

# TBI Television Business International **Asia**

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## Editor's note Richard Middleton

### Singapore sling

Interest from the west in the east has never been greater. With streamers attempting to find growth outside of a saturated US market, all eyes are on Asia and the giant audiences it holds for opportunities to catapult their expansion to new levels.

There couldn't be a better time for Asia TV Forum & Market. As the event opens its doors, it is abundantly clear that the potential is only just being tapped into by those operating outside of the region. While the hugely competitive Indian market has garnered much attention over recent years, there is still relatively little Western action in huge countries such as Indonesia.

In this special edition, we look to reflect this soaring interest by speaking to a myriad of players who are already operating across this creatively and culturally diverse region.

Who better to explain the soaring potential of India than Shibasish Sarkar, whose International Media Acquisition Corp recently snapped up *Sacred Games* prodco Reliance Entertainment as part of a \$140m deal that underlines the bullishness around local production and its global significance.

Over in Singapore, we speak to Beach House Pictures co-founders Jocelyn Little and Donovan Chan to discuss how their pan-Asian strategy is developing following a series of acquisitions and appointments, while we also take a deep dive into Japan to find out what's next for this fascinating market.

Banjay Asia's Deepak Dhar reflects on the burgeoning potential of reality; we hear from Omdia's Tony Gunnarsson about the growth of streaming across Asia and what it means for pay-TV operators; and TBI's resident format expert Siobhan Crawford discusses how creatives can combine.

It's clear that the opportunities on all fronts are huge and, more importantly, there is a desire from those in both the east and west to work more closely. And as you'll see when reading this edition, the untapped creative potential in some of these countries is immense – and now is the time for action.

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# About Town

## Content celebration

Irvine Welsh's *Crime, Once Upon A Time In Londongrad* and *The Masked Singer* were among the stand-out shows celebrating success at the eighth Content Innovation Awards (CIA), which took place late last month in London.

The annual awards ceremony saw the great and the good of the global content industry pack out Church House Westminster in London, where food and fizz combined to create a celebratory atmosphere as the prizes were handed out.

YouTube enjoyed a prolific evening, taking home awards including the Best Short-Form Series for *In Space With Markiplier*, while Bandicoot snagged Entertainment Format of the Year for its UK version of *The Masked Singer*.

The coveted Best True Crime Series prize went to Rise Films and Universal International Studios for *Once Upon A Time In Londongrad*, with Best



Documentary Series won by Workerbee and AEC for *Janet Jackson*.

The Representation and Inclusion Award was taken home by Keshet International for *Ellie Simmonds: A World Without Dwarfism*, while Cineflix Rights snagged one of the most sought after prizes of the evening, with *Crime* named the year's Best Debut Drama Series.

Special Award winners were also unveiled, with Viaplay CEO Anders Jensen taking the Outstanding Contribution to Content Award for his company's ongoing support of Nordic content, while Banijay Rights' VP of Digital Shaun Keeble took the Rising Star prize.

Capping off the evening was Creative Diversity Network's CEO Deborah Williams, whose tireless work was honoured with the Excellence in TV award.

## Leaders land in London

Starzplay CEO Maaz Sheikh, Banijay UK chairman Patrick Holland and Sky Studios COO Caroline Cooper were among the C-suiters who provided deep insight at the inaugural Media & Entertainment Leaders Summit in November. Combining the expertise of TBI, Digital TV Europe and analyst arm Omdia, the Summit welcomed companies ranging from TikTok and DAZN, to ITV and Paramount, with senior execs exploring how content and technology are combining to open up new frontiers for creatives, with topics ranging from FAST growth in Europe and the challenge of surging production costs, to AI's impact and super-aggregation.



## Dancing the night away



Paramount's prowess for putting on dazzling events once again came to the fore, this time as the US studio took its MTV European Music Awards to Düsseldorf in Germany. Utilising its extensive contacts, the Awards pulled in some of the biggest global hitters to wow audiences, with hosts Taika Waititi and Rita Ora (above) accompanied by a smorgasbord of talent, ranging from Taylor Swift to David Hasselhoff.

## Swings & Roundabouts

**117** Sony Pictures Television revealed far-reaching deals for its drama, *A Spy Among Friends*, ahead of its debut on ITVX in the UK this month. Buyers include MGM+ in the US and Amazon Prime Video in Canada

**100** Korea's Yoon & Company and BBC Asia were among firms to snag rights from Passion Distribution's factual slate, ahead of the Asia TV Forum. The Tinopolis-owned sales firm sold more than 100 hours ahead of the event, including *Engineering Reborn*

**30** *Tulsa King* firm Paramount joined its US studio rivals in cutting staff, with around 30 roles being disbanded. Among them is former Apple TV+ exec Kim Rozenfeld, with Paramount TV Studios and CBS Studios affected

**475m** It was a bad end to the year for AMC Networks, which expects to face restructuring costs of between \$350m and \$475m to turn the company around. CEO Christina Spade has departed the *Better Call Saul* studio and around 20% of jobs are now set to be cut





## Tech & Analysis Tony Gunnarsson

### Streaming ahead in APAC

**Omdia's Tony Gunnarsson explores how streaming adoption across Asia will evolve**

In Asia & Oceania, there are now more people taking SVOD than pay-TV and in the years to come, SVOD is expected to reach enormous scale previously unseen by pay-TV. In the period 2019 to 2027, Asian SVOD subscriptions will more than double to 860 million (from 421 million subscriptions in 2019). It isn't so much that pay-TV is disappearing – actually pay-TV is plateauing if anything, and Omdia believes that overall pay-TV will remain relatively flat for the foreseeable future – it is the sheer size of the increase in SVOD that is responsible for this transformation. Already, the onward march of SVOD has radically re-focused the entire TV & video market – we are today in a very much streaming-first world already.

Key drivers for SVOD are major global services like Netflix, Amazon, Disney+ and HBO Max as well as local regional major players like Tencent Video, iQiyi and Youku Tudou. The global covid pandemic was a major driver for many new SVODs, but the arrival of new services like Disney+ and HBO Max and others are equally responsible.

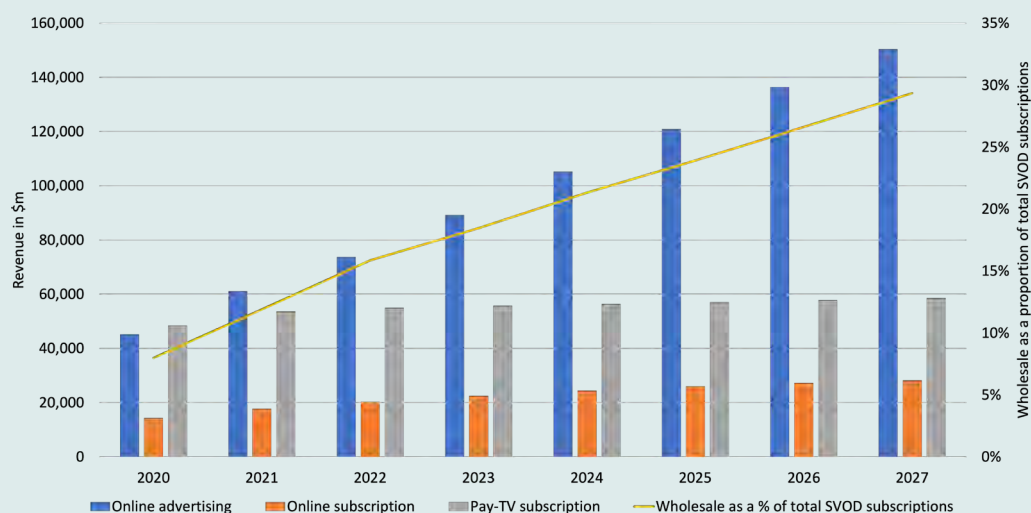
At a household-level, self-bundling of SVOD continues to be a major trend globally. The average number of services per household in Asia is currently

at 1.88 services and by 2027, it will have grown to 1.98 services per home, but SVOD growth rates are starting to slow down. In Asia, the annual growth rate for SVOD subscriptions is +10% for 2022 and the same rate is expected for 2023, but from 2024 onwards Omdia expects single-digit annual growth to be the norm, with 2027 currently set at +3.4% based on what we know today. Underlying these admittedly preliminary figures is the transformation of SVOD as we know it – we're on the threshold of a major return of advertising to TV & video in general, and for online video a major shift from direct retail to indirect wholesale arrangements via operators.

