

# TBI Television Business International

**Bright future**  
StarzPlay CEO on streaming turbulence & delivering growth  
Page 12

**Eastern promise**  
How CEE dramas are looking to secure international appeal  
Page 16

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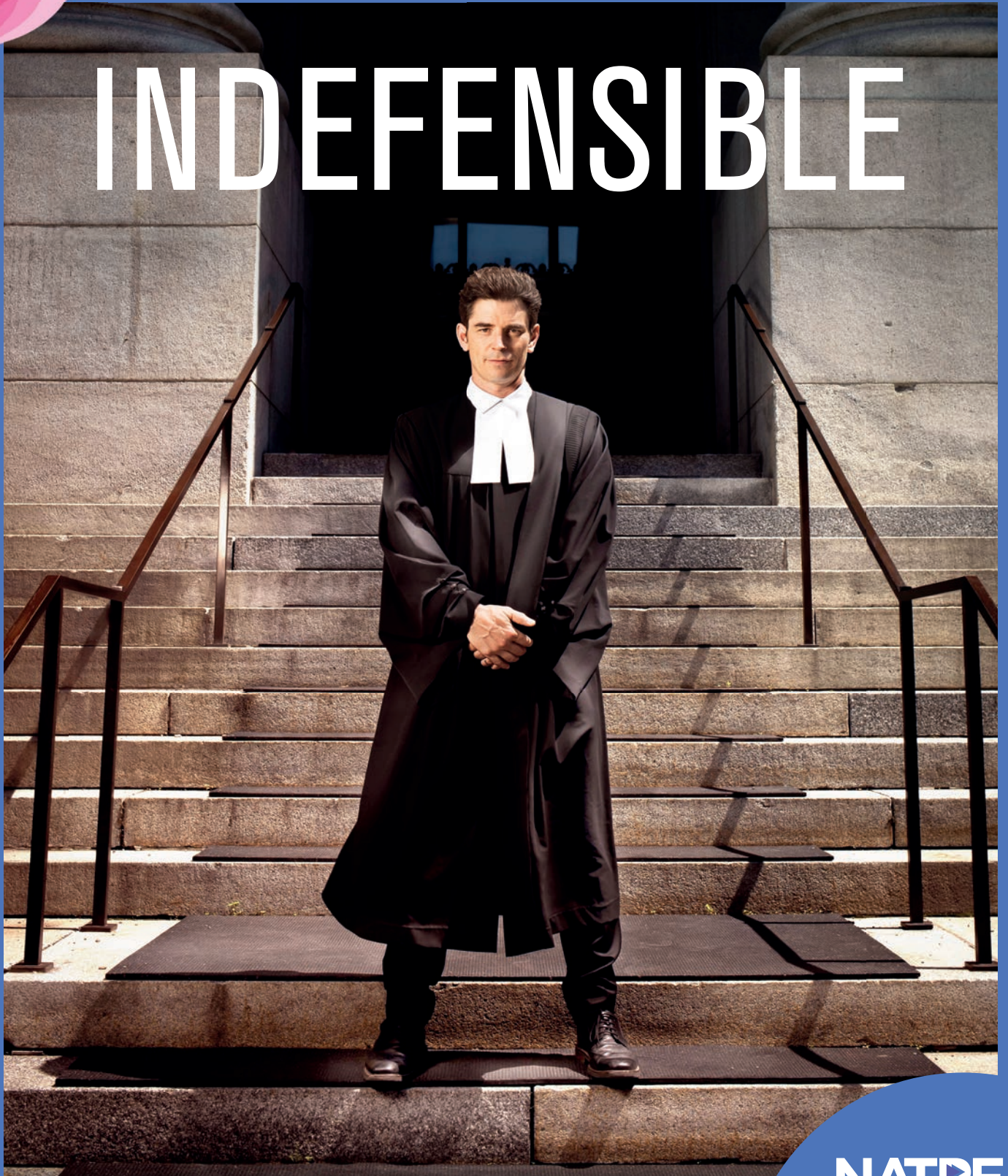
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## Above & beyond

It has been an eventful six months for the content business and we're not done yet. Rarely has the industry pivoted and evolved so radically, with the US writers' strike, job cuts, streamer strategy shifts and budget concerns all squeezing buyers, producers, distributors and financiers to varying degrees. We've seen the cost of living crisis force regional streamer Viaplay to reassess its numbers, while production execs are now openly admitting to TBI that the market is increasingly soft – and the concern is clear.

These worries are not particularly tied to any one region, either: the same issues are being faced by most in the industry, no matter where in the globe they operate. As ever, though, there are those navigating choppy waters rather well and we speak to one such exec on page 12, as StarzPlay CEO Maaz Sheikh details his streamer's approach to content and explains how the service is managing to sustain growth. With several CEE-focused markets this month, we also hear how and why dramas from the region are increasing budgets and ambitions (page 16), while a clutch of buyers provide their programming wishlists on page 20.

There's also an exhaustive exploration of the key trends fuelling Spanish scripted product (page 24), plus an array of opinion and insight from leading industry players as they guide you through the turbulence...



## Contents

### 12. Growth trajectory

StarzPlay CEO Maaz Sheikh tells Mark Layton why hyper-local content and sports coverage are paving the MENA player's road to success

### 16. Serious intent

Central and Eastern Europe's scripted industry has faced a turbulent 12 months. Richard Middleton finds out what's next for the region

### 20. What's the big deal?

Mark Layton hears from commissioners including Israel's Keshet 12, South Africa's MultiChoice and Canada-based OUTtv about their latest content demands

### 24. New Wave

Spain will launch more than 80 new scripted shows this year. Irene Jiménez finds out what is driving such numbers and what are they key titles and trends

**Plus:** 4 About Town, 6 Scripted, 8 Formats, 9 Diversity, 10 Legal, 11 Tech & Analysis, 28 Last Word: Nicolas Eglau, Moonbug Entertainment

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# About Town

## Lights, camera, action

LA was calling for many in the international business last month as buyers descended on Hollywood for the 2023 LA Screenings, although it was unclear just what they might find on the Californian coast.

The WGA strike was understandably the talk of the town, with execs on the acquisition side sharing an air of caution about programming availability going forwards, given the visible placards and picket lines on the streets.

However, the US studios were keen to relay how much content is currently in the can and ready for global sales, with buyers able to get a first look at what the likes of Sony, Fox, Paramount, Disney, NBCUniversal and Warner Bros. Discovery were adding to their slates this year.

Sony was the first to announce some big deals during the week with pick-ups for some of its latest key titles including *Twisted Metal*, *The Winter King* and *Ten Pound Poms*.



On the ground, it was the usual flurry of screenings, meetings, dinners and drinks, with NBCUniversal revving up a *Fast X* cocktail reception and screening at Mann's Chinese Theatre, as one of the more social highlights of this year's LA Screenings.

## Colorado calling

Golf ball-sized hailstones and the US writers' strike couldn't stop SeriesFest from delivering another jam-packed edition of its Denver-based event in May, with Richard Kind and Chelsea Handler among stars heading to Colorado. TelevisaUnivision CEO Wade Davis, BBC Studios scripted chief Mark Linsey, Propagate co-CEO Ben Silverman and Liberty Global's topper Mike Fries were among execs chewing the cud, before Handler was joined by Joel McHale, Jay Pharoah and Adam Ray to wrap the event at a jam-packed, albeit slightly wet, Red Rocks Amphitheatre.



Tom Cooper/Getty

## Play the trumpet



Doesn't time fly? It's been 10 years since NEM Dubrovnik first opened its doors and welcomed execs to the deep azure blue of the Croatian coast, providing a market with a view and a welcoming access point into this part of the world. While the industry has transformed in many ways, some things haven't changed. Pay-TV remains a dominant force but, more importantly, Sanja Božić-Ljubičić – CEO of Pickbox and the brains behind the event – still knows how to party. Here's to another decade...

