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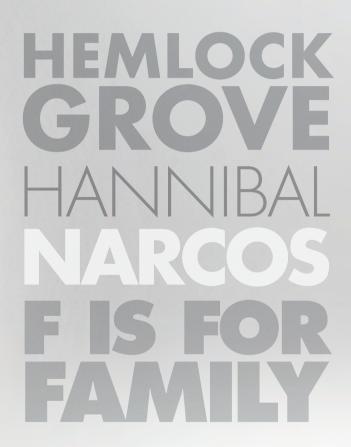
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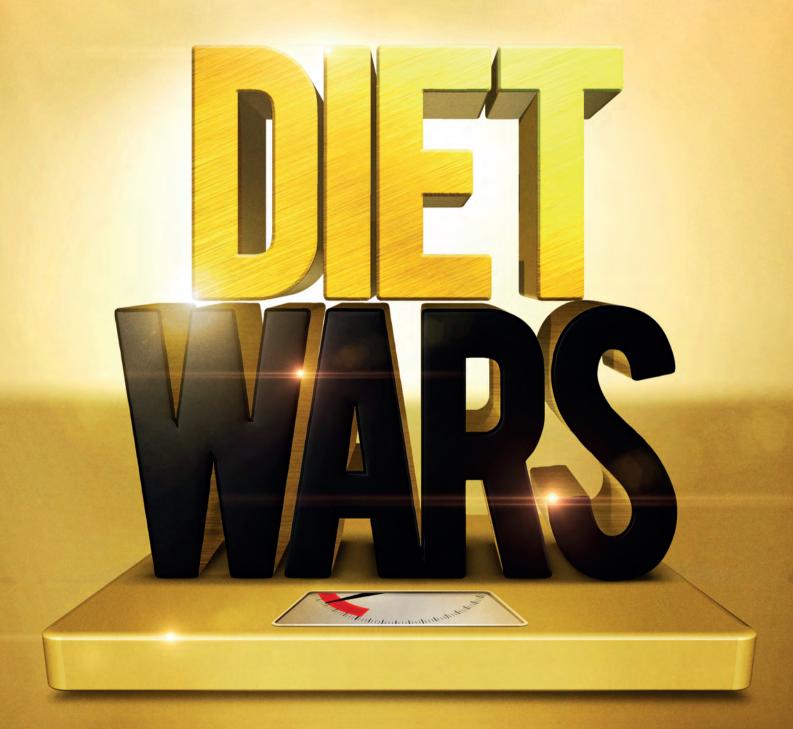
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TBI Formats

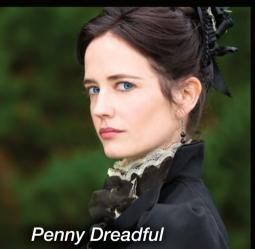
Pranks shows, the best new formats launching at MIPCOM and country profiles of Ireland and France, as well as news and views from the formats world



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EDITOR'S NOTE



STEWART CLARKE

If Netflix boss Reed Hastings' assertion that all TV will soon be online TV is correct, then the current crop of online multichannels are the big broadcasters of tomorrow.

That is the bet the likes of Disney, Endemol Shine and the Modern Times Group are making when shelling out millions for MCNs and sinking even more into new digital content groups. As one analyst tells us in our lead feature, the hundreds of millions paid today could start to look cheap if these channels deliver on current growth forecasts.

In a varied MIPCOM issue, we also look at how online apps, systems and platforms are seeking to revolutionise the distribution, and kids TV, businesses. In content sales, the Frank brothers, late of Zodiak Media, tell us how their new trading platform will allow buyers and sellers to transact far more quickly and efficiently, while not replacing the physical markets such as MIPCOM (fortunate given that they are at the market with the new service).

In kids, the likes of Hopster and OobEdoO are transforming the way content is consumed. Meanwhile, the 'traditional' kids business is, we discover in TBI Kids, struggling to get to grips with how to fund multimillion pound (or dollar, or euro) content in this new world.

