

# TBI Television Business International

## High ambitions

SkyShowtime's content chief on expanding his originals strategy  
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## Wired right

What HBO's veteran hit teaches us about risk & returns in scripted  
Page 16



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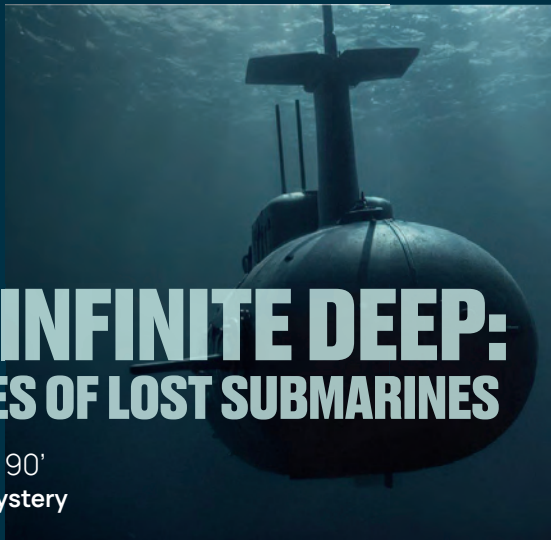
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# TBI April/May 2024



**T**his year's MIPTV looks set to mark a watershed moment for the industry, as players across the sector battle budget squeezes and a new set of economic realities.

Streamers are looking for cost-efficient programming such as reality fare and soap operas to retain subscribers and balance budgets, while mainstream dramas and franchises are taking centre stage. Yet for those that are prepared to embrace some modicum of risk, the longer term returns could be great.

To this end, we take a deep dive into one of the standout scripted series of the past two decades – *The Wire* – to find out how the show delivered bucket loads of returns for HBO and helped propel the US cablenet onto the path to global stardom (page 16). And given that securing commissions is in the minds of all right now, we speak to SkyShowtime about its originals plans (page 12) and serve you up with three profiles on buyers looking for content (page 24). We also explore how two powerhouses of the French market – M6 and TF1 Group – are looking to embrace streaming (page 28) and we've picked out some of the most unique shows heading to Cannes this month, ready for acquisition. Time now for the purse strings to be loosened and a risk to be embraced...

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# About Town

## Mania returns to Lille

It has not been the best of starts to 2024 for many of you in the scripted world, so the annual trip to Lille for Series Mania Forum came at an opportune moment to share notes on what might be done about the next nine months of the year.

‘Survive to 2025’ seems to be the overriding mantra for many of the execs that TBI spoke to during the three-day event and the queue that snaked its way across half of the convention centre ahead of Netflix exec Larry Tanz’s keynote (right) underlined where most are placing their bets for commissions in 2024.

Despite the industry’s collective furrowed brow, Series Mania again pulled in some stellar numbers – 4,200 delegates from 72 countries attended the professional-facing Forum strand, while almost



100,000 people made their way to Series Mania festival events. Patricia Arquette and French actor-cum-rapper Sofiane Zermani (left) were among stars on show, while ZDF Studios’ party provided an opportunity to shake off the shackles and make shapes on the dancefloor.



## Clubbing together

The European Writers Club (EWC) made the most of the assembled talents at Series Mania Forum to unveil the winners of its Boosting Impact program, which launched last year and aims to accelerate scripted TV shows based on impactful true events. EWC chief and former Copenhagen Film Fund CEO Thomas Gammeltoft did the honours, revealing six projects to receive further development: *Deadline* (Denmark); *White Gold* (France); *The Cloud* (Germany); *Strictly Confidential* (Norway); *Gold* (Switzerland); and *The Last Flight Of The Condor* (Spain).



## Connected thinking



More than 600 attendees landed at the Connected TV World Summit in London in March to explore the future of the business, with around 80 speakers taking to the stage to offer their takes on the year so far. FAST was again a major topic of conversation, as industry players of all flavours look for emerging revenue streams to diversify into as turbulence across the sector continues.

## Swings & Roundabouts

**5m** Amazon & MrBeast are making history with new Prime Video competition series *Beast Games*, which will see 1,000 contestants competing for a record-breaking \$5m cash prize – the biggest TV payout of all time

**2.2bn** Global online video subscriptions will number 2.2 billion by 2028, according to Omdia research, presented by media and entertainment research director, Maria Rua Aguiar at Connected TV World Summit

**61** ITV, the UK comcaster behind *Mr Bates V The Post Office*, saw its pre-tax profits dive by 61% , from £501m (\$638m) in 2022 to £193m (\$246m) in 2023

**3.4** Fremantle’s revenue fell 3.4% in 2023, leading the company behind *Got Talent* & *Neighbours* to shift its self-imposed €3bn target back by 12 months to 2026



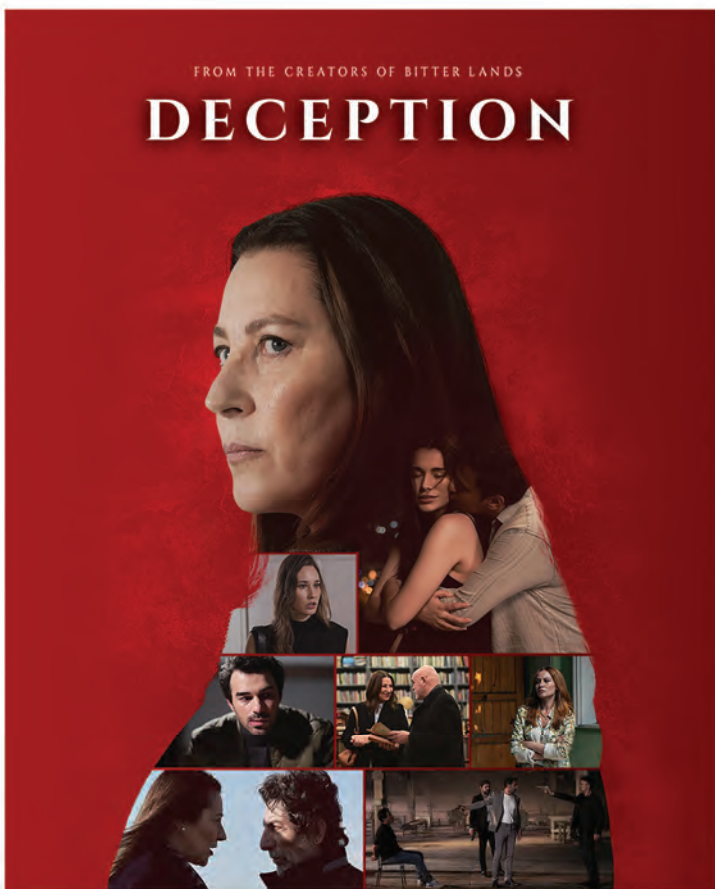


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## Formats Siobhan Crawford

### Dear April: OOO in the sunshine of Cannes (eat that London)

**“We have time to impact how 2025 will look if we start changing things now”**

**M**y MIPTV tickets are booked. Countdown is on and I know you lot are guaranteed to have FOMO if you are not coming. Guaranteed. Sunshine and actual warmth?! OK, it is weird this year and people seem to be coming Saturday to Tuesday but that means MIPFormats is the draw and if RX can just fatten out the agenda with some genuine take-home knowledge and mid-exec level speakers who have more than inspirational quotes, I think they would realise the value. We as a market are still trying to learn and be informed! MIPFormats pitch has more entries than MIPCOM last year and that means hope is alive and kicking.

So what am I going into MIPTV thinking about? How can we lift the mood, because a 36-year-old (who started a company 15 months ago) cannot believe the industry she loves is in a terminal state.

We just need to go through some communal industry CBT to change our thought patterns because 2024 is going to be a long year, so let's get our heads screwed on straight.

**INDIE KING IN SPRING** – LineUp, Can't Stop, Primitives, AllRight, Be-Entertainment, GLOW. This is your European core of format firms and it is certain they have been saving their line-ups for MIPTV because London Screenings does not accommodate the smaller indies. They will all attend and you should expect a minimum of 15 newish titles to pop up that you need to look at. MIPTV is for the indies, MIPCOM is the groups – this is the new normal.

**SMARTER NOT HARDER** – A friend of mine is an eternal optimist, he takes everyone's interest as something to pursue. Stop this! If you want to work smarter in Formatland you need to be thinking about quality, not quantity. Who can get your content from A to B given the economical circumstances and broadcaster preferences? Shorten your list, work with the regulars and think strategy. And please, be informed so the energy you expend is worth it.

**CHANGE IN 24** – Another wonderful chat with H and another thought is that if we just 'Survive to 25' then next year it will be same crap, different year. We have time to impact how 2025 will look if we start changing things now. Mind-mapping and strategising, cooperating and collaborating. Find your niche. Or pivot and flex. But do something, I am. And no, FAST channels are not our saviour.

**QUIET PLEASE** – The revenues and commissions of others in the trade press is loud. The magic and ease that some people seem to trade with, the FOMO that they create... it can really have you wasting mental power comparing and worrying. A news story without a broadcaster mentioned is not a sale, it's someone just trying to get attention. Stop listening to the noise, don't feel the panic – you do you boo.

**CHEER** – There has to be some joy in the industry to buoy us. It is about celebrating wins. But who do we cheer for? I want to celebrate the wins that change our ecosystem, that see growth or progress... not status quo. A format getting a revival, a brand being extended – yeah, I have some cheer. A paper format being picked up *that is not from a group*, a friend getting a UK commission with a small French format, a recommission for a small indie prodco – you cheer loud. Cheer for each other and progress, don't compete.

And one final thing: anthem time. I get it, it's rough out there but you are doing whatever you can, so instead of U2 or Tom Walker to sob along to, we need: Cat Burns' *Live More & Love More*.