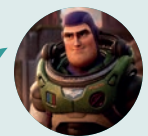
## Swings & Roundabouts

**40** CBC in Canada has cast fears of a programming squeeze aside, revealing more than 40 new and returning originals for the 2023-2024 season including *Bones Of Crows*, plus two new FAST channels

**13** Nordic production group Monday Media is now home to 13 companies, after making two acquisitions – *Mobile 101* producer Rabbit Films and Denmark's ImpactTV – in less than a week

**12** Viaplay's CEO Anders Jensen stepped down after the Nordic streamer admitted the cost of living crisis has hit subscribers and ad revenues, the latter set to be down 12-16% in Q2

**75** Disney cuts have hit Pixar Animation Studios, with 75 positions set to be disbanded including that of long-standing exec Galyn Susman, who counts the original *Toy Story* movie among a raft of credits



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## Scripted Anthony Kimble

# Hollywood's fatal attraction to reboots

**Anthony Kimble, co-CEO of Arrested Industries, laments the rise of the reboot & its impact on creativity**

**T**here's a new sound in L.A. Rumour is that it's the ominous death knell for the Golden Age of TV drama!

It was only a few years ago that television started to compete with film as a medium where true auteurs could fashion intricate stories. Big screen names such as Jane Campion, Steven Soderbergh and Jordan Peele led the charge, lured by incredible paydays and promises of creative freedom and the time to tell their stories how they wished. And they delivered some groundbreaking and creatively thrilling series to screens that had been predominantly populated by generic procedurals and the odd limited mini-series.

It was an extraordinary time to be a producer, writer, director. I remember the chatter at dinner parties – Netflix was well known for writing blank cheques for a series from acclaimed talent and simply letting them get on with it. It truly was revelatory: no tedious guidelines on nudity, swearing or risqué material, no rounds of tiresome notes from the studio and network... life was good!

But this creative utopia could not sustain forever. As more competition started to arrive in the streaming landscape and budgets got tighter, the commissioning briefs began to get more specific and focused on bringing in a broader base to ensure continued subscriber growth outside of the coastal elites. Commissioning by algorithm was born and the overall quality of shows started to decline due to the sheer volume needed to feed the platforms' ravenous appetites.

Fast forward a decade plus some change, and the shit has hit the fan. With the streaming bubble burst and studios and platforms cancelling shows left, right and centre, combined with the appetite for true creative risk well and truly out the window, we are now in the perilous position of having to watch a never-ending stream of reboots, sequels and prequels.

These are nothing new in the entertainment industry and have been used by studios to capitalise on the popularity of successful TV and film brands for decades. However, the recent surge in the number of reboots has been unprecedented... *Weeds* and *Nurse Jackie* just added to the mix in May. The laziest example for 'wringing out every drop' has to be Showtime/Paramount+ creating a prequel and sequel for hit show

*Billions*, imaginatively titled *Millions* and *Trillions*. I thought this may have been an April Fool's Day joke when I first read the news.

Only time will tell if this strategy is going to work but history tells us otherwise. *Fantasy Island* is the latest reboot to fall by the wayside after an underwhelming performance and the long-awaited *Fatal Attraction* series was disappointing and eviscerated by critics: 'Tepid', 'not sexy but still sexist'. It didn't even have a boiled bunny and, as a result, it was not quite as delicious. People really wanted that rabbit to die!

Most reboots/prequels/sequels are lacklustre and fail to live up to the original, instead often rehashing old ideas and characters with little or no innovation or creativity. This is not to say that all reboots are dire. Some, like *House Of Cards* and *Westworld* (the first season at least), were critically acclaimed and managed to find new audiences, but such instances are in the minority.

When studios rely too heavily on reboots they are neglecting new, original content and this is the nub of the problem - it leads to a lack of diversity in programming and limits the creative opportunities for writers, directors and actors. By using the same old formulas and ideas, the industry is failing to represent different cultures and perspectives: just look at the characters we're bringing back for our collective 'enjoyment': *Dexter*, *Bosch*, Bobby Axelrod, *Spartacus*... All straight white men with severe toxic masculinity issues! Just sayin'... Come on people!

In relationships, I've always been told never date an ex. Going back in the hope of rekindling what you once had (and forgetting why you broke up in the first place) is usually a recipe for disaster. Strange how that universal truth hasn't made it to Hollywood.

By constantly pursuing reboots, rather than fresh ideas, we are perpetuating a culture of nostalgia that prevents us from moving forward with new, more relevant discourses – and the pursuit of the perfect programme. The industry desperately needs to strike a better balance between nostalgia and innovation to ensure we continue to see fresh compelling content on our screens or those precious subscription dollars will plummet. As for me, the only reboot I'm interested in is *Back To The Future*... AKA a time where TV shows continually strived to push boundaries. **TBI**

Anthony Kimble is co-CEO and founder of Arrested Industries, overseeing its scripted operations from LA



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## Formats Siobhan Crawford

### Managing expectations

**“There has never been a tougher time to get paper formats picked up. Never.”**

**J**e suis fatigué. There is a reason that from all those French lessons this is the phrase we remember. After the rush of the spring, MIPTV, London Screenings, the state of the market... aren't we all just a little bit tired?

Tired of the fact that paper formats have become so damn hard to get picked up; that companies making redundancies don't assess staff for a transition to new roles but instead just let one half of the business go (bye HBO); that people resent the reboot era we are in but don't appreciate how much work goes into refreshing heritage formats for those reboots. Or that people think distributors are magicians who can sell any 'formats', that Zoom and Teams have not learned that the 'share audio' setting on shared screens should automatically be on and that people can't just accept what is reasonable in contracts. Say it with me: Je suis fatigué.

The market today is not recognisable from five years ago. So let's reflect on why, perhaps, we are not all 'shiny happy people' (sing the song if you choose).

#### Redundancies, strikes & reduced hour contracts

You cannot currently look through LinkedIn without seeing a job exit article or an 'open to work' label on a profile. Everybody knows someone or multiple people who have lost a job. I was reading recently that there is an "unprecedented lack of work" in the unscripted sector in the UK for freelancers – many are reporting not working since January. Do we know if Netflix wants to bring back their covid freelancer fund – because now seems like a good time. Disney cuts, Netflix cuts, Paramount cuts, ITV cuts, Vice administration. The rise of consultants – realising they have more job stability and satisfaction as self-employed, rather than the pressure businesses are putting on employees to meet targets with less content or on reduced hour contracts with a hot desking system!

However, there is money somewhere; everyone has money for FAST channels or how about billions to invest in Korean content or minority backing of the new prodcos of exiting-employees or the growth travel budgets to accommodate even more sales markets.

#### Paper format hell

There has never been a tougher time to get paper formats picked up. Never. People don't have time for paper, they prioritise their fully-owned content rather than develop someone else's good idea. There is a need to invest more in content prior to pick up, meaning development is now an activity for the wealthy and funded, not the average Joe. And when it is created, if you can hang on to 50% you are winning, because 'time is money' has never been more true.

Also the drive toward the next *The Masked Singer* and the next *Married At First Sight* has spawned a lot of sub-par attempts at primetime entertainment that do not travel. If you have a good paper idea (and a good lawyer for the contract) talk to Fox, Talpa, TF1, Mediaset... your friendly neighbourhood distributor. But know the market has changed and half-baked won't do.

#### Distributors, not magicians

During a time where content is light and there are fewer slots, there will be a grab for content. As a distributor this is frustrating. It means prodcos are being over-promised to get access to their content, or an advance cheque will make the decision for you. The unrealistic expectations of lots of sales means prodcos will blame distributors for lack of movement/quick sales and not MARKET CONDITIONS and THE IDEA. Remember there are thousands of formats in the market and not all of them are good enough or international enough – but to have someone champion your format in the long term is a success. And moving the format to a new distributor after it has already been pitched widely – we cannot perform magic. MARKET CONDITIONS and THE IDEA. Manage your expectations and pick a distributor wisely.

So if you are one of the many independent prodcos full to bursting with productions or distributors lining up your titles for autumn already, your reward is almost here: the Scandi summer shutdown is coming. Je suis fatigué of today's formatland but holidays are helping. **TBI**

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



## Diversity Deborah Williams

### Representation fit for a king

**“Here was one of the most formally structured institutions in the world taking the opportunity to change things”**

**T**he past few weeks have been all about change, including crowning a new monarch for the UK and Commonwealth.

A lot of the conversations in the run up to the coronation focused on decolonisation and how some Commonwealth countries were dropping the king as head of state.

There was also a lot of righteous indignation online towards Floella Benjamin as she shared that she would have a role in the ceremony. From her perspective it was a positive sign that the king was embracing diversity. Her detractors decided that she was a token and that she should be ashamed.

In my view, the ceremony was a great example of what you can do with content if you are minded to. It was an eclectic service. There were multiple faiths represented, a mix of international dignitaries, folk off the telly and regular people who had in some way achieved success or provided public service. Black women, gay and lesbian members of the church led parts of the service and there were more women in significant roles. I had not expected that. I was surprised and pleased. Outside, there were representatives from all over the world marching and keeping watch over the monarch.