In a major industry about-turn, all major global SVOD providers are now committed to advertising, with Netflix and Disney+ in the lead, currently in the first phase of rolling out ad-supported tiers on their subscription services globally.

Omdia's initial analysis of the two global SVOD market leaders shows that by 2027, 66% of Netflix's subscriptions will be ad-tier. For Disney+, it's as high as 75% (and that's excluding Disney's SE Asia market leading hybrid AVOD/SVOD platform Disney+ Hotstar, which by 2027 is expected to have around 50 million ad-tier subscriptions). **TBI**

**Asia & Oceania: TV & video revenues, in \$m, with wholesale SVOD subscriptions as a proportion of total SVOD, in %**



Tony Gunnarsson is principal analyst, TV, video & Advertising at Omdia, the research arm of TBI owner Informa. Tony will be presenting a keynote at the ATF Leaders' Summit, taking place 7 December at 1pm



## Diversity Deborah Williams

### Taking a deep breath for 2023

**Deborah Williams looks back on 2022 and urges organisations to create space for change over the next 12 months**

It's been a very long year and, as a rule, I try to be positive and considered when I write this column. But, as I mark six years at the Creative Diversity Network (CDN), I feel it's important to point out a few home truths. So here we go.

It's critical to look back before you go forwards. So let's review how far we've come. Around 100,000 people have submitted three million diversity forms to Diamond, providing information about themselves and their work on and off screen in UK television during the past five years. For that we thank you. I thank you.

CDN has delivered its first multiple layer annual campaign, named Doubling Disability, which uses Diamond data as an evidence base for activity such as training for disabled people in the industry to move it towards being more disability inclusive.

We have partnered with the Edinburgh International Television Festival to access provision, which has started to make the event accessible to disabled people. We are continuing to work with Professor D R Eikhof and partnering with the University of Glasgow on the soon-to-be-launched Everyday Diversity app. We are also continuing to share our approach and analysis with partners around the world, in the global TV industry, with parliamentary groups and NGOs.

I hope you all agree that this is positive, collaborative movement. These, however, are just the tips of the massive iceberg of work our small but determined team has been carrying out. It can be exhausting, it engulfs your psyche, your body and your soul. What's made it worse at times are the naysayers who don't feel I fit their idea of how diversity works, or who get upset when I offer a different perspective on their programmes of activity and ideological positions.

Struggling against this internalised oppression and opposition has made me wonder about whether I can carry on and whether anything will

change significantly when it comes to investment, innovation and leadership in our industry.

What's kept me going and makes me push those thoughts to the back of my mind is the dedication of the small CDN team, working constantly to deliver programmes of work that we believe in. So, I am going to take this opportunity to personally thank them: Amy, Adam and Monique, together with Blessing and Pete, who have passed through the doors fleetingly over the Covid period. Without their belief in my vision and approach, none of this would be happening. Day by day, they come in and listen to me ramble, then turn those words into reality.

I was also honoured to receive the Excellence in TV Award at the Content Innovation Awards in November and to be given this industry recognition from TBI and from Richard personally, who has given me the opportunity to air my musings in this column.

Recently I took my first full break in three years. So I feel I can now breathe again before entering 2023 and delivering the exciting work we've got planned, including rolling out our disability inclusion training, working for the first time with Realscreen to make their summit accessible and the hugely complex task of creating an upgraded diversity monitoring system to build on where Diamond has got us so far.

What my time away has given me is space to think and consider how to navigate the pain that comes from the internalised oppression and opposition. We have to be kinder to each other in this work. It's not a fight or a competition to recreate the hierarchies and bad habits we are seeking to remove. That will not get us anywhere and is a disservice to everyone working in the area and the industry itself, which will only fall behind if diversity is not fully and properly embedded.

So I'm urging everyone to please consider giving space for change from every angle. Do you think we can do that? **TBI**

Deborah is executive director at the UK's Creative Diversity Network and has worked in arts, culture and the creative industries for more than three decades





## Legal Julian Wilkins

### Get virtual

**In his monthly TBI column, consultant solicitor Julian Wilkins explores how legal frameworks might apply in the wild west world of the metaverse**

Julian is a consultant solicitor and notary public with Eldwick Law, plus a founding member of mediation and arbitration practice Q Chambers. Julian contributes to the EU Audio Visual Observatory IRIS publication and lectures upon intellectual property and crypto asset issues, including for the University of Reading

**T**here is little doubt that the TV industry is embracing the metaverse and NFTs, a fact underlined by *The Masked Singer* franchise recently revealing plans to develop viewer immersive shows. Yet the nascent tech giants such as Meta and Twitter, as well as crypto finance, are all experiencing growing pains. Regulation of social media, NFTs and crypto currencies remain in their infancy.

Yet blockchain technologies are being embraced by many sectors, from medicine to the creative industries, with fashion and art being early adopters – and the metaverse provides immense advertising and branding opportunities for TV. Further blockchain technology provides immutable proof of title for intellectual property rights.

The metaverse is essentially a universal immersive 3D world utilising virtual reality (VR) and augmented reality headsets that imitate real life, like clothes and land, or to be ‘present’ in a TV show. It imitates real life but as it is virtual, it has scope to be fantastical.

The metaverse requires a huge amount of data and it is for producers to ensure protection of personal data. Metaverse users’ consent is required as to how information is used – the recent acquisition by ITV of Tesco and Boots databases demonstrates the scope of data. Although countries have similar data protection laws, they are nuanced, meaning a British person visiting a US metasite causes the US site to comply with UK data laws.

However, a metaverse site may operate in countries non-compliant with the original data host site whilst consumers conceal their data location.

Actors’ performances may also be digitally recreated for the metaverse and therefore, ensure clearances and consents cover metaverse use.

Compliance with national regulations, like Ofcom’s, may be difficult in a borderless, virtual world. Will regulations apply at all? Test cases will help create clarity.

There are numerous areas to explore. Trademarks may be prone to abuse – for instance, a trademark

used in the metaverse may be shared or copied on social media. A breach of trademark can only be pursued if in the course of business. Does replication by friends on social media constitute in the course of business?

Steps concerning trademark use are beginning to occur e.g. a metaverse trademark can be acquired from the U.S. Patent and Trademark Office (USPTO). Otherwise, producers and studios should consider trademark enforcement in the territories where current their registrations exist.

A European Court of Justice decision has also determined that creations for the metaverse can be artistic works and protectable by copyright provided the interface is the author’s own intellectual creation.

Copyright will exist in the underlying software programmes and the technologies providing the virtual reality will be subject to patent protection and potential infringement disputes.