Can you think of better advice in a junky time in the TV world? When we have to ask what actually matters and how we spend our precious mental power?

Fake it till you make it. I am still trying to live the lyrics too, but if we are trying this hard it must be worth fighting for.

Happy MIPTV, may it bring surprises. **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



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## Scripted Anthony Kimble

### The trouble with talent

“Nobody in Hollywood seems prepared to take a risk anymore”

Last week I was caught in what felt like a Dante-esque circle of hell. I’ve been working on a fantastic new series, with a great script by an A-list writer – one that could clearly be awards’ bait for the right acting talent. But the talent agents I was talking to were refusing to present the project to clients without confirmation that it was fully financed and greenlit. And the financiers and platform I was in negotiations with wanted confirmation of talent attachments before thinking about writing a cheque.

It’s the Catch-22 that keeps on giving and giving...

I’ve said it before. In fact, it’s fast becoming my most-used four-letter word... RISK.

Nobody in Hollywood seems prepared to take a risk anymore. Cord Jefferson, writer and director of the superb *American Fiction*, called this out beautifully in his Oscar acceptance speech after the trouble he had getting the film off the ground. He asked Hollywood to take a chance on first-time filmmakers like him and maybe consider greenlighting ten \$20m movies rather than one that costs \$200m.

And the same goes for on-screen talent. The agency model here means that the ‘big three’ routinely overlook amazing scripts from incredible writers and I’m convinced they don’t even show things to their stars when the budgets are modest. After all, why would they make do with a meagre commission on a ‘risky’ indie project when they can wedge their clients into yet another multi-million-dollar sequel/prequel or a series reboot and get that Malibu beachfront property built?

Even if you’re lucky enough to have the financing in place, there are no guarantees when it comes to talent. You still need to convince the agent to read the script. The whole process is a delicate art, much like trying to sneak a love letter to your crush without getting caught. You send it through the right channels, sweeten the deal with promises of critical acclaim and artistic fulfilment, and then cross your fingers and hope the object of your ‘affections’ gets to see it. And falls in love...

Attaching talent has become such a gargantuan task; usually protracted, with similarly vast fees attached and often the mother of all scheduling problems to solve along the way. In the end, locking in A-list talent is a rare and magical triumph – a bit like capturing a unicorn.

Having cut my teeth in the UK, where typically there weren’t budgets for prominent casting directors, these responsibilities mostly fell squarely on the shoulders of the producers. Working on the other side of the pond, I’ve quickly learned to include a decent chunk of change in development budgets to allow for the services of a reputable casting expert. Any good actor with a vote of confidence from a skilled casting director should not be seen as a risk. But that’s certainly not the case.

However, this is an area where I’m hopeful of seeing a chink of light. It hardly takes a casting genius to drop, say, Jennifer Aniston into a rom-com or Ray Winstone into a London gangster series – but now that casting agents are being recognised with a new ‘Achievement in Casting’ category for the 2026 Oscars and BAFTA already having this category in play, things may change.

Big names are constantly crossing into TV and have been for years – Glenn Close as a Farsi-speaking baddie in Apple+’s *Tehran* is a recent favourite of mine. But more than that, I’m hoping with a brighter spotlight shining on casting that we can not only see the best people playing each character but also that it will help usher in a new breed of on-screen talent.

Companies like A24 should be applauded for its risk-taking. From producing edgy TV series such as *Euphoria* and *Beef* to its support of *Dreaming Whilst Black*, it is bringing new talent front and centre and attracting Gen Z and Millennial audiences in their droves – something the archaic legacy studio bosses can only dream of. Meanwhile, its films, such as *Past Lives* and *The Whale*, both introduced us to new faces and took a punt on bringing an old one – Brendan Fraser – back again. The A24 execs obviously don’t think they are taking risks; they’ll have a clear strategy around projects and talent to grow their business. Why can’t more companies follow their lead?

The conundrum inherent in talent mirrors the complexities of the entire LA entertainment ecosystem. The traditional studio model is as reliant on big names now as it was in the Golden Age of Hollywood. And this over-reliance on the same names, the same writers/directors, the same TV and film franchises and to some extent the same business models, just isn’t working. It’s time to move on people! **TBI**

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



A promotional image for the TV series 'Golden Swan'. It features a man in a dark suit and a woman in a black dress embracing in a grand, ornate ballroom. A Christmas tree is visible in the background. Another man in a suit is standing in the background to the right.

# GOLDEN SWAN

Period Drama | 56x60'

COMING SOON

A promotional image for the TV series 'Heartless'. It shows a close-up of a man's hands in a dark suit, with his fingers interlocked. He is wearing a watch on his left wrist.

# HEARTLESS

REVENGE IS AN ART

Thriller | 8x45'

A promotional image for the telenovela 'Cacao'. It features a man with dark curly hair and a beard, wearing a green shirt, and a woman with long blonde hair, wearing a white top. They are embracing in a tropical setting with palm trees and a sunset sky.

# Cacao

Telenovela | 139x50'

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## Tech & Analysis Daoud Jackson

# Underlining the value of Netflix's non-English content

**Omdia's Daoud Jackson delves into Netflix's global viewership data and explores what it tells us about global consumption patterns**

Netflix is both a supplier and a producer of content at a global level, and its viewership data allows us to see where substantial asymmetries exist between where shows are produced and where they are consumed.

The US is the largest provider of both content and subscriptions. Though 57.7% of Netflix viewing from January to June 2023 was of US titles, just 28.9% of subscriptions – as of end Q1 2023 – were from the US.

This relationship is unsurprising but it is worth reminding ourselves that 60% of Netflix's subscription count now comes from markets where English is not the primary language and that Netflix represents an accessible source of American content, especially in markets such as Germany and Australia.

South Korea has rapidly become Netflix's most important content export market. In the Jan-June 2023 period, 8.7% of Netflix's total viewership came from South Korean shows, such as *The Glory* (pictured, right), and just 3% of the company's subscriptions come from the peninsula.

In June 2023, Ted Sarandos underlined the broad appeal of Korean content by remarking that 60% of users had watched at least some Korean content.

### Breaking it down

Comparing subscription numbers to viewing hours is not exactly comparing apples with apples: consumer behaviour and sharing varies from market to market.

Omdia research suggests that consumers in markets such as Brazil are much more likely to share their accounts. Therefore, a single subscriber is likely to have many more hours watched on their accounts in these markets than in one in market where subscription sharing is not as common.

Nonetheless, it is a safe assumption that much of the content watched in markets such as France and Germany on Netflix is from the US.

English-language viewing was less concentrated around top titles than viewing in other languages.

The top 10 English-language titles accounted for 4.7% of all viewing on the platform.

In turn, the top 100 English-language franchises (grouping series, sequels and spin-offs under a single name) accounted for just 16.5% of the total viewing on the platform. The fact that almost 85% of Netflix viewing does not come from the top 100 English franchises underlines the importance of Netflix's back catalogue and non-English content.

Beyond English, Spanish saw the largest positive difference between titles and viewing hours: just 5.2% of the top 18,000 titles were originally in Spanish, but these accounted for 8.3% of viewing in this period.



The top 10 Spanish-language titles accounted for 2.0% of total viewing on the platform, propelled by Colombian dramas *Fake Profile* and *The Marked Heart* and Season 3 of *La Reina del Sur*.

Overall, the top 38 Spanish-language titles accounted for 50% of all viewing of Spanish-language titles in this period; meanwhile, the equivalent mark for English was the top 453, showing far less concentrated viewing of top titles.

The number of titles in languages such as Japanese is slightly higher than average because anime series are often split into subsections. Equivalent Spanish series are often undivided and constitute more than 50 episodes, pushing down the title count in comparison with English-language shows. **TBI**

Daoud Jackson is senior analyst, media and entertainment, at research powerhouse Omdia, which, like TBI, is part of Informa Tech



# THE STEAL

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# High ambitions

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SkyShowtime's content chief Kai Finke shares his strategy with TBI, from returnable titles and high impact acquisitions to the "beauty" of co-productions and becoming the "home" of *Star Trek*

**I**t is a little over a year since SkyShowtime completed its European roll-out, with those intervening months seeing the streaming service rapidly expanding its offering of exclusive and original programming.

The pan-European streamer, a joint-venture between Paramount Global and Comcast, launched 10 original shows in 2023, including Swedish-Finnish crime drama *Codename: Annika* and Polish comedy-drama *Warszawianka*.

Both came about as part of a deal struck in early 2023 that saw the streamer acquire 21 series that had previously been destined for HBO Max in Europe.

Since September, former Netflix EMEA content director Kai Finke has been building upon this foundation, having been brought on board as chief content officer with a mission to grow SkyShowtime's originals output.

Among the titles launching in 2024 are *The Tattooist Of Auschwitz*, a Holocaust drama based on the book by Heather Morris; Swedish crime thriller *Veronika*; and an adaptation of the crime novel *Sleboda*, marking SkyShowtime's first Polish original commission.

"We launched 10 originals in 2023 in our first year of operation – I think that's a really solid number – so investing in local and original programming and exclusive content remains a big focus of what we are doing this year," Finke tells TBI. He adds that SkyShowtime, which is available in 22 countries including much of CEE, as well as the Nordics, Spain and the Netherlands, has "really only just scratched the surface" over the last year as the service pushes forward with more commissioning and co-productions.



“Partnering with other broadcasters is something that we’re taking very much into consideration,” says Finke.

“The beauty of the co-production model is that you can split the bill, you can build an audience together and you have the opportunity to make more sense of the economics in the current climate of increasing budgets.”

## Brand power

Having both Sky and NBCUniversal owner Comcast and Paramount as co-parents also gives SkyShowtime access to a strong pipeline.