So, what does this have to do with my work?

First, it is a chance to once again celebrate the superlative BBC events team. As we continue to wring our hands about the skills and talent gap in our industry, we should be mining them for all the knowledge that they have. This quality does not just happen. There needs to be some way for these skills to be transferred to a new cohort in order to ensure our creativity thrives.

Second, the conversation about diversity and inclusion is always hindered by someone somewhere stating that it's difficult to change the way things are usually done.

This is not true, and the coronation is an example

of that. Here was one of the most formally structured institutions in the world taking the opportunity to change things. They placed diversity at the centre of what could have been a dry and dull event for a select few. The inclusion in the event of the many different cultures from all across the UK is a sign to all you commissioners and producers who insist it's not possible.

Third, there is no one way to do diversity. It was clear that Floella felt a sense of pride at being invited to participate in the ceremony. But this was used against her by people who felt for whatever reason that they had the right to dismiss her involvement in order to fit their own narratives.

Their attitudes are objectionable and unacceptable. It is perfectly OK to be black and have a different perspective to other black people. If you are going to engage with the lived experience, make sure that you are not falling into established, tokenistic race-based tropes.

Finally, it was a fine example of working together. Using the structures and systems that you have no control over, mixing them with the things that you do have a chance to influence and providing an example that others can follow. The coronation was more diverse and representative of the UK than lots of content I have seen over the last five years which was supposedly developed and commissioned to reflect the lives of the country's population.

It shows how it's not that difficult. If you want to do it, you can. If you take ownership of decision making and use power for the greater good, you will find the results are beyond anything specially concocted in a petri dish which is supposedly good for us.

King Charles has shown us how it's possible to accommodate change and progress. If you can't see this as positive, maybe you need to hand your crowns over and let someone else take the reins. **TBI**

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



## Legal Julian Wilkins

### We need to talk about AI

**TBI resident legal expert Julian Wilkins explores AI's potential impacts on writers**

**T**he current US writers' strike is as much about artificial intelligence (AI) as it is about pay and other conditions. The Writers' Guild of America (WGA) is concerned about AI being used to write scripts for film and TV, especially taking into account the high output required by streaming services.

Earlier this year, the WGA indicated that it may not object to some use of AI if it was no more than a support device for writers, the AI received no credit, and writers' income was unaffected.

If a script is based primarily on a novel, screenplay or newspaper article then the written work is derived from source material. Whereas, if it is based upon a writer's original idea then the story or screenplay is regarded as literary material. Basically, the writer gets a lower fee, usually 25% less, if it is not based upon their own idea.

However, if an AI system writes the script using data sourced from the internet, can that be classed as an original literary work? Also, how would you assign credits? AI uses data and its strength is identifying the data and piecing it together. AI is not a creator in the sense of a writer or artist. AI generated material is not eligible for copyright protection (certainly in the US), nor can the AI provide a certificate of authorship.

The WGA wants to protect writers against having to rewrite or adapt material that has been generated by AI and carries no copyright. Also, to prevent film and TV companies from asserting that the AI is responsible for the literary material.

Another issue concerns a writer using an AI tool but retaining substantial human involvement in the creative process – that is likely to be protectable by copyright. It is not clear where the line of protectability lies between AI generated and significant human involvement.

The fear for writers is that AI could replace them

to create scripts, especially for those productions where there is high output and relatively low budgets. Seasoned well known writers may be 'safe' and be commissioned for more premium expensive productions. However, less experienced or established writers seem vulnerable.

The question is can writers and AI co-exist? AI cannot replicate the sensibilities, nuances and emotions of a human. The WGA dispute revolves around how to ensure writing remains a human centred activity but exploiting AI where appropriate; for instance having the equivalent of virtual assistants as used in gaming to help players by providing information or guidance during gameplay. These assistants use natural language processing to understand and respond to player requests.

Also, will the issues arising from the WGA strike cause any modification to copyright laws in different jurisdictions like the US and UK?

Earlier this year, the UK Law Commission (UKLC) completed its consultation about possible reform to copyright law in the context of AI, and hopefully their recommendations will be published later this year.

The issues the UKLC is considering include whether computer generated works without a human author should be copyright protected at all. Currently, such works protected in the UK have 50 years safeguarding. How should laws for licensing or exceptions to copyright be modified for text and data mining, which is often significant in AI use and development. Getty Images, for instance, is suing for alleged breach of copyright by an AI company for using its photographic images to 'teach' AI systems to create photographs.

The discussion about AI and its regulation has only started. Be prepared for a long running soap-opera rather than a one-off commission as the story unfolds. **TBI**

Julian is a consultant solicitor and notary public with Eldwick Law, and a founding member of mediation and arbitration practice Q Chambers



## Tech & Analysis Maria Rua Agnete

### Doubling up

**Central and Eastern Europe's FAST market remains in its nascent stages, but revenues are set to double within six years. Mark Layton talks to Omdia's Maria Rua Agnete about potential across the region**

**F**ollowing two years of unprecedented growth for Free Ad-Supported TV (FAST) in the US, rights owners and operators further afield are now looking at the potential that the medium could have in their regions of the world.

One often overlooked set of markets lie across Central and Eastern Europe (CEE), housing countries that range from Poland, the Czech Republic and Hungary, to Albania, Serbia and Latvia. While the vast region houses a wide range of diverse viewing habits – as well as differing consumption methods – CEE as a whole remains largely a stronghold for pay-TV and free-to-air.

Yet streaming is growing here – SkyShowtime has made the CEE region a major focus for its activities, for example – but obstacles such as broadband penetration and piracy have hampered more explosive OTT growth.

Nevertheless, new research from analyst powerhouse Omdia has revealed that FAST revenue across CEE is projected to almost double by 2028 to reach \$42m.

Annual revenue from FAST in CEE currently stands at \$23.5m, with the region joining a market that is at present dominated by the US, although rapid expansion from the UK, Canada and Australia is expected over the next four years.

“Traditional linear TV and social video have typically driven video advertising revenues in CEE, which have generated \$5.6bn and \$1.1bn respectively,” explains Omdia’s senior research director for media & entertainment, Maria Rua Agnete.

“Pay-TV is still growing in this market alongside a strong traditional free-to-air viewing model,” adds the analyst, who says that while CEE is “present” in the FAST race, “growth will be limited compared to other regions.”

“This region’s online advertising market is a lot less developed compared to their Western Europe counterparts and there is currently no ecosystem or marketplace that can provide premium ad-supported advertising video on demand (AVOD) and FAST services. A combination of these factors has resulted



Maria Rua Agnete shared Omdia’s latest research into CEE FAST revenue projects at NEM Dubrovnik in early June 2023

in reduced consumer interest in FAST.”

Indeed, many services have not yet even launched in the region. Rakuten and Plex are the only FAST platforms available in CEE at present, and while there a handful of local players that exist including Kabaret TV in Poland, overall, the region’s FAST market remains very much nascent.

Due to CEE’s current smaller market size, the international FAST channel operators have not launched their channels in the region, owing to various factors. ITV Studios, for example, cited the cost of dubbing as its reason for not rolling out its FAST offering into Italy or Spain, meaning CEE markets with multiple languages look likely to lag even further behind.

However, technology – including Artificial Intelligence (AI)-powered innovations – look likely to further reduce barriers to entry and allow the region’s FAST market to open up more fully, leading to the doubling of revenues within six years.

Rua Agnete says the relatively “low cost and minimal investment” required for FAST means it can succeed across the CEE markets and create opportunities that are currently being embraced in English-language speaking countries.

“Artificial intelligence is a technology that channel operator DAZN is looking into as a means to provide cost-effective dubbing,” she continues. “CEE is definitely a market to watch over the coming years.” **TBI**

Maria Rua Agnete is senior research director for media & entertainment at research powerhouse Omdia. TBI and Omdia are both owned by Informa

# Growth trajectory

Maaz Sheikh, CEO and co-founder of StarzPlay, tells Mark Layton why hyper-local drama and sports coverage are paving the road to success for the MENA regional player

It's been a good few months for MENA streamer StarzPlay, which recorded a 70% boost in viewership and 50% hike in sign-ups during Ramadan, over the previous year, while its recent move into original content is also bearing fruit.

Typically delivering a big, if temporary, subs pike, Ramadan viewing figures are largely driven by regional soaps, such as established Syrian series *Bab-Al-Hara* and, this year, by shows like historical drama *Seroh-El-Bateaa* and Egyptian action series *Harb*. These peaks, however, can lead to longer term subs retention.