Performers and crew working in the metaverse may have to wear VR equipment for some time so regular breaks and health assessments ought to be undertaken. Likewise, viewer warnings on how the equipment is used including regular breaks.

There are tax, employment and immigration rules where production staff derive from multiple countries. Arguably, immigration laws may not apply as a person’s place of work is where they are physically located. However, corporation tax may apply as one employee located in a jurisdiction may be sufficient to say a business has a permanent establishment making local tax apply.

As the metaverse is a decentralised platform, there remains the issue as to which legal jurisdiction regulates the activities of the platform. An international jurisdiction for the metaverse may be required akin to the domain name dispute resolution, including bespoke mediation and arbitration services.

Much is unclear but one thing is certain: the metaverse is a legal frontier country requiring careful thought. As the wonderful late Olivia Newton-John sang in *Physical*: “I gotta handle you just right.” **TBI**



## Opinion Siobhan Crawford

### Is it too late to join the train to Asian content?

**TBI's resident format expert explores how the clamour for Asian IP is affecting opportunities and asks what needs to change to increase sales into the region**

**P**op Quiz. Let's all say the things that spring to mind when thinking about the Asian unscripted formats market. I will predict your answers: *Masked Singer*, *Squid Game*, *I Can See Your Voice*, *Bomanbridge*, *Wonwoo Park*, *Takeshi's Castle*, *Ninja Warrior*, *Nippon*, *Something Special*. Did I get it right?

#### The unknown

There are two regions that strike fear into the hearts of execs everywhere (not only unscripted); Latin America and Asia. Two regions that evade many of us due to the sheer size, language and cultural barriers and variations between the countries. It used to be that you spoke with Sony for Lat Am – other big players have tried and backtracked in the region. In Asia, it seems partnerships are the most popular way forward. Credit where it is due, Asia did not start to blow up our screens until 2014 when *Small World* got *Grandpas Over Flowers* commissioned on NBC. Now, 'Korea' has become the buzzword synonymous with smash hits that execs get serious FOMO over. And we've talked FOMO before, but missing a Korean format is a faux-pas that you will replay in your head during your career. I have heard the stories.

But do we believe Asia holds the next big thing? Are headlines translating into sales? Can Korea have a scripted and an unscripted boom simultaneously? And how integrated are the Asian markets with their biggest clients in Europe?

#### Too late. It's covered?

*I Can See Your Voice*: Fremantle. *Masked Singer*: Fremantle. *DNA Singer*: Fremantle. *Blood Game*: Banijay. *Exchange*: Banijay. *Drive Thru Oke*: NBCUniversal. Fox Alternative Entertainment partnering with Wonwoo Park's DL Turn. CJ ENM agreeing catalogue partnerships. It doesn't seem like there's much room left in Korea for anyone but the big players when it comes to finding the next bit hit. FOMO means deep pockets and big groups are winning the battle

for content and the small indies can try, but we as an industry are leaving Koreans with an unrealistic expectation of what format distribution agreements should look like. You have to believe, though, that sometimes big group strategy is exactly what these formats need to become hits.

The next territory making waves is Japan. *Ninja Warrior*, *Takeshi's Castle*, *Dragons' Den*. We have TBS pushing into co-production partnerships, Kansai entering into development with Fremantle, Nippon worked with Warner for lukewarm hit *Mute It*, Line Up represent NHK formats worldwide... the list goes on. Working with Asian territories is certainly for the optimists amongst us – and those who have the firm belief that the next big hit will come from one of these territories.

There is, however, still space in Asia. Broadcasters like YTV in Japan hit the spotlight with *Light Away* at BCWW 2021 and control distribution. Chinese producer HF Media is pitching *Idol Formation* into Europe after the huge pan-Asian success. The juxtaposition of the broadcasters, not the producers, making the push to exploit content internationally is something uniquely Asian though. In Europe, we feel the presence of the prodcos much more.

#### Next

The idea of selling a format into Asia is near impossible in 2022 unless you have the big brands. The changing situation in China to foreign owned IP has created a barrier that for a decade we, as an industry, have not overcome. So does this leave Asia as an export-only territory – our scouts solely looking for shiny floor hits to bring to Europe? The content quality/style is so alien to European production standards that content has to be re-packaged/developed for European consumption and consideration. It feels like we need more than one market a year – especially as the contingent from Asia was low at MIPCOM. How do we open this market up? Ideas on a postcard, I am afraid – no one seems to have figured this out yet. **TBI**

Siobhan Crawford is co-founder at Glow Media and has worked in the format business for almost two decades at firms including DRG, Zodiak, Banijay and Primitives

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## Room for growth

IMAC CEO Shibasish Sarkar talks to Mark Layton about the recent acquisition of his former company Reliance Entertainment and the growth opportunities of the Indian market

**B**ig moves are afoot for International Media Acquisition Corp (IMAC) CEO Shibasish Sarkar.

In October 2021, the Indian exec stepped back from his long-time role running Mumbai production giant Reliance Entertainment to focus on his new US-based venture, IMAC.

The special purpose acquisition company (SPAC) launched last year, having raised \$230m, with the ambition of establishing a major presence in the Indian market, looking to stake a claim across production, streaming and exhibition. And it has now made its first move.

In October 2022, just one year since Sarkar stepped back from Reliance, and in a highly speculated move, it was his former firm that IMAC confirmed it would be taking public as its first acquisition.

Sarkar's new venture acquired Reliance, which in 2018 launched the crime thriller *Sacred Games* as Netflix's first Indian original series, alongside Risee Entertainment, for a combined cost of \$102m in cash and \$38m in investment.

While IMAC had considered around "20 to 25" acquisition possibilities, in the end,

Reliance was more than just a company that Sarkar was highly familiar with – it represents just the opportunity that IMAC aims to build on.

"My vision was always to create or have an integrated media and entertainment company," Sarkar tells TBI. "From that aspect, Reliance is an interesting asset, because it has business lines across film, production and distribution.

"They have done significantly more than 400 films in last 15-16 years, they are the largest animation studio

**"India has a population of 1.4 billion and between Netflix and Amazon, there's a significant growth opportunity there"**

in the country, with more than a thousand animators working in the company, they have a varied pipeline in making content for the OTT platforms. At any stage they probably have multiple shows on the floor and in development and they have a respectable gaming company.”

It’s clear that Sarkar sees great potential in Reliance, whose production divisions are also behind titles including ZEE5’s *Black Widows*, SonyLIV’s *Dr Arora* and *Masoom* for Disney+ Hotstar, as he continues: “It’s a mix, where you have the presence of traditional old school businesses like film and television as well as the new media business of animation and gaming, so basically they are creating content agnostic to platform.”

Sarkar will become CEO of the company that emerges from the deal, joining a board of five directors comprised of execs from IMAC, Reliance and/or Risee, with Sarkar telling TBI he wants to be hands on back at the studio to “be focused on the operation and see how the business grows.”

While Sarkar previously announced ambitions in other areas such as streaming, he says that the current focus is now to close the Reliance transaction and that once the business grows to “a certain level or certain scale” then IMAC will be ready to explore further opportunities.

And Sarkar is clear that he sees plenty of opportunities in the Indian market: “It is a young country; more than 50% of the population are less than 30 years of age, the country’s data cost is virtually negligible, and you can get a smartphone (India’s primary method of online video consumption) for \$100 – there is an audience waiting for you.”

He explains: “The amount of investment in the digital space, purely looking from the global platforms, probably four or five years back, was around \$225m. If I look at the current year, it is almost \$1.2bn. The market is growing substantially and if you want to be a meaningful player, you can be through creation of content or a B2C player. But [for IMAC], those thoughts are all for a later stage, currently the focus is to get this transaction closed.”