Multimillion pound budgets are not, meanwhile, as hard to pull together in the drama world. An ever-increasing number of commissioning channels are looking for the next brand-defining series. What are thin on the ground, however, are story-of-the-week procedurals ('boring TV' as one European TV boss calls them in our feature). We talk to buyers and sellers about where the next big procedural is coming from, and find it is likely to have a European connection.

Elsewhere, we have exclusive interviews with Giorgio Stock, the former Disney exec who has turned Turner around in the EMEA region, Hollywood producer Steven Soderbergh, and action star Wesley Snipes, as he moves into TV.

See you at the market, and, hopefully, at our annual end of market pub quiz on Wednesday.



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DIARY

3-4 October **MIP Junior**

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5 – 8 October MIPCOM

Cannes, France www.mipcom.com

13 – 15 October

Brand Licensing Europe

London, UK www.brandlicensing.eu

12 - 15 October **Sportel Monaco**

Monaco www.sportelmonaco.com

26 - 29 October

Cartoon Connection Canada

Quebec, Canada www.cartoon-media.eu/cartoon-connection/ connection-canada.htm

29 October – 1 November **Tokyo Docs**

Chiyoda-ku, Tokyo www.tokyodocs.jp/2014/en/

4-6 November **DISCOP Africa**

Johannesburgh, South Africa www.discopafrica.com

4 – 11 November

Santa Monica, US www.americanfilmmarket.com

9 – 12 November OTT TV World Summit

London, UK www.ottworldsummit.com

21 – 22 November

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New York, US www.iemmys.tv/festival.aspx

29 November – 2 December **German Screenings**

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2 - 4 December

Asia TV Forum

Singapore www.asiatvforum.com

19 - 21 January 2016

NATPE Miami

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24 - 26 January 2016

Toy Fair

Miami, US

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31 January – 3 February 2016 Realscreen Summit

Washington, US www.summit.realscreen.com/2016/

11 - 21 February 2016

Berlin International Film Festival

Berlin, Germany www.berlinale.de

8 – 11 February 2016

Kidscreen Summit

Miami, US

www.summit.kidscreen.com/2016/

1 - 3 March 2016

DISCOP Istanbul

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Cartoon Business

Warsaw, Poland www.cartoon-media.eu/cartoon-masters/ cartoon-business

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Bologna Children's Book Fair

Bologna, Italy www.bookfair.bolognafiere.it

2 - 3 April 2016

MIPDocs

Cannes, France www.mipdoc.com

2-3 April 2016

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SVOD channels transform Watchever

or non-German readers, 'Es gibt noch so viel zu entdecken' translates as 'There is so much more to discover'. That is the message that Vivendi's Watchever is driving home and the strapline in a nationwide ad campaign promoting the SVOD's service makeover.

Karim Ayari is the Vivendi exec the French media giant put in charge of Watchever after its founders, Stefan Schulz and Sabine Anger, exited last year. Speaking exclusively to TBI, Ayari says a full makeover of Watchever goes more than skin deep, and is about creating a new type of service.

"We've been one of the pioneers of SVOD in Germany and Europe, launching in 2013," he says. "Since then the world has evolved, the market has matured, and there has been the emergence of many players: niche players, licensors creating SVOD channels, and people experimenting with D2C.

"Within that universe, we feel we need to move to the next level of SVOD. We're seeing the big players evolve, and we want to take a different route. It's not all about being a me-too service but by brand. Watchever has deals with CBS, Disney, NBCUniversal and Sony as well as Vivendi stablemate StudioCanal and BBC Worldwide, and the initial channels roster includes CBS, Disney Movies on Demand, BBC First, MTV and Universal Music. There will also be *Doctor Who* and Jamie Oliver channels.

The changes are designed to help Watchever stand out in Germany, the biggest TV market in Europe. Within the SVOD sector the Vivendi-owned service fights it out with Amazon, Netflix and ProSieben's Maxdome, and was bleeding cash in the year after launch; Vivendi was widely reported to have brought Merrill Lynch on board to help sell the service. The French media giant has, however, embarked on a new content-led strategy, and Watchever is back in the fold. Insiders say that having been considered a small company within the group, it is now an integral part of Vivendi Village, one of the firm's content groups, as Vivendi seeks to be an industrial player in production and distribution. Like its peers, Watchever does not break out customer numbers, but well-informed sources suggest it has slightly under 300,000 subs.



but there is still a lot of value in having a 'channel'," Ayari says. "We can offer engagement and promote brands and content in the same way as a cable company, but we are still OTT. We wanted to take the best from both worlds, and subscribers can still navigate through search."