But this is just the latest headline in what has been an ongoing growth trajectory for the MENA streamer, StarzPlay's co-founder and CEO Maaz Sheikh tells TBI.

"The last two to three years, we've been experiencing 40% to 50% growth year on year," says Sheikh, who admits that despite this he expects to see a flattening of the curve on the road ahead – while also recognising there is still plenty of room for expansion in the region.

"As the numbers get big, you know, it's just math; at some point, the growth rate is going to come down. But the market is still in early stages and the streaming adoption is still in its early stages. I think we have a long way to go before streaming services truly become household products throughout the MENA region."

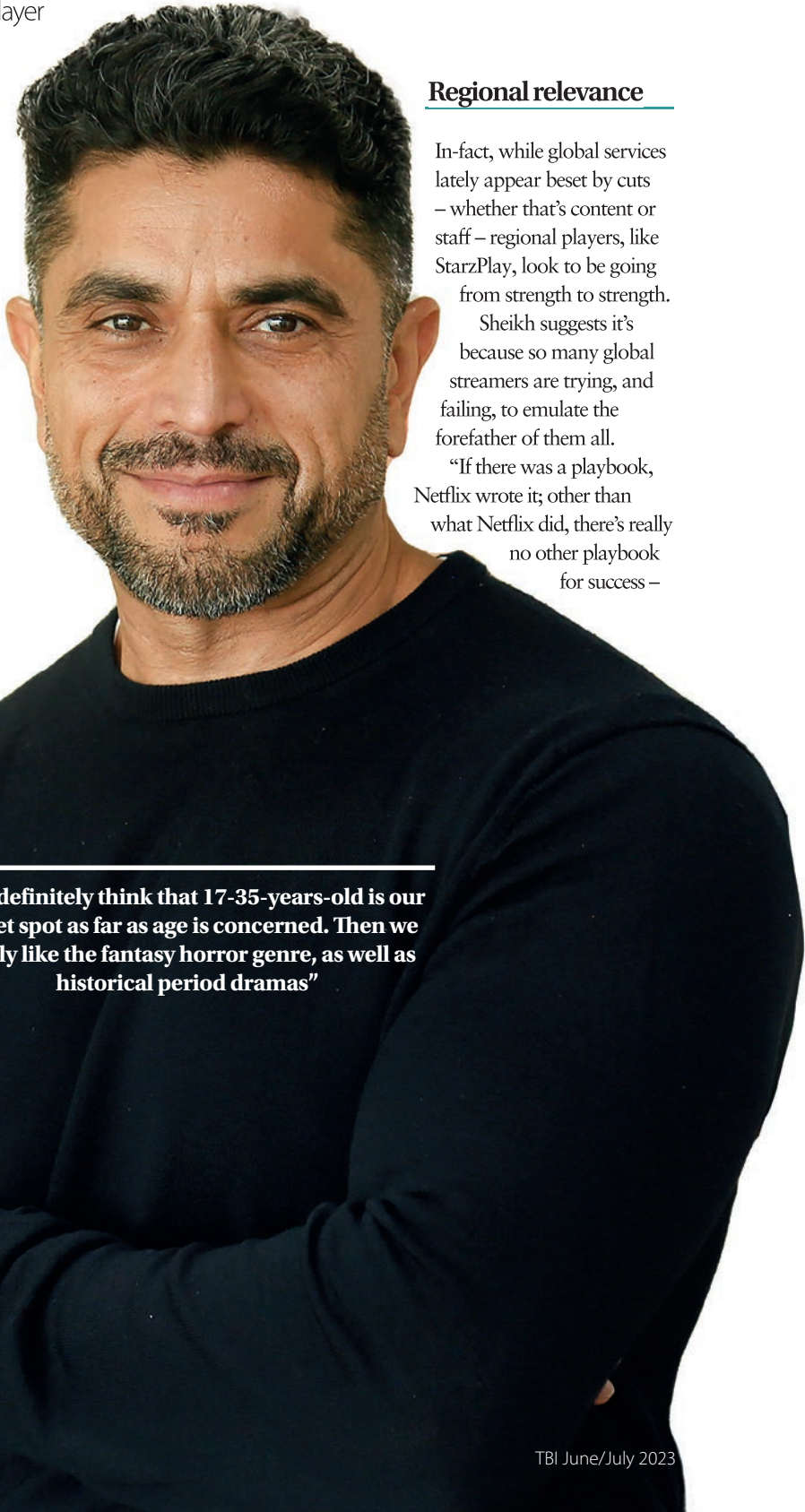
There is already plenty of competition vying for attention in MENA, however, with big global brands like Disney+ moving into the region. But for now, it's the local players that are dominant, and StarzPlay is among the most successful, reaching more than 2.1 million subscribers across 19 countries.

## Regional relevance

In-fact, while global services lately appear beset by cuts – whether that's content or staff – regional players, like StarzPlay, look to be going from strength to strength.

Sheikh suggests it's because so many global streamers are trying, and failing, to emulate the forefather of them all.

"If there was a playbook, Netflix wrote it; other than what Netflix did, there's really no other playbook for success –

A portrait of Maaz Sheikh, CEO and co-founder of StarzPlay. He is a middle-aged man with dark, wavy hair and a beard, wearing a dark blue long-sleeved shirt. He is smiling slightly and looking towards the camera. His arms are crossed.

**"We definitely think that 17-35-years-old is our sweet spot as far as age is concerned. Then we really like the fantasy horror genre, as well as historical period dramas"**



and Netflix had a 15-year head start. I think for anyone to replicate what Netflix did is near impossible, because they have established a brand. They have the content, and they can make it work at a global scale.”

Sheikh says that where regional players are succeeding is by not trying to mimic the global services, but by working around them. “That means doing what we can do better, which is finding that locally relevant content and telling those hyper-localised stories that connect emotionally with our audience that they will not find on other global platforms.

“We are focused on this region; I don’t have subs in Asia to worry about or Latin America, we can create content for MENA and focus on that alone. I think that’s where our strength lies.”

Sheikh says that this hyper-localisation is about more than just content, however, encompassing telco and mobile operator partnerships to facilitate methods of payment in a region where credit card penetration is sparse. And additionally, cultivating a social media connection that understands the local audience.

“It’s execution on all three fronts. It starts with content, hyper-localised methods of payment, and then finally, building that social awareness,” he says.

## Key demographic

As far as hyper-local content goes, StarzPlay has been pushing into originals in recent months. Its first original series was *Kaboos*, a horror anthology that debuted

*Kaboos* is a hyper-local horror anthology, and StarzPlay’s first foray into scripted originals

at the start of the year, exploring folklore and urban legends from different parts of the Arab world.

Sheikh explains that creating the hyper-local content that StarzPlay audiences want is not as simple as just making Arabic shows. For example, with *Kaboos*, he reveals “our goal was that if you gave someone the name of the episode, that they would immediately know what this tale is, and they should be immediately transported to their childhood when their grandparents were telling them this story.”

Sheikh says that the success of *Kaboos* has given StarzPlay confidence as to where it wants to focus its content strategy.

“We definitely think that 17-to-35-years-old is our sweet spot as far as age group is concerned. Then we really like the fantasy horror genre, as well as historical period dramas. These are the two genres that have worked well for us.”

*Chambers*, StarzPlay’s latest original Arabic series, is a “dark thriller”, while original film *Mr Harley* came to the service earlier this month, after a theatrical run, with both aimed at that key demographic.

Meanwhile, on the unscripted side, StarzPlay is pulling in local versions of established formats, having adapted Discovery’s *Say Yes To The Dress*, while *Million Dollar Listing* is launching in September.

As far as budgets are concerned, the streamer is spending between \$40,000 to \$200,000 per episode, depending on the project and whether it is scripted

or unscripted, and Sheikh says that StarzPlay is always open to co-production, at various stages of development.

“For us, the most important aspect is relevance for our audience and financials. If those two things work, then we’re open to different models of co-producing or commissioning, and even licensing.”

## Curated acquisitions

While largely focused on local content, StarzPlay is also acquiring western series that appeal to that same 17-35-year-old demographic, looking at action, drama and thrillers.

“We try to build sort of a balanced, curated offering,” says Sheikh. “So, for example, this summer, we are releasing the new season of *Billions*. This is a much-awaited season and it’s exclusively on our service.”

He explains: “We try to have one major, exclusive show like this and then at the same time, we have shows like *The Big Bang Theory*, or *House* or *Frasier*; older box sets that might not be exclusive to us, but still do really well. We realise we need both, and we can’t always afford everything in first window and exclusive.”

