

# TBI Television Business International

**The Year Ahead**  
Top execs predict how the coming year will shape up  
**Page 8**

**The Interview**  
HBO Max's programming strategy unpicked  
**Page 16**

# GR5

INTO THE WILDERNESS

8 x 50 - PSYCHOLOGICAL THRILLER



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FROM THE AWARD-WINNING WRITER OF *NATIONAL TREASURE* AND *KIRI*

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A suspenseful crime thriller set on Hierro, one of the smallest and most secluded of the Canary Islands.

NAPTE Booth: 304

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# Contents TBI December 2019/January 2020



8

## TBI Scripted

### 24. From Slough House with love?

Apple TV+ has turned to a familiar genre for its first European drama, but are viewers reaching saturation point with spy stories?

### 28. Opening up

Innovative local scripted series and recent dramas such as *Chernobyl* are raising interest in Ukraine's rich history of storytelling.

### 32. Scripted Hot Picks

TBI chooses a selection of new dramas from around the world that are worth taking a look at as we head into a new decade.



24

### 8. 2020 visions

Industry experts from across the content spectrum cast their thoughts over the year ahead and predict how the business will change in 2020.

### 16. The TBI Interview:

#### HBO Max's Sarah Aubrey & Sandra Dewey

The streamer's originals chief and production president talk strategy.

### 20. Equitable thinking

What opportunities do private equity companies bring to producers and what should you know before doing business with them.



38

### 38. Dialling up development

Tim Dams uncovers how growing demand for standout unscripted ideas is impacting the way producers approach development.

### 42. Format futures

Brazil has not been known for its unscripted formats but branded content, streamers and regulatory support could change all that.

### 45. Unscripted Hot Picks

From the impact of meat on the world's climate to fast fashion and the solar system, TBI picks out three shows deserving your attention.

**Plus:** 4 Editor's Note • 6 Well-being • 7 Diary • 48 Last Word: Endemol Shine Boomdog's Leo Zimbron



## Editor's note Richard Middleton

### Future gazing

**W**elcome to TBI as a new decade stretches out before us, no doubt awash with opportunities and potential and industry changes that right now might seem barely fathomable.

It's fitting then that in this edition, we explore just how rapidly the business of content is changing. We've got an in-depth interview with two of the key execs behind HBO Max, Sarah Aubrey and Sandra Dewey, who tell TBI exactly how the hotly anticipated WarnerMedia streamer will look to tap into originals to bolster its offering to viewers and their precise requirements for programming – check out the colourful and hugely informative scattergraph on page 18. The service might be launching only in the US in the first instance but, in this globally connected world in which we live, the result is that there are an array of potential partnerships for producers and broadcasters based elsewhere to benefit from, a subject that's also touched on by Endemol Shine Boomdog's Leo Zimbron in our Last Word column.

The impact of streamers on development is also investigated, as unscripted producers look to get ahead of the curve in an increasingly competitive part of the production sector, while on the drama front we dive into the reasons for Apple TV+'s first European scripted commission and why a spy saga could be a solid bet – or a potential gamble.

From the imminent growth of the Brazilian format market to the emergence of Ukraine as a scripted hub, the central strand running throughout this issue is the ongoing demand for high quality product. And that is exactly what private equity companies are looking to profit from, so as their involvement in the TV industry grows, we take a look at what these investment outfits want out of your business and pick apart how you can safely negotiate this potential avenue of opportunity. As ever, there are risks and rewards – the vital ingredients that make this business so compelling.

Here's to a fantastic 2020...

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**6 x 60' factual**  
This fascinating series takes an uncompromising look at the past century by examining powerful and defining photographs.

**NAPTE Booth: 304**





## Well-being Tracy Forsyth

# Embracing an alternative New Year's resolution

**In this month's Well-being column, former BBC Studios exec and corporate wellness coach Tracy Forsyth discusses an alternative approach to New Year's resolutions.**

Tracy is a creative mentor for the Channel 4 Indie Growth Fund, the producer of the WFTV mentoring scheme and a professional executive coach. Follow her at [walterwootze.com](http://walterwootze.com)

**W**hen I was a VP in a corporate role, I got some 360-degree feedback. It was mostly extremely positive, but one comment read: "Tracy can be abrupt and I find her direct style too much." I focused on that sentence above all others until the head of organisational development said to me: "Tracy, I think people should spend more time focusing on what they do right, rather than wrong." Wise words indeed.

In my world as an executive coach, I constantly see so many talented people focusing on what's wrong and completely ignoring what's right. Highly driven, high achievers are often highly self-critical and nothing short of perfection will do. They are always looking to improve themselves, get even better and drive themselves to new heights. They are also brutal with themselves. Sound familiar?

If so, my top tip this January is simple: instead of writing a long list of New Year's resolutions of what to do less or more of, spend that time and energy on acknowledging and owning all the fantastic qualities you already have. If you've got it - and you most certainly have - it deserves to be flaunted much, much more.

I know this will be hard for some of you over-achieving perfectionists, so here are my top tips:

### 1. Achievements

Acknowledge them. Make a list (on your phone so you can keep adding to it and have it to hand) of what you've achieved in your life from large to small, they all count. You'll be surprised that you've forgotten so many. Get a friend or colleague to help because you are likely to be too modest. Take a moment to let that list sink in properly and thank yourself for achieving it.

### 2. Assets

Look at the common themes - what assets has it taken to achieve these things? Expertise,

knowledge, some serious professional skills? Whatever the assets, recognise them as something to be valued, not dismissed or taken for granted. Not everyone has what you already have. Imagine each of them as a merit badge stitched on to your jumper or a trophy on a shelf. I bet it's getting pretty crowded.

### 3. Qualities

It's not just what you do, it's how you do it. Others may have had the same role as you but how do you do it differently? Are you pro-active, tenacious? Do you think win-win? Can you charm the birds from the trees? Do you leave no detail unattended? Think about these as your super-powers, they are a unique part of you and what makes you stand out. Embrace those qualities!

### 4. Repeat

By now you should be feeling pretty good but if that still hasn't worked, get that list and stand in front of the mirror. Read out all of your accomplishments, assets and your qualities. Repeat them until it trips off the tongue.

### 5. Accept compliments

Finally, and this may be the hardest step - learn to accept compliments. I think that, even taking flattery and exaggeration into account, for the most part the compliments we give and get are genuine. So, if someone applauds you or says you've done well or that you are great at something then, instead of batting it away modestly, accept it, digest it, believe it and, above all, enjoy it. And the next time you find yourself thinking 'I should be more...' stop and remember the multitude of things you have to celebrate already instead. **TBI**

## About Town

### Festive feelings

It might feel like months ago now but Christmas markets, drinks and parties were the talk of the town in December.

Attendees at the inaugural NEM Zagreb were treated to some of the finest festive treats Croatia had to offer, with the country's famed Christmas markets providing the backdrop for a conference featuring the likes of *Sanditon's* Kris Marshall, *Cardinal's* Billy Campbell and *Leonardo* co-creator Frank Spotnitz.

At a bustling three-day event at the swanky Esplanade Zagreb Hotel – originally built to house passengers disembarking from the Orient Express – the TV business was dissected, discussed and deliberated upon, before delegates headed for drinks and delicacies at the event's all singing, all dancing Christmas show, organised by national broadcaster HRT.

Back in London town, Christmas events were also in full swing, with Kew Media Group among the first to kick of the party season with their scarecrow-themed event held at Soho icon The Groucho Club. Celebrating the BBC adaptations of *Worzel Gummidge – The Scarecrow Of Scatterbrook* and *The Green Man*, both of which Kew distributes - cocktails and canapes flowed, ensuring the festive season started in fine style.



NEM Zagreb's closing party



Cardinal's Billy Campbell at NEM Zagreb



Kew Media's Worzel Gummidge party

### Cross-border thinking at ATF

Partnerships were the name of the game at the Asia TV Forum in December, where Singapore's Mediacoop unveiled plans to link up with Hong Kong-based broadcasting and streaming outfit ViuTV on two Chinese-language titles. The first co-production is *Ink At Tai Ping*, a 15-episode cross-genre murder mystery about the exploits of an enigmatic female tattooist in Hong Kong. Desmond Tan and Edwin Goh were in Singapore to mark the show's launch.



### Camped out in Cannes



Forget all those rumours suggesting MIPTV could move to Barcelona in the near future. December brought news that event organiser Reed Midem had struck a deal with the French town, keeping the event - and MIPCOM - in Cannes until at least 2024

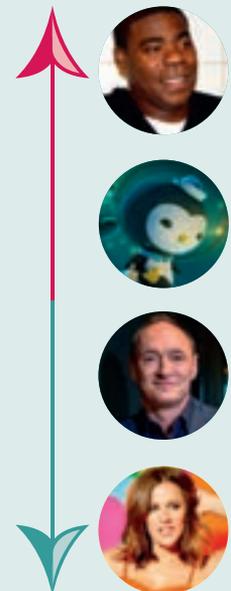
### Swings and Roundabouts

**50** HBO Max might offer *Friends* and *The Big Bang Theory* but 50 originals are also planned, including a recently revealed Tracy Morgan comedy

**195** What does \$195m get you these days? Sony Pictures Television decided that was the price worth paying for *Octonauts* prodco Silvergate

**325** Max Conze's ProSiebenSat.1 had hoped to wrap up the sale of Red Arrow Studios before Christmas, but the deal - valued at ~\$325m - was postponed in December

**1** ITV's *Love Island* was a presenter down when Caroline Flack left the show having been charged with assault but she was swiftly replaced a day later by Laura Whitmore



# 2020 visions

TBI gets the lowdown from execs operating across the content spectrum to find out what will be hot in the coming year and where you should look for opportunities

## Gary Davey, Chief Executive Officer at Sky Studios



### What does the formation of Sky Studios and its huge ambitions tell us about the way the content business changed in 2019?

I think the ambition, scale and energy of Sky Studios tells us that the content business is in rude health and nowhere more so than here in Europe. Two of the biggest, most important shows of 2019 – *Chernobyl* and the final season of *Game Of Thrones* – both had British and European talent right at the heart of them. It's this kind of creativity that Sky Studios will showcase to audiences around the world – it's a massive vote of confidence in the creative community here.

### How will the streaming ecosystem look this time next year?

By this time next year all the new major streaming services will have launched and so I expect there will inevitably be a period of refining the proposition (including content, pricing, release structure, ad load etc) based on consumer feedback, while each service looks to find its place in the market.

### Do you expect to see more consolidation in 2020 compared with 2019?

Possibly, but not at the scale we have seen in 2019. Whether it's Disney/Fox, AT&T/TimeWarner or Comcast/Sky, I think all of these major acquisitions will now go through a period of evolution and bedding in.

## Nina Lederman, EVP of global scripted development and programming, Sony Pictures



### What most surprised you about the global drama business in 2019?

I've been surprised that packaging TV series has become the norm. It's become evident that producers are relying on IP, casting, A-list writers and elevated auspices to get their project noticed in an effort to break through the clutter. Given how competitive the drama landscape has become, buyers are looking for extraordinary projects and packaging elements is a way to de-risk decision making.

### What show of the past 12 months most surprised you and why?

The Israeli series *Shtisel* is a perfect local language series. It's in Hebrew and Yiddish, and a drama with cultural authenticity and specificity that transports you into the world of an Orthodox Jewish family in Israel. It is engaging

and relatable with universal themes of family, religion, and love. Even though the world is unique and specific to the Orthodox culture, it resonates on many levels and makes it extremely accessible.