## Following the market

As Sarkar notes, in the past few years, India’s streaming market has grown to around 40 platforms, with global players like Netflix, Amazon and Disney all taking an interest in the country as subscriber numbers begin to reach saturation in the US and Europe.

“They have to look at Asia Pacific for the next level of growth for the large platforms. The biggest irony in Asia Pacific is that none of them are in a position



to enter China, because China is not allowing anyone to set up shop. That’s why they started focusing on India,” says Sarkar.

“There are close to 40-odd platforms now, the top ten are the global players, so from Netflix, Amazon, Disney+, Lionsgate, SonyLIV – everyone has more or less set up their shops.

“Then we have a host of broadcaster-driven platforms, who have a broadcasting channel, and they have opened up their digital platforms, people like Zee, Voot, so there are 10 platforms who in a very active space and there are 30-odd other platforms where the growth is also happening a lot in the regional languages.”

Sarkar highlights that regional content is currently a big growth area in India, which he describes as being like “a mini-Europe”, explaining: “We make content in 20-odd languages, cultures are different, every state has its own language at the end of the day. So, the growth of the digital platforms in the last 2-3 years is happening significantly in the regional places and not so much in the mainstream, because mainstream Hindi is getting more saturated.”

Despite this, Sarkar says that streamers are still just “scratching the surface” when it comes to subscriber

ZEE5’s *Black Widows* is a remake of the 2014 Finnish show, *Mustat Lesket*





SonyLIV's *Dr Arora* (above) and *Masoom* for Disney+ Hotstar (right) have helped Reliance grow rapidly

numbers in India: “I mean, the country has a 1.4 billion population and if you look between Netflix, which has probably a couple of million subscribers, and Amazon, which will be probably 8 to 10 million, there’s a significant growth opportunity there.”

Demand for Indian content is also rising, with Sarkar noting that when Netflix launched *Sacred Games*, the data showed that more than 2/3rds of the viewership came from outside of the country.

For Indian scripted content creators, quickly gaining experience after being largely confined to writing soaps before the streaming boom, this international attention is opening even more doors: “The platforms are finding you can create a great story at a much more reasonable cost, because in India the cost structure is significantly lower in terms creating a show compared to the US or a developed market. But if the story strikes a chord, it can travel anywhere.”

Meanwhile, in non-fiction, Sarkar says there is growing interest in “Indian ethos” shows with “local nuances” that tackle topics such as Bollywood housewives and weddings, as well as comedy shows. “People are experimenting, whether these are getting picked up with global attention or not, and many of these shows have now gone into a second season or more.”

Having been given a second chance to steer Reliance Entertainment, now as a public company, Sarkar says that he is a “strong believer that the first object should be how to take the local content global.”

With the firm now listed on the NASDAQ, Sarkar believes it will also attract more global talent to work with Reliance and will “open up the horizon wider.”



He adds: “And when I say global, it is not necessarily only the west or US, there are significant opportunities happening in southeast Asia, especially in countries like Indonesia and Taiwan, which I think are the next growth markets after India.”

With one eye firmly fixed on that expanding horizon, and the Indian market itself full of opportunities, the next 12 months could prove to be just as eventful for Sarkar. **TBI**



of *Sacred Games* viewers came from outside India





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# All eyes on Japan

Japan's unique TV ecosystem is drawing global attention from those looking for new ideas and fresh IP. Nick Edwards explores how partnerships are flourishing

DETECTIVE STAY HOMES | 2  
2022 03/27 03:27 22:08-23:25

ACTOR : TAKUMI KITAHARA, MARIKA MATSUMOTO, HOMAMI SUZUKI, SHOSUKE TANIHARA  
KAI KOKUYAMA, MANTO KUSUHARA, AYESA KODIYA, IPAMA OSHIDA, YINO SHINJI

名探偵

大黒

*Connected: The Homebound Detective* is a co-pro between Japan's Nippon TV and the UK's Envision Entertainment

Japan's TV industry is sometimes referred to as the 'Galapagos islands' of the global market. Its thriving local ecosystem is largely independent of the rest of the world yet has spawned a breathtaking amount of breakout format hits, including *Dragons' Den* (Nippon TV), *Ninja Warrior* (Tokyo Broadcasting System) and *Total Blackout* (Fuji TV/Fremantle), to name just a few.

Whilst scripted has not travelled as well (beyond East Asia), largely because of cultural tastes and lower budgets, this is rapidly changing. As this year's Asia TV Forum gets underway, Japan finds itself becoming one of the world's most keenly watched global markets.

"I've always been fascinated by Japanese TV because the ideas are so fresh and unique," says Vasha Wallace, EVP of global acquisitions & development at Fremantle, which recently announced a co-development gameshow format deal with Kansai TV. "It's very different to what you can get anywhere else in the world."

Michael Nakan, CEO & founder of London-based Envision Entertainment, which co-produced *Connected: The Homebound Detective* (2022) with Nippon TV this year, believes the same can be said for scripted. "I've always had an affinity for Japanese video games, anime, film and TV. The quality of Japanese storytelling is second to none."



### Streaming's familiar tale

In Japan, like much of the world, the infiltration of international streamers has disrupted audience tastes and eroded legacy outlets' market share. Japanese companies are now starting to look outwards to the foreign market for international partners in the hope of winning new audiences and to shape content for evolving local tastes.

Against this backdrop, the current global economic situation is creating both opportunities and challenges. On the format front, a global cost of living crisis can be a positive as the escapism they

provide is valued more than ever. "What audiences want is feel-good programming. It's the same as the financial crisis of 2008," says Wallace. "The nature of the Japanese market is very family friendly. It's fabulous, joyous programming. That's part of the current increased interest," she explains.

Japan is also a very well drilled incubator of non-scripted shows, which reduces risk for international partners. "They'll do a lot of test and proof of concept (what we call pilots) – sometimes they'll do a short run – and Japan has a strong culture of variety shows. Segments that have proved popular are sometimes developed into formats," says Wallace. *Hole In The Wall*, which Fremantle acquired in 2007, was originally a 15-minute segment in a variety show and has since been rolled out in around 50 countries.

In scripted, there are fewer upsides to the economic crisis, although as advertising revenues face challenges – thus affecting budgets – Japan's sector seems well placed to adapt. The market is already characterised by low budgets of between \$200,000 to \$600,000 an episode, meaning the changes taking place in Japanese scripted look set to weather the severe headwinds.

Japan also has a large population that consumes a lot of media – something US streamers are very much aware of. Research by Ampere Analysis showed that the number of "distinct Japanese live-action scripted TV show titles" available on SVOD's outside of Japan grew from under 1,000 in 2019 to more than 3,000 in 2022 so far.

Netflix revealed at the end of last year it would add 50 further titles to the 90 that were already available for international audiences to stream, with such activity dovetailing with an uptick in local productions, as well as new international partnerships. Nippon TV, in addition to deals with Netflix, has struck a co-pro deal with Disney. Its streaming service, Hulu, has inked a flurry of scripted co-pro deals and are already onboard with HBO Asia's *Miss Sherlock* and Mediapro's *The Head*.

Tokyo Broadcasting System, meanwhile, will be working with Netflix to launch two scripted series and is also working with Disney+, Keshet International and Zee Entertainment Enterprises, as well as Korea's CJ ENM.

And overall, the number of shows being commissioned are up, according to Ampere: its data claims that "the number of brand-new first-run TV shows" announced in 2022 up to October totals 865, surpassing the total number of new shows announced in the entirety of 2021, which was 805.