One area where StarzPlay has been finding huge success is anime. Having declared itself the region’s “home of anime” in 2021 after striking a deal with the TV Tokyo Corporation, the service has greatly expanded its offering in the months since.

“I would say two years ago we were carrying maybe three to four major anime titles. Now we have over 3,000 hours of anime content and we’ve focused on securing and licencing those big franchises like *Naruto*, *Boruto*, *Attack On Titan*, *My Hero Academia* – all the household names. But at the same time, we have curated a library [of lesser-known titles appealing to] discerning anime fans.”

## Sporting halo

Another of the driving factors in StarzPlay’s subscriber growth has been its premium sports coverage. Ahead of the start of the Indian Premier League (IPL) cricket season earlier this year, the service registered a ten-fold increase in new sign ups.

Again, Sheikh points to local interest, not just in teams or athletes from the region, but also a large local interest in specific sports.

“We showed the ACR World Cup and very recently wrapped up the IPL season. We’re acquiring these rights in the MENA region – I don’t have to acquire those globally, so the economics work for us.

“That’s number one. Number two; we are

looking at our audience. We don’t see them as one homogenous group; for example, in UAE the population is quite diverse in nature and there’s a significant portion of the population that’s of the subcontinent descent. If you’re going to target that audience, there’s no better product than cricket to do it with.

“Similarly, with the local Arabs, in this part of the world, football is a passion. That’s why we carry Italian league, we carry the local UAE leagues... and we’ve built that hyper-localised sports offering to cater to each segment – it is extremely important.”

Sheikh sees sporting events, and the coverage of them, as an important area of growth in MENA, explaining: “We’re seeing this change in in global sporting events and leagues where, events are being held in the region. For example, last year, the NBA had a few games here in Abu Dhabi and the UFC has a number of fights in Abu Dhabi every year.



*Bab-Al-Hara* is a long-running drama that drives an annual subs spike during Ramadan

“The local relevance of sport tends to have a huge halo effect. On one of our more popular shows on UFC, *The Ultimate Fighter*. [UFC champion] Conor McGregor is coming back [as coach on the series], he’s backing one of the teams. So that show is getting a lot of momentum, partly due to the fact that UFC is so heavily supported and localised in Abu Dhabi,” he says.

“This local relevance of sports is going to make this region up for more global sporting events, just like NBA matches, just like UFC. I think you’re going to see more of that here, which means good things for streamers like us, because we benefit from that halo effect.” **TBI**



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## Serious intent

Central and Eastern Europe's scripted industry has faced a turbulent 12 months, with HBO Max cutting commissioning and SkyShowtime entering the region. Richard Middleton finds out what's next

**W**hen news broke earlier this year that SkyShowtime was preparing to launch its first Polish original in June, producers may well have raised an eyebrow or two.

On the surface, series such as *Warszawianka* (aka *Still Here*) seems to be the type of show that streamers in particular always say they are after. It follows the tragicomic adventures of a 40-year-old 'urban legend' in Warsaw, offering universal themes that can appeal to local audiences and those further afield.

Yet the 11 x 40-minute series had, of course, already experienced a fair bit of drama of its own. It was initially part of the extensive slate pencilled in for HBO Max, building on the critical success that former Warner Bros. Discovery (WBD) exec Anthony Root had forged in the

Central and Eastern European region for years, most notably via the HBO Europe brand.

When WBD chose a different course for its CEE scripted efforts, shows such as *Warszawianka* and *The Winner* – a six-part Czech and Slovakian family comedy – along with *Root* and many of his team found themselves somewhat surplus to requirements.

For the programmes at least, there was a happy-ish ending. SkyShowtime, the recently launched Comcast and Paramount joint-streamer, spotted an opportunity and acquired the 21 former HBO Max originals, snagging exclusive European rights to 168 episodes – more than 150 hours in total.

The deal, which handed the nascent streamer the option to acquire worldwide rights on any renewed shows and to order new seasons for several shows,

Polish crime series *Erinyes* is among a number of ambitious dramas emerging from CEE

provided light relief for producers who had spent years getting the series off the ground but it also underlined demand for ambitious, bigger budget CEE dramas.

SkyShowtime CEO Monty Sarhan, meanwhile, described the acquisition as a “landmark deal” for his service, providing it with “an immediate foothold in the original programming space well ahead of plan.”

## CEE’s scripted outlook

That foothold has of course come at a price – TBI understands there were other parties exploring an acquisition of the titles – but while the cost of the shows was not disclosed, their appeal is clear.

The series, which also included Hungarian drama *The Informant* and a raft of shows from Spain and beyond, provide SkyShowtime with the opportunity to point to local originals and exclusivity with none of the hassle of having to actually produce anything.

It also raises questions about where CEE’s drama industry is heading next. The region is diverse and viewers’ tastes differ widely, but international audiences with relatively broad minds are already well aware of the appeal of dramas from countries such as Poland and the Czech Republic.

The latter’s public broadcaster, Czech TV, has been a long-standing commissioner of scripted series, with crime the dominant genre – a trend that fits neatly with broader regional and global trends.

“Czechs love their crime. As my former boss once said, you Czechs are not Slavic people, you are German people pretending to be Slavic people! And like Germans we love our crime dramas, the whodunnits,” Jan Maxa, Czech TV’s director of content & new media, tells TBI.

There is also a long history of co-productions in the region, with broadcasters from what was then West Germany and Czechoslovakia regularly collaborating on shows such as *The Visitors* and *Arabela* almost 40 years ago.

The Czech Republic’s public broadcaster is now looking to forge closer ties with some of those international partners, with its ZDF co-production *We’re On It, Comrades!* one upcoming example.

The procedural, which is from Barletta Productions’ Matěj Chlupáček and Maja Hamplová, tracks the activities of an investigative division that explores paranormal activities during the 1980s and reflects the interest in German-Czech coproductions that were a regular occurrence.

“*[We’re On It, Comrades!]* is interesting for our audience and Germans because it reflects the spirit of co-productions that happened between German broadcasters and Czechoslovakia in the 1980s,” explains Maxa.

“Those shows were focused on family fantasy series that treated the paranormal as something that disrupts the normal lives of the ordinary citizens instead of going into fantasy. That is the spirit that this show has.”

The show is being sold by ZDF Studios and underlines Czech TV’s increasing interest in co-produced dramas says Maxa, with *We’re On It, Comrades!* receiving funding from the Czech Film Fund, the Slovak Audiovisual Fund and the Moravian-Silesian Region.

It also underlines the shifting models of financing that producers in the Czech Republic and other CEE countries are employing.

“In the past we would fully finance everything, but now producers are becoming more adept at finding other sources of financing,” Maxa explains, adding that the broadcaster is looking to build on existing relationships that see it partnering with countries such as Slovakia, Poland and Austria.



“Typically we want all rights for Czech Republic, then our other financing parties can have all their rights and then we split whatever proceedings from the rest of world,” Maxa adds, highlighting that shows are typically running to budgets of around €400,000 (\$430,000) per episode, outside of Christmas specials.

## Grander ambitions

While global streamer strategies flux on regionals, local commissioners are increasingly looking to combine firepower to create shows that can stand alongside series from both Western Europe and the US.

One example is *Erinyes*, produced for Telewizja Polska (TVP) and recently picked up for global distribution by GoQuest Media. The 12 x 45-minute crime series is based on the short stories written by novelist Marek Krajewski and stars Marcin Dorocinski, who became known after TVP partnered with the BBC on *Spies Of Warsaw*.

Beta Film’s *Rise Of The Raven* is set to be one of the biggest budget dramas from CEE

Acclaimed director Borys Lankosz tells TBI that the show, which is set in pre- and post-war Lviv and Wroclaw, was an ambitious ask from the outset.

“It is extremely rare for Poland to produce series on such a scale. *Erinyes* is also distinguished by the fact that it is based on quality literature. These stories take the audience seriously. They don’t fawn over viewers; they don’t suck up to them. They come from the old tradition of detective fiction, which was, of course, entertainment, but for demanding readers who think independently, avoiding clichés and intellectual prostheses.”

Lankosz says this approach is, increasingly, a rarity, and not only in Poland. “Few industry decision-makers treat the viewer as an adult (and by that, I mean something more than the fact of being 18 years old and having access to watching nudity and blood on screen).

“You have to invest something of yourself, some kind of alertness and focus, and then the world of *Erinyes* will open up to you and swallow you up for good. This approach seems quite unique to me.”