### How will streamers such as HBO Max and Peacock impact the US studio business?

Having two new platforms gives producers and studios like Sony more opportunities to sell series. Given that both of these are new, they will need a lot of content, especially in the early years. Although both of these streamers are part of larger media conglomerates, both are also looking outside of their silos for the best content for their respective brands.

## Claire Mundell, Creative director at Synchronicity Films



### What aspect of the drama business gives you most cause for concern?

I'm most concerned by the battle for writers. With so much opportunity it is a veritable gold rush for good writers, but with the increasing consolidation there is a lot of blanket "buying up" of talent from the SVODS, and even the terrestrials. This is a challenge for indie companies but I still passionately believe that with the pairing of a savvy, passionate producer and a writer whose skill they champion, we can cut through and find those distinctive voices, which audiences around the world crave.

### What change in the scripted business during 2019 most surprised you?

The surprise for me has been in the emergence of short-form as a format the market is really up for, but then any trip on public transport will demonstrate how hungry people are for content and stories to lift them out of their everyday lives and provide escapism.



Synchronicity Films' *The Cry*



**Superna Kalle, EVP of international digital networks at Starz**

**What is your single biggest concern for the future growth of your streamer into 2020?**

I wouldn't call this a concern, but more of a focus - we're thrilled with the expansion we've seen in the last year, and right now one of our areas of focus is developing and acquiring more content that speaks to our expanding local audiences. Continuing to integrate our service and deepening our relationships in the local markets with this content is one of our foremost ambitions for 2020 and beyond.

**Do you expect more SVOD consolidation?**

If there is anything to take away from the landscape this year - and what we are seeing for the year ahead - it's that consolidation and building scale is on trend and I wouldn't be surprised to see more of that in the next year.



**Francoise Guyonnet, Executive managing director for TV series, Studiocanal**

**How will commissioners' behaviour change in 2020?**

They will look for more event series. These may be smaller in terms of episodes but with bigger production values. IP and brand awareness are a big asset.

**What is the biggest challenge for non-English language drama in the coming year?**

To reach the English-speaking territories! Our content travels everywhere but the English-speaking countries remain a challenge for non-English speaking series.



**Derren Lawford, Creative director at Woodcut Media**

**Interest in factual has proliferated recently, do you expect to see this growth slow down over 2020?**

No, not really. There are even more buyers and platforms, some of which are launching next year. They all need distinctive content and factual is a key part of any direct to consumer offering. What will grow in tandem with interest in factual is the desire for bigger, more ambitious series and higher editorial expectations irrespective of the programme's tariff by those trying to compete with the streamers.

**Do you expect streamers to increase their deals with unscripted talent this year?**

Possibly, but it's harder to identify the one person who makes a factual series sing. It's possible that an indie exec with specific output and a track record could sign an uber-output deal.



**Laurine Garaude, Director of TV at Reed Midem**

**The events calendar for TV has proliferated over recent years, what does this say about the content business?**

It's a reflection of the huge changes in the global content industry - ongoing consolidation, the launch of streaming platforms, new technologies and distribution platforms, new business models. In this increasingly complex landscape, the industry needs face to face networking more than ever, and established international markets like ours offer business-efficient ways to do that. Additionally they are looking to these events to provide insights they can trust and strong curation to help them discover new content and make new partnerships and deals.

**Do you expect to see a consolidation in the number of content-related events occurring over the next couple of years?**

With so many markets out there, probably, but from a Reed Midem perspective, no we don't. Our portfolio of MIPCOM, MIPTV, MIPChina and MIPCancun has evolved to support a growing and increasingly important international content market. We've just had a really vibrant, highly successful MIPCancun, now in its sixth year. The need for face-to-face is only growing. There is always going to be a need for efficient markets that bring together key decision makers from around the world. People will start to be more selective about which they attend, choosing the ones that best understand and support the changing needs of their businesses.



**Harold Gronenthal, EVP of programming & marketing at AMC Networks International**



**You operate an array of streamers, from thriller-skewing Shudder to UK-drama focused Acorn TV. With the launch of catch-all services such as HBO Max, do you think your streamers could be combined?**

People will go to our options and choose to exit and enter as they will. There is more capacity for more options that are curated, and that's what we have with Acorn and Shudder, they are services that are truly curated by people who know and love those genres, and creating that package of content is very attractive to people. There is plenty of room for growth and it's a good strategy that aligns with our strengths.

**Attention inevitably turns to streamers impacting incumbent broadcasters, but how do you see the linear business developing?**

Channels are still vital and they are doing well, but of course that isn't to say SVOD and direct-to-consumer isn't looming. But linear is pretty strong in the rest of world, still. It's about focusing on what we do well - and that is distinctive quality programming that is on brand. We need to push that against the various and sundry platforms coming.



**Stuart Baxter, President of international distribution, Entertainment One**

**Have streamers been a positive or negative for the distribution business over the past 12 months?**

The arrival of streamers have been more beneficial as we're seeing more shows commissioned. Streamers are a significant part of a distributor getting its shows produced and distributed. They can also help to reduce or address the

deficit and can be a good partner to the traditional broadcaster relationships. While we remain platform-agnostic and seek out the best distribution plan per project, streamers have generated more opportunities for creative deal-making and global pacts.

**How will the commissioning behaviour of streamers and their attitude to rights change over the next 12 months?**

As the number of global streamers increase, the demand for the best

shows will increase. The initial first phase of streamers had limited competition. The advent of competition means they may need to be a little more flexible on the most sought-after projects.

**Which show not in your catalogue did you watch and wish you'd had?**

*Billions*



**Farhad Massoudi, CEO, Tubi**

**How will the AVOD market change in 2020?**

As free streaming continues to grow, free linear streaming will become pretty commoditised. Most streaming platforms and OEM devices will directly integrate free linear feeds into their platforms, while a lot of networks will launch free linear feeds as a mechanism to have a bet in AVOD. In light of the success of the streaming business models, AVOD is going to continue to take over TV viewership as linear declines.

**Do you expect to see AVOD services commissioning more content over the next year?**

AVOD content will improve across the board. On Tubi, a number of titles are AVOD exclusive, as we are democratising premium content and making it easily accessible to a broad spectrum of underserved audiences. You will see a general upward trend with AVOD commissioning content and securing exclusives.

**What's the biggest challenge for AVOD growth?**

It's the same for all of TV: content discovery. We are striving to pair the consumer with the right piece of content in a short amount of time across any device.

**Jonathan Ford, EVP of sales, Kew Media Distribution**

**Have streamers been a positive or negative for the distribution business over the past 12 months?**

As new streamers and brands enter the market it is having a positive effect, balanced against the fact that the longer standing ones are moving more to commissioning originals rather than acquiring finished products.

**How do you predict the commissioning behaviour of streamers and broadcasters will change over the next 12 months?**

Increased focus on originals and co-productions to provide real value to the viewer. For a distributor, the role will also involve being a broker of pre-sales and co-productions, which means a company such as Kew - that also owns production companies and therefore IP - is well placed.

**Which show not in your catalogue did you watch and wish you'd had?**

*Chernobyl* on scripted. *Three Identical Strangers* in docs.



**Vasha Wallace, EVP of global acquisitions & development, Fremantle**

**Streamers started dipping their toes into the format business in 2019, how will change?**

We are going to see the streamers continue to grow and go from being

US-based platforms to becoming more local platforms with a focus on local markets. This means we'll see them commission more local programming. What we know and what we've seen is that local audiences respond better to local programming. Local audiences want to see local faces on screen, speaking their language.

**What show most impressed you in 2019 and which format outside of Fremantle's offerings do you think will succeed in 2020?**

*The Greatest Dancer* from Thames (part of Fremantle) and Syco Entertainment for BBC One did phenomenally well when it launched back in primetime in January 2019. I've also been very impressed by *The Masked Singer*. It's exciting on a number of levels, as people said that there were no more big global travelling formats and that's simply not true. The reason for its success is because it's a guessing game, similar to *Game Of Talents*, with audiences constantly guessing who is singing behind the mask.



# REVEALING ALL...



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**Femke Wolting, Founder and managing director, Submarine**



**2020 looks set to be a watershed year for short-form. How will this part of the content business look in a year's time?**

Short-form has great potential as a medium both in and of itself and also as a way to pilot bigger ideas or create a proving ground for longer form series at a reasonable budget level. This won't meaningfully impact the appetite for more full-length television content though. It has a place alongside it in the content eco-system as opposed to a replacement for it. There is a push for short-form as a way to capture younger audiences and it will continue to grow – it's also easier to take a risk on new voices through a short-form project, it's a great platform for new talent.



Submarine's *Undone*

**What will be the biggest challenge for producers over the next 12 months?**

Getting series made with the budget levels that are currently being discussed – and once you do, actually getting them seen by audiences.

**Hannah Demidowicz, Commissioning editor, TCB Media Rights**

**Your role signalled a shift as distributors became commissioners, how will that trend develop?**

It will likely continue. Just recently we've seen Rachel Job join A+E and Leila Monks land at Off The Fence. As distributors become more involved further upstream, they'll need execs who speak the same language as producers, who can develop ideas and form strong editorial collaborations with broadcasters. This doesn't replace but instead complements the increasingly complex commercial skills also required within a distributor.



**What's the major challenge in getting factual shows off the ground and how are you working around it?**

Squeezed budgets at broadcasters are a real issue. I've noticed a decline in the values attributed and contributions made to factual projects in the last 10 years. The middle ground is seriously challenged when it comes to programme making. At TCB, by commissioning our own programmes we ensure a steady pipeline for our catalogue which is not solely reliant on third party content, as well as then being able to provide broadcasters quality content at an affordable tariff.

**JP Bommel, President and CEO, NATPE**



**Development of projects across scripted and unscripted is happening ever earlier, how is this affecting the events business?**

There is a sense of urgency to address the demand for content on a global basis and this is why it is important to have more events in different locations around the globe to discover and distribute new content.

**How will the events side of the content business adapt to the growing dominance of streamers?**

NATPE was the first on the market with a sold-out event for the streamers in LA last July. The reason for its success is because, as the largest global content association, we bring together a new community of online creators, brands and Studios' leadership. They discussed trends, business models and the future of content. It's the modern age of global content syndication so familiar to NATPE.

**David Michel, President, Cottonwood Media**



**2019 was another year of decline for most kids-focused linear networks as viewers shift to streamers; what will 2020 bring?**

From a producer's perspective, the key stakes will be discoverability. As the linear networks keep declining and move their offerings to digital with an infinite amount of shelf space, the focus will be on finding ways to create content that extends its reach to the same volume of viewers we had with channels.

**Tim Mutimer, CEO, Banijay Rights**



**What is the biggest challenge for distribution in 2020?**

As more global OTT services launch, IP retention will continue to be a challenge. Of course, media companies with global footprints like Discovery and Nat Geo have been testing this model for years in the linear space and distributors have thrived and found ways to work with these

outfits alongside local clients. Inevitably, business models will adapt and evolve and there will be new opportunities to offset any issues along the way.

**Which show outside of Banijay's catalogue do you wish you'd had and why?**

I'm a big fan of *Succession*, so I'd love to get early access to the next series. Luckily for me, Banijay is built around entrepreneurship and creativity so I can enjoy the show without it hitting too close to home! **TBI**



Succession

# 15 YEAR ANNIVERSARY

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# Max factor

HBO Max made waves after spending \$500m on *Friends* but its original commissioning plans are even more noteworthy. Head of original content Sarah Aubrey and Sandra Dewey, president of business operations and productions, talk strategy to Richard Middleton



Aubrey (left) and Dewey are overseeing a huge original content push



**W**arnerMedia streamer HBO Max is fast becoming a behemoth on the increasingly populous streaming landscape. And it hasn't even launched yet.