This means shows and movies from Universal Pictures, Paramount Pictures, Nickelodeon, DreamWorks Animation, Paramount+, Showtime, Sky Studios and Peacock also stream on the service – and Finke highlights the value added by these titles, particularly returning series.

“What we’re seeing with titles like *Halo* season two, *Mayor Of Kingstown* and *Yellowstone*, or with the recent success of our Spanish SkyShowtime Original Series *Los Enviados*, is the power, appeal and importance of returning shows.

“We’re interested in projects that could potentially run for multiple seasons and build an audience over time.

“As a relatively young service that continues to grow its market share and its audience, it’s really important to bring back some of the brands that have really defined us in our first year of operation.”

Among these brands is Paramount’s sci-fi franchise *Star Trek*, which Finke highlights as one of SkyShowtime’s current top draws.

“*Star Trek: Strange New Worlds* has performed very well for us, cementing our position as the home of *Star Trek* throughout our footprint. It is an iconic brand that keeps growing its audience which is why we’ll be launching new seasons of *Star Trek: Discovery* this spring.

“*Tulsa King* is another impactful title for us which returns for a second season later in the year, and *Poker Face* and *The Curse* are critically acclaimed, fantastic series with A-list casts that have appealed greatly to our members too.”



*Star Trek: Strange New Worlds* (left) is a top performer and *The Tattooist Of Auschwitz* (below) is one of the service’s newest titles





*Halo* (top) is a Paramount show available on the streamer, while *Veronika* (above) is an upcoming original thriller series

Despite access to this stockpile of well-known brands, Finke tells TBI that he is looking to partner on totally original ideas at various stages of development as he continues to grow the SkyShowtime offering.

“We will be evaluating projects that come fully packaged or partially financed as well as evaluating pitches that are relatively new. Sometimes in a conversation at conferences or industry events, ideas are shared with us that catch fire and lead onto something bigger.

“We continue to evaluate projects through our regional content directors, but also through colleagues focused more on English-language content and of course through myself.”

He adds that it is important for projects to “really feel complementary to the pipeline of entertainment from our shareholders.”

## Flexible on rights

Finke explains that there are “multiple paths” to working with SkyShowtime at this point. “We have been acquiring shows after completion and we will continue to do that. We are also looking into acquiring library and evergreen titles throughout our footprint that are complementary to the content we are making available from our shareholders.

“But as we’re doing right now with *Sleboda*, [we are] also in a position to commission projects as a SkyShowtime original series, where we are either contributing either the majority or all of the budget required to create a hit show.”

Finke also stresses the “good news” of SkyShowtime’s rights flexibility. “One of the privileges of being a relatively young service is that we’re doing many things for the first time. Even though we’re working to a strategy, we can still work alongside the producers, distributors or broadcasters that we’re teaming up with to find solutions for every single title on a project-by-project basis.”

He tells TBI: “SkyShowtime does not intend to warehouse rights and would be perfectly fine with sharing the international distribution with its partners.”

He points to a recent deal that saw Mediawan picking up the distribution rights for SkyShowtime’s original series *Codename: Annika*, with the crime thriller now having “the opportunity to hopefully reach a global audience” outside of the streamer’s footprint.

In terms of rights that the service wants to acquire, Finke says that it is “mostly [and] ideally the first run rights across our footprint for projects that we are investing in.

“But depending on the right partnership we could consider second run windows or even library and catalogue windows. Overall, SkyShowtime is really flexible and we want to accommodate the needs of our partners from the local creative ecosystems and we welcome their flexibility by mirroring that.”

As for third-party acquisitions to sit alongside all the brands SkyShowtime already has access to: “If we can find local titles in early and exclusive windows across other territories we’re operating in, that’s something we want to take into consideration for sure.

“We’re looking at projects with really recognisable talent, high production values, first class execution – content that doesn’t compete with all the great global IP that we’re programming but that is complementing it.” **TBI**



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# Rewiring the system





Paul Stradi

As commissioners look to franchises and mainstream dramas to provide returns on investment, Nick Edwards takes a trip to Baltimore to reflect on how *The Wire* set a new precedent for scripted series & delivered decades of returns for the HBO brand

In today's world of squeezed budgets, risk-aversity and a trend towards mainstream, franchise-driven scripted series, there seems little chance that a show like *The Wire* would be commissioned, nevermind survive for five seasons.

HBO's ground-breaking Baltimore-set cop show was famously unwatched when it first aired (US viewing figures averaged under 1 million per episode across its entire run) but it has since become recognised as one of the defining series of America's 'Golden Age' of TV drama.

And in a world in which every show must now prove its worth, working out how much value *The Wire* has added to the HBO brand is an impossible task. But two decades on, what can we learn from a show that has become so pivotal in building the industry as we know it?

### Tracing *The Wire* back to *Oz*

TV's ambition to be something more than a means of keeping viewers seated until the advert break ('sit back' or 'don't turn off' TV, as it was once known) had been evolving ever since *Hill Street Blues* first experimented with character arcs and storylines that spanned multiple episodes and seasons, whilst also confronting social issues.

HBO's first serialised TV drama of this model, the gritty prison drama *Oz*, set the precedent for what subscription (or ad-free) TV could be, whilst *The Sopranos* broke preconceptions of just how big a global

phenomenon it would become.

But even amongst these milestone cable shows (and others ranging from *Mad Men* to *Breaking Bad*, as well as ground-breaking network hits from that era such as *Lost* and *E.R.*) *The Wire* has come to adopt its own unique and revered place in America's cultural history.

"I remember when David (Simon) finished writing the bible for the show and sent it into HBO. You knew it was breaking new ground," says Joy Lusco Kecken, a writer, producer and director on all five seasons. "And then, the first night of production, something magical happened and I realised that what was being filmed transcended even what was on the page."

Simon's vision of a post-industrial city in decline was symbolic of what had happened to much of America, as well as much of the western world. "It debunked the myth of law and order. It took on the hypocrisy of the war on drugs. It exposed the underbelly of a city that has a lost generation of black children," says Lusco Kecken, who has worked on shows such as Marvel's *Cloak And Dagger* and BET's *Tales since The Wire*.

Simon's exploration of these issues was underpinned by a gripping traditional police procedural structure, the plot line of which was ripped from a string of articles he had written for the Baltimore Sun about the rise and fall of real-life drug baron Melvin Williams, a key figure in industrialising heroin consumption in Baltimore and beyond.

Simon had got to know the world of *The Wire* when he was hired by the Baltimore Sun to cover



David Lee

Main pic: Michael K Williams as Omar Little and Wendell Pierce as 'Bunk' Moreland. Above: Dominic West as Detective Jimmy McNulty, arguably the main protagonist of the show's large ensemble cast

the police beat where he had come face to face with the drugs trade, murder and the politics of city hall.

In 1988, he took a leave of absence to embed himself with Baltimore's police force to write about his experiences. The result was *Homicide: A Year On The Killing Streets*. Not only was it hailed as a literary "masterpiece" by authors such as Martin Amis (*Zone Of Interest*, *The Rachel Papers*) but the film producer and director Barry Levinson bought the rights to it intending to make a feature.



HBO/Nicole Rivelli

Michael K Williams as Omar Little was a breakout character on the series and a favourite of former US president Barack Obama

"But Barry thought there were too many good stories to tell in two hours. So, he brought me on board," says Tom Fontana, showrunner of NBC's landmark adaptation, *Homicide: Life On The Street*.

As a follow-up, Simon's publishers wanted him to look at the war on drugs from the perspective of the users and victims, resulting in *The Corner: A Year In The Life Of An Inner City Neighbourhood*. The combined works of these books and Simon's journalism provided the source material for *The Wire*.

His literary background famously meant Simon conceived individual episodes as 'chapters' and seasons as 'novels', all of which individually tackled different social issues. This is why the show drew comparisons with the work of 19th Century writers such as Charles Dickens.

"David hired novelists and journalists – the entire writing staff of season one didn't have a single Hollywood veteran in it, as far as I recall," says Rafael Alvarez, a former colleague of Simon's at the Baltimore Sun, who was a staff writer on season two of *The Wire* as well as writing episodes of season one and three (with Simon and his long-time collaborator, Ed Burns).

## Separating fact from fiction

*The Wire* also became a benchmark for creating the sense of authenticity that many of the shows from this era sought after. It was so authentic that it became hard to separate what was fiction and what was reality.

"My source in the FBI told me that on Monday mornings, after the show had come out, all the chatter on the FBI's wire taps would be about *The Wire*. Everyone they were investigating had been

watching the show the night before," says Doug Olear, who played the FBI agent Terry 'Fitz' Fitzhugh across the show's run.

*The Wire's* influence also spread far beyond the US. *Gomorra* – one of the series that put Italian TV drama on the map – was based (like *The Wire*) on a non-fiction book in which its author Roberto Saviano exposed how Mafia control was endemic across parts of Southern Italy's economy.

Similarly to how Simon shadowed Baltimore's homicide police department, Saviano recounted his experiences of working undercover on the building sites and factories run by the Neapolitan Mafia. Like *The Wire*, *Gomorra* also received praise for its storytelling and gritty realism (as well as for the ground-breaking visual style of director Stefano Sollima).

France's first cable TV drama, *Engrenages* (or *Spiral* as it is known to English-language audiences) was also heavily influenced by HBO's early shows such as *The Wire*. In Canal+'s gritty female-led cop show starring Caroline Proust, plot lines were sourced directly from real-life crimes and the writers worked hand-in-hand with French police.

Like Baltimore in *The Wire*, Paris was seen as a character, with an uncompromising depiction that was praised for its authenticity (with much of it set in areas normally hidden from tourists).