For Jimmy George, VP of sales & acquisitions at GoQuest, *Erinyes*’ “vast fan following” was vital, something that Aleksandra Kaźmieruk, head of worldwide film & TV sales at TVP, agrees with.

She adds: “From our experience and the analysis of buyers’ needs, I also see that there is still a high demand for crime and costume dramas. It’s great if we can have both genres combined in one show, as in *Erinyes* or our latest title *Moth Hunting*.”

But to travel successfully, shows must of course be well written and have “strong leads” but also “perhaps an unconventional approach to presenting a story, which will pleasantly surprise the viewers.”

Kaźmieruk, like Maxa, adds that funding models are adapting and while most scripted series at present are fully financed by the broadcaster, she says that adding partners on higher budget projects would be welcome.

Tax incentives are also helping to entice producer-distributors such as Beta Film further into the region, with the German firm behind upcoming epic *Rise Of The*

**“We have funded all premium dramas ourselves, which is a pretty standard business model for broadcasters... however, we might welcome other partners to work on a high-budget project”**

Aleksandra Kaźmieruk,  
head of worldwide film &  
TV sales, TVP



*Warszawianka* was originally destined for HBO Max, before it was rescued from cancellation by SkyShowtime

*Raven*, which has Hungary’s TV2 and Austria’s ORF already attached.

“What we need to boost production activities is to develop and implement innovative financing models,” says Moritz von Kruedener, MD of Beta Film. “This goes not only for CEE but for all regions. A good example is *Maria Teresa* about the Austrian empress, which was financed, developed and co-produced entirely out of the region with partners from Czech Republic, Hungary, Austria and Slovakia.”

And while HBO Max might have departed from the region, streamers such as SkyShowtime and entrenched operators such as Canal+ Poland also offer potential.

Beatriz Campos, SVP of global sales & production financing at Studiocanal, points to two series – *Klangor* and *The Teach* (aka *Belefer*) – as shows that highlight how CEE’s scripted output, particularly from Poland, has been rising and resulting in broader global sales.

Both series were produced with Opus TV, which rose to international prominence after the Academy Award wins for *Ida* and *Cold War*. Since then, its drama hit *The Teach* has been sold globally, including to Walter Presents for the US and the UK, as well as Belgium’s M7 Group, Polar+ in France and SBS in Australia.

Co-productions between the Canal+ Group also make sense – there are “synergies” as Campos puts it – while crime and thrillers continue to be the preferred genre, she adds, because the stories tend to translate well in different territories, although she admits there remain markets where English-language still dominates.

“Slowly but surely, we are finding ways to introduce our Polish language series in territories like Lat Am and Asia. Europe continues to be an extremely flexible region when it comes to taking risks with different languages.”

Campos says the fast-shifting streamer strategies means more flexibility in terms of rights and windows, adding that “there seems to be more opportunity to collaborate together.”

For Lankosz, the key to delivering more shows that compel viewers outside the region to watch relies on commissioners embracing risk.

“With the growing importance of streaming platforms and the possibility of global exposure associated with them, I see a tendency to ‘Americanise’ domestic productions,” he tells TBI.

“Of course, there is nothing wrong with wanting to be readable, understandable to people outside of my country or civilization, but it does not mean that we all have to make and eat hamburgers, right?”

For now, the industry is watching the CEE market carefully, particularly to see how SkyShowtime’s shows fare. Ambitions are rising, as are budgets, and if the “foothold” proves stable, regional producers could find momentum to take their dramas to new heights. **TBI**





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# What's the big deal?

With a flurry of markets, conferences & co-production-focused events taking place in the coming weeks, Mark Layton speaks to key buyers, including MultiChoice in South Africa, Keshet 12 in Israel and Canada-based LGBTQ+ streamer OUTtv about the shows they want and the models being used to pay for them



## Ilanit St Hirsch, head of programmes & acquisitions, Keshet 12

### What's on your commissioning wishlist at the moment?

That's a good question, because as we speak, I'm on my way to *The Traitors* set, which will be shot in Hungary. It wasn't one of the usual suspects, when we discuss new formats, but considering what it did for the BBC, and globally, is just one example of shows that we're really keen to have.

Another one, which is unusual and which we're just in production on, is *The Amazing Race*. After covid, the world just opened up again; a small village in which we can make as our playground. So just two examples for our last purchases – and newcomers.

We will go for primetime family viewing shows, usually, but not only, of course. We have local dramas - we don't purchase scripts, we write them. Our audience is keen for big, local stories and our dramas are focused on that.

We have current affairs on our schedule, factual entertainment, that we either develop on our own or purchase – and we develop quite a lot. I think that what is common to our schedule, is that it is family skewed. I think it's warm hearted, in a way, very Israeli.

We call ourselves Israel's television; we want to reach into each and every segment of our audience. So we need to be wide, we need to be sometimes bold, we need to be distinguished, but we need to be primetime in the very fundamental sense of the word.

### What about your financing models? Are you open to co-productions?

Yes, in dramas we are looking for co-productions. Bear in mind that, for us, the language is a barrier, so with a project such as entertainment formats, it's even more difficult to go for co-production. But we are open for co-productions in dramas, especially.

### Are you looking to acquire any particular content at the moment?

If we would have talked two months ago, I would say *The Traitors*! There are several relationship shows that we are now discussing. Adventure reality shows are something that we are intrigued by, though we have *The Amazing Race* and it answers this one, but I think those are two subject matters that we're interested in.

But we're not looking for finished tape. In our primetime, when

I'm talking about entertainment and reality, they are locally adapted formats.

### What are your key current or upcoming shows?

*A Body That Works*. It is an unusual subject to deal with on primetime drama. But here in Israel, having difficulties with getting pregnant is something that is really discussed. As a subject matter, it's not something that you usually say, 'wow, let's make a drama out of it', but we took it under consideration and understood that it's something that we should work on.

Also, *Line In The Sand* has a second season. It's a well known story that we made a drama out of and it worked very well. It's about cops that changed sides.

Then you have a new drama that hasn't aired yet but is making a lot of buzz. The English title is *Trust No One*, and it's about the youngest head of the Israeli MCX and his story.



*A Body That Works* (top) and *Line In The Sand* are both performing well for Keshet 12



## Yolisa Phahle, CEO of Showmax & Connected Video, MultiChoice Group

**What's on your commissioning wishlist at the moment?**

We are always looking to surprise and delight our subscribers with new content that is hyperlocal, contemporary and fresh. Our portal is open for submissions at any time; this is also where we post specific briefs for content that we would like to see.

**What about your financing models? Are you open to co-productions?**

We commission the majority of our content, but we are also open to licensing if producers have already produced something great.

We are open to co-producing on a case-by-case basis. There are many factors that play into a co-production, which makes them unpredictable. They're not our core focus but we're doing a lot more of them, including *Spinners* with Canal+, which was the only African series at Cannes this year, and *Reyka* with Fremantle, which was nominated for two International Emmys. We've also co-produced with the likes of HBO (*Trackers*), NBCUniversal (*The Real Housewives* franchises in Africa), BBC (*Devil's Peak*), Banijay (*Temptation Island South Africa*), Night Train Media (*Catch Me A Killer*), and Acorn (*Recipes For Love and Murder*), among others.

**What upcoming shows are you most looking forward to?**

Set in the 1700s, *Shaka iLembe* tells the story of the iconic African king. The production has been six years in the making, consulting historians, academics, and family descendants, including the incumbent King Misuzulu ka Zwelithini, Prince Mangosuthu Buthelezi, as well as the late King Goodwill Zwelithini. Produced by Oscar and Emmy-nominated Bomb Productions, it's launching on Mzansi Magic on 18 June 2023. MultiChoice Studios is handling international sales.

*Outlaws* is the first Showmax Original neo-western, an epic love story that plays out in the dangerous world of cattle theft syndicates, in the breathtaking mountains on the border between Lesotho and KwaZulu-Natal. It's being produced by Tshedza Pictures, the South African production company behind the International Emmy-nominated telenovela *The River* and the recent Showmax #1, *Adulting*.

The first African series ever selected in competition at Cannes, *Spinners* follows Ethan, a 17-year-old driver working for a local gang. Trying to support his younger brother but increasingly disgusted with gang life, Ethan discovers a possible way out via spinning, an extreme motorsport where he can put his driving skills to better use. But the looming gang war jeopardises that hope. Cantona James is a revelation in the lead role, and it's beautifully directed by Jaco Bouwer. It's a co-production between Showmax, Empreinte Digitale and CANAL+.

