\$1.7 billion. That gave DNI 12 TV networks across the region generating both advertising and affiliate fee revenue.

There has also been sideways expansion within pay TV with a deal for a minority stake for Eurosport extended this January to give Discovery majority control from 2015. DNI has also invested in Takhayal Entertainment, which operates Middle Eastern food network Fatafeat, and in Italian kids and general entertainment broadcaster Switchover Media, which operates four growing free-to-air and pay TV channels.

The Eurosport deal is a milestone for the company, according to Zaslav. "Eurosport, is one of the strongest, most dynamic pan-regional sports platforms in the world. We believe that combining the power of Eurosport's brands and audience reach with Discovery's network portfolio, boots on the ground, and country-specific expertise creates an unrivaled and powerful offering for viewers, advertisers and affiliates."

In ad-supported TV meanwhile, having launched DMAX in Germany in 2006 Discovery now also has dedicated free-to-air offerings in Italy, Spain and the UK and the SBS channels live in both pay and free TV worlds.

"We have really focused on being innovative and building scale through organic growth and strategic acquisitions," says Dee Forbes, president and managing director, Discovery

Networks Western Europe. "This strategy has helped us become the third biggest broadcaster in Italy [after Mediaset and Rai]. We also launched a male-skewing factual channel in Spain in the depth of their recession. We are

It was only 2008 when Ricky Gervais gently ribbed Discovery and its rival History Channel for being all about 'sharks and Nazis'. He would not be able to make the same joke six years later with both much broader lifestyle and

"The challenge is to take some of my digital experience and use it to transform DNI into the number one non-fiction video company across all screens"

JB Perrette, president, Discovery Networks International



launching TLC in a free-to-air environment in April this year in Germany and in 2013 created an ad sales house with Viacom in the Benelux region. This growth strategy has paid off – we grew our audience share by 48% last year."

The move into sport was in part about reaching young male viewers but more squarely about providing DVR-proof live programming. Discovery has shown live events such as Nik Wallenda's walk across the Grand Canyon and soon will televise Joby Ogwyn's Everest base jump, but a sports network appeals to operators keen to have channels that demand viewers tune in at the time as live events take place.

entertainment operations. But has Discovery lost some of what helped it become so popular in the process? "From History to National Geographic to the German PSBs and the BBC, the whole world of factual TV has shifted from more 'serious' docs to more factual entertainment shows – the good news is that whatever form in which factual exists it tends to travel better across boundaries than other types of shows," says Hollinger.

The other pillar to DNI building its market-leading position has been owning rather than licensing content. That has not always played well with producers that are increasingly keen to

"From a revenue point of view 2014 could very well be the year the company makes more revenue outside the US than inside"

Mark Hollinger, outgoing president & CEO, Discovery Networks International



Within pay TV the scope of the business has also got bigger in recent times, says Hollinger. "If you look over last three or four years there were a series of decisions to move the international business beyond the core genres of factual and beyond the core business model of pay TV."

retain rights, but stumping up most of the cost of production means Discovery owns almost all of its programming.

Its large US portfolio also means a production machine turning out thousands of hours for the international channels.

The push to make more internationally-originated programming is underway. “Great content is now being developed in a number of different places and we have people on the ground talking to these creatives and we’re

and we’ve found new talent such as Ed Stafford, Joel Lambert and Ben Hanlin, who are resonating with our local audiences,” he says.

There has been a reinvention of the popular science category with returning shows



“We have become the third biggest broadcaster in Italy. We also launched a factual channel in Spain and we are launching TLC in April in Germany”
Dee Forbes, president & managing director, Discovery Networks Western Europe

thinking about what’s the next format, what’s the coolest new idea,” says Perrette. “So, over the next three, five, ten years we will take where we were as a great content company primarily developing US-originated content, to really become a great global content company where content originates from any number of places and starts to go across borders.”

Luis Silberwasser is executive VP and chief creative officer at DNI and, assisted by creative director Julian Bellamy, oversees the DNI original content drive, which started with invention four-parter *How We Invented the World*. He cites the likes of *Naked and Marooned* and *You Have Been Warned* as the

including *Breaking Magic* working for DNI nets. The next big original series will be six-part show *The Mystery of the Lost Islands*, in which wildlife expert Dave Salmoni investigates mysteries surrounding the planets’ most successful predators. Silberwasser says the DNI Production and Development group turns out 200 hours per year and commissioned 70% more content last year than in 2012. About a third of series are coproduced with, and air in, the US with *The Unexplained Files* a notable success as the US Science Channel’s top series in 2013.

The local content initiative was given extra impetus with the 2011 acquisition of UK-based



“Given its track record and success in producing content for the UK market, Betty will be a key supplier of factual entertainment content for TLC around the world”
Luis Silberwasser, EVP and chief creative officer, Discovery Networks International

notable successes two-and-a-half years into the push into originals. “In addition, we’ve brought Bear Grylls back to Discovery Channel with two fantastic new concepts – *Bear Grylls: Escape from Hell* and *Bear Grylls: Extreme Survival* –

Freaky Eaters producer Betty. “While it is not our core business to buy and aggregate production companies, finding great creative talent and access to winning content is a key element to growing our channels around the

world,” says Silberwasser. “Given its track record and success in producing content for the UK market, I am confident that Betty will be a key supplier of factual entertainment content for TLC around the world.”

Given the expansion, will there be a time when DNI grows to the extent that Discovery Channel is no longer the biggest brand?

“The reality is that in a way that’s a goal and ambition we have, not because we want to see Discovery reduced in any way, we want to see it grow as it has, but also want to see that happen to TLC, ID, Animal Planet and Eurosport,” says Perrette. “The success of Mark and the team over last few years was to take what was one brand and create a portfolio with multiple flagships. As that continues, inherently Discovery by itself as a channel will become less of the total, but that is a very healthy diversification.”

With TLC largely rolled out the next push will be ID: Investigation Discovery. Currently in about 70 million international pay TV homes there is a lot of distribution work to be done. Like TLC it skews female, but is younger than its more established stablemate.

As the next chapter begins at DNI, Zaslav – who will feature heavily in that future as Discovery CEO until at least end-2019 and an increasingly powerful shareholder – says running the international business is “a demanding role like no other”.

He speaks in glowing terms of his new chief lieutenant in the international space: “JB is one of the smartest and most versatile executives I have worked with in the media business,” he says. “He has it all – strong strategic vision, operational expertise and exceptional team-building skills.”

Summing up, Perrette says retaining a risk-taking investment culture is essential. “When [in the early days of pay TV] a lot of people were sitting a bit fat and happy with the US business and were not that incentivised to do anything outside the US we planted that flag and went out and built that incredible platform of distribution, which today, despite the fact many people are eager to do it, is really hard to replicate. And then we were early into HD and 3D – the company has a philosophy and culture of being comfortable forward-investing in the next big thing.”

In DNI’s case, Perrette’s role is to make sure it plants the right flags. Put simply, Discovery needs to keep on discovering. **TBI**

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Almost 60 years after the Americans and Russians battled for supremacy of the stars, two new reality TV formats are engaged in their own space race, while more broadly factual space programming is becoming hot property. Huw Fullerton reports

Watch this space

Who will win TV's space race? On the formats and entertainment side there are a pair of clear contenders. The Dutch-originated effort *Milky Way Mission*, created by

Tuvalu and Simpel Media for Sony Pictures Television, has aligned itself with Netherlands-based Space Expedition Corporation (SXC), whereas the Mark Burnett-produced NBC show *Space Race* is attached to the high-profile Virgin Galactic project, which recently completed a

successful test flight.

While there are differences between the formats – *Milky Way Mission* is a celebrity show while *Space Race* is not, and the SXC flights put people as co-pilots rather than passengers – both involve a group of contestants put through

Cosmos host Neil deGrasse Tyson looks to the stars



a series of extreme astronaut training challenges, gradually eliminating them until one takes the prize of blasting off to space from the Mojave desert.

One thing is clear: no matter the pedigree of those involved, or the individual merits of the

shows, whichever blasts off first will be the format that makes the headlines and grabs eyeballs – and the scheduling of each project relies heavily on when the spacecraft can actually launch.

Felix Baumgartner has, however, set the benchmark in TV terms after he augmented his Red Bull Media House-backed 39km stratosphere jump by broadcasting it globally to millions via YouTube – followed later with a keynote speech at MIPTV 2013 and wider distribution through the sales Red Bull scored with broadcasters. Meanwhile, the social media success of Canadian astronaut Chris Hadfield from the International Space Station showed that in space, everybody can hear you tweet and in the world of cinema *Gravity* won a spate of BAFTAs and is expected to pick up Oscars.