Numerous other shows attempted to compare themselves to *The Wire* in marketing, but it was these two European series that provided the exceptions and merited some comparison to the HBO show.

*The Wire* also broke new ground in terms of who was on screen. The casting of predominantly non-white actors in multi-faceted roles on both sides of the law was arguably the biggest breakthrough since the 1977 ABC miniseries *Roots* (America's first TV show to consider slavery from an African American perspective).

*Homicide: Life On The Street* (*HLOTS*) had already led the way by being the first TV series to feature two black detectives talking together on screen at the same time (previously a white detective had always been present), and the show's racially diverse cast also reflected the true make-up of Baltimore.

"Barry Levinson was born there [in Baltimore] and the city had never been seen in a TV series prior to our filming there," says Fontana, who hired Simon as a screenwriter on *HLOTS*.

**"David hired novelists and journalists – the entire writing staff of season one didn't have a single Hollywood veteran in it, as far as I recall"**

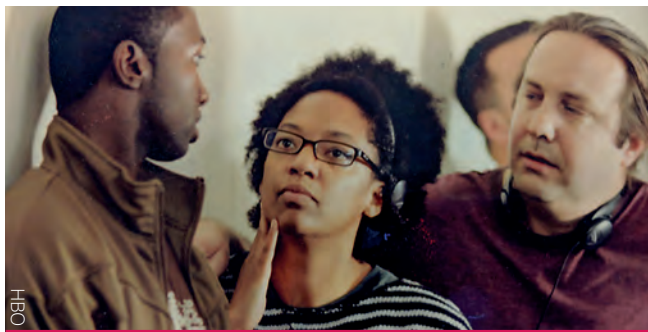
Rafael Alvarez



"We wanted to show Baltimore as authentically as possible. But we also wanted to portray the lives of Baltimore's citizens in a well-rounded universe," says Fontana, who was also creator and showrunner of *Oz*.

A decade after *HLOTS* first aired, *The Wire* spawned a generation of critically acclaimed black actors that included many A-listers such





**“On the first night of production, something magical happened and I realised that what was being filmed transcended even what was on the page”**

Joy Lusco Kecken (pictured on set, centre)

as Idris Elba, Michael B Jordan and the late Michael K Williams.

“I have to acknowledge the progress that’s been made,” says Lusco Kecken, “but also it’s not enough. Most black shows are being cancelled in the post-strike TV landscape,” she says. “Latino and Indigenous shows? I’m impressed with the work CAPE (Coalition of Asian Pacifics in Entertainment) is doing to support AAPI (Asian American and Pacific Islander) creatives and executives. It is not performative. It’s long-term and intensive and I’m intrigued by the talent that is emerging from that community.”

The show also depicts many white working class characters, particularly in season two when the plight of blue collar workers is explored when a human trafficking racket sparks an investigation set in Baltimore’s ailing shipping industry.

Olear’s casting was typical of the authenticity of the show.

“FBI agents are typically highly studious, they are highly educated, they’re not normally on the streets making tough busts, they’re behind computer screens. But Fitz has got a tough edge to him. He’s from Pimlico. I never knew where Pimlico was, so I looked it up, and it was a tough neighbourhood in Baltimore, like I came from,” says the former Golden Gloves boxing star, who went on to have roles in shows such as *The Mentalist*, *Law And Order* and HBO’s Emmy winning movie *Something The Lord Made*.

Whilst *The Wire* shed light on many social problems that had hitherto not been discussed in TV drama, how much it actually changed any of them is another matter.

This is perhaps most evident in the show’s overriding theme – America’s ‘war on drugs’. In his recent non-fiction title *Don’t Count Me Out: A Baltimore Dope Fiend’s Miraculous Recovery*, Alvarez points out that whilst, “some 58,000 Americans died during the war in Vietnam,” in current times around 70,000 Americans a year are reported dead “from an overdose of drugs”.

Alvarez, who after *The Wire* went on to work on shows such as NBC’s *The Black Donnellys*, concludes: “*The Wire* changed TV but it didn’t change Baltimore.”

The dichotomy between TV series and what happens in the real

Wendell Pierce as ‘Bunk’ Moreland and Dominic West as Jimmy McNulty, two of the primary homicide detectives on the series

world is an ongoing one. “Crime is still a part of life in American cities, suburbs and rural areas,” says Fontana, who was showrunner on AMC and Canal+’s recently released mini-series *Monsieur Spade*.

“We are facing the same problems as we did back then. TV shows don’t cure society’s ills, intelligent leadership and community involvement do.”

## Quantifying *The Wire*’s value to HBO

What is abundantly evident, however, is that shows such as *Oz* and *The Wire* built HBO’s brand. AMC gained a similar reputation when it made *Mad Men* and *Breaking Bad*, as did FX with *The Shield* and *The Walking Dead* and Showtime with *Homeland* and *Dexter*.

Significantly, this kind of drama did not put art over commerce. When HBO was producing *The Sopranos* and *Sex And The City*, the cable channel made more money than all the networks combined.

Since the early days of subscription-based TV, the industry has produced ever more content. However, the reality of post-pandemic viewing habits, coupled with the end of an era of low interest rates, has exposed gaping holes in the business models of streaming platforms, which in turn has led to extensive cuts and consolidation.

Many fear the industry today may not have the same appetite for risk that it did when those original shows of the cable revolution were commissioned. But it does not follow that because more drama is made that more great drama is made.

Between 2015 (when FX’s former chairman John Landgraf famously discussed reaching the era of “peak TV”) and 2020, the amount of TV series made in America alone doubled. However, since the late 1990s, only a handful of ‘must see’ shows have emerged each year. In 2008, *The Wire* came to an end whilst the first episode of *Mad Men* aired. In 2023, *Succession* came to an end whilst the second season of FX’s *The Bear* aired.

Even in today’s increasingly corporate entertainment landscape, shows are made that break our preconceptions of what it is possible to do on the small screen. These shows have an overall effect on the industry is unquantifiable.

“I can walk into a restaurant to this day and hear people randomly talking about *The Wire*,” says Lusco Kecken. “It’s awe-inspiring to me that the show is so timeless and the conversation it started carries on.” **TBI**



# Flying high

US docuseries have helped to revolutionise factual content over the past decade but the genre's evolution in Europe is now also attracting attention, writes Nick Edwards

**E**ver since Netflix's *Making A Murderer* and HBO's *The Jinx* hit screens in 2015, producers in European countries have been developing their own take on the documentary style that incorporates the episodic and narrative structure of scripted series.

Since then, the tectonic plates of the industry have shifted significantly on both sides of the Atlantic.

"There's a feeling that too much was being made and things aren't being discovered the way they used to be," says Marc Smerling, creator of *The Jinx*, speaking from New York. "Everyone is trying to adjust to the new reality of less production and fewer shows being made for a finite

number of streamers. It seems there's a sea change in the business."

In Europe, however, the high-end docuseries model is proving more resilient. "Overall we are actually investing more than we did three or four years ago," says Petter Wallace, head of commissioning at NRK, referring to the Norwegian public service broadcaster (PSB)'s spend across both factual and scripted.

"But the genres being bought are changing. Drama producers are struggling more. The big streamers started to buy local series, companies expanded to reach that demand, then one after another those platforms have pulled out. But docuseries are not affected so badly," he says.





MH370: *Missing*, produced for France 2 by Federation, has sold to countries such as Germany and Spain

In Germany, Christian Beetz, whose company Beetz Brothers is making five-part series *Mafia Hunter* for ARD, tells TBI: “We also have a robust PSB system. They want high-end series to compete with the streamers, especially for younger audiences.”

The landscape in France is also similar. “Whilst it’s very interesting and exciting to work with the global streamers,” says Myriam Weil, head of docs at Federation, “when you look at the volume of what they commission it’s really small. If you solely relied on them for your business it would be pretty risky.”

Netflix commissions a handful of premium French language docuseries each year, whilst the combined output of the other global streaming platforms is around a dozen.

In contrast, France Télévisions (including its regional channels) still produces around 800 hours of documentary programming annually; Canal+ Group says it is behind “several hundred hours” and Arte

remains very active.

French trade body, the CNC, last year revealed that France Télévisions had spent almost €72m for its 755 hours of docs programming, while Arte paid €32m for 234 hours and Canal+ committed almost €20m.

Whilst these are not all premium docuseries, Weil adds that “the volume for linear is the same or even more than it was a couple of years ago.”

“The budget for a commission is stable,” she explains, but cautions that inflation has impacted the market, meaning that in real terms budgets have fallen. “But overall, it’s a pretty healthy market,” she adds.

Beetz, whose company specialises in the ‘high-end’ doc market, points to the competitive advantage of docuseries at the moment.

“The impact of the streamers is that everything has to look high-end and cool. They always need new ways of storytelling – surprising narrative angles and so on. To do that in fiction is so expensive, it’s many, many times more expensive than in factual. Docuseries are

**“A couple of years ago *Crime Scene Berlin: Nightlife Killer* would have been shot in English and aimed at worldwide subscribers – this is shot in German and aimed at Germany first”**



Christian Beetz, CEO at Beetz Brothers

expensive but not in comparison to scripted. It’s a much cheaper route to a big audience,” he says.

He also notes that the global streaming platforms have changed their strategy. “They’ve gone to ‘local to local’ rather than ‘local to global’. By that I mean they are concentrating their slate on local content for the local country rather than aiming for it to take off globally.”

One show that exemplifies this shift is Netflix’s *Crime Scene Berlin: Nightlife Killer*, which has Joe Berlinger (*Jeffrey Epstein: Filthy Rich*) on board as EP.