**"Show tastes, production budgets and the way we form the production team are all different from what we have done previously"**

Fumi Nishibashi,  
The Seven/TBS





## Looking out

Responding to the changing environment, Japanese companies, rather than making everything in-house as they have been doing for years, have started to create studio structures in the mould of the UK's ITV Studios or BBC Studios.

They can now pivot from producing content for their own brands, co-producing, or producing for entirely different Japanese or international outlets. TBS has just established a studio-style outfit, The Seven, that will develop and produce shows for global audiences.

“Show tastes, production budgets and the way we form the production team are all different from what we have done previously,” says Fumi Nishibashi director of business development at The Seven/TBS.

Hulu has boarded HBO Asia's *Miss Sherlock* (below) while *Cowboy Bebop* (bottom) is one of Japan's most popular anime series exports



Changes in society are being reflected in locally made narratives. Japan has been criticised by some for being behind western democracies in regard to female equality, but a handful of recent scripted shows with a female point of view have resonated with international markets.

Kansai TV's *Elpis*, a crime show that features a lead female character experiencing sexism in the TV industry, not only has a strong female cast, but is led by female producer (Ayumi Sano) and has a female scriptwriter (Aya Watanabe) on board.

Another Kansai production, *My Dear Exes* (2021), about a 40-year-old multi-divorcee raising her teenage daughter whilst running a construction company, was also produced by Sano and can be streamed on Netflix. And then there's Nippon TV's *Mother*, first produced back in 2010, and about a schoolteacher who responds to an abused child's cry for help. It is one of Japan's most successful scripted exports and has been remade in countries including South Korea, France, Thailand, China, Turkey, and this year in Spain by *Money Heist* broadcaster Atresmedia.

## Animated growth

Japan's most famous export, the illustrative narrative style manga, has also been on a growth trajectory for decades and boomed again during the pandemic. Manga publishers hold some of the worlds most valued IP but the medium lends itself to animation (hence the popularity of its film form 'anime') rather than live-action TV series.

But this is also changing. “Thanks to the improvement of VFX technology, more and more manga/anime-based live-action shows have been produced, even with the big spectacular or fantasy titles,” says Nishibashi. Akira Morii, the producer of the manga-based live-action Netflix original *Alice In Borderland* (2020), has joined The Seven as chief creative officer.

Whilst well known manga/anime IP, such as *Dragon Ball*, *Cowboy Bebop* and *Spirited Away* are examples of its most distinctive form, they are also the tip of the iceberg. Much of the manga canon is far more grounded and recognisable as familiar genres, such as thrillers, romances and traditional drama, which are far more suitable to live-action remakes.

“Our conception of Japanese content will change as different types of anime and manga are becoming popular in the west,” believes Nakan.

The live-action adaption of the manga series *Drops Of God* (*Kami, No Shizuku*) that headlined Legendary Entertainment's scripted slate at this year's MIPCOM is set in the fine wine industry and nods towards this new trend.

*Drive My Car* won the Oscar for Best International Feature Film earlier this year



**“The nature of the Japanese market is very family friendly - it’s fabulous, joyous programming and that’s part of the current increased interest”**

Vasha Wallace,  
Fremantle



Nakan believes that as ambition for scripted becomes more cinematic, Japanese content will be unleashed to far larger audiences; “Japanese cinema is already recognised as great,” he says, referring to recent Japanese films such as this year’s Oscar-winning film *Drive My Car*, which starred Toko Miura, who also has a lead role in *Elpis*. “When cinema and TV collide as it has done in other successful territories, I think the same will happen in Japan,” he adds.

### Global partnerships

Working with Fremantle’s global network of experienced producers gives Kansai TV, which is part of the Fuji Group, vital insight into what works beyond Japan. “For example, in gameshows our audience doesn’t care so much about the final outcome – who wins and what prize they can take home. But for a gameshow format to be successful internationally, a grand finale is very important. We were advised to create something big and entertaining at the end of the episode,” says Miho Okada, executive managing director at Kansai TV.

Following the incredible success of South Korea’s *Squid Game* and *The Masked Singer*, producers are increasingly seeing Japan as the next hotbed of innovative East Asian IP.

To achieve a successful partnership in Japan’s mature format market, Wallace has some best practices: “From the beginning be open, honest and transparent about what you want from each other, and to be clear on who’s going to lead the first production, and then how you’re going to do the international roll-out,” she says.

In scripted there can be a mismatch between what international players expect and what Japanese rights holders want, in terms of global rights, distributors rights, and so on. “It’s definitely not the case of who has the biggest cheque book,” says Nakan. “It’s quite courageous how Japanese companies are resisting the urge from the US market to come in and just take over all the rights to everything.”

In contrast to Korea’s fast, entrepreneurial, individual decision-making nature – something more in line with the American approach, perhaps – Japan is akin to a big ship slowly changing course.

“It’s a consensus-driven culture, that requires respect to be shown, plans to be presented and things to be done in a very structured and reasonable way,” says Nakan, who, along with Nippon TV’s creative director Itaru Mizuno, co-developed *Connected* over a period of around 18 months (with Sayako Aoki of Nippon TV’s International Business Development, producing).

An English-language version is in the works and other international adaptations are planned. “Big Japanese companies make decisions slowly but when that company starts to move in a direction the whole company moves in that direction. They do what they say and the process is smooth. What I think is exciting about Japan is they’re all starting to move in an international direction.” **TBI**

*\* (This data is taken from Ampere’s Commissioning service, which tracks the commissioning and production of original content across the globe through all stages of development, production, and release on a title-by-title level)*





## Eyes on the prize

Singapore's Beach House Pictures has tapped into local talent and surging streamer interest to create a pan-Asian production firm like no other. Co-founders Jocelyn Little and Donovan Chan tell Richard Middleton what's next and which countries are worth watching

**W**hether serendipitous or just downright savvy, Beach House Pictures has ridden the twin waves of unscripted and streaming growth over recent years to more effect than almost any other production player based out of Asia.

Now nearing 20 years old, the Jocelyn Little and Donovan Chan-founded firm has positioned itself cleverly: from its HQ out of Singapore, production interests and partners now fan out across Asia, tapping into the region's innumerable cultures.

*Mind Your Manners* (above) is hosted by Sara Jane Ho and recently rolled out on Netflix

Some of these interests are well established – such as Beach House Beijing, which has six co-productions in the works – whilst other strategic moves, such as its nascent launch into India, reflect the bullishness of both the company and predictions for growth across the region as a whole.

“We’re quite geographically spread so we have Beach House Beijing, which is pretty busy at the moment, Vesuvius in Japan is doing a Netflix true crime show, we have Momo in Singapore, and then we’re just launching in India,” says Little.





## From Manners to Midnight

And the slate is indeed rich and varied. Beach House made its name in factual but it has been increasingly diversifying its fare: at the time of speaking in early December, Sara Jane Ho's *Mind Your Manners* had just dropped on Netflix, a month or so after its Indonesia-shot tween show *Mr. Midnight* went live on the global streamer.

The two series neatly underscore the diversity of the Beach House slate, but premium factual retains its place at the top of the table, with shows such as *Uptown Otters* for Animal Planet and *Love Nature*, plus *Evolve* for Curiosity Stream. Most recently, the firm struck a deal with *The Night Manager* prodco The Ink Factory to adapt *Cleopatra Wong*.