That branding is, of course, an immediate nod to its roots and while it looks likely to remain a direct-to-consumer conduit for HBO's much-vaunted programming, it's clear from talking to head of originals Sarah Aubrey that this streaming newbie has far greater ambitions.

The 50 original series it is aiming to greenlight before launching in the US in May surpass most of the equivalent plans from either recently launched streamers or those set to do so in the coming months. In fact, its originals ambitions are probably only surpassed at present by the insatiable appetites of incumbents Netflix and Amazon – neither of which have HBO Max's almost endless shelves of library content to fall back on.

"It is a huge number but Netflix has set the bar at

---

**"Our North Star is how are we pushing culture forward. If we are just redoing ideas that we've done before without a reason, then it feels very pedestrian."**

Sarah Aubrey  
HBO Max

a pace with new shows just for you," says Aubrey of that 50 originals plan. "There is always something new to check out and that has accustomed viewers to wanting something new, I'd say, at least once a month if not sooner.

"And that isn't just one demo, that is across all demographics," continues Aubrey. "So yes, it sounds a lot but if you look across a year and [the fact] that we have to go from kids to adults, then we feel confident it is a good amount to start with."

From the off, it looks like HBO Max will be a different competitor to other OTT entrants. Disney+ is going global with a smorgasbord of library content and an array of originals such as *The Mandalorian*; Apple TV has unveiled a somewhat pared back offering of commissioned series initially; and NBCUniversal's strategy for Peacock is finally gathering pace ahead of a launch early next year.

WarnerMedia, meanwhile, has taken something of a different tack: HBO Max is built on a huge library of existing studio product but it's also offering partnership

potential for producers, broadcasters, financiers and distributors around the world.

That is in large part because for now at least, HBO Max's focus is on the US. The service is planning to launch Stateside in the spring with 10,000 hours of its own content, 50 shows commissioned exclusively for the streamer and a further 30 originals that will be taken from HBO.

This approach has immediately presented opportunities for those outside the US. Comcast-backed Sky, for example, has negotiated a five-year extension to its overall deal with HBO, handing it exclusive rights to series such as the spin-offs from *Game Of Thrones*. Such deals suggest that in some countries outside of the States, WarnerMedia can make better returns licensing content to third parties than piping it direct to customers. at least for the time being.

For producers and broadcasters, the clear takeaway is that there is another deep-pocketed US-based participant playing in the co-production sphere. Sky already has plans to work on HBO Max shows, while in December the WarnerMedia streamer confirmed it was co-producing on *Boys*, a drama from *Doctor Who* scribe Russell T Davies and Nicola Schindler's UK-based, Studiocanal-owned Red Production Company. It will air on Channel 4 in the UK and will chart the emotional journey of five friends during the 1980s whose lives are changed with the rise of AIDS.

Despite such partnerships, WarnerMedia's Warner Bros. is clearly set to become a "primary supplier", as Sandra Dewey, president of business operations and productions, puts it. But she adds that HBO Max "absolutely wants to talk to other producers because our primary objective is to bring the best content to our subscribers and have the best shows, whether they come from us or someone else.

"It is also advantageous for us because we are initially launching domestically in the US," adds Dewey. "And although we plan to launch in Latin America shortly and then in selected European territories, it isn't a light switch. We are making deals with some of our partners where we are taking domestic rights and then they are able to retain international rights."

So, what do the WarnerMedia execs need? Aubrey, who previously oversaw US cabler TNT, admits HBO Max wants to "very quickly and aggressively" get into the streaming game and that means an offering fit for all. The streamer's cause is helped by its existing US networks funneling their shows across – but more than that, WarnerMedia's understanding of how its existing content attracts different demos means that the gaps Aubrey is looking to fill quickly become apparent.

"HBO, for example, mainly skews adult and primarily male – obviously there are exceptions but that is where the bulk of HBO shows sit demographically. We want to compliment that and round out HBO Max so we have shows for children then right up through to adult premium, covering all demos in scripted and non-scripted," she explains.

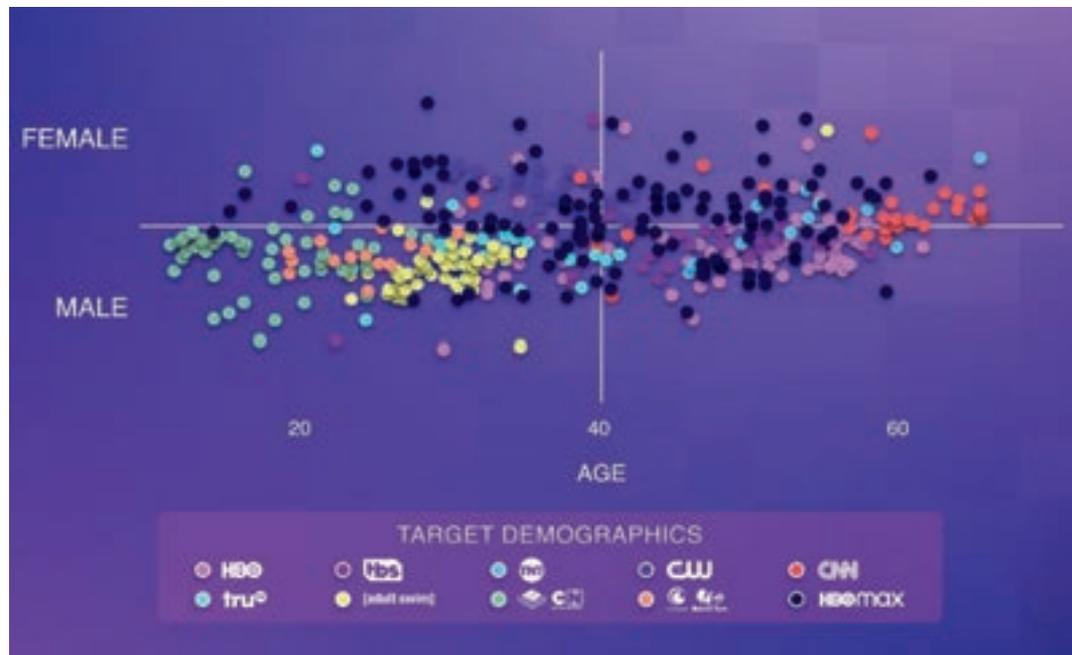
TBS and TNT "skew more male and adult," Aubrey adds, while The CW is "younger and more female-skewing". Elsewhere, CNN is "definitely older and skews male, but dual" and True TV and Adult Swim tend to attract "younger males". Add a "robust animation collection for adults" and anime from CrunchyRoll – plus of course that enormous offering from WarnerMedia's programming library that includes *Friends*, *Sesame Street* and *The Big Bang Theory* to name but three – and the goal for HBO Max's originals becomes clearer.

It means "the focus is primarily on 18-34s,

*The Big Bang Theory* and *Sesame Street* are among offerings for HBO Max



HBO Max originals, in black, will form a vital part of the streamer's all encompassing offering for viewers



**“Unlike other platforms, we are already in business in lots of places around the world so part of our challenge is to harmonise that as we move forward.”**

Sandra Dewey

millennials and generation Z,” Aubrey says, which will help to fill in gaps not immediately served by existing content. “That said,” the exec adds, “in the adult space, we are looking to complement HBO’s offering with some programming more squarely female-skewing – and no show performs just according to demographics either, of course.”

### Following the ‘North Star’

HBO Max has not been shy in commissioning its originals, which is understandable given its ambition. Numerous series have already been revealed, from Ridley Scott’s *Raised By Wolves* to Paul Feig and Anna Kendrick’s *Love Life*, while a show with Kaley Cuoco and super-producer Greg Berlanti is also planned. That’s in addition to *The Fault In Our Stars* actor Ansel Elgort’s first TV series, set in Japan.

Late last year, the streamer made its first series pick-up with a high school-set comedy drama produced by *Girls* creator Lena Dunham and at MIPCOM, WarnerMedia chairman Bob Greenblatt unveiled a *Grease* spin-off was in the works, joining a reboot of teen drama *Gossip Girl*.

Mining the WarnerMedia IP library has clearly been a key area of exploration for the originals team and Aubrey admits she could have all but stocked up the HBO Max originals slate with reboots from existing shows and movies. “But our North Star is how are we pushing culture forward,” she explains. “If we are just redoing ideas that we’ve done before, without a reason, then it feels pedestrian.”

“We’ve regularly had producers coming in and asking if they could reboot this movie or that show, and we have to date been very selective,” Aubrey says, highlighting that the reboot of *Gossip Girl* offers a timely exploration of wealth in today’s society and a reinvigorated storyline.

While Aubrey and Dewey are keen for partnerships, clearly the longer term plan for HBO Max is global. The message from the exec duo is clear: first the US, then Latin America, then Europe.

Complicating the situation is the fact that HBO content is already piped via direct-to-consumer services such as HBO España and HBO Nordics, in addition to the aforementioned content deals struck with the likes of Sky and others such as OCS in France.

“We plan to roll out internationally and initially that push will be into Lat Am and then Europe,” says Dewey. “Unlike other platforms, we are already in business in lots of those places so part of our challenge is to harmonise that as we move forward. Europe is our second target in terms of these plans, because we know to succeed we have to succeed there.”

Dewey also admits there will be a “bit of navigation of the existing platforms and services to work out how quickly we can meld the pieces together.” The complexity of that process and the deals struck to date suggests we won’t see HBO Max – or at least a full fat version including all HBO programming – in major, non-US markets for at least the next year or two.

For producers and broadcasters, that should mean that opportunities for partnerships remain open for some time yet. **TBI**

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# Equitable thinking

Private equity companies are sinking their teeth ever deeper into the TV production business but what do they want in return? Richard Middleton explores a fast-changing sector



**W**hen *Hostile Planet* producer Plimsoll Productions agreed a deal with private equity firm LDC earlier this year, it underlined a growing investment trend within the TV business.

It also highlighted the way that PE companies tend to work. Founded in 2013, UK-based Plimsoll established itself over the intervening years as a key player in the natural history space, with commissions from networks such as National Geographic and ITV but also streamers including Apple and Netflix.

That didn't go unnoticed. When discussions began around raising investment funds, numerous PE companies wanted to be involved, alongside the more established TV-focused investors that would previously have come from the distribution end of the market.

LA-based Thomas Dey, CEO and president at ACF Investment Bank, was involved in the discussions between Lloyds Banking Group-backed LDC and Plimsoll and describes it as a "fascinating deal" to be involved in. Not least because there were no fewer

than 10 companies, including trade buyers, looking to take a stake.

"PE haven't really been focused on television for a decade," explains Dey, but the "buoyant" TV sector is luring them in, he says. ACF has certainly been kept busy, with activity that has included Fremantle and BRON Ventures taking a stake in *The Immigrant*, the launch of *Bear Grylls' The Natural Studios* with Banijay in October, and Entertainment One's deal for *Blackfin* back in August.

Indeed, it has been a frenetic few months for M&A execs of all persuasions. From Banijay's acquisition of Endemol Shine Group to Hasbro buying Entertainment One and the numerous deals in between, one thing is clear: the market for production companies is hot.