“A couple of years ago this would have been shot in English and aimed at worldwide subscribers but this is shot in German and aimed at Germany first,” says Beetz, whose company will also be making three other true crime projects for Amazon (including the four-part series *German Cocaine Cowboy*) in 2024.

For NRK, its docuseries model is proving highly effective. “Most of the docuseries we have done have been amongst the highest rating [shows] on our linear channel and on our streaming service,” says Wallace.

“They are considered event series and we try to make them available all at once for binge watching – unless the last episode has a revelation in it, in which case we may try to drag it out for as long as possible.”

Like NRK’s famous scripted output, the broadcaster’s non-scripted series also focus on innovative storytelling that may well appeal to foreign audiences. *Scandinavian Star* is about a major ferry accident that occurred between Copenhagen and Oslo, in which hundreds of people died.



NRK's *Scandinavian Star* (above) was a co-pro between three countries while *L'Affaire Flactif* (right) for Canal+ tackles a racially-motivated murder

The screenplay was written by Nikolaj Scherfig, the Danish writer who wrote for the international scripted hit *The Bridge*. “It was a very expensive production. It needed a large amount of research in three different countries to make it relevant to all the contributing countries. So we co-produced with DR in Denmark and TV4 in Sweden. If we hadn’t have done that we couldn’t have bared those costs ourselves,” says Wallace.

However, much as NRK’s shows are loved at home, they do not tend to travel as Nordic crime fiction has. But this could all change. Wallace points to a rival’s production – *Murder In Mayfair*, which is a co-production between commercial broadcaster TV2 and the UK’s BBC. The show revolves around a murder in London involving a Norwegian as an example of a production that could spark a broader interest in docuseries from the region.

Federation’s *MH370: Missing* is another international story that takes place in multiple countries. Produced for France 2, it has many English-speaking protagonists and has already been bought in Germany, Canada and Spain, amongst others.

And global uncertainty is also providing an array of topics to explore – from war to climate change and politics – that generates international demand (often via pre-sales and frequently with interest from US buyers).

The driving genre of the docu-series is still, of course, true crime and it faces different challenges on both sides of the Atlantic. Productions that drive creativity within the genre are about more than just the crime itself. For example, *L'Affaire Flactif*, which Federation made for Canal+ in 2023, explores a potential racial motive behind a killing in a beautiful Alpine village. It is the type of project that is in the remit of a PSB to air.

“There are ethics in true crime that we should be very aware of as a PSB. Not glamorising the perpetrator is one of them. Finding stories that are not simply salacious or repeating what has been done before is a challenge,” says Wallace.

This was the case with NRK’s upcoming *Phenomena Phillippe* about a violent embezzler who scammed wealthy Scandinavians for millions of Krona.



“We tend to end up with a lot of unsolved crime stories that may or may not already be known to our audience. Sometimes we have known about them in the newspapers for years.

“We’re all still waiting for that one where we help solve the crime, like in HBO’s *The Jinx*, I think everyone in the world goes around waiting to get an ending like *The Jinx* in one of their series. But we work hard with our producers to make sure there is enough value in the storytelling itself, even if it ends up being unsolved.”

Smerling, whose Oscar-nominated feature *Capturing The Friedmans* was pivotal in establishing the true crime genre is now fearful for its future at home. “I’m a little worried for challenging non-fiction,” he says, “particularly the kind of journalistic investigations that don’t necessarily explore murders, but other crimes and scandals that are more complicated and that use the crime to shed light on what else is going on in America today.”

Smirling has pivoted his career before. His podcast *Crimetown: Divine Providence* is one of the most successful of all time and Apple TV+ is currently shooting a scripted adaptation of his 2021 podcast *Firebug*, with Dennis Lehane (*The Wire*) as showrunner.

He believes that 2024 may prove to be an existential moment for documentaries and docuseries, with new ways of connecting with audiences emerging. And, almost a decade on from the impact of US shows such as *The Jinx*, Smerling suggests that European models may be more deeply adopted.

“Perhaps [it could be] in a low budget way, maybe through independent movies. Maybe offer streamers and studios a model that resembles what we used to do – break up the cost, break up the territories.

“Maybe we look to a more European model – you get a little money from Germany, you get a little money from France, you spread it around.” **TBI**



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# What buyers want

TBI speaks to key execs at Globoplay, Rakuten TV and UKTV about the shows they are commissioning and acquiring and the models that are being used to pay for them

## Antonio Augusto Valente, head of content strategy, Globoplay



### What kind of titles are you currently looking to commission?

Our strategy is mostly focused on dramas and documentaries.

### Are you open to pitches & at what stage would you want to join a project?

Ideally at a stage when we can give input to the scripts and actively participate in the development.

### What financing models can you offer & how much can you contribute towards productions?

We can and will fully contribute creatively, and we are flexible in terms of models, acting from 'pure' licensing to pre-buy deals, co-pros and straight commissions.

### What upcoming titles are you most looking forward to?

This year we have *Justiça 2* (pictured, right), a second installment to our Emmy-nominated anthology series *Justiça*, again written by talented author Manuela Dias, on the same format of 28 episodes; and *O Jogo Que Mudou a História/The Game*, an epic action drama from the makers of *Dissident Archangel*, telling the story of the rise of Rio's organised crime groups in the late 1970s-80s, from inside a prison after a soccer match.

### What is it about those projects that makes them a good fit for your channel/platform?

One is a classic melodrama originated from a beloved and extremely successful IP, with a stellar cast; the other is a violent, edgy, action packed epic drama with a social background.

### Which titles are performing well for you currently?

Our telenovelas are always on our Top 10 lists, our original documentary *The Brazilian Mafia* has been a cultural phenomenon since its launch in November; we currently have *Big Brother Brazil* that is still huge for us in its 24th edition; and on the international side, currently Televisa's *Rebelde* and MGM+'s *From* are doing very well.

### How do you approach balancing acquisitions vs original commissions?

We firmly believe in our local content and since 2019 we have been shifting our investments from licensing to originals, produced either in-house by Globo Studios or the best independent producers from

Brazil. Our DNA is telling Brazilian stories, made by Brazilians and aimed at Brazilians. Saying that, we are still licensing international content and have a strong complementary offer with major studios and indie series, Turkish and Mexican telenovelas, international documentaries and more.

### What is on your acquisitions wishlist at the moment?

In this context, we also intend to invest in Korean dramas, which have been standing out in recent years.

### Which rights would you be looking to acquire? How flexible can you be?

SVOD and AVOD rights are a must, for pay-TV and free-TV we can be flexible.





## Marcos Milanez, chief content officer, Rakuten TV



### What kind of shows are you currently looking to commission?

When Rakuten TV launched its originals back in 2019, our ambition was to showcase remarkable and inspirational stories of optimism, empowerment, diversity and resilience that reflects the company's DNA. It's upon this foundation that we continue to build on.

We have a broad editorial scope, from high-end feature sports documentaries, having successfully launched titles such as *Sadio Mané: Made In Senegal* (pictured, right), *Andrés Iniesta: The Unexpected Hero* and *Ona Carbonell: Starting Over* and inspirational documentaries such as *Rumeysa: Walking Tall*, to exciting reality and talent shows including *Hairstyle: The Talent Show* and *Make Up Stars*. Most recently, we brought back our hit reality challenge show *Discovering Canary Islands* for a second season, which was in collaboration with the Canary Islands Tourist Board, which worked very well for us.

Our remit is very focused – we look for uplifting and positive stories that have the ability to inspire, educate and entertain. We will continue to champion inspiring and remarkable people from the worlds of sport and entertainment, and to create fast-paced and fun reality and talent formats.

### Are you open to pitches & at what stage would you want to join a project?

Yes, absolutely. We have a fantastic originals team led by Daniel Gilgado, and we are open to pitches at various stages of the project; we can look at developing a project with a producer or refining an already well-developed project to meet our remit for our originals.

A continued key focus for Rakuten TV is around the growth of our FAST offering and we are always open to collaboration with partners for third-party content and channels to acquire to the platform. Here we have a far larger remit and can look at both broad and niche acquired content.

### What upcoming shows are you most looking forward to? What is it about those projects that makes them a good fit for your channel/platform?

After the recent launches of the talent shows *Make Up Stars* and *Hairstyle: The Talent Show*, we have just launched the second season of our hit reality show *Discovering Canary Islands*, which is an adventure-race hosted by the iconic Spanish celebrity Pilar Rubio. Filmed in stunning locations across the eight islands of the Canaries, eight contestants from different countries across Europe face a series of challenges in their quest to find the mythical San Borondón, immersing themselves and the viewers in local culture and legends along the way.

The series is family-friendly, has a fantastic energy to it, looks glorious, and works incredibly well for us. It is the type of show that brings in a strong viewership, but more importantly, engagement – as it's a genre that generally results in high repeat rate due to its

stickiness factor. Plus, the pan-European nature of the show, featuring contestants with different nationalities works well across the range of our audience.

### What is on your acquisitions wishlist at the moment?

We have approximately 100 branded Rakuten TV FAST channels across Europe and it continues to grow. The Rakuten TV Movies channels are our cornerstone, which we've successfully led in the market with an ample offering of Hollywood and European titles, but we're always open to new partners that improve quality and local relevance. In addition to movies, we are also in search of true crime, reality and factual entertainment content for Western Europe.

### How do you approach balancing acquisitions vs original commissions?

The majority of the volume of content available on our platform consists of acquisitions (i.e. content licensing), however, we take a very careful and strategic approach to the originals we set out on our service, as there needs to be an appealing editorial and commercial aspect to it.



### Which rights would you be looking to acquire? How flexible can you be?

Rakuten TV is a platform that offers premium content across various types of access, ranging from Transactional VOD, AVOD and FAST.