**“Korea is so dynamic but saturated, Japan almost feels to us like a dark horse emerging, there’s this amazing history of great TV”**

Donovan Chan,  
Beach House Pictures



It is a mixture of shows, a mixture of buyers and a mixture of models, but co-productions and streamers – as Chan predicted in a piece with TBI four years ago – have provided much of the fuel for growth.

Chan admits the company has always wanted to be “truly international” but it has also sought to use its Singapore base to maximum effect. And as streamers now struggle for growth in the US and in many part of Europe, attention is turning to the populous countries in Asia to fuel continued – albeit more cost-efficient – expansion

“We understood we had to be relevant in our own back yard and that meant being relevant in big population centres that have lots of eyeballs like India and China, but also figuring out how to create a network of up-and-coming filmmakers in key markets in southeast Asia,” Chan says.

To do that, Beach House has been striking partnerships and setting up shops across the region over the past few years. It acquired Singapore-based scripted prodco Momo Film Co in November 2021, which came nine months after parent Blue Ant Media acquired Hyoe Yamamoto and Deborah Barillas’ Japan-based firm, Vesuvius Pictures.

It has also supercharged its Beach House Beijing operation with the appointment of former Youku exec Felix Feng as general manager, launched post-production facility Space Lion Studios in Singapore, and formed Riverland Entertainment out of Mumbai with the former chief of Netflix’s documentary productions in Asia-Pacific, Raghav Khanna.

The moves underline Little and Chan’s ambitions to position Beach House not just as a major operator in Asia, but as a conduit for interest coming in from across the globe.

“The timing couldn’t be better for us entering these markets in southeast Asia as the search for profitability and subscribers makes it way out to Asia,” says Chan. “We find ourselves in a really unique position where our experience of producing at the highest levels in the west, combined with the unique experiences of working in Asia, is reaping some great dividends.”

## Firing up in Japan

Of all the recent activity, it is perhaps the partnership in Japan that is most exciting. Despite being home to a handful of the best-known international formats of the last 20 years – from *Dragon’s Den* to *Ninja Warrior* – the industry remains tough to access for many in the west.

“Japan is changing quickly,” Little says. “We always build around talent and Japan is fascinating, but it has always been a bit impenetrable.” Vesuvius offered considerable potential, she continues, because it has “the

same ambitions as us, for Japanese audiences but also global viewers.”

The prodco specialises in factual, factual entertainment, reality and scripted programming, with credits including an episode of Alex Gibney’s *Dirty Money* for Netflix and an episode of *Earn A Living*, an interactive web documentary series produced for Arte and VPRO.

More recently, it has been behind a local remake of BBC Studios format *Bake Off* for Amazon Prime Video, the country’s leading streamer, and there’s a yet-to-be-revealed true crime show in the works with Netflix. The largely untapped creative potential in the country is palpable, Chan says.

“We’ve always found Japan so much more interesting than Korea. Korea is so dynamic and saturated, Japan almost feels to us like a dark horse emerging, there’s this amazing history of great TV. I remember as a kid some of the amazing ideas – *Ninja Warrior* for example. People have forgotten that Japan created those kooky formats, way before *The Masked Singer*.”

The country looks unlikely to provide too many quick wins for Beach House, not least because the local culture “is very distinctive and it requires a lot of patience and listening,” Chan adds.

“But for us, it’s about slowly chipping away at that and making our way into the close-knit world of filmmaker networks. Our hope is to bridge some of these connections with buyers in Japan and beyond.”

And there are signs that the market is changing, with Chan pointing to some of the successes secured by companies such as Discovery, which gained substantial viewers on YouTube.

“There’s a whole new audience and the streamers are starting to make some in-roads into understanding what they want,” Chan says, pointing to commissioning shifts at local streamer U-Next as one example. “Their team is doing some really interesting shows and co-productions – we feel that is a really positive movement in Japan, in terms of competing with Netflix and Amazon.”

## Raising all boats

Over in India, Beach House’s tie-up with former Netflix exec Khanna is another indicator of how the talent-led approach is being pursued.

Mumbai-based Riverland Entertainment is aiming to partner with local Indian talent to create shows for global and Indian audiences, using Beach House’s network and its post-production facility, Space Lion Studios.

The nascent firm will also provide line-production services to incoming international productions and assist with local talent, crews, permits and tax incentives.

“We want to be that partner that can help creatives



*Mr. Midnight* is based on James Lee’s book of the same name and went live on Netflix in October

**“Japan is changing quickly. We always build around talent and Japan is fascinating but it has always been a bit impenetrable”**

Jocelyn Little,  
Beach House Pictures



and producers achieve some of their goals by bringing that talent out,” says Chan.

“It’s such a fast-growing economy, there are more and more people who will be interested in premium factual, which is different from the fare normally available and that’s why we are there.”

Beach House is also continuing to go against the trend and find success in China, with its Beijing-based operation, which has around five co-productions in the works, including *Silk Road From Above* with CICC.

“Our patience is paying dividends now, our partnerships have matured on some levels and because we understand them better we can find ways to work better,” Chan says. “That is crucial when there’s so much conflict and misunderstanding, it is even more important they have a partner with Beach House that will lend a listening ear and try to problem solve the issues. It is too easy to be reactionary today.” Little adds that budgets are also improving – “they’re pretty comparable to a Discovery or Nat Geo now”, she says.

There is also increasing streamer interest in other populous countries in the region, including Indonesia. Little adds that Vietnam and Thailand are showing great potential too, with Beach House looking predominantly at scripted in the countries via its Singapore-based Momo.

“Thailand is more advanced but Indonesia has a big local feature film market and those [films] do very well,” Little continues. “From the TV side, the big broadcasters have their own in-house production services and a long history of doing long-running series, too.”

“It’s an incredibly young talent base as well,” Chan adds. “It’s not old fashioned by any stretch and that is the most exciting thing for us – when we concoct a new idea it is with fresh new talent.

“It’s still lower budget and streamers are just getting in, but you can see the improvements in quality and more filmmakers are coming out who have been fed a rich diet of high-end streaming fare. We think Indonesia has huge potential.” **TBI**

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# December selection

From a multi-cultural Japanese singing format to a doc exploring the world of fast fashion, check out the hottest shows heading to market

## Catch Me A Killer

**T**his fact-based drama, based on the book of the same name, tells the true story of former journalist-turned-psychologist Micki Pistorius, who became South Africa's first serial killer profiler.

Set in 1994, this 9 x 60-minute & 1 x 90-minute drama (also available as 11 x 60-minutes), stars Charlotte Hope as Pistorius, who joins a team on the hunt for a notorious serial killer and is launched into a dangerous underworld. She is assigned with profiling the Station Strangler; a serial murderer who has left a trail of 22 dead boys in his wake – and it will be far from the first case she takes on.

While finding her feet in a male-dominated arena, Pistorius must also battle with her status as an outsider in the police force and in the community she serves.

“Micki's story allows us into the world of true crime from a completely unique perspective,” explains executive producer Simon Howley. “Her transformation from lecturer to South Africa's first serial killer profiler is an exhilarating and terrifying ride. In each of the 10 episodes in the series, Micki is instrumental in catching the killers, wading into the depths of their depraved minds all the while trying to keep herself from falling too far into the abyss.”

Production designer Warren Gray and his team “painstakingly recreated the era with incredible skill and sensitivity,” says Howley, who says that there is a “dynamic and cautious optimism” to life in the 1990s setting.

“Gearing up for its first democratic election, the country finds itself at a tipping point with the eyes of the world watching.

“It is a delicate moment, always on the brink of violence. The possibility of a political and societal wound breaking open is ever threatening and always close to the surface. Despite this, hope, for the first time, is within reach.