And while those billion dollar deals might seem some way from the day-to-day regime of running a relatively small production outfit, the sheer appetite for content is one of the key drivers of PE interest. Investors are increasingly tempted by the potential

*Hostile Planet* producer Plimsoll Productions is using private equity financing to fuel both its domestic and international growth plans

of production companies able to tap into the surging demands for programming from a burgeoning and competitive group of buyers that range from Netflix and Amazon to Apple and WarnerMedia.

Tom Manwaring, partner at Helion Partners, says several reasons are driving PE interest, not least the fact they have “more funds than ever which they need to invest.” His company helped to secure the recent deal between Sky Studios and Wendy Darke’s natural history prodco True To Nature (TTN), and he says PE outfits have also noticed the growth of the marketplace driven by streamers, including the demands for scripted but also unscripted.

For producers who might be considering a sale, this influx of PE interest and cash can provide swathes of opportunity. But how do deals with PE firms work and how do they differ from the more traditional arrangements with well-known industry production conglomerates?

## Private equity vs trade deals

Stephen Fuss is CEO at Stargrove Pictures, a London-based media advisory and consultancy. Earlier this year, his company launched a new Enterprise Investment Scheme (EIS) in association with the British Film Institute (BFI) and PE firm Calculus Capital.

The UK Creative Content EIS Fund is raising around £20m (\$26m) from investors such as high net worth individuals, which will then be ploughed into production companies. Its first deal was struck in December with Wonderhood Studios, the prodco founded by ex-Channel 4 CEO David Abraham, which is behind BBC Two show *Eat The Years*, featuring celebrity chef Heston Blumenthal. The company has reportedly received almost £1m (\$1.3m) to expand its team and develop new content.

Other deals are in the works but have not yet been formally completed, with Fuss, who has previously overseen investment into shows such as *Call The Midwife* and *The Fall*, aiming for between six and 10 stakes to be taken each year.

He says the main difference between PE and trade deals from a production point of view is gaining independence. “Up to now, if you wanted to grow you’d go to a distributor such as an All3Media or a Banijay, and those deals have been quite widespread and at a relatively early stage.

“They take an equity stake, but there will usually be strings attached to the deal. If you want to auction your content around, you might not be able to do so. If you have PE investment, that is something you would be able to do.”

Dey adds that for companies such as Plimsoll, PE

provided a clear opportunity because LDC’s ambitions matched those of the production outfit and CEO Grant Mansfield. “The reason you sell to PE is because you believe it will be the start of a voyage; you’re saying you want to build something.”

That is exactly what Mansfield said following the deal with LDC, highlighting that the arrangement “is about giving Plimsoll Productions extra support and expertise to build on our success.” Abraham, meanwhile, said the investment from his PE backers “allows us to deliver our plans faster and to begin to explore genres such as drama sooner.”

Fuss adds that “the pressures from the PE side should be aligned with those that the management team is putting on themselves. They’ve come to us because they want to grow their company and want an injection of capital to grow faster and therefore they have the ambition to grow in line with what our investors are looking for.”

## Doing the deal

Whether you choose to take investment from a PE company or a trade buyer, the process is similar, says Manwaring. “They’ll require similar amounts of information, profits and loss, revenues. Depending on the PE suitor, however, they tend not to be industry experts so there’s often more of a learning exercise for them in that regard.”

It’s a point that Harbottle & Lewis lawyer Colin Howes underlines. His company provides specialist corporate finance and strategic advice on buying and selling businesses, and he says the first thing to understand with PE is that your acquirer likely “won’t understand the sector as well as you do or as a trade investor would.

“PE also tends to invest on more investor friendly terms than trade investors so you can expect tougher controls,” he adds.

Manwaring continues: “A PE investor will normally have significant protections on their investments, particularly if the business doesn’t perform. At a basic level that would include monthly board meetings. If the business underperformed, then their involvement would tend to increase significantly to safeguard their investment.

“PE also generally only invests in more mature businesses with a decent portfolio of returning shows. They tend not to invest in early stage companies or those reliant on just one show because of the increased risk profile. They are however interested in carefully thought through buy-and-build strategies.”

Fuss says he wants companies “with a track record of getting TV shows off the ground and greenlit by

**“Private equity companies are interested in carefully thought through buy-and-build strategies.”**

Tom Manwaring,  
Helion Partners



Stargrove Pictures' CEO Stephen Fuss has previously worked on shows including Gillian Anderson-starring thriller *The Fall*



### Producer view: Kate Beal, CEO at Woodcut Media



Private equity companies have been diving further into production companies of late but they have also been investing directly into shows and slates.

Kate Beal, CEO at Woodcut Media, has worked with PE companies on several occasions and for various different reasons - with the one constant being that their involvement has helped to ensure that ideas can become actual shows.

"We've done a couple of projects with PE," Beal tells TBI, ranging from shows that have been entirely financed by private equity firms - such as Idris Elba's feature doc *Mandela, My Dad And Me* - to smaller investments on *World's Most Evil Killers*.

"They clearly need to buy into the idea of the show but they also really need to buy into the numbers and the plan. You can't go and say we'd like \$100,000; you have to say we need \$100,000 and this is precisely when we need it and this is exactly when you will get it back."

Beal says the timeline of projects must be worked out and producers need to talk to distributors about how a potential show might progress on the sales-front.

"You want to be able to point to numbers that say this is month six, this is 12 months, this is 18 months and this is when you will have your investment returned, you really do need to know your maths. And that is where we, as a producer, have an advantage because we know our numbers."

Those figures can then be run past analysts, who will work out best and worse case scenarios. "They follow the market like any other, it is not really that different from them investing in oil."

The rate of return depends on how much is initially invested, Beal adds, and she advises producers to regularly run through projects with PE partners so they know about potential opportunities.

"How much they get back all depends on how much they put in, however I'm of the opinion that having a percentage of something produced is better than having 100% of something that never gets made. In this new world order where deficit financing is king, we need PE more and more. They are taking some of the strain from distributors."

major broadcasters and distributors. That can come from within the company or from its principles, if they have a strong record of doing that. We'd want a company with a good network of strong talent connections too."

### Exit plans

While some PE deals will be made in order to fund not just organic growth but acquisitions, others such as the Calculus-backed fund will provide the investment for "overheads and development of the company to help them grow," says Fuss, as in the case of *Wonderhood*. "It can include being used to pay for staff or whatever is needed to help grow the company organically.

"We'll also take a seat on the board and we'll generally look to help the producer in any way we can. Stargrove has a network of contacts who can be useful to help grow the company. And with our industry contacts and Calculus with their venture capital experience, we'd hope to add value but without interfering in the creative process, which is certainly what we're not looking to do."

But the PE firm won't be looking to stick around for the long term. Generally, they will invest then sell within five years, though Fuss says the exit timeline for his EIS fund is between four and six years.

At that point, there are various options. For smaller companies, a PE "might either sell to another PE house, which is not uncommon, or they would sell to one of the other trade players, possibly to a bigger indie or one of the groups," says Howes.

"The PE player then would be out of the picture but the people buying would still want the founders to stay on for a further period, of course. The value of a production company lies in its people, the IP and its track record." **TBI**

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# From Slough House with love?

Apple TV+ has turned to a familiar genre for its first European drama, but what makes spy stories so enduring and are we reaching saturation point? Stephen Arnell explores

Since joining Apple in 2017, Jay Hunt has kept a relatively low profile. All this could be about to change after the recent launch of the streamer and the details of her first major scripted commission, the spy drama *Slow Horses*.

To industry observers, Apple TV+'s European content chief can be seen to have made either a smart move, given the proven popularity of the genre, or perhaps a gamble, given how crowded the marketplace has become with spy thrillers.

From *The Night Manager*, *London Spy* and *The Honourable Woman*, to *The Americans*, *Deutschland 83/86/89* and *Jack Ryan*, spy sagas have been coming thick and fast over the past five years or so. Shows such as *Killing Eve* have also taken the genre into new areas, with an appeal that goes beyond the traditional target audience.

Series such as *Condor*, airing on Canadian network Audience, and Sasha Baron-Cohen's *The Spy* for OCS in France and Netflix internationally, have also launched, while the global streamer has enjoyed success with Israeli series *Fauda* from Yes Studios.

And the market isn't done yet: on the horizon are CBS's Queen Latifah-fronted reboot of 1980s show *The Equalizer* and Showtime's *Intelligence*, while Finnish thriller *Shadow Lines*, set in the 1950s, is soon to become available to global buyers.

Emmanuelle Guilbart, joint CEO & co-founder of *Shadow Lines* producer/distributor About Premium Content, said the show's warm reception on Finnish streamer Elisa Viihde – which ordered the series – was due to a combination of factors including “the stylish 1950s fashions, a sophisticated approach and the Finnish setting - Helsinki was often used as substitute for Moscow in thrillers such as *Gorky Park*. The young female protagonist gives the show a unique appeal and a younger audience when compared to other TV spy thrillers too,” Guilbart adds.

Importantly, the story also explores “the present-



*Slow Horses* is the first novel from Mick Herron's *Slough House* series



day relevance in the misogyny of a male-dominated workplace, ‘fake news’ and the possible reignition of the Cold War,” Guilbart adds.

Clearly the spy genre provides a conduit for a multitude of other themes to be explored, but with so many series on offer, is saturation being reached?

Nothing suggests that yet, but the cancellation of *Berlin Station* on Epix and the end of *Counterpoint* on Starz in 2019 could be taken as evidence of possible audience fatigue. Add that to the disappointing ratings performances of both BBC One's John Le Carré adaptation *The Little Drummer Girl* in 2018 and Channel 4's *Traitors* last year, coupled with the generally underwhelming reaction to Fox's European commission *Deep State*, and perhaps viewers are tiring. Like other genres such as Western, detective and zombie dramas, spy thrillers tend to stick to certain conventions, which increases the risk of over-familiarity.



A case in point is BBC Two's 2015 Cold War drama *The Game*. Despite a solid cast, including *Succession*'s Brian Cox and *Victoria*'s Tom Hughes, Toby Whitehouse's six-parter seemed to some critics to hew rather too closely to Le Carré's oeuvre - and to a lesser extent Len Deighton's - to really make its mark.

And the fact that further Le Carré adaptations are in the pipeline, including *The Spy Who Came In From The Cold* for BBC and AMC, and possibly *The Night Manager II*, under the aegis of his sons Simon and Stephen Cornwell of The Ink Factory, means that any ersatz versions are probably superfluous.

Simon Cornwell, for one, believes that the genre is in rude health. "I don't see any danger of the spy thriller being overused as the genre continues to be a metaphor for the world we live in today and the eternal conflicts of loyalty to country and right and wrong," he tells TBI.

*The Spy* was produced for Canal+ and Netflix

"They also manage to mine deep emotions beneath the surface. John Le Carré's work in exploring the complex moral choices faced is a reason for his titles' continuing success. In the age of Donald Trump, it can be said that real life could be stranger than fiction, but if anything, this makes the genre more relevant than ever and the moral choices more urgent as we enter what appears to be a new Cold War."

Cornwell's TV favourites include *Killing Eve*, for its "subversion of the genre", Beta Film's *Babylon Berlin* and French thriller *The Bureau*. "I'm also particularly excited by Laura Prescott's *The Secrets We Kept*, which delves into the story of the weaponisation of Boris Pasternak's novel *Doctor Zhivago* by the West against the Soviet Union," he says, with the novel now being developed by The Ink Factory.