Elsewhere, National Geographic is looking to revolutionise the space genre, with two high-profile projects set for blast off. *Cosmos: A Space-Time Odyssey*, the sequel to Carl Sagan's seminal 1980 series, bows in March on the channel, while the ambitious *Live From Space* season on National Geographic, Fox channels and Channel 4 in the UK comes in soon after.

Live From Space will consist of three programmes examining the life of astronauts on the ISS. Two will be documentaries with some live sections, but the centerpiece is a globe-spanning live broadcast between astronauts Rick Mastracchio and Koichi Wakata and NASA's mission control in Houston.

It is an enormous undertaking that requires meticulous planning and is made more difficult by the fact the route of the ISS's orbit is unknown until two weeks before the broadcast. While only 250 miles away from us vertically, the transmission signal has to reach Houston, then the UK, then LA for Fox's channels, including National Geographic, which will beam the live broadcast around the world.

Furthermore, the movement of the station means that the transmission will be lost every 20 minutes – and this can't be planned for before the exact details of the orbit are known. Even building the studio set has been difficult. NASA's mission control is listed, meaning the set had to meet strict regulations. More prosaically, details such as how late at night the astronauts can work as they move between territories (the ISS is on Greenwich Mean Time) have to be factored in.

"It just becomes this huge technical and logistical challenge, where you decide one thing,

and there are implications, and you decide another thing, and there are implications," says Tim Brisley, creative director of Arrow Media, the UK independent producer that is making the programme.

There will also be second screen elements across Instagram, Twitter and other platforms that will allow viewers, chosen at random, to interact with the astronauts.

But what if something doesn't go according to plan? "There is back-up plan after back-up plan after back-up plan," explains National Geographic Channel's executive VP, programming, Heather Moran. She adds that *Cosmos* and *Live from Space* are part of Nat Geo's wider push into smarter programming that gives viewers takeaway information.

Brisley notes that *Live From Space* is a much more complex broadcast than the two reality shows, which largely take place on Earth for the elimination rounds and, accordingly, Wayne Garvie, chief creative officer for SPT is pragmatic when addressing the challenges faced by *Milky Way Mission*. "The other day someone said to me 'Will you be able to broadcast live?' And I said, 'How do you think, when they landed on the moon in 1969, they transmitted live around the world?'"

For the live coverage of the Red Bull Stratos jump the technical challenge of monitoring Baumgartner in real time and broadcasting the images to a global audience was considerable. Red Bull Media House used 40 cameras to capture the mission, some of which were ground-based and others airborne. Cameras were located inside and outside Baumgartner's capsule, the pilot had five HD video cameras on his suit and long-range optical tracking systems delivered images from the ground while a tracking helicopter provided airborne HD pictures.

The Red Bull Stratos team say that they wanted to provide new scientific data that could influence the future of manned space flight, especially regarding possibilities for escape in emergency situations.

The live jump also provided spin-off content. A partnership with the BBC yielded a feature-length documentary that aired on BBC Two in and the National Geographic Channel in the US. In conjunction with the one-year anniversary of the mission in 2013, Red Bull Media House also produced a new documentary, *Mission to the Edge of Space: The Inside Story of Red Bull Stratos*.

In an era when making content available on different devices and in different forms is all important, the coverage of the Stratos Mission ticked a lot of the boxes.

“Users could seamlessly switch among TV, mobile and the web as they liked, simultaneously getting local commentary on television and real-time data online, for instance; or following on mobile when they needed to be on the move. It has always been relevant to both provide a live global audience with documentation of a unique historic event and share a fascinating, authentic story in broadcasting,” says a Red Bull rep.

There have been over 50 million YouTube views and with eight million concurrent streams during the event, it set a live online viewing record. Traditional viewing numbers also stacked up with the US Discovery Channel’s broadcast of the full live feed becoming the net’s highest ever rated non-primetime programming event with 7.6 million viewers. Internationally, broadcasters in over 50 countries ran at least a portion of the live feed.

In terms of space-related content, one question remains: why, given its popularity, hasn’t space programming been tried before?

It has. In 2000, fresh off the success of hit show *Survivor*, Mark Burnett mooted the idea of a space travel elimination series called *Destination Mir*. The series would see contestants battle it out to complete astronaut training and travel to the the Russian/American space station. Unfortunately the plans fell apart because so did Mir. Decommissioned, it broke up as it fell through the atmosphere with somewhat less fanfare than Baumgartner managed some years later

Further tentative plans were hatched in 2002, but scrapped again. It seemed the project was doomed and Endemol’s surreal 2005 hoax show *Space Cadets*, whereby gullible Brits were convinced they were training in Russia to be astronauts without ever leaving the UK, was the nearest TV would come to reaching space.

But Burnett stuck to his guns, and in autumn last year first revealed to TBI he was working on a new project that was “pretty huge and on-brand for me: an adventure and game”. That turned out to be *Space Race*. His international sales boss C. Scott Cru further explains: “For a variety of reasons the timing just wasn’t right before, but Mark never gave up, and never thought that we wouldn’t do this one day.



Felix Baumgartner’s space jump set viewing records on YouTube and Discovery Channel

Then this opportunity with Richard and Virgin came up, and they got together and said ‘Wow, let’s do something great with this, and let’s tell a great story.’”

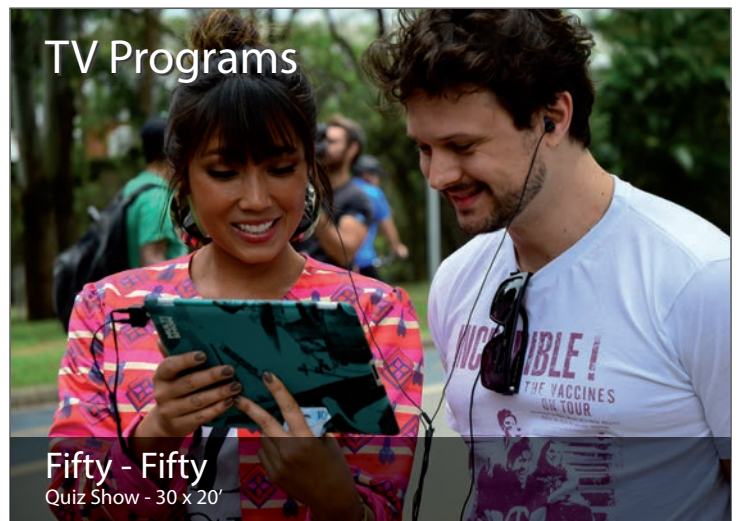
Fundamentally, Cru says, it was the red tape and governmental monopoly on space travel that made it difficult to televise, and that’s what’s beginning to change with companies like Virgin and SXC. “This is really the beginning of the commercialism of space travel, you know. We could not be any closer to the front than we are now.”

Garvie agrees. “Previously, to get into space you had to be an astronaut, it was limited to a very small pool, and very few countries –

Russia, United States, Europe and China. Now, technology means that very soon commercial flights to space will be happening – and there’ll be a lot of them.”

Certainly it’s become more cost-effective too, though not exactly cheap. While none of the executives will reveal their show’s budget, Scott Cru suggests, “Whatever number you’re thinking of, double it”.

On the factual side the 1980s science series *Cosmos: A Personal Journey* reached an audience of 750 million in over 175 countries and won Emmy and Peabody awards – but it’s taken 34 years for a follow-up. Why? Executive producer Seth Macfarlane’s suggestion is that



we suffer from a “culture of lethargy”.

“We’re obsessed with angels and vampires and whatnot when there are many more exciting and very real and much more spectacular things to be excited about, that are right in our own planetary backyard,” he told *The New York Times* in 2011.

But things may have changed in this aspect too – host of *Cosmos: A Space-Time Odyssey* Neil deGrasse Tyson said in a recent interview for Condé Nast’s US lifestyle magazine *Parade* that he believed we were now enjoying a “space moment”, far beyond the activities of SXC or Virgin Galactic or even new scientific discoveries.

Instead he cited TV and film as the drivers, with shows like *the Big Bang Theory* and *CSI*, along with Oscar-nominated *Gravity*, making science popular again.

Nat Geo’s Moran says the *Cosmos* reboot should be seen in the context of the channel having always looked to the stars.