“Yet while the rest of South Africa is in the midst of a jubilant move towards freedom, the places that Micki finds herself in – from Mitchell's Plain to KwaZulu-Natal – are far removed from this hopeful future.”

Howley says that basing the show on a true story adds an extra layer that he thinks will appeal to crime drama fans.

“There is something about knowing that these events actually happened – that Micki is a real person and that the world depicted on our screens actually existed,” says the exec producer.

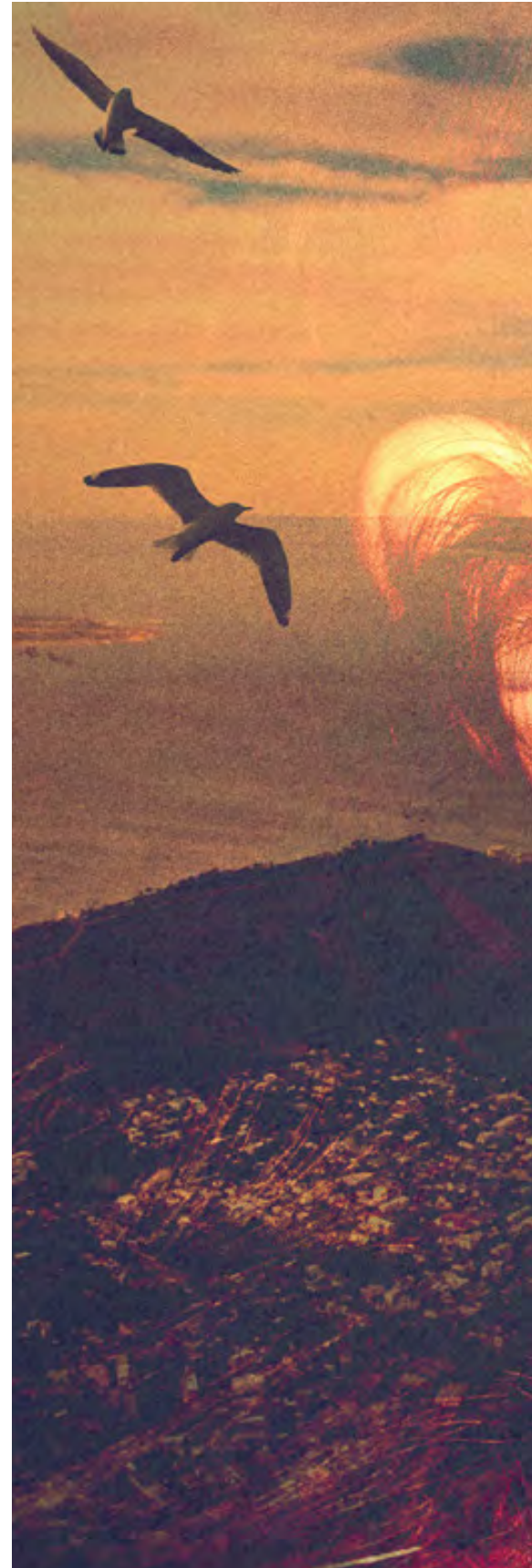
“The South African setting also brings an additional layer of intrigue and fascination, especially as there are so few international South African true crime thrillers.”

**Producer:** CMAK Films & Night Train Media

**Distributor:** Abacus Media Rights

**Broadcaster:** M-Net/Showmax (South Africa)

**Logline:** Fact-based crime drama about the work of Micki Pistorius, the journalist who becomes South Africa's first serial killer profiler





**Top  
Pick**







### Inside The Shein Machine

**Producer:** Zandland Films

**Distributor:** Beyond Rights

**Broadcaster:** Channel 4 (UK)

**Logline:** Undercover cameras explore working conditions inside e-commerce giant Shein's Chinese factories, while experts highlight the cost of fast fashion'

Reporter Iman Amrani delves into the rapid growth and mysterious operating practices of e-commerce giant Shein in this 1 x 60-minute documentary,

which explores how the Chinese fast-fashion retailer overtook Amazon this year to become the most downloaded shopping app in the US – and yet very little

is known about who runs the company and how it works.

“The filmmakers set out to inform us as much as possible about the company and we get a good overview for the first time really, although its owner still remains a big unknown,” reveals Claire Runham, SVP of acquisitions and co-productions at distributor Beyond Rights.

“I was particularly fascinated to see the footage on how clever Shein’s website is. It’s full of algorithms and ‘dark matter’, which effectively pushes its customers to act in the ways Shein wants them to. Unnerving, but a masterclass in knowing and reaching your target audience.”

During the pandemic, everyone from influencers to high-street loyalists grew to love Shein, but as rumours of exploitative working conditions in its factories and the devastating environmental impact of fast

fashion arise, undercover cameras go inside Shein’s factories in China for the first time.

“What we ultimately learn is that Shein’s business model isn’t sustainable and isn’t ethical,” reveals Runham, who says that the film is more than an exploration of Shein’s practices but also “about fast fashion as a phenomenon”.

Runham explains: “This isn’t just about fashion, or a cautionary tale about secretive Chinese businesses. We’re told by one expert in the film that fashion is one of the most polluting industries in the world – more polluting than air travel and shipping combined – which is really shocking.

And we’re told the world can’t cope with the amount of clothes that companies like Shein are producing. It’s most definitely a global issue and therefore, should be of interest to audiences everywhere.”

### Vocals Like Locals

**Producer:** Nippon TV

**Distributor:** Nippon TV

**Broadcaster:** Nippon TV (Japan)

**Logline:** Contestants show their passion for foreign cultures by performing songs from other countries in front of a celebrity panel

This new reality competition format brings together amateur singers from all over the world to celebrate their love of a foreign country – through song.

Contestants will to sing a local hit from their chosen country and must do their best to sound like a native – even if they don’t know how to speak the language.

Singers must ensure their love for the local music and culture shines through as they perform in front of a panel of four celebrity judges who will score them based on their vocal ability, expression and technique.

“The contestants already know how to sing the local song beautifully with great accents, but the challenges are to show the judges how much they love and understand the song, the local culture, and perform their best on competition day so that the audience will come to love the song, too,” explains Yuki Akehi, director of international business development at Nippon TV.

Those contestants that manage to impress will advance to the next round, where they will be in with a chance to meet the original singer of their chosen song.

The number of contestants can be scaled, depending on how long a producer decides their version of the format will be.

“In the Japanese version, there are only two chances to sing, to win. Our original format usually runs for about three hours, and

we have 10 to 12 contestants. The contestants need to prepare two songs in case they proceed to the second and final round.”

Akehi adds that the show has international appeal through its celebration of other countries and the power of great music.





## Supertato

**Producer:** BBC Studios Kids & Family and Tencent Video

**Distributor:** BBC Studios

**Broadcaster:** CBeebies & BBC iPlayer (UK)

**Logline:** A heroic potato protects the vegetable inhabitants of a supermarket after dark

When the supermarket is closed, mischievous vegetables come out to play in this 52 x 7-minute adaptation of the children's picture book series by Sue Hendra and Paul Linnet.

With Evil Pea on the rampage, it is up to Supertato, the world's greatest potato superhero, to save the day, as he and his fruit and veg pals do everything they can to try and stop the villainous pea.

"The series is designed for upper end CBeebies and bridge, so sweet spot 4- to 6-year-olds, but more broadly hoping to also appeal to 7- to 8-year-olds. So we

developed the series to look and feel older than the picture book series," explains Tony Reed, production creative director of animation at BBC Studios Kids & Family Productions.