The streaming service is, like its SVOD peers, notoriously protective of the data it harvests from users. It will, however, offer more information to the content outfits launching channels, and the new system means a deeper, relationship with these companies. "They will do more than just bring their catalogue, and we will be doing more than just buying it and putting it online," says Ayari. "We will discuss marketing, promote their brand and we will also be more open with our data.

"Another aspect is that, by introducing channels in this way, we can bring to the surface content that might not otherwise get found. This won't make blockbusters out of small content, but it can influence how successful it is on Watchever."

If Ayari can successfully complete the Watchever turnaround that started with last year's transformation plan, Watchever could launch beyond Germany. Similarly, producing original content – Vivendi is amassing a growing cluster of prodcos – is on the cards, if the service can succeed on home turf. "First, we have to prove this model for VOD," says a Vivendi insider. Watch(ever) this space. **TBI**



to Netflix, because there are different strategies."

The result is a new look, but more significantly, the introduction of 'channels'. These are programmed and organised by content owners, offering them greater control and opening up a wider selection of content for subscribers.

"We have lots of usage data and have concluded there is a better way to provide people with a better UI and content," says Ayari. "The biggest pain people specify is how long it takes them to look for what they want, and we want to create something like an [SVOD] department store."

The channels will not be ordered by genre,

A transformation plan kicked in during the second half of 2014 and full-year 2014 revenues were €26 million (US\$29 million), compared with €12 million (and an estimated €66 million loss) a year earlier. Vivendi said the cumulative Vivendi Village turned EBITA positive in the first half of this year, singling out cost savings at the post-transformation Watchever for special mention.

The new channel-led makeover combines some of the attributes of a pay TV platform, where customers are offered an aggregated selection of channels. "We are in a post-Netflix world, so it shouldn't be a TV-user experience, KATIE BRANDON WENDY STEVE DEAN MCGRATH JAY MCLAREN CREWSON BYERS MCDERMOTT

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CONTENT

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Gil's distribution guile

Israeli's Gil Productions has become the latest independent to enter the distribution market. Here, company founder Assaf Gil tells TBI about the challenges ahead, and why he has created Gil Formats

il Productions is one of the grand old men of the Israeli television production community. Turning 25 next year, the company is one of Israel's most prolific producers, and recently entered the world of formats creation as the world began to sit up and take notice of Israelioriginated programming.

At MIPCOM, Gil moves further forwards, stepping out with a sister company, Gil Formats, which is billed as a content company designed to create and distribute programming for the international market. Assaf Gil, who lends his name to the company he created, will debut Gil Formats to the market a year after relinquishing the day-to-day duties at the production arm to become chairman.

"The idea was to set up a company that was both a content company and dealing with distribution independently, while maintaining a local production business specialising in local shows," he says.

The debut slate will comprise ten formats, some of which have launched already, such as comic game show Are You For Real? and scripted title The Life of Maya Dagan, and some of which haven't.

Fresh off the development slate is Life on Duty, which is billed as a returnable observational factual entertainment series with a "narrative line of drama". The format follows characters from the police, fire and hospital

production sister create, leaving Productions, which make the Israeli version of MasterChef and One Born Every Minute, to make both in-house and third-party shows.

"Everything depends on how things start out, and the next six months will be very exciting," says Gil. "On the one hand we will develop and invest in concepts and formats, but on the other hand we will always seek international partnerships; we're open to all sorts of partnerships. We will only focus on things we believe in and that have been tested

"We will only focus on programmes we believe in and that have been tested in the market" Assf Gil Gil Formats





trauma services, and contrasts their chaotic and heroic days and nights at work with their oftenneglected private lives.

Israel's Channel 10 has commissioned the show for a local 12x60mins run to debut likely in January next year. "It's a show that speaks for itself," says Gil.

"I had some initial meetings about it in London three weeks ago and got an enthusiastic response from factual entertainment companies in the UK. That's why I believe we will be making deals for this show soon."