“We’ve always had a firm hold on space,” she says. “I think *Cosmos* is another way of us getting there.”

The project, which has been years in the making, will see Nat Geo work with 21st Century Fox stablemate Fox. The broadcast of the first episode will go out across all Fox channels including Nat Geo in a huge simulcast. Subsequent instalments will be on



Milky Way Mission's proposed SXC shuttle

Fox on Sundays and Nat Geo will run its version the following Monday. It is undoubtedly one of Fox’s biggest ever programming commitments.

The appetite for space content has always been there, Mark Burnett’s Scott Cru contends. “Interest has always been there untapped, but there just hasn’t been anything new to pique it in a while.”

Whatever the reasons, space programming is definitely becoming hot in the international

market, as SPT’s Garvey attests. “We’ve had interest for *Milky Way Mission* in all of our territories. It’s one of those things; space travel is still hugely romantic.”

“It just feels like the time has never been better to have space programming,” adds Arrow’s Brisley. “And that’s because of *Gravity*, that’s because of Chris Hadfield, Virgin Galactic, Stephen Hawking talking about the survivability of humankind; that all feels like it’s part of a reason for the current interest. Space programming is on the agenda at the moment and maybe it’s just because the stars all aligned.”

Baumgartner himself offers another explanation for the fascination with space. “When I was young we had people going to the moon. When I was young we also had people like Edmund Hillary, who climbed Mount Everest.

“With over 50 years having passed since Joe Kittinger’s [31km] jump, Red Bull Stratos was something so new and so exclusive and breathtaking. The quality from the pictures that we brought into people’s homes was so extraordinary – and it was *live*. This was really important, that it was happening right at that second, while you were watching.”

Meanwhile, there are always new frontiers. The complexity and planning required for both *Cosmos* and *Live from Space* mean neither are TV events that Nat Geo is likely to repeat but Nat Geo’s Moran says it is “very interested in Mars”. Could *Live from Mars* be the next giant step for the channel? Watch this space. **TBI**



Live from Space will allow viewers to interact live with astronauts



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Israel comes of age

As the global market attracts ever more of Israel's television talent, the question of how its programming travels overseas has taken centre stage. Jesse Whittock talks to local producers and distributors and checks out the latest wave of hits in the making



The title of Keshet International's runaway post-MIPCOM success *Rising Star* could quite easily double as a moniker for Israel's new found status on the international programming scene. Though the country has little over eight million inhabitants and just 2.1 million TV homes, according to Informa Telecoms and Media data (see page 37), the volume and quality of programming flooding from its borders has been nothing short astounding.

"The interest and the focus of the international market is totally on Israel, and we're feeling it clearly as parties from different companies visit each month enquiring about what's new, it has given a boost to our efforts to create more," says Assaf Gil, owner and managing director of Israeli indie prodco Gil Productions.

Though companies such as Dori Media Group and Armoza Formats have been shopping the territory's wares to the international market for several years, it was the Keshet International-distributed scripted format *Prisoners of War* (aka *Hatufim*) – best known globally as the basis for Showtime's spy drama *Homeland* – that really opened the floodgates.

"*Homeland* was the big breakthrough and it created incredible momentum in many aspects – it was a gamechanger not only for us but the whole market," recalls Keshet International's managing director Alon Shtruzman.

Dori Media's CEO and president Nadav Palti agrees *Homeland* represented a crucial moment but notes the trend harks back further to instances such as when his firm shopped *In Treatment* (known locally as *BeTipul*) to HBO. The difference is "more and more people now understand we create great shows", he adds.

According to Hedva Goldschmidt, managing director of Jerusalem-based boutique TV and film distributor Go2Films, Israel is producing a high volume of high quality and widely-distributed formats because "it's a hot house for great stories with so many cultures, religions and conflicts".

Though it is focused on festival and theatrical distribution Go2Films is a regular at MIPTV, and will be in Cannes helping Dori Media sell religion-themed drama *Shtisel* and cableco HOT shift miniseries *Mekimi*, which is based on a best-selling book about by Noa Yaron-Dayan, who was a popular figure and celebrity in 1990s Israel.

Shtisel is a gentle family drama for Yes that's

focused on a father and son who are the only remaining members of an ultra-Orthodox family still living together in a Jerusalem neighbourhood.

The series picked up 10 Israeli Academy Awards in January and Dori Media is now rolling it out internationally, with France's Pretty Pictures and Swedish cultural pay TV channel Axess TV the first buyers. A deal with a Finnish free-to-air channel is understood to be in the works.

The format has also been pitched in the US, and there is understood to be widespread interest. "You can adapt it to the complicated issues of other countries and people will get the humour too," says Dori Media's Palti.

Meanwhile, Keshet's latest scripted effort is *She's With Me*, a comedy-drama about a poor baker who has a relationship with an Israeli 'It' girl. "It's a refreshing light comedy and I'm certain it can translate into different languages," says Keshet's Shtruzman.

Another Israeli scripted comedy with US remake potential is Gil Productions' *The Life of Maya Dagan*, which had previously been under option with Lionsgate but now has ICM working on a new adaptation deal. It's loosely based on the memories of an Israeli comic and uses animated flashbacks to draw extreme humour out of her awkward teenage years. "When we're pitching it, we're looking for the local Maya Dagan – the same age and with

Rising Star at the last MIP", in Cannes.

Traditionally, Israeli producers have looked to local broadcasters for a commission before handing over large chunks of rights and having projects sold internationally. Increasingly, however, Hebrew companies are looking at different models such as having a sales agent take the show global first and then, with international rights secured, bringing it home for an Israeli deal.

"We've done several pilots for the international markets by partnering with companies like Armoza and FremantleMedia. This allows us to decide how our show is distributed and to have a more flexible relationship with the seller, and to keep a larger chunk of the rights," says Artza Productions' partner Dafna Prenner.

She claims Israeli broadcasters are "very aware of the upside of owning original formats", and says rights ownership is a continuing bone of contention for producers. Artza's originals include *How to Be* and *The Gran Plan* (left), both of which have sold internationally. Armoza Formats shopped the latter – a comic inter-generational unscripted format in which three grandmothers attempt to sort out problems of young people – to broadcasters including Germany's ProSiebenSat.1 before Israel's Channel 10 came onboard – with a smaller percentage of back end rights than usual.

Elsewhere, Gil Productions is best known as



certain youthful elements," says Assaf Gil.

Elsewhere, Red Arrow International is soon to launch July August Productions' comedy dating show *She's Out of My League*, which is based on Will Smith romcom *Hitch*; and Dori Media is offering Channel 10 series *Power Couple*, which Palti says "could be a hit like

producer of local versions of *Strictly Come Dancing* and *MasterChef* but has heavily moved into original format development.

"One issue that dominates the market is we don't have laws that limit the stake broadcasters can take in IP so you have to be creative," says Assaf Gil. "We've invested in and piloted [new



HOT's *Mekimi* is among the latest batch of Israeli dramas set to hit the international market

format] *Are You For Real* and will hopefully have a distributor by MIPTV. Only after it rolls out internationally will we pitch it in Israel.”

The format sees a couple assume identities and convince another pair they are real, says Gil.

Armoza’s founder and CEO Avi Armoza says the size of the territory and the instability of the broadcast market means “you cannot sustain a business that’s focused on only the local market” – hence his global focus.

Even July August, which focuses on the local market, sold to a global media group and now makes about 30% of its revenues from the international market, according to its CEO Lisa Uzrad. The company has a pair of scripted formats headed for US broadcast pilot season in the shape of Armoza-distributed and CBS-bound Yes drama *The Ran Quadruplets* (aka *The Ran Quartet*) and Reshet comedy *Irreversible*, which ABC is adapting with *Friends* star David Schwimmer starring and producing.

Armoza has gone even deeper into the global market and begun co-developing formats with international broadcasters. Examples come in the shape of *Runway in My Closet*, a new fashion format for Hungary’s Viasat3 that’s launching at MIPTV, *I Can Do That* with China’s JSBC and *Do Me a Favour* with Argentina’s Telefe. “It’s a much more efficient

way to focus on development,” says Avi Armoza. Dori Media, meanwhile, has a well-established global telenovela production business.

With all this said, it’s clear Israeli channels – Keshet, Reshet, Channel 10, HOT and Yes – have done much to establish Israel as a quality content producer and provider and the producers behind them on the global circuit.

Keshet International has built up a wide-ranging content pipeline and launched local productions businesses in Australia, the US, the UK and Canada to create content around the world, and its MD Shtruzman says the London-based company has become “one of the engines of the Israeli market”.