Charlotte Hope, who played Myranda in *Game Of Thrones*, stars in *Catch Me aKiller* as Micki Pistorius, South Africa's first-ever serial-killer profiler. Adapted from Pistorius' memoir, the harrowing true crime series is set in the mid-90s and traces Pistorius' quest, as a newly qualified forensic psychologist, to track down South Africa's most feared killers at a time when the country was gripped by an epidemic of

*Spinners* (below) was the first African series selected at Cannes and *Adulting* (bottom) was a recent number one title for Showmax



rising crime and mass murder. It's a co-production between Showmax and Germany's Night Train Media.

**Are you looking to acquire any particular content at the moment?**

We are acquiring a wide range of major studio films and shows from the likes of NBCUniversal, Sky, HBO, Warner Bros, and Sony, but we are also always on the lookout for a great indie movie, documentary or series.

**What kind of rights would you be looking to take**

We look for exclusive Sub-Saharan Africa rights.

**Any shows doing particularly well for you right now?**

*Adulting* has been a phenomenal success with our subscribers. It's a 18LSDVN bromance set in Johannesburg, about four university friends whose strong bond has held them together even as their journeys in life have taken them in very different directions. We're happy and the fans are happy; that's all that matters at the end of the day.

**What does the year ahead look like for MultiChoice?**

We're very excited about the pending relaunch of Showmax, in partnership with Comcast's NBCUniversal and Sky, who will provide ongoing support through the licensing of both content and Peacock's globally scaled technology.

Across MultiChoice, our investment in local content will grow substantially: we are all about giving our subscribers more of what they love. MultiChoice will continue to grow by adding new services, platforms and functions for our subscribers.

## Lauren Whitelaw, head of programming, OUTtv



### What's on your commissioning wishlist at the moment?

We are always looking for stories and programming which is centered on queer people and their narratives. In particular, unique competition shows, docuseries and dating shows with interesting talent attached or off-beat subjects. Pitches must be entirely LGBTQ+ focused.

### Are you open to pitches?

Yes, always. It is helpful to have pitches include a visual pitch deck, pilot script (for scripted projects) and a budget top sheet. We champion creators, storytellers and contributors from the LGBTQ+ community - so that also guides the focus of our commissioning.

### What are your financing models like?

We have a huge range, dependent on the project, the talent, the country of production, and exclusivity.

### What can you contribute towards productions?

Up to 100% – and we like to see details on any fund applications when relevant.

### What upcoming shows are you most looking forward to? What is it about those projects that excites you?

It's great to be doing more multiple season/returning shows, so I'm looking forward to new seasons of *Gogo For The Gold*, *For the Love Of DILFS*, *X-Rated City*, a franchise that we are expanding to Los Angeles and the fourth season of *Pride*, a docuseries.

For new programming and series, we're particularly excited about our first feature-length romcom – *It's All Sunshine And Rainbows*, starring Priyanka, winner of *Drag Race Canada*, stand up series *Live At The Queer Comedy Club* and the documentary *Some Girls Hate Dresses*, a product of our documentary fund in coordination with the Iris Prize and the University of Aberystwyth.

### What is your acquisitions strategy?

We look for offbeat or provocative WTF shows, docs and movies that have a high percentage of our territories available (in the English-speaking world), we also acquire foreign language programming, dubbed or subtitled.

### Are you on the lookout for any particular genres or types of show at the moment?

Unscripted projects do particularly well for us, especially dating formats that are unabashedly queer such as *For The Love Of DILFS* and *Dating Unlocked*.

We are also looking for more female-led and focused series. For scripted content, we like webseries (generally around 11 minutes per episode) or lower budget drama/comedy and limited series (like *Avocado Toast* and *Cam Boy*).

### What kind of rights would you be looking to acquire?

SVOD, AVOD, FAST for the English-speaking world and broadcast rights in Canada and South Africa.

### Any shows doing particularly well for you right now?

*For The Love Of DILFS*, *Behind The Drag Queen Of The Year*, *Sew Fierce* and *Sugar Highs*. **TBI**

*Sugar Highs* is one of OUTtv's most popular current original scripted titles





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# New wave

Spain's scripted industry will launch more than 80 new shows this year, but what's driving such numbers? Irene Jiménez explores the key trends and titles in the works

**F**rom period drama to thrillers, crime series and biopics, Spain's scripted industry is sizzling.

According to data revealed by government-backed trade body Audiovisual From Spain, up to 83 new Spanish scripted series will be released in 2023, together with 31 returning seasons.

## Period's proliferation

Many of these shows will find their ways to international shores and there are common global trends to be found in Spanish commissions. Period drama, for one, is back worldwide and the Spanish industry is aware.

At the beginning of 2023, public broadcaster RTVE launched *The Vow (La Promesa)*, a daily series set in 1913, a new romantic drama from StudioCanal's Bambú Producciones that has already been sold to Italy's Canale 5.

More recently, RTVE greenlit another period drama for its daytime schedule: Mediawan's Boomerang TV will adapt *Tea Rooms*, a novel by Spanish author Luisa Carnés, released in 1934 and portraying the life of different women at that time.

After launching the 1946-set *The Patients Of Doctor García (Los Pacientes Del Doctor García)*, co-produced by Diagonal TV (Banijay Iberia) and DeAPlaneta Entertainment, RTVE will explore a risky love story set in wartime, with *Operación Barrio Inglés*. Produced by Onza, this new primetime drama has spies, Nazis and a British community, all gathered at the same time in 1940 in Huelva, Andalucía, known as the Spanish Casablanca.

Over at Antena 3, the commercial broadcaster and Buendía Estudios are shooting *Beguinas*, a new drama series inspired by the Beguinatos, female communities that stood for an alternative and marriage-free lifestyle back in the 13th century.

Both companies have also collaborated on *Nights In Tefía (Las Noches De Tefía)*, a period drama mixed with the musical genre and inspired by true events. Between 1954 and 1966, the desert island

*Zorras (aka Tramps)* is an upcoming Atresmedia show, based on the novel by Noemí Casquet

of Fuerteventura hosted a concentration camp for homosexual men arrested under Franco's dictatorship. With the aim to survive, a group of prisoners created an imaginary music hall to express themselves through their alter egos. It will be launched on Atresmedia's streamer Atresplayer Premium during 2023.

Streamers such as Vix have also made moves into period fare: *Las Pelotaris 1926* tells the struggle of three female Basque pelota players striving to achieve their dreams in a men's world. The show is the first to have been originated from the strategic agreement between The Mediapro Studio and TelevisaUnivision's streaming platform.

## Calling all crime

Appetite for thrillers and crime series, especially those based on novels, also remains strong and several productions share similar ingredients: an existing best-seller noir trilogy with significant international reach that has a female lead.

First, there's Netflix's *The Snow Girl*, renewed for two more seasons, while Atresmedia's *The Gypsy Bride* has its second season coming later this year (to be known as *The Purple Network*). There is also big budget Amazon Prime Video show *Red Queen*, which also looks likely to be extended.

Prime Video also has the upcoming *Memento Mori*, a police thriller based on another trilogy – it will be available in Spain, Portugal and Andorra – and the streamer has also already shown a sneak preview of *The Farads*, a new original series set in Marbella in the 1980s, in the heart of a family dedicated to arms trafficking.

Disney+ has also made interesting moves, acquiring Spanish rights to *Tú También Lo Harías*, a short-form thriller series produced by LA-based Legendary Television and Spain's Spotlight Media, while Movistar Plus+ is launching the second season of *Rapa*, a crime series set in a small village in Galicia.

The Mediapro Studio's most international production, *The Head*, is another thriller series that could also secure a third season, after being sold to more than 90 territories so far.

For Netflix, its next Spanish thrillers are *El Cuerpo En Llamas*, which is based on a real crime that happened in 2017 in Barcelona, and *Mano De Hierro*. The latter is set in the port of Barcelona, one of Europe's most important entrances in the profitable business of drug trafficking. The streamer is also adapting Mikel Santiago's bestseller *The Last Night At Tremore Beach*, set in Ireland and directed by Oriol Paulo.

## Creative evolution

While scripted series are growing, so are the sources of the ideas behind them. A new generation of Spanish writers is portraying the worries of young people of today, with shows such as *Thistle (Cardo)*.

This atmospheric drama focuses on a 30-something-year-old woman who is unhappy with her life, and has been created by Claudia Costafreda and Ana Rujas.