Double-crosses, moles, father-figure bosses, sinister/

exotic foreign locales, femme fatales and the final episode ‘big reveal’ tend to come with the territory, but as with *Game Of Thrones*’ disruption of the TV fantasy epic, there’s plenty of scope for surprises in the espionage thriller, another reason for its long-standing appeal.

Recently, Netflix’s *The Crown* flirted with the genre, with episodes focusing on alleged Soviet infiltration of the Labour party and the proven treachery of the Surveyor of the Queen’s Pictures Anthony Blunt – played by Sam West, who incidentally also essayed the role in 2003’s *Cambridge Spies* for BBC Two. The show also delved into the possibility of Lord Mountbatten’s tentative involvement in a planned coup against Harold Wilson’s Labour government.

Which brings us back to *Slow Horses*, Apple TV+’s adaptation of the first of Mick Herron’s much admired Slough House series of novels, which is being produced by UK-based See-Saw Films.

There’s no escaping some surface resemblances between Le Carré and Herron’s work, with the setting of Slough House – based in London’s Barbican – a dumping ground for washed-up spooks. The presence of Gary Oldman in the lead role of spy Jackson Lamb lends weight to the forthcoming show too, and comes after his impressive turn as George Smiley in Tomas Alfredson’s acclaimed 2011 movie version of *Tinker, Tailor, Soldier Spy*.

There are plenty of crucial differences from Le Carré’s novels however, ranging from the strong elements of humour to the overt violence, satire and occasional absurdity, all of which are apparent in the book’s of Herron, who tells TBI he is enthused by the prospect of the Apple adaptation.

‘I’m very happy that we have a great team in Graham Yost (*Justified*) and Will Smith (*Veep*) bringing *Slow Horses* to the screen. I’ve already visited the writers room,” he says, adding that Yost’s presentation of the show’s storyline to Apple was “incredibly impressive.”

The author also stresses the importance of historical context in the *Slough House* series, emphasising that the story “hues to the tradition of more grounded, realistic British spy thriller, but includes satirical elements, often referencing current events.

“With the political turmoil of the present-day, it helps with such outlandish occurrences as Trump that you can push the boundaries, although *Slough House* eschews the gadgetry of some spy thriller novels.”

The author credits the novels of John Steinbeck as an influence on his approach to dialogue and underlines the black humour of the Jackson Lamb novels. Le Carré’s books also offer laughs of a sort, but



Finnish thriller *Shadow Lines* has a young female protagonist

they are usually of the driest and bleakest kind – with the odd exception, such as the improbable sight of Alec Guinness as Smiley in a long leather trench coat in a seedy German sex club in 1982’s *Smiley’s People*.

That being said, Le Carré’s latest novel, the Brexit-themed *Agent Running In The Field*, has led many to assume a satirical aspect - or maybe in the current political environment, it is simply uncomfortably true to life.

For Apple, *Slow Horses* is clearly another costly bet on talent-led drama. The presence of 2018 Oscar winner Oldman in a very rare TV role adds to the lustre of *Slow Horses* and could help sell the show to prospective subscribers who may not yet have engaged with the streamer.

The series may also have the knock-on effect of giving Oldman’s post-Oscar career a boost, following appearances in thrillers such as *Tau*, *Hunter Killer*, *The Courier* and *Killers Anonymous*. And while there has been little word yet on the supporting cast, the presence of the aforementioned Yost as executive producer, together with *Veep* co-writer and co-producer Smith promise a strong commitment to crackling dialogue and character development.

Turning to the spy genre also suggests Hunt may be looking to add more grit to Apple TV+, with this first European scripted offering contrasting with the glossy budget-busting shows such as *The Morning Show* and *For All Mankind*.

For commissioners looking to adapt another spy drama, they could possibly do a lot worse than Manda Scott’s *A Treachery of Spies*, which comes highly recommended by Herron himself. And then there’s the long-rumoured adaptation of Len Deighton’s *Game Set & Match* by Quentin Tarantino. We can probably consign that idea to history, but with the current demand for bringing spies out of the cold and onto the screen, you never know. **TBI**

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**“The spy genre is a metaphor for the world we live in today and the eternal conflicts of loyalty to country and right versus wrong.”**

Simon Cornwell,  
The Ink Factory





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# Opening up

Nick Edwards explores how innovative local scripted series and recent dramas such as *Chernobyl* are helping to raise interest in Ukraine's rich history of storytelling



In the world of high-end TV drama, any mention of the term ‘emerging territory’ is met with a shrug of the shoulders.

“Another one?” is the likely refrain from jaded executives exhausted from traipsing around the ever-increasing number of European markets and festivals that now take place annually.

Alongside the ‘golden age’ of scripted TV in the US, we’ve had Scandinavia with *The Killing* and *The Bridge*, *Engrenages* and *Les Revenants* in France, then Italy with *Gomorra* and *1992* - and throughout it all, Israeli shows were being remade. Hits such as *In Treatment*, *Homeland* and *Euphoria* were all adapted from Israeli series, while *Fauda* and *Shtisel* have been big hits for Netflix in their original form.

For Ukrainian execs, it has not been an easy task trying to draw attention to what is going on in their part of the world. The production values of their primetime dramas cost around \$20,000 to \$40,000 per hour and hence struggle to deliver the ‘wow’ factor to European audiences, where the average show costs in excess of €1m (\$1.3m) per episode - or to Americans, whose current crop of productions cost upwards of several million dollars. It’s even harder to find co-producers to come on board when you have such little funding to bring to the table.

However, things have changed. *The Sniffer*, a crime procedural about a detective with an uncanny sense of smell was picked up by Netflix. A signifier of change is that Graham Frake of *Downton Abbey* was cinematographer on the show’s second season.

Another production from Ukraine, *Hide And Seek*, has been picked up to be distributed globally by

Germany’s ZDF Enterprises. The 8 x 60 minute show has attracted a lot of attention since being showcased at events such as the MIP Drama Buyers Summit and major European festivals including MIA (Mercato Internazionale Audiovisivo) in Rome, Italy.

The show is also another step up the ‘high-end’ drama ladder for Ukrainian producers Film.UA Group, which was also behind *The Sniffer*. The latter features a weekly case that is wrapped up at the end of each episode, coupled with storylines that span the entire season, whereas *Hide And Seek* is a slow-burn atmospheric piece of crime noir that interweaves plot and characters’ personal stories into a climatic denouement.

“*The Sniffer* is more *The Mentalist* whereas *Hide And Seek* is *True Detective*,” explains Kateryna Vyshnevskaya, head of development and co-productions at Film.UA Group, talking to TBI at MIA earlier this year.

Stepping into the well-trodden road of noir is a brave gambit. Ever since *Wallander*, *The Killing* and *The Bridge*, established Nordic noir on the international TV drama scene has been infinitely imitated and remade with varying degrees of success. But despite the fatigue that one might expect, the public’s thirst for the genre remains strong for the right types of series. If UA films get it right, *Hide And Seek* could prove to be a strategic move for both themselves and the region.

The key to a great noir series is to include all the familiar tropes but somehow reinvent them. The landscape is famously a defining element of Nordic noir, and in *Hide And Seek* the producers used Enerhodar, a remote city in the south-east of

**“Sometimes you disagree with partners but you work together, sometimes you stop working, and sometimes you stay friends and carry on doing great work.”**

Kateryna Vyshnevskaya,  
Film.UA Group



*Hide And Seek* (opposite) and *The Sniffer* (left) are examples of the differing types of dramas emerging from Ukraine

**“In our efforts to diversify our series catalogue we are looking to work with experienced producers in the CEE region.”**

Mirela Nastase,  
ZDFE.drama



*Chernobyl* was a hit for Sky Atlantic and HBO

Ukraine, which has not experienced gentrification or multiculturalism. That in itself makes it distinct from the majority of sub-titled drama imported to the UK.

In fact, the city and its inhabitants seem to have experienced the full ravages of neglect in a country that is struggling to get on its feet economically and over which the threat of war constantly hangs.

The heroine, detective Varta Naumova, played by Yulia Abdel Fattakh, is slightly at odds with the world and very much shaped by her traumas. She is a subtle new take - and worthy descendant of - the icons of European crime noir to date, such as Sarah Lund in *The Killing*, Saga Noren in *The Bridge* and France’s Laure Berthaud in *Engrenages*. Maksim Shumov, her colleague, played by co-star Pyotr Rykov, is also the product of the region and suffers from its blight – alcoholism. From watching the opening episodes, the storytelling by screenwriter Oleksandr Protsiuk – previously a successful crime novelist – is thoroughly original and the plot and characters intriguing.

Indeed, the sum of the parts are more than enough to make you want to become thoroughly immersed in the cold and brutal world of Ukrainian noir. This is certainly how ZDFE see the project.

“In our efforts to diversify our series catalogue,” says Mirela Nastase, director of ZDFE.drama, also speaking from MIA, “we are looking to work with experienced producers in the Central Eastern European region and this project caught our attention.

“There is a strong visual identity and the themes behind it are universally relevant but they still reflect social Ukrainian realities. Noir crime drama is an under-represented genre in Ukraine - in fact Ukrainian series and generally CEE ones - are still under-represented, so this gave us a good angle for our promotion and international distribution strategy.”

Although the rest of the world has shown little interest in Ukrainian series to date, the country

actually has a thriving industry. From the more than 200 local and international channels available, around eight produce content. These are controlled by privately owned media groups and they are very generalist, so the content tends to be medical drama, soaps, a few glossy entertainment shows and a lot of unscripted productions.

The Ukrainian Public Broadcasting Service, UA:PBC, does not produce scripted content and Netflix and Amazon Prime, although available to end users, have not commissioned Ukrainian scripted content yet. Netflix did, however, co-produce *Winter On Fire*, a documentary about the Ukrainian Revolution that was short-listed for the 2016 Academy Awards.

Elsewhere, Ukrainian and Russian VOD platforms are just entering the original content scene. *Hide And Seek*’s budget of \$220,000 per episode is huge by Ukrainian standards but the other reason it looks so good is because of the low overheads of shooting there and being able to exploit the country’s cinematic infrastructure, which has produced many internationally acclaimed ‘art house’ films. Things look likely to improve again, following a recently announced rebate offer for those who want to shoot there.

Tight budgets mean ambitious Ukrainian productions need partners and most often these would have been formed with companies in Russia (Ukrainians are bi-lingual). Relationships continue despite the serious political divides between the two countries and this extends to the TV industry. “We need each other,” explains Vyshnevska, describing the relationship with Russia. “Sometimes you disagree on things but you work together, sometimes you stop working together altogether, and sometimes you stay friends and carry on doing some great work.”

Prior to the break-up of the USSR, Ukraine made up almost a sixth of the world’s population. If one imagines the amount of stories and perspectives on the world that have not yet been told from the region, from a producer’s perspective, it is a mine of untapped content waiting to be discovered.

Being Russia’s neighbour also means that the rest of the Western world has an interest in what life must be like there, in a similar way to how the Israeli show *Fauda* garnered so much intrigue because it dealt with another of the world’s most divisive conflicts, between itself and Palestine.

The zeitgeist in the air is underlined by the proven interest in the region generated by the recent HBO and Sky co-productions *Chernobyl* and *Catherine The Great*. After years of trying to get jaded executives interested in TV drama from her region, Vyshnevska is finally starting to find they are knocking on her door. **TBI**



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# Orphans Of A Nation



Set both in São Paulo and amidst the refugee crisis resulting from the war in Syria, this drama reflects the growing trend for telenovelas to tackle much grittier subjects than they might have previously. That said, *Orphans Of A Nation*, known locally as *Húerfanos De Su Tierra*, retains some traits of the telenovela genre, with the show running to 90 hour-long episodes and incorporating a romantic story arc.