Factual entertainment will play a large part in Gil Formats's first assault on the market, with a focus on development for commercial networks. (That said, another unnamed fact-ent effort is being worked up with pubcasters in mind.)

Gil Formats will comprise six executives (including Gil himself), two of whom are focused on development and three on sales. The firm will own the original IP that it and its in the market."

Moving into distribution puts Gil in a league with a select handful of other Israeli content creators that also sell internationally, namely Armoza Formats, Dori Media Group and Keshet International. However, Gil says this grouping does not mean much to him, nor to buyers increasingly hungry for strong formats.

"The other Israeli players are good companies with fine people behind them, excellent sales teams and good shows," says Gil, "but, the market now is not really that curious about where you're from: people are just looking for good content and will buy content if they appreciate it.

"I do feel lucky there seems to be growing interest in Israeli content, as the business atmosphere that has been created means people are willing to seek out new content and take risks. However, I don't see Gil Formats as 100% dedicated to Israeli content." TBI

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irkus is coming to town with a new attraction in the form of Curio, an SVOD service programmed with high-end factual programming. When it launches early next year, it will sit alongside the core Cirkus offering, a best-of-British SVOD service that launched in 2013.

A former Talk Talk, Tiscali and BBC exec, Cirkus cofounder Hugh Williams says there is a gap for an SVOD 'channel' focused on high-quality factual. "The Discoverys and the Nat Geos are chasing ratings because of the pressure on linear pay TV channels," he says. "They have vacated a space for customers who wants to watch intelligent documentary, who are being starved of this stuff."

Fellow co-founder Mark Bradford, a former Flextech exec, adds: "Channels do their distribution deal [with a pay TV platform] and then they quickly need to maximise commercial impacts. That drives them towards high-volume, lower-quality fact-ent that delivers those viewing numbers."

Discovery Channel founder John Hendricks observed the same trend and has rolled out an OTT factual service, Curiosity Stream. It, however, is aimed directly at consumers while Curio will be pitched to pay TV platforms in the same way as Cirkus, which launched in 2013 after agreeing a deal with Swedish cable operator Com Hem. Cirkus then launched in Norway and Finland, going live on TeliaSonera's Finnish Sonera IPTV platform. This June, it

rolled out in Iceland, on Vodafone's platform.

Curio will also hit the Nordics first. Cirkus' research shows the factual category is close behind drama in the region in the preferences of what it labels 'content connoisseurs' (people most likely to be consuming programming ondemand). Bradford says: "Documentaries work for 25-34s very strongly in the Nordic countries, as well as the 45s to 54s, so they cut across young and more middle-aged demos, which is unique to that market."

At launch, the service will have over 200 hours of long-form factual, split into three categories: 'The World Around Us', 'Civilisation' and 'The Way We Are Now'. With a tagline of 'For Curious People', Curio will be the first dedicated doc SVOD service in the Nordics.

The initial Cirkus service was designed as a hedge for operators worried about the advance of Netflix and its OTT brethren, allowing pay TV incumbents to launch a strong, branded SVOD alternative to the headline-grabbing streaming services.

"What we see everywhere is that platforms, particularly the big telcos and cable operators, are looking for SVOD content," Williams says. "They have discovered they are overweight in linear channels and underweight in VOD, and what customers want is content they can view on-demand."

Bradford adds that major pay operators are in many cases looking to trim their linearchannel offering and supplementing that slimmer line-up with on-demand. "There is a lot of talk about skinny bundles and operators getting rid of tier-two channels because they are no longer cutting the mustard," he says. "Operators can't ignore the threat of customers trading down and need to put more value into packages. That means more than adding another four or five linear channels; it is adding SVOD from various suppliers."

With their branding and offering to pay TV platforms, Cirkus and now Curio are presented like linear pay channels, albeit without a lot of the costs and challenges. "The problem with launching linear channels is you have a lot of luggage, a lot of people and back office, and hardware," says Williams. "So, while linear channels now also offer operators a lot of catch-up and SVOD, that is not the answer; catch-up is hard to integrate for the operator, and the SVOD from the linear channel operators is a lump of stuff viewers have seen on their channel anyway."