There's also the continuing *Selftape*, a semi-autobiographical show created by sisters Mireia and Joana Vilapuig, who shared an acting career in their childhood and now have a complex relationship.

RTVE's *Ser O No Ser (To Be Or Not To Be)*, meanwhile, follows the emotional journey of a 17-years-old trans boy during his transition. The show has been created by Coral Cruz and will have a second season, while *Tramps (Zorras)* is an upcoming Atresmedia show about "free women, friendship, self-love and a lot of sex." It is based on a novel by Noemí Casquet, a popular writer and journalist specialised in sex education who has been deeply involved in the development of the series.

Younger writers are also introducing series that touch on subjects that have been little-explored to date. *This Is Not Sweden*, a European co-production led by Catalan writers Aina Clotet and Sergi Cameron, will premiere next fall and delves into upbringing and the effects of different approaches.

Work from Series Mania winner and International Emmy-nominated Álvaro Carmona – who was behind *People Talking* – is also returning to screen, this time with *Déjate Ver (Show Yourself)*, about a young girl who has started to disappear. The short-form series will premiere shortly on Atresplayer Premium, while *The Left-handed Son (El Hijo Zurdo)*, written and directed by Rafael Cobos, and winner of Canneseries 2023, is another Spanish short-form series deserving of recognition.

Among the most valued young Spanish talents are Javier Calvo and Javier Ambrossi (*Veneno*), the creators, producers and directors of *La Mesías*, probably the most ambitious show of Movistar Plus+ in 2023. The series mixes several genres, from thriller to musical, and explores the childhood traumas and religious fanaticism through a wide cast of characters. The creative duo are also responsible for *Vestidas De Azul (Dressed In Blue)*, the continuation of *Veneno*, focused on a group of six trans women in the 1980s in Spain. It will be launched later this year on Atresplayer Premium.

## Biopics, horror & reboots

After the biopics of singer and composer Miguel Bosé, porn star Nacho Vidal, and controversial 1980s couple Ángel Cristo and Bárbara Rey, the lives of singer Camilo Sesto and haute-couture designer Cristóbal



*Balenciaga* from Disney will explore the life and work of the iconic haute-couture designer Cristóbal Balenciaga and what inspired his genius

Balenciaga are the next celebrities to be found on screen.

The first show will track how famous singer Sesto tried to bring the risky musical *Jesus Christ Superstar* to Spain in the 1970s, while Disney's original drama series *Balenciaga* will explore what lay behind the Basque fashion genius.

It is not just celebs, however: Bambú Producciones is developing a drama series about the rise and fall of Spanish political party Podemos, while the lives of elite athlete Gervasio Deferr and Second World War spy Juan Pujol 'Garbo' will also be featured in coming projects.

Like other countries, Spain is also looking to its film business for inspiration – notably by tapping into the global recognition of Spanish horror movies. Several upcoming series are trying to gain the same recognition for TV, with supernatural terror present in *Romancero*, a short-form Amazon original set to premiere soon.

There is also the famed *30 Coins*, initially an HBO Max original that was created by Álex de la Iglesia, which has a second season coming in October. The filmmaker will also shoot *1992*, a new Netflix thriller that mixes suspense and political intrigue about a potential serial killer in Seville. Movistar Plus+ will also explore the horror genre with *The Other Side (El Otro Lado)*, a ghost story that also offers comedy.

Despite the creative surge of original ideas, Spain has not avoided the reboot trend that has hit many other parts of the world. Female-led detective series *The Mysteries of Laura (Los Misterios De Laura)*, superhero dramedy *A Normal Family: The Comeback (Los Protegidos: El Regreso)*, mystery series *The Boarding School: Las Cumbres*, and iconic horror anthology *Stories to Stay Awake (Historias Para No Dormir)* have all come back in the last couple of years and dance series *UPA Next*, whose original edition was sold to more than 60 territories, is also returning.

Romantic dramedy *Dates (Citas)* also has a new season, with the city of Barcelona as background, and the first spin-off from global hit *Money Heist (La Casa De Papel)* – to be known as *Berlin* – is also premiering on Netflix in December. Its success will be closely tracked, despite the proliferation of series set to launch in the coming months as Spain's scripted industry maintains its resurgence. **TBI**

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## Last Word Nicolas Eglau

### The case for kids' linear in the streaming age

**“Expanding linear TV creates a huge opportunity to increase global brand reach and deliver ad-free content, which is a priority for many families regardless of location”**

In a rapidly evolving media landscape, it is common to hear claims that linear TV is a dying medium, especially in the realm of children's entertainment. While it's true that kids' primetime viewing figures in the US fell considerably between 2017 and 2021, according to a 2022 report by MoffettNathanson, audience viewing patterns are not reflective of what's happening on a global level, especially in the children's entertainment space.

From a global perspective, the conversation is a lot more nuanced. While it is true that most English-speaking countries, such as the US, Australia and most of Europe, are cutting the cord, millions of families across the world still rely on linear channels as their main source of programming. A 2021 Kagan Consumer Insights study found that the majority of adults in Asia still primarily watch linear TV, citing factors like the lack of quality native language video in SVOD content and the availability of inexpensive multichannel TV services. Similarly in Africa, there are 21.7 million pay-TV subscribers as of 2022.

As we look at audience engagement at a global level, internet access and educational content varies greatly by market, so it comes down to accessibility. I've seen the global success of linear at Moonbug Entertainment with our own Moonbug linear channel, reaching families in 75 countries that other services may have left behind.

We have a unique position as a trusted kids' brand because we have the opportunity to create content that speaks to universal themes of growing up and learning, allowing our shows to resonate with audiences no matter their location. We ensure that we translate our content into local languages and have even started exploring multilingual characters, such as our most recent *Blippi* Buddy, Juca, who speaks Portuguese and has been created with a Brazilian audience in mind.

Additionally, the linear channel model can be a unique tool that families can use to create routines in conjunction with the scheduled programming. Whether it's brushing teeth in the morning or going to sleep at night, we curate our content to reflect daily moments. We often look into our channel data and make changes to the programming to coincide with

viewing habits unique to each territory. The audience success in markets like Malaysia, Indonesia, and Turkey shows how much young families value this curated 24/7 experience.

For platforms, the Moonbug channel offers a great opportunity to add a variety of global blockbuster brands to their line-up. Their subscribers recognise well-known shows like *CoComelon* and *Blippi* immediately, which reduces the need for expensive marketing campaigns. This translates into high engagement and loyal viewing behavior, which create significant value on both sides.



Moonbug operates a linear kids' channel, with content like its *CoComelon*, aiming to form part of daily routine for youngsters

From a business viewpoint, expanding linear TV creates a huge opportunity to increase our brand's global reach and deliver ad-free content, which is a priority for many families regardless of location. At Moonbug, we are always thinking about our community, so we show up in linear format because that's where a part of our audience lives. The internet and other technological advancements have opened the door for studios and channels to be global, and it is time that media companies start focusing on their audience behavior from a regional perspective in order to meet families where they are and be successful in this highly competitive landscape. **TBI**

Nicolas Eglau is managing director for EMEA & APAC at Moonbug Entertainment, the UK & US-based kids content company behind *CoComelon* and *Blippi*

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**Opening Keynote David Olusoga** OBE, historian, TV presenter, social commentator and children's book author opens CMC 2023 with his view on how content for kids that explores truthful and realistic narratives of the past and empowers young people for a difficult future is more important than ever.

**The CMC International Exchange** on 29 June – is a day of one-to-one meetings online with buyers from a wide range of territories and platforms.

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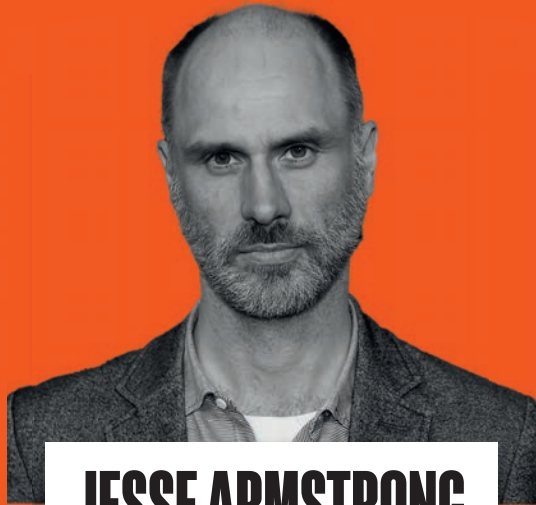
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