The series has been written by Thelma Guedes and Duca Rachid, who won the International Emmy Award for Best Telenovela in 2014 with *Precious Pearl*. Gustavo Fernández has directed the series, which revolves around Laila, played by *The Other Side Of Paradise* actor Julia Dalavia, and Jamil, played by Renato Góes of *Dark Days* fame.

Guedes and Rachid say their focus with the show was “to shed a light on the stories of a world with less war, walls and restrictive borders, and more empathy, compassion and love.”

The story tracks Laila as she moves to São Paulo with her family in a bid to escape her war torn homeland. She is pursued there by Jamil, who intends

to take the woman back to Syria in a bid to force her to fulfil a marriage contract with a powerful sheik.

The show goes on to follow the duo’s ongoing relationship, which sees Jamil falling in love with the woman he was meant to abduct. But when the sheik is murdered, his daughter looks for revenge.

While the drama incorporates a love story, there were also extensive efforts made to ensure the show reflected the realities of the Syrian conflict.

Producers partnered with the United Nations High Commissioner for Refugees (UNHCR), which provided insights and expertise on how refugee camps were constructed. An architect from the agency joined the show to provide assistance on the assembly of the camp, with real uniforms and tents from humanitarian operations used on the series (with this equipment later replaced by Globo).

The partnership also saw UNHCR provide information on the forced relocation and socio-cultural integration of refugees, themes that play out throughout the show.

The drama, which recently secured a Rose d’Or award in the Soaps and Telenovelas category, was a ratings hit in Brazil and is among an eclectic slate for Globo. It includes telenovelas *Sweet Diva* (*Dulce Ambicion*) and *A Life Worth Living* (*Suerte De Vivir*), as well as 10-part crime drama *Desalma* and miniseries *Where My Heart Is* (*Donde Esta Mi Corazón*), which tackles the story of a doctor who deals with his pressurised life by using crack cocaine. **TBI**

## Orphans Of A Nation

**Distributor:** Globo International

**Producer:** Globo

**Broadcaster:** Globo (Brazil)

**Logline:** A love story set in the current context of refugees from around the world

# Thin Ice

**T**he storyline of this 8 x 45 minute drama would - a few years ago - likely have appeared far removed from reality but it now instead finds itself set deeply within the possibilities of contemporary life.

Set off the coast of Greenland, a Swedish oil research vessel is attacked and the crew kidnapped. The ship is found adrift as the Arctic Council meets to sign a treaty, proposed by the Swedish Foreign Minister, to prohibit further environmentally harmful oil drilling in the Arctic.

Suspicious arise that Russia may be responsible for the attack. Huge oil reserves have been discovered in the area and Russia is secretly offering Greenland independence in return for the drilling rights. This is Greenland's ultimate dream, which could be shattered by the treaty.

The show has been commissioned for Nordic streamer C More and Swedish broadcaster TV4, with Banijay Group-backed producer Yellow Bird co-producing the drama with Sagafilm. France TV, Denmark's DR, NRK in Norway, Finland's YLE, Iceland's RUV and Lumiere Group are also onboard.

"*Thin Ice* brings up a captivating story about what really happens in the Arctic when the ice melts and when the exploitation of natural resources becomes possible," says Søren Stærmosé, exec producer at

Yellow Bird, who lives on Greenland. He admits that US president Donald Trump's recent exploration into the feasibility of buying the territory "makes the TV series insanely relevant."

The series, which is set to debut later this year, stars Lena Endre (*Kingsman: The Golden Circle*), who has been an ambassador for environmental charity Greenpeace, and came up with the concept for the show with Stærmosé.

"This show has been a long journey with many challenges," Endre says, admitting that shooting in the Arctic between January and March before the ice melted was an "amazing experience."

Swedes, Norwegians, Danes, Greenlanders, Finns, Icelanders, Americans, Russians and those from the Baltic have all been involved on the series, which is being directed by Cecilie Mosli (*Mammon*, *Grey's Anatomy*) and Thale Persen. **TBI**

## Thin Ice

**Distributor:** Banijay Rights

**Producer:** Yellow Bird, Sagafilm

**Broadcaster:** C More, TV4 (Sweden)

**Logline:** Thriller dramatising the burning issues of climate change, Arctic exploitation and international geo-politics





## Small Axe

**T**his anthology series is made up of hour-long stories that have been conceived and written by *Twelve Years A Slave*'s Steve McQueen, with Alastair Siddons and Courtia Newland also attached.

The 6 x 60 minute films feature actors including *Star Wars*' John Boyega and *Black Panther*'s Letitia Wright, with the show delving into an array of narratives set within London's West Indian community between the late 1960s to the early 1980s.

"I felt these stories needed to be shared," says McQueen. "I wanted to re-live, re-evaluate and investigate the journeys that my parents and the first generation of West Indians went on to deliver me here today calling myself a Black British person."

The series has been executive produced by Tracey Scofield and David Tanner for Turbine Studios and McQueen for Lammas Park, with shooting taking place across London last summer. BBC One in the UK commissioned the series, which has already been acquired in the US by Amazon.

"What's important about our stories is that they are local but at the same time global," continues McQueen. "I think audiences will identify with the

trials, tribulations and joy of our characters as well as reflecting on the present environment in which we find ourselves," he adds.

Scofield has been working on the show with McQueen and the BBC for over five years, with its commission marking the first project on the slate for Turbine Studios. The prodco was set up in 2018 by Scofield, Tanner, Andrew Eaton (*The Crown*) and Justin Thomson (*The Fall*).

And for those wondering, the title is derived from a Jamaican proverb that has resonance throughout the Caribbean: If you are the big tree, we are the small axe. It is also the title of a Bob Marley song from The Wailers' 1973 album *Burnin'*, which acknowledges that marginal voices of dissent can successfully challenge those more powerful. **TBI**

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### Small Axe

**Distributor:** BBC Studios

**Producer:** Turbine Studios, Lammas Park

**Broadcaster:** BBC One

**Logline:** Six films that tell five stories, with the first told across two episodes, set within London's West Indian community from the late 1960s to the early 1980s



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# Hekimoğlu

**T**urkish drama has been rampant across Latin America over the past five years and *Hekimoğlu* looks like another scripted series from the country that could be an intriguing one to watch.

The Turkish show debuted on Kanal D in mid-December to domestic acclaim and is a remake of the much-vaunted US dramedy *House MD*, which was produced by Universal Television and aired on Fox for eight seasons until 2012.

The remake has been produced by Red Arrow Studios-owned Karga Seven Pictures Turkey, whose CEO Ömer Özgüner admits his company had “wanted to produce a local version of House MD for many years” prior to acquiring remake rights from NBCUniversal International Formats.

The Turkish version has been written by Banu Kiremitçi Bozkurt, with Hülya Gezer directing and Karga Seven’s Ömer Özgüner and Ümmü Burhan

serving as executive producers.

It will again track the life of an unconventional doctor, played by Hugh Laurie in the US version and Timuçin Esen in the Turkish remake, as he disregards hospital rules and regulations to come up with controversial hypotheses about his patients. Other cast include Okan Yalabık, Ebru Özkan, Kaan Yıldırım, Damla Colbay and Aytaç Şaşmaz.

*Hekimoğlu* joins a growing scripted slate for Karga Seven’s Turkish division, which was launched in 2017 and is behind new Netflix limited series *Ottoman Rising* and Fox Turkey drama *Her Yerde Sen*. **TBI**

## Hekimoğlu

**Distributor:** Kanal D International

**Producer:** Karga Seven Pictures Turkey

**Broadcaster:** Kanal D

**Logline:** Following a doctor who solves medical puzzles with the help of a team of young diagnosticians using unconventional thinking



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# Dialling up development

With growing demand for standout unscripted ideas, some producers are rethinking the way they approach and fund development. Tim Dams reports



**T**he art of developing ideas for unscripted TV shows is changing, reflecting the industry upheaval caused by the rapid growth of the streamers.

Buoyed by the success of shows such as *Queer Eye*, *The Final Table*, *Our Planet*, *All Or Nothing* and *The Grand Tour*, the likes of Netflix and Amazon have been greenlighting an increasing amount of unscripted content, often with significantly higher price points than their linear rivals.

“The new players are getting their act together as far as unscripted is concerned,” confirms Neil Smith, the managing director of *Grand Designs* and *60 Days On The Street* producer Boundless, pointing to a raft of unscripted hires at Netflix and Amazon.

The result, Smith says, is that producers now have a much wider range of clients to think about when they start developing shows. These clients have different needs too.

Delbert Shoopman and Bear Grylls are behind The Natural Studios

Traditional broadcasters have, of course, long turned to unscripted to fill their schedules with lower-cost, high-volume popular series. However, pressure on budgets as a result of falling ad revenues and changing viewing habits means that producers need to think hard about whether broadcasters can afford their unscripted ideas, says Smith.

On the other hand, the Boundless boss says, “we also have to think about people who want to make shows that cost over \$1m an episode. That’s very interesting to try and negotiate. Nonetheless, it’s very positive – I would say that it is a very good time to be in development.”

Smith adds that most of Boundless’ work still comes from traditional players, but that it is now looking towards the streamers, “thinking about how we can do ideas for them that are bigger and more international.”

Most producers say that developing ideas for local, linear broadcasters has not changed to a great extent,

and that orders can still be won based on paper proposals and good relationships with commissioners.

That's despite there being plenty of talk that UK broadcasters are increasingly looking for sizzle tapes and detailed pitch documents. But Smith says that is not always the case. "I know that is what people say, but we've not been finding that... I'm sure we will at some point though."

## Streaming requirements

For global OTT platforms, it's often – but not always – different. Sarah MacDonald, co-founder of London and Singapore-based indie Make Waves, whose credits include feature doc *The Great Green Wall*, HBO's *The Talwars: Behind Closed Doors* and Channel 5's *Edwardian Britain In Colour*, says she's currently in discussions about creating a "global factual series" for a new OTT platform.

"They are not going to take us seriously unless we have a bible and a sizzle reel," says MacDonald.

In many ways, this echoes the development and pitching process that has for a long while been a feature of the US market.

Development is also more complex for bigger budget, international projects which require multiple co-production partners. "Because you have to stitch these deals together, you have to have a really slick pitch," says MacDonald. "You're not just going into one broadcaster that you know really well who you can hand a piece of paper to."

Pitch documents for big US broadcasters can take six to eight months to work up, says MacDonald. "I will have a 25-page document that has got all the cast of characters, all of the episodic breakdowns – it is super detailed." To help with this, Make Waves is in the midst of appointing a head of development, MacDonald reveals.

However, the need for such in-depth development ahead of a pitch can vary depending on the platform or broadcaster, its relationship with a producer, or the talent involved in a project.

Delbert Shoopman is Bear Grylls's long-time producing partner, and recently launched The Natural Studios with the adventurer and Banijay Group, with a focus on producing both non-scripted and scripted adventure content.

Shoopman says that on some projects he can put forward a brief proposal, have a phone call and then achieve a quick sale, while other projects, in particular new formats, require "the long marathon" development period with a 20-page deck.

Shoopman says that most development with Grylls takes place on a plane or in the middle of nowhere,



DCD Rights, which is behind *The Ladykillers*, will help to fund development on projects with international potential

"because that's where we are 95% of the time." Once the idea has been worked up, The Natural Studios will then partner with a Banijay company that will produce the project.