“The Israeli creative television community has been benefitting from Keshet’s overseas exports. We’ve helped them break the glass ceiling and see that success.

Beyond that, we always give an incentive to creators, we always make sure they’re involved creatively and commercially in the local version and they always get a part of the back-end.”

Keshet International itself has bypassed the local market to get shows away. Set for USA Network on US cable is *Dig*, an action adventure series it is creating with *Heroes*’ Tim



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Kring and *Homeland's* Gideon Raff. "It's an American story but is set in Jerusalem and it might not work for Israeli broadcasters in Hebrew," explains Shtruzman.

Meanwhile, different kinds of narratives are affecting content distribution. The country is moving the broadcasting system from the franchise model under which Keshet and Reshet share the Channel 2 slot through the week to a licence model. "It's going to be a very interesting place and the level of competition is going to rise," says Avi Armoza.

Insiders say it is likely two of Keshet, Reshet and Channel 10 will have to merge when the change goes through, with budgets tight and debts to pay. Moreso, the switchover may not happen until 2017 as there are options to extend the franchise system beyond the current 2015 deadline, one source says.

"The Israeli market is very small and I believe that when the Israeli broadcasters get their licences there will [still] be 14 days of broadcasting [per] week – two channels. The next stage of growth is instead abroad," says Yoav Peretz, CEO of the country's oldest production company United Studios of Israel, whose Dori Media-sold comedy *So Where Were We* (pictured page 26) is in negotiations for adaptation in the US via ICM.

The local distribution business will likely heat up too, as Endemol taps into its recent 33% investment in Reshet by piping more Israeli content into the international market. Others such as cableco HOT (which will sell *Mekimi*



Gil Productions' *Are You For Real* will hit the global market before Israel

globally, Go2Films' Goldschmidt says) and satcaster Yes are looking to the international market to better exploit their programmes. "They are considering their own internal arms but at the moment they continue to give producers the choice to distribute or do it together. Endemol will sell Reshet shows but we have an exclusive deal as the distributor of Channel 10 programmes," explains Dori Media's Palti.

"The market is now at a stage of maturity," adds Armoza. "We were pioneers and were

able to prove there was a market [for international distribution] but we always knew we wouldn't remain alone and were ready for the competition."

Palti suggests that though there will be new entrants to the sales scene, "only those like us who want to do it seriously and as a core business will remain five years from now".

July August's Uzrad, meanwhile, says being part of ProSiebenSat.1 Media-owned Red Arrow Entertainment has "opened many doors to programmes and TV executives worldwide", while Keshet's Shtruzman says he has "confidence in the market" thanks to the network's strong rating performances. How the forthcoming changes affect conditions will depend on the local ecosystem, he adds. "For us, it's only going to get better."

Artza's Prenner shares that optimism. "I don't feel limitations with the international market right now," she says. "We have the sense that everything is possible."

United Studios, behind formats such as TNT's *Deal With It* and NBC pilot *Pillars of Smoke* and producer of a 1,000 hours of Israeli programming per year, is going one step further.

Backed by media investment giant Taya Communications, the company has engaged bankers to identify potential acquisition targets from the UK indie sector. CEO Peretz explains: "The UK market is very interesting to us – it's a very similar territory but there you can keep the IP of the product. We believe we will find the right company to invest in this year." **TBI**



Dori Media sold award-winning Yes drama *Shtisel* into Europe



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Factual, Seriously

As MIPDoc gets underway TBI takes a look at the best new documentary series and one-offs launching at the market



THE SHOW: *World Wars*

THE DISTRIBUTOR: A+E Network

THE PRODUCER: Stephen David Entertainment

THE BROADCASTERS: History (US, international), France Télévisions, N24 (Germany)

THE CONCEPT: Landmark doc series looking at how the two World Wars were one bloody continuum

Former UK Prime Minister John Major, his Italian counterpart Mario Monti, US general Colin Powell and secretary of defense Donald Rumsfeld are among the contributors to *World Wars*, a new six-parter for History Channel that suggests World War I and World War II were in fact one bloody continuum rather than distinct events.

From *The Men Who Built America* producer Stephen David Entertainment, the series is the first international coproduction led by all of the international History channels, with input from their US counterpart.

Running in chronological order over its six one hours (or three two hours for the US version) the series lays out how the most iconic figures of WWII—Adolf Hitler, Benito Mussolini, George S. Patton, Charles de

Gaulle and Douglas MacArthur—were caught up in both conflicts and were infantrymen and privates in WWI the "war to end all wars".

"This is the first collaboration across all of the international channels," explains Sally Habbershaw, VP, international programming, production and operations at A+E. She adds that amid a glut of World War programming to mark 100 years since the start of World War I, the History series brings a fresh way of looking at the conflicts and intervening period: "It's that perspective that makes it stand out. No-one has focused on that hiatus, that period between the wars before and we play heavily on that and also on the core characters and the relationships between them in that era."

One editorial challenge was the different

ways the World Wars are perceived in different countries and A+E has folded in contributions from local commentators, in their own language, into the show, giving some local flavor and perspective.

The series relies on archive and to a greater extent drama reconstruction, which accounts for over half of the run time, to tell the *World Wars* story. It will launch on History, possibly first in India or Spain later this year. With the World Cup some of the international History channels will wait until after the soccer tournament to launch the show.

French pubcaster France Télévisions and German channel N24 have prebought the series with other deals expected to be announced at MIPDoc. A+E is handling all international sales.

THE SHOW: *The Whale Hunters*

– *A Forgotten History*

THE DISTRIBUTOR: Hat Trick International

THE PRODUCER: Keo Films

THE BROADCASTER: BBC Four (UK)

THE CONCEPT: A non-judgmental look at the history of the whale hunting industry

Whale fishing, or hunting, is an emotional subject with environmentalists campaigning hard for an end to the practice. Keo Films' doc about the industry sets out to offer an impartial look at its history and the lives of the first generations of whale hunters.

BBC Four commissioned the project as a two-parter, which it will show later this year. The lack of space for 2x60mins docs with international broadcasters means that it is being sold globally as a 90-minute special.

Hat Trick International is on distribution duty and director of sales Sarah Tong says she is hopeful of sales in English-speaking territories.

“Cultural implications mean that whale hunting is now a very emotionally charged subject, but historically it was a remarkable industry and part of the history of Britain and other countries.”

The doc is fronted by writer and historian Adam Nicolson and takes a close look at whale hunting's genesis, beginning with the early history of whaling in Scotland and how it developed into an industry that was then taken forward by the Norwegians. It also looks at the lives of the men who worked on the whale hunting base in South Georgia, one of the remotest parts of the British Empire.

Exploring the work of the whalers that lived there gives the show a human angle, Tong says. “The hunters lived these unbelievable lifestyles in isolation in the South Atlantic and that human angle makes [*Whale Hunters*] more relatable and something over and above a history lesson.”



THE SHOW: *Emptying the Skies*

THE DISTRIBUTORS: Java Films, Submarine Entertainment

THE PRODUCERS: RingTheJing Entertainment, Sustainable Films

THE BROADCASTER: TBC

THE CONCEPT: Doc based on Jonathan Franzen article on secret songbird culls

Literary darling Jonathan Franzen lends his sizeable intellect and support to this enviro-conscious doc, which France's Java Films is taking to Cannes for MIPDoc.

The *New Yorker* magazine had tasked the Great American novelist to write another of his well received articles and the result was ‘Emptying the Skies’, a 12-page assault on the controversial – and often illegal – practice of songbird culling.

As a keen bird watcher, Franzen felt passionately about the subject and soon his article, as with many of his books, had been published around the world. Eventually, the groundswell saw him hook up with Roger and Douglas Kass to spend a year producing *Emptying the Skies*, a 1x52mins/1x78mins doc.

France's Java Films then negotiated a deal brokered through David Koh at Submarine Entertainment and Roger Kass to acquire rights to project. The 52-minute version is currently in production and will be ready for MIPDoc.

The doc takes to task poaching of migratory birds in Southern Europe and includes production talent such as editor Michael Levine (*Restrepo*) and Marty Beller, who created the score for HBO's *In Treatment*.

Kathryn Bonnici, Java's head of acquisitions, says a key challenge will be selling it into territories where songbird culling is often

considered a pastime. “We've got a track record for films like this so it's just a question of finding the audience and packaging it for them,” she says.