### Which shows are performing well for you currently?

On AVOD/FAST, we have seen a strong performance of genres such as movies, live news, true crime and reality. The rise in prominence in AVOD and FAST has grown exponentially over the last few years on Rakuten TV, with our audiences enjoying a wide range of free-to-access content. We've also managed to attract more locally relevant brands and top broadcasters to join our FAST proposition, as they've come to realise there's a huge market potential across the CTV landscape.

Meanwhile on transactional VOD, Hollywood blockbusters straight from the cinema continue to be enormously popular. The freshness of these titles coming into homes so quickly after its cinematic release is always a huge draw, and a great addition to Rakuten TV's offering.

**Richard Watsham, CCO,  
UKTV & global director of  
acquisitions, BBCS/UKTV**



**What kind of shows are you currently looking to commission?**

UKTV Originals are ambitious, with strong talent and originality, irrespective of genre. We are currently looking for new projects across a number of genres including crime drama, male-skewing comedy entertainment and fact-ent for both male and female 30-40 somethings. As always, given the breadth of what we commission, it's best to start a conversation with the relevant commissioners and get a detailed brief.

**Are you open to pitches & at what stage would you want to join a project?**

We're always open to pitches and equally happy to develop projects from scratch with producers, come in on projects that have already been developed by others, or acquire as a pre-buy, depending on the cost and ambition of the piece. We know the value of partnerships and are keen to explore projects at every point on the spectrum between a full commission and an acquisition.



**What financing models can you offer & how much can you contribute towards productions?**

We cashflow originations, fully funding or co-funding alongside other broadcasters and distributors across a wide range of genres.

**What upcoming shows are you most looking forward to? What is it about those projects that makes them a good fit for you?**

We have a new comedy entertainment format from an original Korean show, called *Battle In The Box*. In it, two pairs of comedians compete against each other in ridiculous challenges. The catch though is that the two teams are confined to a rectangular box for 24 hours and every time they win a challenge, they steal space off their opponents and get to fill their side of the box with luxury items. It's a brilliant combination of comedy and reality with a mechanic that encourages just enough

competition to give the whole show a wonderful energy.

We also have a brand-new crime drama, *The Marlow Murder Club* (pictured, below left), from the creator of *Death In Paradise*, Robert Thorogood. Unsurprisingly, the scripts are excellent and the casting is top notch, with Samantha Bond in the central role as one of three ordinary women who come together to solve a murder. It's perfect for UKTV Play and our linear channel Drama because of the strong female leads, the twisty plot and the gorgeous world of Marlow.

**What is on your acquisitions wishlist at the moment?**

First run, English-language drama, especially female-skewing crime procedurals. Archive drama boxsets, both famous titles and lesser-known gems that our audience may have missed, and we're always in the market for fact-ent for both male and female audiences.

**How do you approach balancing acquisitions vs original commissions?**

Both acquisitions and originations are vital to UKTV's success and our ability to balance the two has been integral to us keeping our head above water during this latest advertising downturn. Both content sources have different functions though and we use them in different quantities to balance overall volume, known titles, marketable pieces, press attention, reputation and awards.

**Which rights would you be looking to acquire? How flexible can you be?**

We're generally looking for VOD and linear rights for our seven channel brands across UK and Eire (Alibi, Dave, Drama, Eden, Gold, W, Yesterday), however, we can be very flexible, and the rights we seek will depend on the title and value we think it will bring to UKTV.

**Which shows are performing well for you currently?**

*Bangers And Cash* on UKTV Play and Yesterday is a large and growing franchise and both the main show and the spin off, *Restoring Classics*, drive big numbers for us across both VOD and linear. One of our acquisitions, *Darby And Joan* (below) has been doing very well on Play and Drama in January, and BBC Studios' *Sister Boniface Mysteries* special was our highest rating show in the run up to Christmas. **TBI**







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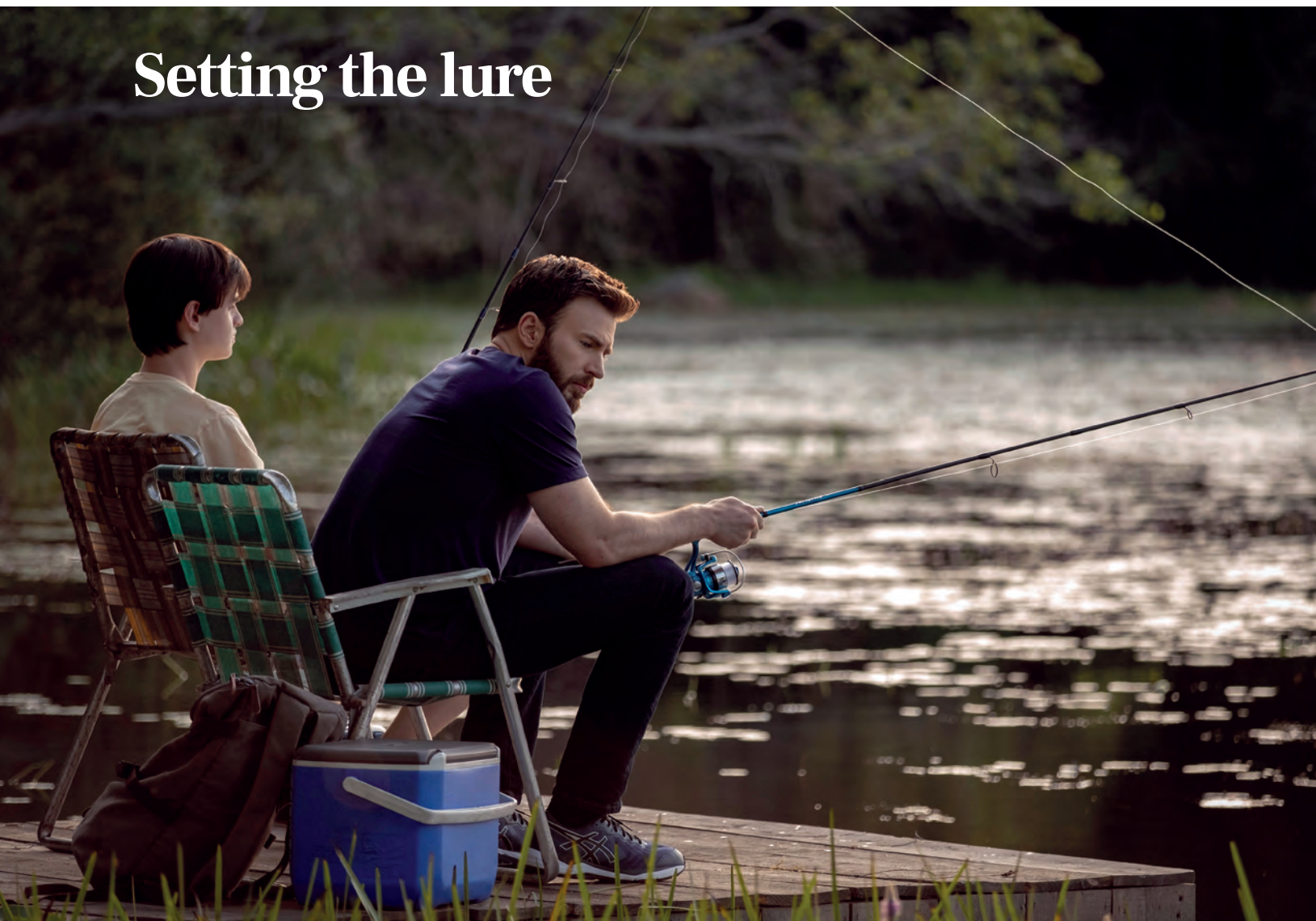
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# Setting the lure



Barely 18 months since an aborted merger, French broadcasters TF1 and M6 are once again set for battle but this time on the country's rapidly evolving streaming landscape. Marie-Agnès Bruneau reports

**A**fter the launch of TF1+ in early January, French broadcaster M6 revealed its own plans for a new ambitious streamer in March, underlining changing strategies within an evolving landscape.

M6+ is to replace 6Play in mid-May and will, like TF1+, be mostly ad-supported, with the former allies on now-defunct subscription service Salto (October 2020-March 2023) refocusing towards their core advertising market.

Both platforms are, however, making available a premium subscription offer for those who want the service ad-free, priced respectively at €5.99 (\$6.49) for TF1+ and €4.99 for M6+, which will provide improved quality and some other services. M6's kids platform Gulli will remain separate.

## M6+ spending & acquisition plans

RTL Group-owned M6 is planning a €40m investment in M6+ across 2024, growing to more than €100m by 2028, with the group promising 30,000 hours of content, including 10,000 hours available exclusively.

M6's chairman, Nicolas de Tavernost, was in attendance at the launch of the streamer, ahead of his planned retirement on 23 April, following a 37-year stint at the broadcaster.

"I'm so happy to conclude my time with the presentation of M6+, this is the future," he said. "Streaming is not a sprint, it is a marathon and today, we are accelerating. But traditional TV is far from dead – we intend to walk on our two legs," he stressed.



*Defending Jacob* (opposite) on TF1+ originated on Apple TV+, while *The Marvellous Mrs Maisel* (below, right) on M6+ is a Prime Video series

Tavernost's successor, current sales director David Larramendy, said the "goal" is to double 2023's digital consumption – 500 million hours viewed – to 1 billion, while tripling revenues from €74m to €200m.

M6 is counting on RTL Group's dedicated subsidiary Bedrock to develop innovative technology, partly based on AI.

## 'Ambitious' content strategy

On the content front, the group's channels & content director Guillaume Charles says he is planning a "a very ambitious strategy." One focus is to ensure "linear programming [is] streaming-ready," he explained, pointing to shows such as *L'Amour Est Dans Le Pré* (*Farmer Wants A Wife*).