Of course, Grylls' track record as the face of survival and adventure TV can help open doors, and allows a speedier commissioning process. This extends to the usually difficult to access streamers, which have hired many unscripted execs that the duo have previously worked with at the networks and cable channels.

Grylls' show *You Vs. Wild*, for example, was quickly greenlit by Netflix VP of unscripted originals and acquisitions Brandon Riegg, who Grylls and Shoopman had successfully worked with at NBC on *Get Out Alive With Bear Grylls*, *Running Wild With Bear Grylls*, and the US version of *The Island*. "He already knew how we develop out a project with Bear," says Shoopman.

## Developing with talent

While onscreen talent such as Grylls can often be the key to securing commissioner access, it's not always necessary to have them at the outset, argue producers. Boundless's Smith thinks it's "all about the ideas".

"It's wonderful when you have a great piece of talent to work with. But actually that's truer for the UK than it necessarily is with the new players, who will often say don't worry about the talent. They want to have the best ideas and then will help you find the talent they want to have."

MacDonald says that she will look to provide plenty of information about behind the scenes talent for projects that she is pitching to OTT platforms, or that she is seeking funding for on the international market. But the lengthy amount of time it often takes to raise financing means that it's always a juggling act in terms of keeping the talent on board.

"It's so kind of Hollywood. Who's the director?"

**"Two heads are definitely better than one [in development] - if you team up with the right person."**

Stephen Stewart,  
Green Inc.



Who are the producers? Who is the talent attached? But people come and go – they get signed up to other stuff. They know, and you know, that there is no guarantee until the money is in the bank and the contracts have been signed.”

The cost of developing unscripted projects, particularly for smaller producers, can be prohibitive – and that can cause many to seek new ways to alleviate the expense.

Stephen Stewart, managing director of Northern Ireland-based Green Inc, says he made the decision a few years ago to co-produce projects right from development through to delivery.

“The reason I did that was because I noticed that broadcasters expect you to scale up the development – they all expect tasters, fully fledged treatments and fully fledged development. For a small company, if you’re doing a lot of those in any year – especially if it is a quiz show where a run through can cost £20,000 (\$26,000) – you could be in trouble.”

Green Inc has co-produced projects such as *Hive Mind* with indie Salt Beef, RTE’s *Crime Call* with Rare TV and *Ireland’s Got Talent* with Kite, and is in active development at the moment with former ITV and Sky head of entertainment Duncan Gray’s company twentysix03 and former BBC entertainment chief Alan Tyler’s North By NorthNorth Media.

Sharing development costs and co-producing with other companies, says Stewart, brings all sorts of advantages: the broadcaster ends up with two respected companies on a project, the talent pool working is increased, and the workload is shared.

“Two heads are definitely better than one if you team up with the right person,” he says. “The downside is that you have to split the profits. But we’d rather have the commission and split the profits, than not have the commission.”

By way of example, Stewart cites its production of *Crime Call* with Rare TV. The show was put out for tender by RTE, and Green Inc was asked to pitch because of its track record in live production. It teamed up with factual specialists Rare TV to work on the development and pitch process.

“The combination of the two companies together worked really well,” says Stewart, who adds that he has one major rule for co-development: “I only work with people I know, I trust, and I like.”

Another way to fund development is by involving distributors early on in the process. Distributors like DCD Rights, for example, will part fund projects that they think can potentially find a home on the international market.

DCD chief executive Nicky Davies Williams says the company helped to fund and package 55 hours of

factual last year.

“It’s a natural progression for well-funded distributors,” she says. “If you can’t buy what you want, you have to help create what the market wants.”

DCD has a number of new shows that it is launching at NATPE that it has co-financed, particularly in the crime, science, engineering, history and ‘tough jobs’ genres, including *The Lady Killers* and *Aussie Bullcatchers*.

The process of identifying projects to invest in is “very market driven,” according to Davies Williams. There’s a weekly meeting between the sales and acquisitions teams, where the latter report what is on the slate of production companies that they work with, while the sales team explore if there is a match with what they are looking for and can possibly fund.



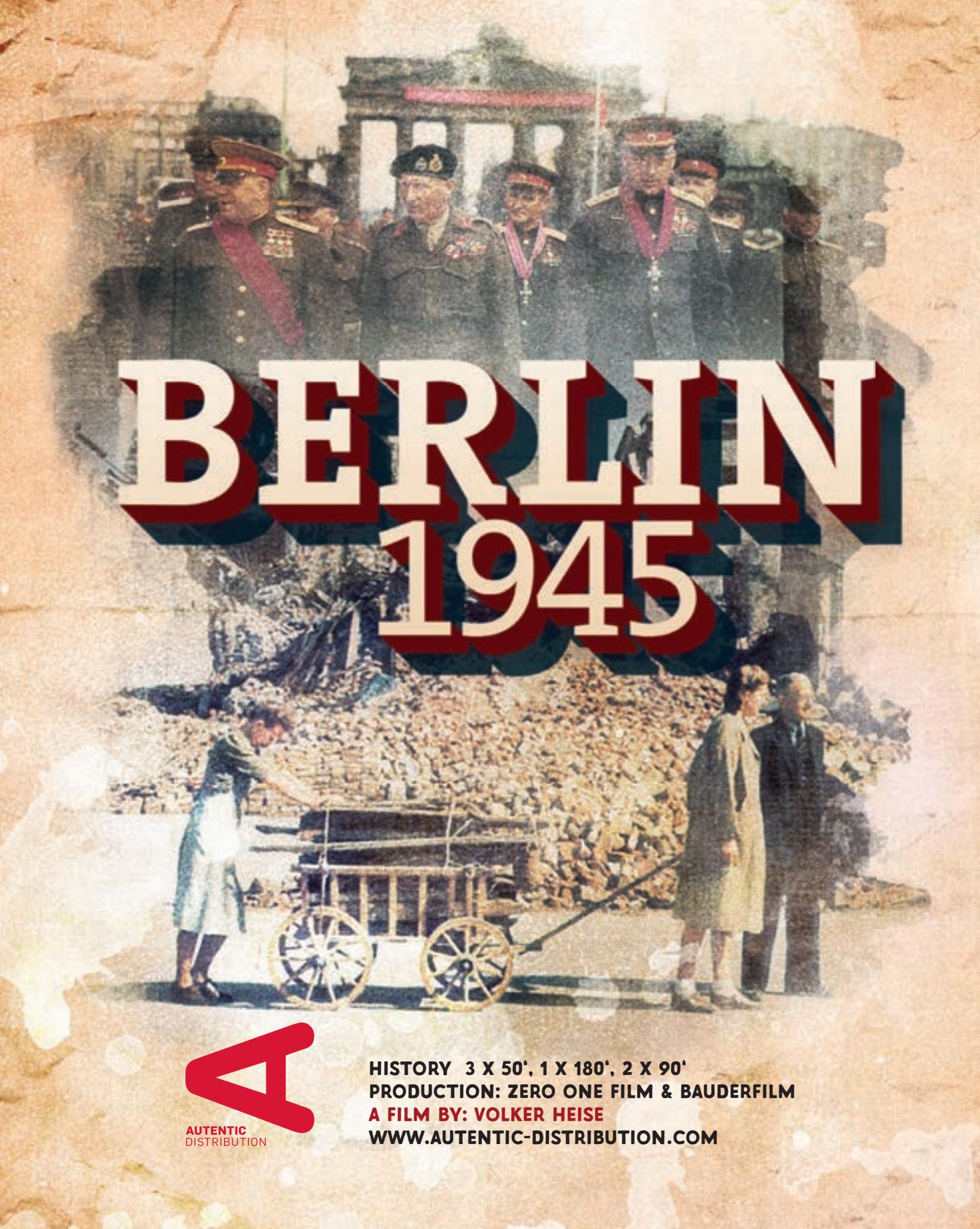
*60 Days On The Street* is from Neil Smith’s production firm Boundless

“In a lot of instances, particularly with the growth in demand for crime, we’ve spoken to particular market specialists and asked what is on their slate. And we’ve taken on maybe two or three ideas that we feel we can package with broadcasters, and we will part fund,” explains Davies Williams.

“This is about talking very early on to production companies about their slate, highlighting a few of the places that coincide with our market knowledge, and then helping to bring those shows to market.”

She describes it as a more “organic and involved” process than simply picking up commissioned shows. The acquisition team will advise on the international market potential during the development process, and will view rough cuts to provide feedback.

It’s yet more proof of how development is changing to bring in new players and financing to help meet the market’s need to create stand out unscripted shows at a time of heightened competition. **TBI**



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Culinary format *Mestre Do Sabor* was created in-house by Brazilian broadcast giant Globo

## Format futures

Brazil has not been known for its unscripted formats but the growth of branded content, demand from global streamers and the impact of regulatory support could change all that, writes Richard Middleton

**T**hink of Brazilian original content and the likelihood is your mind will turn to scripted fare. Telenovelas have long been a staple of the traditional broadcast industry, filling up schedules with long-running storylines of love and passion that have tended to provide relatively little room for unscripted ideas.

It is a point made by Laurens Drillich, president of Endemol Shine Latino, who says that “for a long time - and often, still now - almost all primetime programming in Latin America has been made up of telenovelas.” Things are however changing.

Partly, that is because the scripted side of the TV business is evolving rapidly and no more so than in Brazil, where broadcasters are looking for grittier dramas that don’t necessarily have to run to 90 or more episodes. At the same time, Brazil’s huge viewing base is attracting streamers, which are in turn cutting into local audiences with ambitious series and edgier storylines.

That is directly affecting opportunities for unscripted folk and well-documented changes to the local regulatory environment have

also meant Brazilian pay TV operators have had to embrace domestic series. This combination is helping to fuel the country’s production industry, which while relatively nascent, is growing.

“Our local agency, ANCINE, has injected lots of incentives for local production into the market and this had a big impact, creating an independent industry,” says Carla Affonso, CEO at Brazil’s CWA Productions. “Regulations created opportunities for international channels to produce local formats, but usually they retain the rights to international distribution. We still have a lot of space to move into, but if you see the last 20 years, that was an important move.”

Affonso admits that independent production in Brazil “is relatively new” compared to in-house creations from the big TV channels, and that has had a consequential impact on unscripted. But as a former CEO of Zodiak Brasil, Affonso is well-versed in the way Brazil’s TV industry relates to the international format market and she is clear that opportunities are emerging.

“Most of the revenues for the channels used to come from advertisement and subscription, with some generated from readymade sales of shows to other countries,” she explains. “So format sales didn’t mean a lot compared to what they would need to invest. It was always about their financial priorities.”

Producers are now, however, re-assessing their options. “We have great creatives, but besides working for big companies in broadcast and pay TV, they’ve been directing their efforts to the advertising market where we are greatly awarded every year, and where important money is invested.”

That money is now not necessarily being spent on traditional commercials though, with companies looking at digital opportunities and wanting to get more bang for their marketing buck via branded content. In turn, this is driving growth within the format market, something Drillich highlights.

“Brazil has come up with many great ideas lately. Partly that is because they have a big internal market, but if I look at Endemol Shine Brazil, the other thing that stimulates creativity is that brands are willing to invest in entertainment in a very serious way.

“Take for instance our unscripted series *Cabelo Hair* with Pantene or the talent juggernaut, *Best.Cover.Ever* (aka *O Próximo Número 1 VillaMix*) with local Brahma Beer. The fact is the audience in Brazil is very active on digital and that is creating great, unique opportunities that are not happening elsewhere.”