With the nature of theatrical documentary windowing changing dramatically thanks to the growing influence of thematic TV channels and on-demand platforms, Bonnici says Java is working on individual strategies for each territory for which it has rights (worldwide, excluding North America, Australia, New Zealand, Italy, and Italian-speaking Switzerland).

“As a company, we're moving away from that very structured approach to marketing, where we did six months of festivals, then theatrical, then VOD and finally TV. It's all about the right strategy and building momentum behind the film.”

Java will target “Storyville-type” strands and may eventually release a shorter version for news slots.

Emptying the Skies has the relatable characters necessary for wider audiences to tune in, Bonnici contends. “It's perfect for our newly launched features department because it is a very serious topic that people don't know much about but is produced in a very approachable way and features lots of strong characters.”



THE SHOW: *Road to Revolution*
THE DISTRIBUTOR: BeActive
THE PRODUCERS: BeActive, Sol, Sportzone
THE BROADCASTERS: TBC
THE CONCEPT: Multimedia project about the human face of the Arab Spring

Road to Revolution is a multiplatform project that tells the stories of the families and individuals affected by the demonstrations and uprisings that, starting in 2010, swept the Arab World and became collectively known as the Arab Spring.

The brainchild of a trio of Portuguese journalists – Tiago Carrasco, Joao Henriques and Joao Fontes – multiplatform producer BeActive came on board as a production and distribution partner and is selling *Road to Revolution* content in a variety of formats for various platforms. It was made in association with Portuguese weekly magazine Sol and retail chain Sportzone.

The reporters set out on a 9,000 mile journey across ten countries in the Middle East to interview people and find out about the feelings and situations on the ground that led to such widespread unrest. Three became two when one journalist found the subject too much to handle and came home.

Off the back of its adventure doc project *350 South* BeActive had some experience of multimedia travel projects and set about building a website, Facebook page and blog. The writers then sent back video that BeActive edited into web shorts running between three and five minutes.

Following the reporters' return a full feature was produced from their footage as well as a two-part TV series.

"We were editing the webisodes in the first half of 2012 and the reporters came back with more footage and stories and we found

five characters in different countries that had been affected by the Arab Spring and made a feature-doc," says BeActive CEO Nuno Bernardo. The resulting content is about the human stories behind the headlines and, largely in Arabic, in the voices of those who have felt the impact of the troubles. There is the story of the Syrian general who, disillusioned with the military campaign, switches sides and another about the family of Tarek al-Tayeb Mohamed Bouazizi, the Tunisian fruit seller whose self-immolation sparked the region-wide uprisings.

Each story link to the next and with its longer total run-time, the TV two-parter has extra footage not seen in the film, which was released theatrically in Portugal in February.

There is an English-language subtitled version and the package BeActive is shopping at MIP comprises the feature, the doc, 50 webisodes and a companion app.

Broadcasters in the Middle East and Africa have expressed early interest as has PBS in the US. In Portugal SIC is expected to transmit the project. Bernardo says the show would work well for pubcasters or digital platforms, including newspapers groups and streaming services.

"There are so many Western views about the region, but not many examples of the people there talking about how they have been affected. Europeans always talk about The Arab Spring in their own language, but this is real people talking in their own voices about how it has affected their lives."

THE SHOW: *Silicon Wadi: A Hightech Soap Opera*

THE PRODUCERS: Plan B, Know Productions, Yes Docu

THE DISTRIBUTOR: First Hand Films

THE BROADCASTER: Yes Docu (Israel)

THE CONCEPT: A series about start-up culture in Tel Aviv, Israel

Silicon Wadi was first pitched to international broadcasters at IDFA in Amsterdam last November but MIPDoc will be a chance for the entire TV community to see the 4x52mins series.

The programme takes a look at Tel Aviv's 24/7 start-up culture that has steadily grown in the past few years and is defining the Israeli city's young entrepreneurial spirit.

"These companies are being bought by Apple and Google everyday. There's a lot of young guys and women who have ideas and want to do something," says Esther Van Messel, CEO of Switzerland-based First Hand Films, which is selling it to the global market.

Besides looking at the field's key protagonists and their attempts to crack the digital market, it also doubles as an example of a side of Israel that is rarely relayed to global audiences, says Van Messel.

"In Tel Aviv the clock never stops, you can go out anytime and there will be people eating, drinking and discussing. It sits very much within the idea of the start-up company, where you have to give your life and soul and for 24 hours a day to get something off the ground."

However, selling the show will come with a major pre-set challenge – the Israeli-Palestinian conflict, as Van Messel testifies. "On the one hand, [broadcasters] don't want to hear about the conflict anymore but on the other they don't want to hear about anything else."

However, she says *Silicon Wadi* (a working title) is "very well made and we're sure it'll find homes on the international market", and she reveals a feature-length episode is set for production, meaning First Hand can target more slots and platforms.

"At the moment, we're working on slots that are for lifestyle, human interest, technology, maybe even science in a light and entertaining way," says Van Messel.



THE SHOW: *Bannockburn*

THE PRODUCERS: Sky Vision, Arcadia Content

THE DISTRIBUTOR: Sky Vision

THE BROADCASTER: History (UK)

THE CONCEPT: Docudrama coinciding with the 700th anniversary of the Battle of Bannockburn

Sky Vision's *Bannockburn* is one of the timeliest factual programmes hitting the market in 2014. Besides being the 700th anniversary of the iconic battle between England and Scotland that lends its name to this scripted drama doc, it also comes as the pair prepares to clash again this year. In September, Scotland's public are due to vote

on a referendum that will decide whether the country remains in the United Kingdom. It's a fact not lost on Sky Vision's head of programming Danny Tipping. "*Bannockburn* is very timely for the British audience," he says.

However, he contends there's nothing parochial about either the history or the programme. "For the international audience

it's a fantastic David and Goliath story, with a very small group of Scottish freedom fighters taking on what was at the time the world's greatest army."

Those with passing interest in British medieval history will know Scotland's minute army, led by the charismatic Robert the Bruce, resoundingly defeated King Edward II's decorated English forces. The doc focuses on these two figures and their lead generals on the battlefield. "We're following them into the heart of battle," Tipping says.

He adds some might compare the battle's TV aesthetic with the highly stylised Hollywood swords 'n' shields movie *300*. "We've come a long way from sackcloths and shiny armour; there's a lot of dirt, blood and guts. It's warts and all."

Selling such an idea to broad audience channels might be a task but Tipping says it is "not gratuitous. It might be more bloody and brutal than we'd have gone a few years ago but people are used to and expect a certain level of realism now." The programme will, he says, "stand up on factual channels but also on more general channels. This is high-end dramatised documentary".

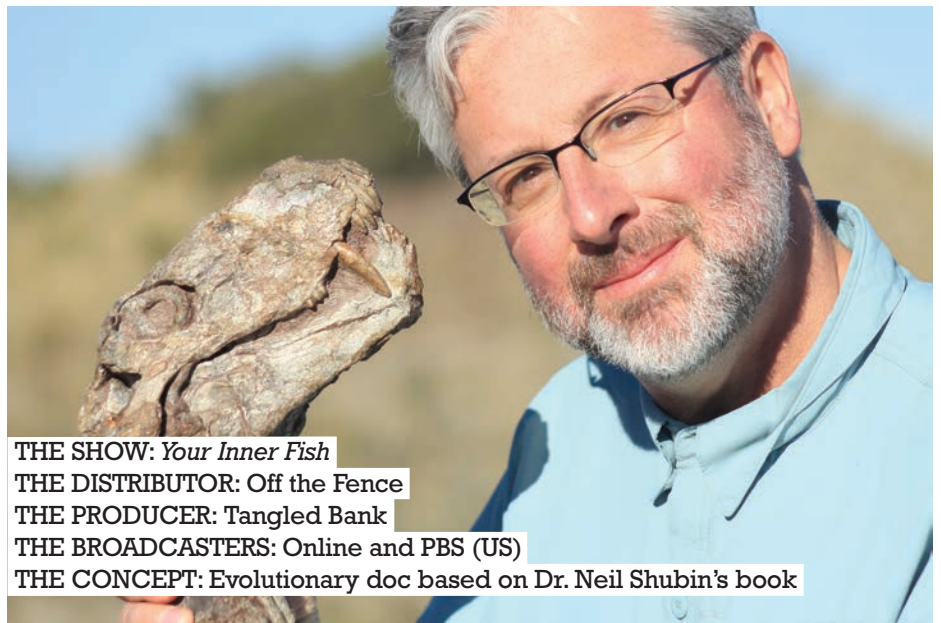
"There are many evolutionary shows out there and they can be dusty, but because Tangled Bank is backed by the Howard Hughes Medical Institute it means there is the budget to ensure this has amazing production values and is an immersive adventure with unique science included," says Bo Stehmeier, Off the Fence's managing director, distribution, of *The Inner Fish*.