The show averages 4.7 million viewers per episode, with 1.1 million coming via 6Play, while *Temptation Island*, which is broadcast on smaller channel W9, gets over 60% of its 1.1 million viewers from its streamer.

With that in mind, the group confirmed it had picked up the *Golden Bachelor* format for a French adaptation on M6.

M6+ will also offer more previews, making some M6 scripted series available on the platform first for a month, prior to broadcast. Original programming will also be increased, including commissioning of shows targeting the streamer's younger demo, with *The MMA Academy* contest an example of an original unscripted project.

It is to be produced by Satisfaction's Ah! Production, while an additional *The Traitors* series is also in the works, which will include younger influencers as contestants. M6+ is planning to launch around three unscripted formats per year.

M6+ will also offer original documentaries, along with shows experimenting with new narratives and comedy series, with new talent being sought.

It is also acquiring around 300 films as well as some US series, including second window rights to originals from the global streamers, exemplified by the deal for Prime Video's *The Marvellous Mrs Maisel*. Some shows may run on M6 although Charles told TBI that this was not the main purpose of the deals.

An agreement has also been reached with NBCUniversal for the group's reality series, with 4,000 hours secured including the Kardashian franchises. The platform will also run some American football games from the NFL.

## TF1's contrasting play

The M6+ strategy looks somewhat more aggressive than that of TF1+ in terms of originals and exclusive acquisitions, although TF1+ does plan to have 200 movies and 15,000 hours of shows across all genres, including past seasons.

A few series will be acquired specifically for TF1+ such as Peacock's *Poker Face*, although the primary aim is for shows that can also be broadcast on the group's linear networks. That also applies to IP such as *Defending Jacob*, which debuted on Apple TV+. It was recently

broadcast on TF1 and simultaneously made available on TF1+.

More focus has been put on strengthening TF1's daytime schedule, with a morning talk-show and the resurrection of defunct France 3 hit *Plus Belle La Vie*, which was scheduled at lunch time. The latter was cancelled officially because of a declining audience but it was still driving over 2 million daily viewers – another, unofficial reason, could have been that it was produced by TF1 Group-owned Newen.

The TF1 strategy is also meant to feed TF1+, with daily soaps increasingly seen as a strategy to strengthen audience loyalty to online services, something the French broadcasters learned with Salto. Soaps are also starting to interest global streamers, with Disney+ commissioning *Return To Las Sabinas* in Spain. M6 also has a daily soap in the works, though details are scant.

TF1+ will also look to leverage the group's strength in news coverage while documentaries are also in the works, as well as thematic FAST channels.

For the TF1 Group as a whole, CEO and chairman Rodolphe Belmer is looking at three main areas: to secure flagship channel TF1's place as market leader; to develop as a studio and production group through Newen; and to adapt to changing viewing habits, which are expected to see on-demand consumption grow from 35% of total viewing today to 50% by 2027.



"More and more people are adopting smart TVs, this is a powerful irreversible movement," he continued, highlighting that a major focus is to secure distribution for the TF1+ app.

Belmer has also stressed that he committed to launch TF1+ without affecting the group's profits, meaning budgets will be carefully watched. TF1 Group is currently driving savings of €40m by 2025, €10-15m of which is to be re-injected into the platform.

For both companies, the goal is to compete within a fast-changing streaming landscape. For M6, the aim is to focus on bigger moves while trying to increase spending, with its more aggressive approach underlined by a major coup recently that saw it take World Cup football rights away from TF1 for 2026 and 2030.

Indeed, as a channel, M6's younger-skewing demo has been slightly more affected by audience fragmentation. If anything, that might force it to move even faster as the French TV and streaming landscape evolves. **TBI**





# Hot Picks

From family drama and a mystery thriller to an impactful documentary and a pulse-pounding quiz format, TBI takes a look at some of the hottest shows heading to market

Top  
Pick

## Playing Nice

**Producer(s):** Studiocanal & Rabbit Track Pictures

**Distributor:** Studiocanal

**Broadcaster:** ITV (UK)

**Logline:** Two couples discover that their toddlers were switched at birth, and face a horrifying dilemma: do they keep the sons they have raised and loved, or reclaim their biological child?

**T**wo sets of parents face a nightmare scenario in this drama, adapted from the novel by British writer JP Delaney, in which they discover that their toddlers were switched at birth in a hospital mix-up.

Pete and Maddie, and Miles and Lucy, have a horrific decision to make – whether to keep the sons they love and have raised, or reclaim their biological child.

“At first it seems all four are agreed on a solution, but it soon becomes clear that hidden motives are at play,” reveals Anne Chérel, EVP of global sales and distribution, at Studiocanal. “As Pete and Maddie are stretched to breaking point, they realise they will stop at nothing to keep their family together.”

James Norton stars and executive produces the series, with Niamh Algar, James McArdle and Jessica

Brown Findlay also starring.

The narrative has been very cleverly adapted by exceptional writer Grace Ofori-Attah,” says Chérel. “She has created a fascinating and enthralling drama in an attractive four-part format which focuses on the themes of parenting and how far we would go for those we love.

Chérel says that the show should hold great universal appeal as parents all over the world will be able to imagine themselves put in the same position.

“If you were suddenly told you had been given the wrong baby, would you be able to give back the youngster you had nurtured and brought up believing to be your own? But on the other hand, if this was not your biological child and your true bloodline, would you perhaps look at things differently?”

## Population 11

**C**reated by Phil Lloyd and directed by Trent O'Donnell, this quirky 12-part comedy mystery is inspired by true events.

Ben Feldman stars as Andy, a US bank teller who travels to a small town in the Australian outback, home to just 12 residents, in search of his missing father (Darren Gilshenan), who was last seen leading questionable UFO tours.

“He starts off as a fish out of water and wants nothing else than to get out of Australia as soon as possible,” reveals Agapy Kapouranis, Lionsgate’s president of international television & digital distribution. He must navigate a quirky group of townspeople to find his missing father.”

Kapouranis reveals that the series, which made its debut on streaming service Stan, explores themes of identity, redemption and the meaning of family

as Andy forges “unlikely alliances” with the rather unusual townspeople that he meets in the search for his dad – while his own life is soon in jeopardy.

“The themes mentioned above are universal,” says Kapouranis, who believes the show should hold global appeal, “*Population 11* includes relatable characters and a recognisable cast, led by Ben Feldman. The show also features a unique mix of action, comedy and suspense, with each episode ending on a compelling cliff-hanger.”

**Producer:** Jungle

**Distributor:** Lionsgate Television

**Broadcaster:** Stan (Australia)

**Logline:** When a man mysteriously vanishes from a tiny outback town, his estranged son must navigate its motley crew of residents to unearth the truth before he winds up dead himself





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## #Nova

**T**his documentary takes a look back at the events of 7 October 2023, when Hamas killed and kidnapped hundreds of young people at the Supernova Psy-Trance Festival in Israel.

What sets this exploration of that day apart is that the film is compiled solely from real-time footage, much of it exclusive – and with no testimonials nor commentaries – to capture the genuine emotions and horror of the attack.

“#Nova shows the actual events as they occurred, hour by hour, without filters, without censorship, without narration or commentary. It’s not about retelling but rather documenting, first-hand, without any external interference or direction, the actions of that day,” says Sharon Levi, MD of Yes Studios.

“Even though some of the footage is blurred, or jumpy and, at times, even upside down, it shows the viewers what the Nova-goers were feeling on that day. This also can speak to younger audiences around the world – the TikTok generation used to consuming content using this visual language.”

Levi tells TBI that the film shows “the intensity of the events and the cold-hearted plan to hurt as many Israelis as possible,” and says that the documentary also stands as “a piece of hard evidence, told from the perspective of young festivalgoers, not news agencies or filmmakers, and

**Producer:** Kastina Communications

**Distributor:** Yes Studios

**Broadcaster:** Yes TV (Israel)

**Logline:** Documentary comprised solely of real-time footage of the Hamas attack on the Supernova Psy-Trance Festival in Israel in October 2023

therefore will be forever part of history.”

The film was produced by Kastina Communications, which had to obtain approval for the footage recorded on party-goers phones.

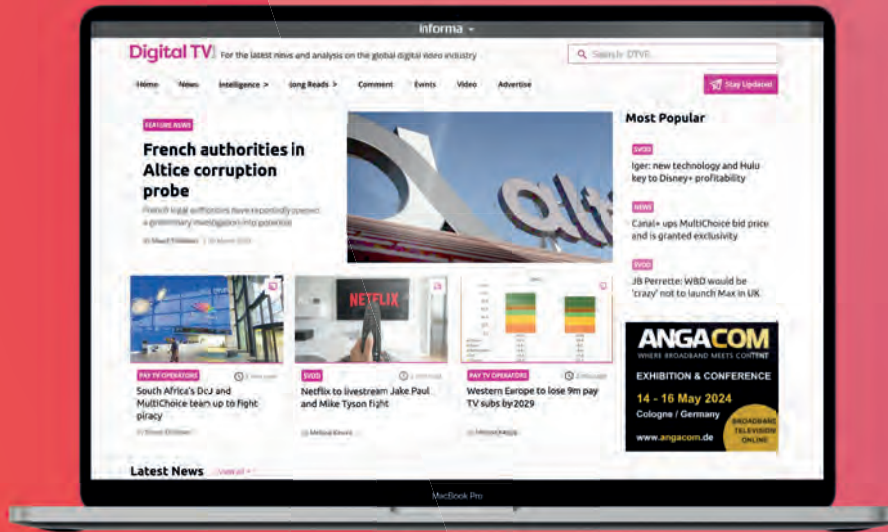
“This was a very sensitive issue and needed to be handled with caution and care. There were hundreds of people they needed to approach including the families of the people that were murdered or kidnapped,” explains Levi.