On the more traditional format front, local broadcasters have to date been importers of IP. “I worked for big international companies and the channels here prefer to have the security of a well-known format,” says Affonso, “where you save money that might otherwise be spent on a mistake or on the risk of making something new.”

José Bonifácio de Oliveira (Bonifinho) heads up unscripted programming for Brazilian broadcast giant Globo and he accepts that with the formula for shows such as *The Voice* tested in other markets, it “in turn makes it easier for TV networks to take a bet on them.”

However, more recently the local market has “found a new interest in products with a stronger local identity, causing a shift in that trend,” he continues. “Brazil is starting to take creative risks in the creation and development of these formats.

“We have a team dedicated exclusively to the development of new products that encapsulate our national identity. A recent example is the recently released reality *Mestre Do Sabor*.”

The culinary reality show uses local produce and flavours, as well as combining what Bonifinho describes as “a differentiated format from the traditional cooking reality shows” that includes blind tastings, plus a domestic edge to the look and feel of the studio. “It is a project rooted in consistency, ready to fight equally with any other existing culinary reality.”

This push for domestic IP, which often then has format potential, is also being partly driven by the streamers’ growing interest in Latino viewers, Brazil in particular.

“Netflix and Amazon are coming with a great amount of money for our market, Brazil is huge and it is a priority for them,” says Affonso. Amazon, for example, launched its Prime service in Brazil

in October, with originals including its *All Or Nothing* format, adapted locally as *Tudo Ou Nada: Seleção Brasileira*, which focuses on the country’s famous national soccer team.

Affonso says the entry of streamers is “wonderful” because they “dare a lot with their programming,” something Drillich says is occurring across the continent.

“The streamers are just getting started in Latin America with unscripted content, but there is already quite a bit and this is likely

**“Channels here prefer to have the security of a well-known format where you save money that might otherwise be spent on a mistake or on the risk of making something new.”**

Carla Affonso, CWA



to grow,” he adds, pointing to shows such as *LOL: Last One Laughing* for Amazon, which his company is producing in Mexico, and Netflix show *Dating Around*.

“Traditional broadcasters can meet that challenge, as they often do, such as with the launch of *The Masked Singer* on Televisa in Mexico this year, which set numerous ratings records, or *The Wall* on Globo in Brazil;” he says.

“But they can do more, especially in that field. Overall, you may see slightly less dependence on telenovelas and more higher-budget scripted fare that we are seeing on the streamers. So broadening the unscripted slate makes sense for broadcasters. And in general, let’s not forget, competition is good, it creates opportunities and stimulates creativity.”

“There is another important characteristic of the local market,” points out Affonso, drawing the discussion back to Brazil. “There is a priority here for the talent and not the format – that means that first you choose a host and then you think about the content, which makes it very difficult for shows to travel to other countries.

“A good example is *Porta Dos Fundos*, which is a great Brazilian comedy show, which has just won an Emmy but is almost impossible to export as it is 100% talent based. The script is very local and the artists are wonderful. It is not a weakness, just a characteristic.”

Affonso’s company, CWA, is just over a year old and to date has been more involved with existing formats from abroad than home grown shows. But that will change she says, as the market continues to develop. Scripted series are being developed by CWA and Portuguese producer SPi, while the company is also working with format developers from countries such as Israel and Holland to explore the potential of their formats in Brazil, while co-developing and distributing its own shows abroad.

Bonifinho highlights homegrown unscripted format *Mestre Do Sabor* as a sign of the changing market, while Drillich points to the export potential of Endemol Shine Brazil’s *Brideway Or The Highway* (aka *Prova de Noiva*), which airs on Discovery Home&Health. Brazil’s formats business might be starting from a low base, but the ingredients for growth are in plentiful supply. **TBI**

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# Unscripted Hot Picks



## Inside Missguided

**Distributor:** Hat Trick International

**Producer:** Pulse Films

**Broadcaster:** Channel 4

**Logline:** An exploration of a business operating in one of the UK's fastest growing and most profitable industries: fast fashion

This four-part docuseries taps into the trend of fast fashion and the highs and lows of operating in the clothing business.

It revolves around the Missguided brand, which grew rapidly over eight years into a major player in the UK fashion world, turning over more than £200m (\$260m) a year. The 4 x 60 minute show picks up with the company after it lost a whopping £46m (\$60m) in 2018, with Nitin Passi, the company's CEO and founder,

intent on making what appears an unlikely comeback.

The series tracks Passi and his predominantly all-female workforce as they embark on a new strategy to return the brand to profitability, which sees it collaborating with A-list influencers on fashion lines, shooting bikini models in sub-zero temperatures on the icy mountains of Innsbruck and cruising around London in a bright pink Rolls Royce with TV royalty for 'Insta likes'.

The show also explores the ramifications of fast fashion, one of the UK's fastest growing and most profitable industries, and delves into how the company is looking to address the way it operates globally amidst the everchanging and increasingly ethically focused clothing industry.

"I am thrilled Inside Missguided will be the first series of its kind to go behind the curtain of fast fashion," says Marisa Clifford, CEO at Pulse Films, who adds that the show will "give audiences a uniquely rare insight into a company that has not only changed the face of fashion but is influencing culture – both on and offline."

It also marks another

addition to the increasing number of behind-the-scenes docuseries, with Pulse cameras given unprecedented access to Missguided's headquarters and the party atmosphere encouraged by Passi.

The series also taps into the story of the working lives of young, ambitious women, with 80% of the company's 300-strong workforce being female, with an average age of just 26. Cameras capture the everyday challenges that come with launching 100 new products each week, while viewers can expect all manner of emotions as the Missguided team look to juggle responsibilities to drive the brand forward.

### Meat: A Threat To Our Planet?

**Distributor:** All3Media International

**Producer:** Raw TV

**Broadcaster:** BBC One

**Logline:** An investigation into the global meat industry and a planet's ecosystem on the brink of collapse

A one-hour special that caused controversy in the UK when it debuted on BBC One late last year, this show is from acclaimed producer Raw TV and follows on from 2018's award-winning documentary *Drowning In Plastic*, which was also from animal biologist and meat-eater Liz Bonnin.

Her latest show takes viewers from cattle farms in the decimated Amazon rainforests to US research labs growing in-vitro meat, exploring how human consumption of animals is affecting the world's



environment and potentially its future as an inhabitable planet.

Bonnin's aim "is to discover if our insatiable appetite for meat is killing the planet," says All3Media, whose sales arm is selling the show globally.

The programme includes interviews with characters from

all sides of the debate, including scientists who argue that meat is an essential part of our lives, to environmentalists who have been charting the effect of the three billion tonnes of animal manure created each year.

Alternatives to eating meat are also explored, with Bonnin

speaking to food scientists who are developing new products designed to be incorporated into our every-day meals.

"The film is a fascinating investigation into the global meat industry and a planet's ecosystem on the brink of collapse," All3 adds.

### Secrets Of The Solar System

**Distributor:** Fremantle

**Producer:** Bigger Bang

**Broadcaster:** CuriosityStream

**Logline:** Providing unparalleled access to the world's space agencies, their data, images and personnel

This show marks the third commission for UK-based production outfit Bigger Bang from US factual-focused streamer CuriosityStream, building on its previous series that include *Stephen Hawking's Favorite Places*.

This latest 8 x 60 minute series features Allan Stern, leader of NASA's Pluto mission, and provides an in-depth exploration of the Solar System. The HD show starts with a tour of all the planets, before episodes focus on the Sun, Venus, Mars, Jupiter and

Saturn, as well as the Asteroid Belt, Pluto and the mysterious outer planets.

The show will also offer "unparalleled access to the world's space agencies, their data, images and personnel," according to Fremantle, which is selling the series globally, "building into the ultimate guide to the sun, the planets, the moons, the asteroids and more." Iain Riddick, founder of Bigger Bang, is exec producing along with Ben Bowie.

"*Secrets Of The Solar System* is the remarkable story of

the world beyond us, told by the amazing people who sent missions there," says Riddick, joint MD and creative director at Bigger Bang.

"Organised as a grand geographical travelogue, it covers the greatest set of journeys ever taken, spanning

hundreds of millions of kilometers and building into the ultimate guide. This isn't just a stunningly beautiful science series, it tells the lesser-known stories of the incredible sacrifices that were made to bring this information back to Earth for all humanity." **TBI**



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## Last Word Leonardo Zimbron

# Talent-led growth will fuel US Hispanic expansion

**“The great production bubble has to burst and will give way to a much more selective system, not only looking for good ideas and talents, but demanding guarantees in processes and results.”**

**T**he state of the market is evident. A strong need for content has stirred the sea and today thousands of projects are being developed in order to be pitched to a platform or channel. There has never been such a great opportunity for creators around the world.

But while this is an effect of the technology - the growth of platforms and their interest in local products - the reality is that it is the public who consumes this content and it will be they who decide the immediate audiovisual future.

This audience is evolving and becoming increasingly demanding in every way. And since their attention is the object of everyone's desire, the offer must be increasingly unique and at the same time massive, of the highest quality, and risky in its form and substance.

The great production bubble has to burst and will give way to a much more selective system, not only looking for good ideas and talents but demanding guarantees in processes and results. Fewer productions will be greenlit than today, but with more resources in each project. Therefore, companies should not only be able to generate great ideas but they will need to deliver them efficiently, both in terms of time and cost.

Production companies and studios will need to adjust to a level of efficiency that has not been easy to find in our media to date. The key should be, first, having executives of excellence, informed, and impregnated with what the public seeks and with the capacity to give ideas a go while wisely managing risk and ensuring results. And second (although as important as the first), there have to be alliances with talent, their companies and teams, that strengthen the search, creation and delivery of content of global competence.

For us at Endemol Shine Boomdog, the search for these alliances began long ago. Now, we have the fruits of our labour. We recently reached an agreement with Kate Del Castillo's Cholawood Productions, who - with her team - not only brings her own acting credentials but also a creative

potential across Latino and US Hispanic markets.

In addition, we have closed a deal with Gastón Pavlovich's Film Factory, a high-end producer whose creativity - plus his team's bases in Los Angeles and Mexico - will help us to develop world-class, ambitious projects.

This strategy seeks not only to obtain good projects from creative teams of proven success but to open the door to great stories and place them in a fertile field. These can then be guided by creative leaders who will help make them a reality in the midst of this imminent future, where there will be more resources for fewer projects.

The secret is not only the idea but the people behind it. Latin America has become the protagonist of this change and these circumstances will begin to be evident soon. At the same time, there will be a need for a significantly higher quality level. And the public will respond accordingly.

This in turn will create globalised competition, regardless of language. Streaming services have radically changed how we consume content and the creative and production process. Today we not only think of local audiences, but global ones. The language barriers, which were previously indestructible walls, are today bridges that cross back and forth with options in all languages, and even multi-language content.

Today, the public looks for original and risky storytelling, leaving behind prefabricated formulas. This is particularly noticeable in Mexico where there is a boom in opportunities and of topics to explore, with better budgets and access to diverse audiences in taste and geography. These global audiences cry out for talent and quality, and alliances fulfill expectations. The ultimate goal is not only to convince the local public, but to transcend borders.

For Latin America, the first stop is the coveted US Hispanic market. The compass points North to the US from where we are in Mexico and as the audiences puts us to the test, the clear strategy has to be to guarantee high quality projects through partnerships and alliances. **TBI**

Leonardo Zimbron is head of scripted programming at Mexico City-based production outfit Endemol Shine Boomdog



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