Off the Fence has a distribution deal with Tangled Bank and is handling international sales of the three-parter, which it will launch internationally in Cannes.

Tangled Bank was set up with US\$60 million a year in annual funding from the Howard Hughes Medical Institute and ex-National Geographic president Michael Rosenfeld is running the operation.

Your Inner Fish was Tangled Bank's first project and is based on paleontologist Dr. Neil Shubin's book of the same name. Shubin fronts the series, which investigates key evolutionary moments and was filmed in various international locations.

CGI elements are interwoven into the doc with journeys into the body or bones being



THE SHOW: *Your Inner Fish*

THE DISTRIBUTOR: Off the Fence

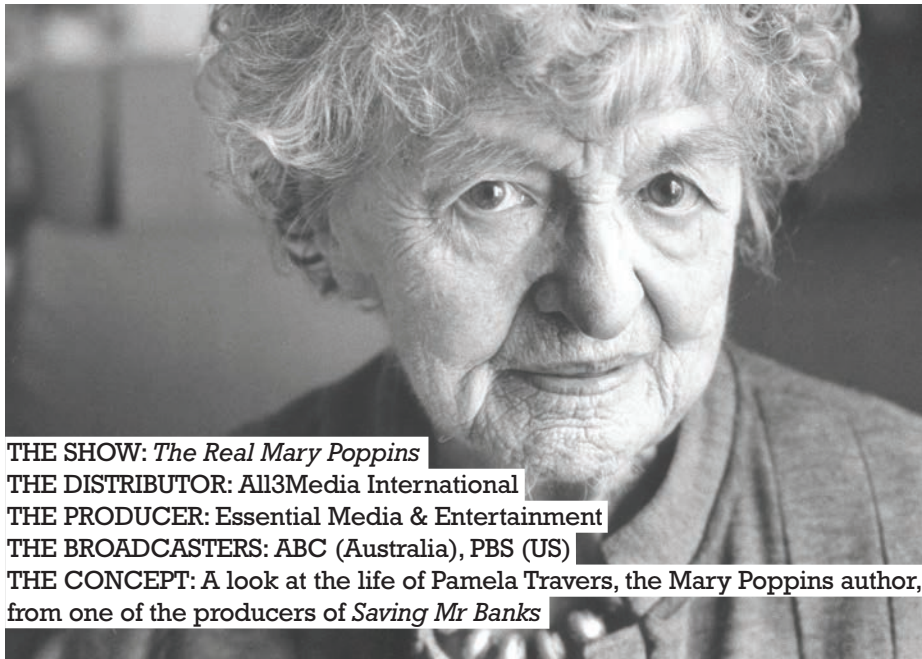
THE PRODUCER: Tangled Bank

THE BROADCASTERS: Online and PBS (US)

THE CONCEPT: Evolutionary doc based on Dr. Neil Shubin's book

animated to show the animals from which they came. In between the narrative, viewers are given takeaway information about the evolutionary journey of man and various other species.

"Most production budgets in factual are not this high, which means we can go after prestigious slots," Stehmeier says. The installments could anchor an evolution season and the show is well suited to PSBs.



THE SHOW: *The Real Mary Poppins*
THE DISTRIBUTOR: All3Media International
THE PRODUCER: Essential Media & Entertainment
THE BROADCASTERS: ABC (Australia), PBS (US)
THE CONCEPT: A look at the life of Pamela Travers, the Mary Poppins author, from one of the producers of *Saving Mr Banks*

Australian indie Essential Media was behind Disney movie *Saving Mr Banks*, which told the story of Mary Poppins author Pamela Travers and how she butted heads with Walt Disney through the production of the now classic movie.

Essential was a coproducer of the feature with Disney in the driving seat and the

Australian indie has taken the opportunity to update an earlier documentary about Travers.

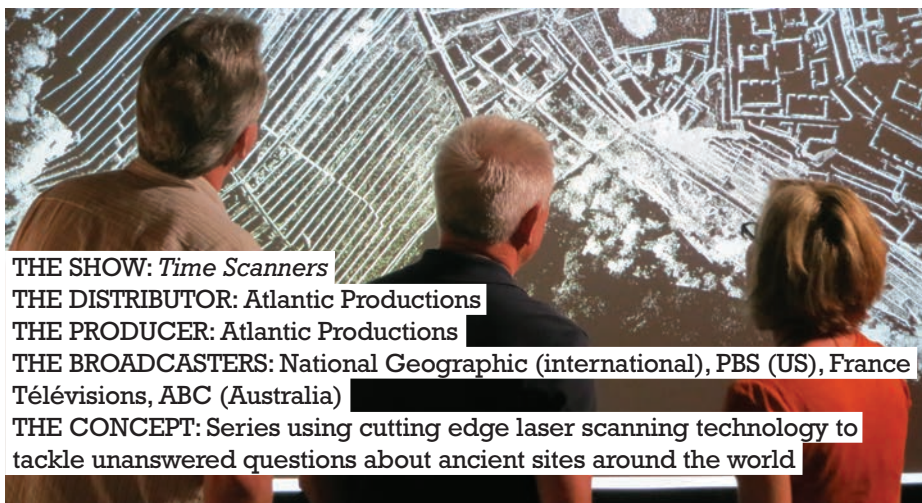
The Real Mary Poppins went out on Australian public broadcaster the ABC's ABC1 channel in February in a Sunday evening primetime slot and will also be shown on PBS in the US.

The one-hour doc traces the parallels

between the lives of Travers and Mary Poppins and looks at the decades long debate between the author and Walt Disney about how to bring the nanny to life on cinema screens.

The 2014 doc is a reworking of Essential's 2002 one-off *The Shadow of Mary Poppins*, which sold into the UK among other territories. The second time around the producers got permission from Disney to use several minutes of footage from the recent movie and selected music rights, making it a much stronger proposition, according to Essential CEO Chris Hilton. "We took the opportunity to remake and repackage it and have made it tighter, richer and more interesting," he says.

As well as the movie clips Disney also allowed Essential to use some of the 'making of' footage from the film and there is also archive of the 1964 premiere of the original feature. One point Hilton is keen to emphasise is that the Mouse House, contrary to media reports, did not interfere with the original *Saving Mr Banks* film script and equally did not make any changes to the companion doc despite it dealing with one of its iconic movie titles and company founder Walt. All3Media International is distributing the *The Real Mary Poppins* at MIPTV.



THE SHOW: *Time Scanners*
THE DISTRIBUTOR: Atlantic Productions
THE PRODUCER: Atlantic Productions
THE BROADCASTERS: National Geographic (international), PBS (US), France Télévisions, ABC (Australia)
THE CONCEPT: Series using cutting edge laser scanning technology to tackle unanswered questions about ancient sites around the world

Time Scanners is an amalgamation of a history, science and engineering series, which Anthony Geffen, CEO of its producer Atlantic Productions, says give broadcasters much-needed flexibility in terms of where it goes on their grid. "Schedulers want shows that they

can place across different genre categories and this is a range of different things coming together. People are interested in ancient history and this series uses new technology and real science to tackle questions and give genuine answers."

The tech in question is Lidar 3D laser scanning and the questions relate to iconic ancient sites. Each one-hour is given over to a particular site and the questions tackled include how the ancient Jordanian city of Petra was built, how large parts of the Colosseum were covered and how the dome of St Paul's was constructed. The series is presented by Steve Burrows, the engineer whose work includes the the Bird's Nest Olympic stadium in Beijing. He is supported by a team of specialists from the Arkansas-based Center for Advanced Spatial Technologies.

"We were thinking about how we could look at the ancient world in a different way and answer questions about it in a way that hadn't been done before," Geffen says of the show's genesis. "It's a whole new way of looking at ancient sites. Often they are examined by archaeologists but for this show we have an engineer who understands how sites were built."