“Also, in wanting to be as authentic as possible, they did think long and hard about what they should include: how much to show and what to leave out or obscure. It was important to show, for example, that people had been killed but they made a conscious decision to blur bodies, out of respect for the dead and their families.”

She adds: “Significantly, as the war continues and narratives shift daily, this film serves to remind people just how brutally it started, how many innocent lives were lost and how many young people are still being held hostage.”







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# Skydive Quiz



**T**his new series literally takes the tried-and-tested quiz show format to a new level – by making contestants answer questions while falling out of the sky.

The show features six contestants per episode – all of them first-time sky-divers – and while the questions are relatively easy, falling from an altitude of 15,000 feet with just three seconds to answer adds a whole new level of difficulty.

There's also another twist. Each episode closes with a TV star entering the game. Contestants can bet part of their winnings on how many questions the VIP will answer correctly. Will they dare to risk their hard-won cash for the chance to double – or lose – their winnings?

There are, of course, technical challenges to overcome, when you're recording your quiz show while in freefall.

"Getting a good sound and film recording at such altitude and speed, with the wind and all the noise, is much harder than you might think," says Ralf Rückauer, VP of unscripted at ZDF Studios.

**Producer:** Mário Daniel Production

**Distributor:** ZDF Studios

**Broadcaster:** N/A

**Logline:** Quiz show in which contestants answer simple questions – while plummeting from 15,000 feet in the sky

"[Producer] Mário Daniel and his team made special helmets for the show, created special camera angles and perfected the whole idea and technology several times in iterative processes – and keep on further perfecting it."

Rückauer adds: "The format is a really outstanding 'feel good' idea. Everyone has fun, it's very light and the basic idea is captivatingly original and unique. Even if you missed the beginning of a show, you would understand the format principles in a second."

The format also offers an opportunity to show beautiful landscapes, with Rückauer adding that it is a good fit "for a summer break, for a season of six-eight episodes per year."





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## Dora

**R**eturning to screens in CG-animated form, beloved kids' heroine and Latina explorer, Dora, sets out on a new series of adventures in a fantastical rainforest.

Joined by her monkey friend Boots and trusty Map, Dora faces a range of obstacles while being challenged by Swiper, the sneakiest of foxes.

"We're building on Dora's legacy as a trailblazing Latina heroine with a new series that features: updated, immersive CG animation; a new dynamic character-driven narrative structure; an enhanced language-learning curriculum; and deep exposure to her multicultural background through music, real-world traditions, food, design and architecture," reveals Ramsey Naito, president of Paramount Animation and Nickelodeon Animation.

Naito tells TBI that this revival has "storylines with faster pacing, exciting character-driven action and bolder comedy" than before, with Dora now

**Producer:** Nickelodeon Animation

**Distributor:** Paramount Global Content Distribution

**Broadcaster:** Paramount+ (US, UK, Canada, Australia)

**Logline:** CG-animated return of iconic Latina heroine *Dora the Explorer*

voiced by "amazing Diana Zermeño, a 10-year-old bilingual Latina girl." She adds "And as a nod to the original series, we cast Kathleen Herles, the original voice of Dora, in the role of Mami, her mother."

Naito foresees children falling in love with Dora's new adventures, just as they did the original series. "Her core attributes remain intact. She's kind and inclusive, a great role model and a good friend. She's an adventurous leader, celebrating diversity and helping to foster an understanding and appreciation for the differences in people. These qualities allow her to cross social, racial and language boundaries, and we're so proud to bring Dora back. **TBI**



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## Last Word Gwenda Carnie

### Co-production in difficult times

**“Co-production is alive and well, and not surprisingly on the rise against this challenging backdrop”**

**T**here’s no doubt that the TV industry is experiencing unprecedented turbulence and very few in the content business are escaping its impact. No matter how big or how small a player you are, you are undoubtedly being hit in some way or another by increased production costs, diminishing advertising revenues, dwindling subscription revenues, changes to public broadcasters, the fear/threat of AI, strikes (and their aftermath), commissioning slowdowns and the continued dispersion and changing habits of audiences. Disruption and change are constants in the content business but even for those used to dealing with change, this recent onslaught can feel overwhelming.

Change in any industry inevitably leads to different and new models of doing business but it seems like one tried and tested model – international co-production – is alive and well, and perhaps not surprisingly on the rise against this challenging backdrop.

The benefits of international co-production are well-known: access to new funding sources; the ability to pool resources and share financial risk; access to new markets, new audiences, broadcasters and distributors; diverse talent pools; and the discovery of new and diverse creative expertise and cultural perspectives. As a co-producer, an expanded reach for your content enhances its global visibility but also opens avenues for cross-cultural engagement. Thanks largely to the streamers, we are all a bit more open to watching TV series that originated elsewhere. The success in the UK of content from overseas is clear evidence that global audiences are craving unique and diverse

storytelling – and international co-production can be a gateway to getting this content made and on to our screens.

However, those engaging in international co-production will also know, only too well, that it isn’t easy. In our consultancy business, we witness every day the challenges that co-production can bring – both the obvious (who has creative control, who gets world premiere, does the financial and creative contribution match the value each party derives from the co-pro?) and the less obvious: arriving at a deal that suits everyone is rarely a smooth process for all sorts of reasons – every country has its own laws/regulations and template/union agreements, every organisation has its ways of doing business, its own credit rules, its own custom and practices. Big companies, in particular, don’t always find it easy to agree ‘off piste’ co-pro deals – they’re just not set up that way. Dare I also say that some companies might occasionally overestimate the value of their input? Yet another challenge co-production can present is the potential for dilution of cultural representation for the UK on a global stage at a time when instability across the world makes leveraging the ‘soft power’ of representation on screen ever more important.

But none of these things are insurmountable and, like many things in life, the key to co-production success is finding the right partner for you and your content. If you find that partner and if you take the time to negotiate a deal informatively, openly and fairly, you can leverage all the myriad of benefits that co-production brings and be much better placed to weather the current ongoing industry disruption. **TBI**

Gwenda Carnie is director at UK TV business affairs adviser Industry Media



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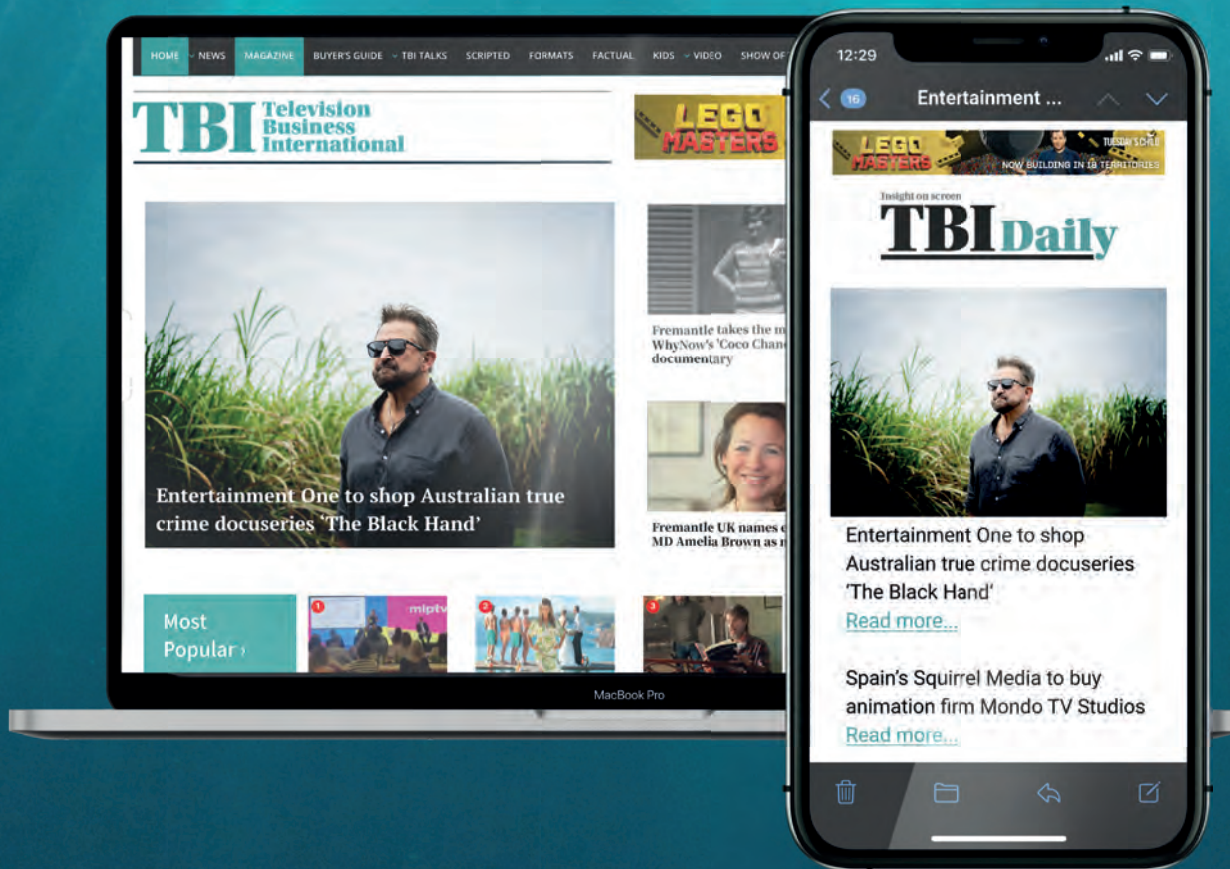
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