This development included more sophisticated storytelling and an older skewing cartoon, reveals Reed: "We wanted the audience to instantly recognise Supertato and his veggie friends (and enemies) but the character and background artwork is significantly older in tone. Like the books, laughter and comedy are central to the series

but also, just like the books, the series has heart with the stories all centring around a group of friends having comedic adventures together with themes of friendship, teamwork and problem solving at their core."

Supertato and his friends tackle adventures ranging from an out-of-control toy dinosaur to building a baguette rocket to

visit the stinky cheese moon in the deli aisle.

"Additionally, we know children love a good baddie and in Evil Pea we have a character who is exceptionally good at being utterly naughty," says Reed. "This is a dynamic quite unusual for a pre-school series and is hugely responsible for the shape of the show."



## Bardot

**Producer:** Federation Entertainment & G-Films

**Distributor:** Federation Entertainment

**Broadcaster:** France 2 (France), Mediaset (Italy)

**Logline:** Drama about the first years of Brigitte Bardot's superstar life, as she deals with her new status while trying to find her true self



This 6 x 52-minute series explores the early life of iconic French actress Brigitte Bardot, transporting viewers back in time to meet the star before she became a household name.

Starring Julia de Nunez, we follow Bardot as a passionate and liberated woman, defying the rules of society at the time. The series focuses on the first years of her career, as she deals with her new status while trying to find her true self.

"Our series is the inside story behind the countless films and images of Brigitte Bardot, which only display the smiling façade and the public persona," explains Judith Rochelois, who co-produces the series with Federation's Pascal Breton. "But who really is Brigitte Bardot? How did she break free from the strangleholds of being a woman in the late 50's? What is the source of her fear of

loneliness and abandonment, her need for protection and her dread of being unloved?"

The series "plunges behind the scenes," Rochelois adds, "with the recreation of iconic shootings such as Vadim's *And God Created Woman* or Clouzot's *The Truth*, which had their share of love, treason, manipulation and excesses."

While the show's subject is one of France's most famous stars, her international appeal and the issues she faced mean it is very relevant to global audiences, Rochelois says.

"She suffers from being over-represented in the media, despite her being the first 'influencer' as we know it. Our series offers a dive into her intimate life, which resonates more than ever with the challenges today's young women are facing in our global, ultra-connected world," Rochelois adds. **TBI**



## Last Word Deepak Dhar

### Keeping it real

**“The longevity of these brands really is testament to how the reality genre continues to evolve”**

**R**eality shows have a unique way of captivating the masses. Based on real people, real stories, real emotions, and real drama, this genre connects with viewers on a deeper and emotional level, and continues to attract audiences year after year.

Since experiencing a reality wave in India, with formats such as *Kaun Banega Crorepati* (*Who Wants To Be a Millionaire?*), *Indian Idol* and *The Voice* taking over our screens, creating household names and crowd favourites, the genre is now a long-standing staple of our TV industry here. And for me personally, this space has played a major part in my career, from adapting globally-renowned formats for the Indian audience like *Big Brother* (*Big Boss*), *Fear Factor*, *Popstars* and *MasterChef*, to creating local formats like *The Great Indian Laughter Challenge*, *Chote Miyan* and *Joh Jeeta Wobi Superstar* (where winners from different reality shows compete with each other).

I believe that with the rise of OTT platforms in India, the scripted market will boom, but not at the expense of unscripted shows and particularly reality TV. This is already evident with the launch of new shows in the region like *Shark Tank* and the resurgence of titles like the iconic *Survivor*. Plus long-running shows like *Big Boss* and *Jhalak Dikhhla Jaa* (*Dancing With The Stars*) continue to draw huge audiences. The longevity of these brands really is testament to how the genre continues to evolve, and how it can both influence culture and take inspiration from societal shifts. Innately diverse and reflective of modern society, no two seasons are ever the same.

An exciting trend emerging in this genre in India is adventure-based reality. With long-running series such as *MTV Roadies* already hugely popular,

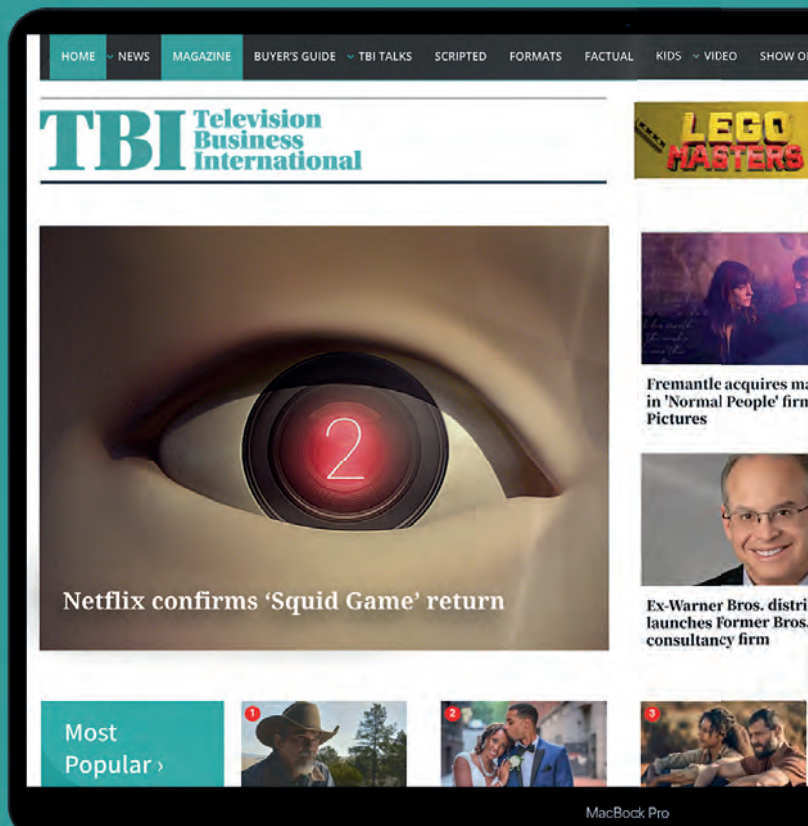
streamers and broadcasters alike are keen for innovative and fresh ideas in this space, and as a platform agnostic company, this is a wonderful time for us, with opportunities that our creative teams are ready to make the most of. We have already produced the survival skills-based *Running Wild With Bear Grylls*, partnering Bear with some of India’s biggest names, including actors Akshay Kumar and Ajay Devgn, as well as Prime Minister Narendra Modi. And another great evolution was *Ranveer Vs Wild With Bear Grylls* on Netflix, which was our country’s first interactive reality special. This was a really interesting new concept that drew audiences even further into the show by giving them the power to pick the route of Ranveer Singh’s journey throughout the series, and it performed incredibly well for the platform.

After experimenting early on with proven reality formats, and evolving and learning from shows like *Big Boss*, this month we are releasing a new show with major Bollywood star, Malaika Arora, called *Moving In with Malaika*. We are used to following these superstars on social media with 30-second clips and reels, but what really happens behind closed doors? In this new series we’re going to take viewers with us as we ‘move in’ with the celebrity and get an unfiltered look at her real life. It has been great to work with Disney+ Hotstar on this project, and it highlights the growing interest from streamers for non-scripted programming.

Reality shows are extremely versatile, they can capitalise on celebrity talent, showcase expertise in competitions or shine a light on some incredible real people in society that we wouldn’t otherwise see on our screens. This appeal means, ultimately, they will always hit a chord with the masses and leave audiences wanting more. **TBI**

Deepak Dhar is the founder and CEO of Banijay Asia

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