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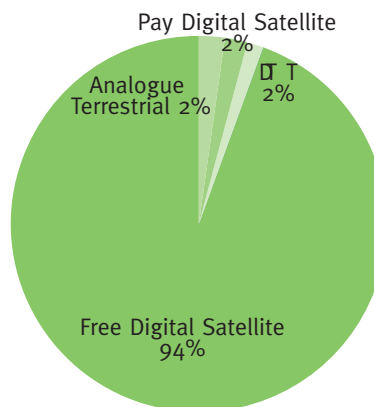
ALGERIA

TV homes: 5.9 million **Pay TV penetration:** 1.8%

- DTH continues to dominate the Algerian TV market, with high FTA multichannel penetration and limited offerings from state TV causing a very limited market for pay TV
- The official timetable for analogue switch off has been brought forward to this year, with a limited DTT service beginning in 2009
- Ongoing political turmoil has helped ensure that progress on liberalising the TV industry has been slow. The government's most recent significant action came in January 2014, when parliament debated legislation to open up the market to private broadcasters
- Domestic service Entreprise Nationale de Television is widely estimated to be the most popular channel, with its sister stations also ranking highly. However, it is threatened by a proliferation of pan-Arabic satellite channels, as well as high-ranking French channels based both in-country and abroad via the 'grey market'

• Both total advertising revenues and those of TV advertising increased in 2012 against the previous year and both are believed to have experienced good growth in 2013

• Informa believes that digital switchover will be completed a year after the current schedule, with most analogue terrestrial users switching to DTT, although DTH will continue to be the leading platform for the long-term



DATA: MENA UPDATE

The Middle East and North Africa region is fast-growing and increasingly dynamic. TBI presents at a glance highlights from some of the key territories from media intelligence specialist Informa Telecoms and Media

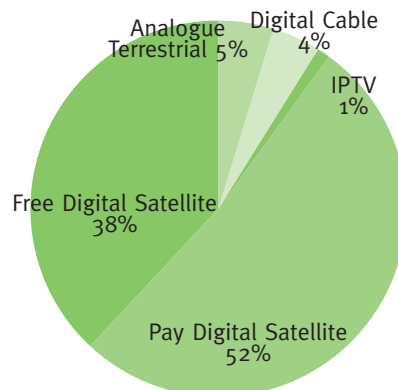
BAHRAIN

TV homes: 123,000 **Pay TV penetration:** 53%

- More than 90% of TV households receive DTH signals, although many of these are free-to-air, leaving a pay-TV DTH penetration of 52%
- With over 700 FTA channels readily available, there is little reliance on terrestrial TV, simplifying analogue switch-off. Although an end-2011 ASO target was not met, transfer to DTT is expected to begin soon
- Al Jazeera Sports continues to lead the pay TV sector, although incumbent telco Batelco launched its IPTV service in competition regionally in late-2011
- The government planned to sell its stake in Batelco by 2011, but this had yet to happen by early 2014
- Alternative telecoms provider Nuetel offers IPTV and triple-play in the Amwaj Islands (where it has a geographic monopoly) and plans to extend its service to the mainland

• The advertising sector saw a decline of 19.5% in 2012 with political unrest and ongoing protests hitting economic growth

• The Informa view is that strong regulatory backing for the broadband sector means there is a positive environment for IPTV, but it will still find it difficult to make a major impact against established TV sectors



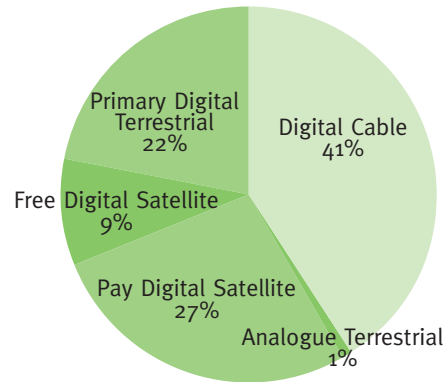
ISRAEL

TV homes: 2.1 million **Pay TV penetration:** 69%

- Informa forecasts that pay TV penetration is already near its peak and will grow from 69% in 2012 to 72% in 2017. Some of this growth will come from new regulations requiring operators to offer a low-cost (so-called 'narrow') package
- Cable operator HOT has accredited subscriber losses largely to the growth of DTT. HOT has been at the center of consolidation moves, merging with telco Mircs Communications. The cableco's primary unique advantage, offering multi-play bundles, was reined in during 2012, as the Communications Ministry ruled against its highly-discounted offers
- Telco Bezeq's 2009 attempt to merge with DTH platform Yes was blocked by the Supreme Court, but could be resurrected in view of legal approval for the HOT/Mircs deal
- Despite high multichannel TV penetration, DTT launched in August 2009 and analogue switch-off was completed in March 2011. DTT may be privatised to compete more directly with HOT and Yes

• The advertising sector has recovered from the global financial crisis with expenditure now exceeding pre-crash levels. TV accounts for around a third of total expenditure

• The Informa viewpoint is that Israel's TV sector is nearing saturation. The future focus is not therefore on subscriber growth, but customer retention and boosting ARPU, primarily via multi-play bundles. New IPTV services and an extension to pay DTT will only exacerbate this trend



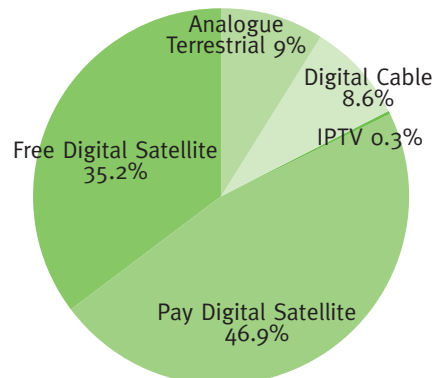
KUWAIT

TV homes: 338,000 **Pay TV penetration:** Less than 56%

- Despite the prevalence of free-to-air satellite signals, the pay TV penetration rate is 56%, one of the highest in the region
- In terms of subscriber numbers, pan-Arab DTH operators Al Jazeera Sports, which rebranded as beIN on January 1, and OSN remain the most popular pay TV platforms, with local Kuwait Cable Vision's (KCV) MMDS TV service trailing in third place.
- Telcos remain unsure about the viability of IPTV but FASTtelco soft-launched the first service in March 2012, opening up the potential for triple-play bundles. However IPTV still remains a nascent part of the total TV market.
- Despite a target of June 2015 for digital switchover being suggested in 2006, little progress has been made. Informa expects analogue terrestrial to be the primary service in just 2,000 homes by end-2017 despite the lack of DTT service

• Gross TV advertising revenues increased by 3.4% in 2012, with total ad spend across all media up by a marginal 0.3%

• The Informa view is that pay TV penetration will increase further, boosted by additional numbers of pay DTH subscribers and potential competition from IPTV



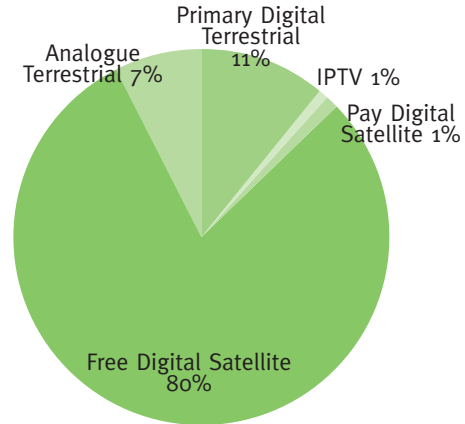
MOROCCO

TV homes: 4.8 million **Pay TV penetration:** Less than 1%

- Free digital satellite remains the dominant multichannel platform, with an 80% market share. However, as the DTH market is fairly fragmented, incumbent Maroc Telecom's IPTV service is the most popular individual pay TV offering
- Advertising across all media experienced growth of around 10% in 2013. TV accounts for the highest amount of advertising expenditure, reaching a 37-38% share in recent years. Its popularity as a medium is partly due to Morocco's low literacy levels
- Pay TV revenues are forecast to more than double during the forecast period, from US\$17 million in 2012 to US\$34 million in 2017
- Morocco is due to switch off its analogue terrestrial signal in 2015, along with other Maghreb countries. Informa expects this to be completed on schedule, with a range of technologies, including DTT, boosted by switchover

• Although there has been a partial liberalisation of the TV sector in recent years, applications for private licences since the passing of a 2004 Audiovisual Communication Law have been refused, with the government owning all but one channel.

• Informa's view is that free DTH will continue to be the most popular multichannel platform for at least the medium-term



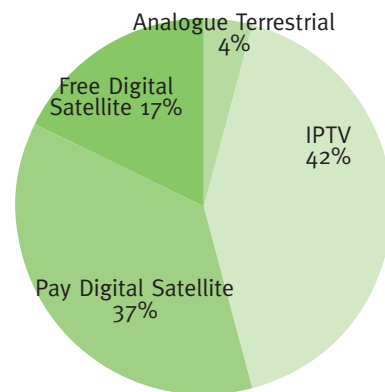
QATAR

TV homes: 133,000 **Pay TV penetration:** 78%

- With free-to-air satellite signals prevalent and pay TV penetration of 75%, there is little demand for terrestrial TV in Qatar
- Informa's research put pay TV revenues at US\$36 million for 2012, a figure expected to reach US\$51 million in 2017. During that period monthly ARPU is forecast to increase from US\$30.10 to US\$33.61
- The Mozaic TV+ IPTV platform from incumbent telco Ooredoo (formerly called Qatar Telecom) dominates the market with 88,390 subscribers by end-September 2013, up from 75,567 subs at end-2012
- State-funded network Al Jazeera is buying up a range of high-profile sports content and is making a significant impact in the regional pay TV sector. Its subscription sports service has been rebranded as beIN Sports from January 2014. beIN has also secured soccer rights in France – confirming that its pay TV plans extend beyond the region

• Despite economic growth and high investment levels, total TV advertising spend declined by almost 16% in 2012 and a further small decline is believed to have taken place in 2013

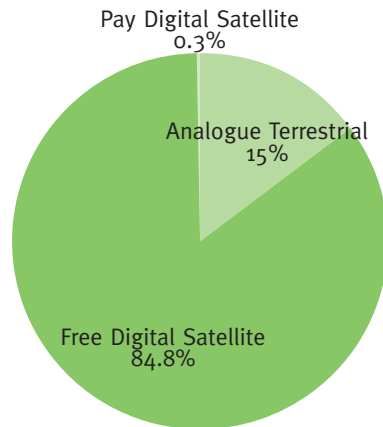
• The Informa view is that – with fibre networks being pushed – the prospects for IPTV continue to improve and Qatar will become one of the world's leading IPTV markets



SYRIA

TV homes: 3.5 million **Pay TV penetration:** Below 1%

- The economy was hit by the anti-regime protests of 2011, but the conflict has since escalated into a civil war. As this conflict and resultant turmoil continues with no solution in sight TV developments have fallen off the country's list of priorities.
- Just under 85% of TV households use satellite TV as their primary TV signal
- Pay TV penetration is very low, with just a few thousand subscribers
- Previously popular local dramas have declined in demand due to neighboring countries relations with Syria, while high production costs have lead to production ceasing
- The advertising sector is suffering as budgets are slashed across the board



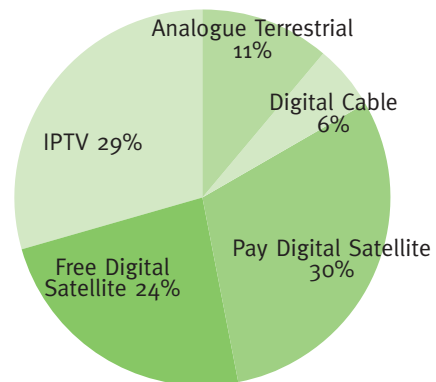
- The Informa view is that the Syrian TV sector offers very limited opportunities for TV companies and the landscape is unlikely to improve in the near future in view of the severe political violence

UAE

TV homes: 891,000 **Pay TV penetration:** 30%

- More than half of TV households take DTH as their primary method of reception. Analog terrestrial and cable continue to lose market share
- Despite IPTV penetration being on the rise, pay-DTH still remains the favored way for consumers to watch TV
- Informa expects IPTV penetration to continue increasing over the next few years but DTH will stay just ahead as the leading TV delivery platform
- Full digital terrestrial switchover had been scheduled for 2013 but no DTT launch had taken place by end-2013. Even after the launch, DTT is forecast to have a minimal impact on the market
- TV advertising spend declined in 2012 in line with the long term trend of rising and falling in alternate years. The 2013 figure is believed to have been flat compared to 2012. TV advertising still remains fairly nascent as a percentage of gross advertising revenues

- The OTT market continues to develop. The UAE now has a home-grown 'Netflix-style' service with an SVOD service launched in July 2013 by Dubai-based icflix



Source: All data and information is sourced from TBI publisher Informa Telecoms & Media and is top-line highlights from its extensive TV Intelligence Centre service. More details are available here: <http://www.informatandm.com/tv-intelligence-centre/>

LAST WORD

RACHEL GLAISTER



The case of *Midsomer Murders*' social media push

Long-running detective series *Midsomer Murders* is a classic whodunit, a classic British export – even the Government cites it as an amusing reflection of our society for overseas audiences.

The drama, produced by Bentley Productions for ITV, recently celebrated its hundredth episode – and a concerted effort has been made to keep this centurion on pace via the youthful antics of social media, whilst maintaining the inherent essence of the show – a straight drama with a ludicrously high murder count.

In 1997, Facebook and Twitter campaigns were not even glimmer in your average *Midsomer Murders*' eye; actors were focused solely on their role in front of the camera. In the early days, with John Nettles playing lead character of detective chief inspector John Barnaby and delighting in press and PR, it could be said that there was an appropriately genteel “fourth wall”, to coin a theatrical phrase. The proscenium arch guarded Midsomer County, which is really a costume drama in a contemporary setting; and an air of unreality and formality prevailed.

Times change however – Neil Dudgeon replaced Nettles in 2011 and plays the DCI Tom Barnaby, the younger cousin of his predecessor. The change coincided with a new executive producer, one keen to embrace audience feedback and the “ownership” that is enabled through social media.

How one approaches social in this instance though is a conundrum. Social can be very time consuming and an end game should always be

borne in mind. Initial engagements by the production team focused on the engagement around the UK broadcast, and the last few months have seen us at All3Media International seeking to engage in the next stage – a global and digitally layered approach.

There are factors to bear in mind when taking the social outreach to an international plane. Timing: around the world the two Barnabys are playing at different times in different countries, oft repeated out of sequence, so a ‘spoiler alert’ has to be kept in mind. Context: this is a significant one for *Midsomer* and worth considering beyond the amusing and perhaps blindingly obvious acknowledgement that promoting murder on social media sites is not sensible (and actually likely to get you arrested). The nature of social narrative and editorial had to be established, avoiding an emphasis on murders, weapons and head counts, despite those being part and parcel of an offline chat about the proceedings. Strengths: guest stars, for example, are a huge factor in the show's success. A brilliant casting director keeps them flowing and we knew we could engage via this route. Young new actors are more likely to have their own Twitter and Facebook pages, and in a nostalgic “remember which episode” vein we created a picture posting ‘Gold Picture Frame’ strand.

Finally, there's “detecting”. The satisfaction of solving the conundrum is universal and is what draws audiences; we knew we wanted to include a puzzle element in games and competitions. Tying in with our digital team's efforts, we strived to engage visually through a

Hidden Game app that has been developed for Facebook and the Apple platforms by promoting the visuals as part of the social postings for dual promotion. The App is delightfully universal in its execution: the player is the detective, operating in a recognisably *Midsomer* environment, beautifully drawn and hand crafted by the developers. An unseen Barnaby offers encouragement but it stands apart from plot spoilers and scripts.

We've progressed to live chats, initially via Facebook with the executive producer and a director to make the social audience truly aware they were now welcome behind the scenes and at MIPCOM we arranged a live chat on the Facebook stand with Neil Dudgeon and another of the show's stars, Gwilym Lee.

With these promotions, we always strive to achieve a further global benefit – we tie in free iTunes downloads in the key territories we are targeting with the chats, we set the timing to work for live feedback in those regions as well and if that's not possible we seek to offer an additional benefit to a local partner so we don't exclude key fans.

We reached out to 250,000 people over the campaign. When we took over from the UK-focused launch we had inherited 90,000, so we've achieved steady and significant growth in a demographic not known for unbounded social engagement. Building on that, to mark the hundredth episode we decided to look at the Twitter account and ran a pre-broadcast question and answer with Neil, which ran alongside a Facebook promotion of the Q&A that also offered a competition with prizes featuring the visuals of the app. Expanding our universe on Twitter is proving tougher than via Facebook but for both, we are confident that we can achieve further growth by building a global club feel, and we've a year before the next UK premieres to do so. **TBI**

Context is significant and worth considering beyond the amusing and obvious acknowledgement that promoting murder on social media sites is not sensible – it is actually likely to get you arrested



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