Should the documentary SVOD channel fare well, Cirkus will look to other categories, Williams adds. "We will see how this strategy will develop," he says. If we get this away successfully, we can look at kids or other categories and develop in the same way as linear channel groups have historically, offering a bouquet of channels."

In the short term, another advance for the original Cirkus service will be launches in the Benelux region and Germany, with operator talks underway. With these roll-outs and Curio, the ITV-backed SVOD service is increasingly a travelling Cirkus. **TBI**

4.00 PH Painting with Mark

9.00 AM Stockbroking with Jeff

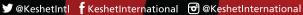




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racey Ullman is returning to UK and US screens with a new six-part sketch series and is heading to Cannes to promote the show with high hopes for its international success.

"I will be at MIPCOM to meet everyone," she says. "People need content, and there are so many digital platforms now and so many secondary markets. The involvement of the BBC and HBO shows the quality is there."

As the comedy star says, having been commissioned by UK pubcaster the BBC, *Tracey Ullman's Show* has also been picked up by HBO in the US.

Ullman has previously worked with HBO on *Tracey Takes On...* and another premium cabler, Showtime, on her most recent series, *Tracey Ullman's State of the Union*, which ran for three seasons, ending in 2010. She has also made guest appearances in numerous US TV shows including *Ally McBeal*, *Will & Grace* and *How I Met Your Mother*.

Her biggest success in the US was, however, *The Tracey Ullman Show*, a sketch-comedy series for broadcast network Fox with music numbers choreographed by Paula Abdul. It was also notable for animated bumpers, segments that saw the first-ever appearance of *The Simpsons*.

Tracey Ullman's Show is a return to characters and sketch comedy, and the comic's first for the BBC for 30 years.



Tracey Ullman's Show

Announcing the show, BBC comedy chief Ben Farrell said: "It's about time the Americans gave her back. Tracey has been the missing gem in the British comedy crown for too long."

Ullman says her Anglo-American perspective will become clear in the new show. "I think I am a hybrid of America and England," she says. "I've done several shows in America, and they have been a mix of characters and things from the zeitgeist. Each episode of the new show encompasses a day in the UK, where people come and go, from dawn to dusk."

Ullman acknowledges that the way we watch TV is changing, and so is the wider world. The increasingly multicultural face of the UK means that even though the show is ostensibly set in Britain, the star can include characters from around the world.

There will be a mix of fictional characters and those based on real people, with German Chancellor Angela Merkel and controversial News Corp executive Rebekah Brooks among those making appearances.

"A lot of the writers were on hiatus from *Veep* and the show has a global take," Ullman says. She adds that there is not a huge difference between working in the US and the UK. "It's a similar experience," she says.

Ullman had a brief and successful pop career and, as with her Fox show, there will be a musical element to the new series, with Richard Thomas, who wrote the score for Jerry Springer the Opera, on board.

The BBC is producing the show in-house

alongside Allan McKeown Presents, the prodco founded by Ullman's late husband Allan McKeown. DRG, which sells Ullman's Showtime shows, is handling international sales.

Noel Hedges, the distributor's executive VP, content and acquisitions, acknowledges that funny does not always travel, but is confident the show will work internationally.

"It can be tough, but Tracey is famous, and this type of sketch show, when done well, is more accessible than narrative comedy," says Hedges. "It is harder to sell in the dubbing territories, but this is very visual and Tracey is larger than life, so dubbing does not affect the comedy value."

DRG will give the show its global launch at MIPCOM. **TBI**

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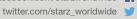
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Force of gravity lifts IPCN

IPCN is the Anglo-Chinese content company that has taken Western formats including *Supernanny* and *Top Model* into China. With backing from a large Chinese investor, it is about to move to the next stage



ith bases in London and China, IPCN has built a healthy business working with international content owners and taking their formats into China. It has brokered deals for versions of shows including Supernanny (pictured), The Secret Millionaire, Got Talent and The Voice, but bringing on a new investor earlier this year has opened up new opportunities, CEO Rebecca Yang tells TBI.

In April, state-backed Chinese private equity fund China Media Capital bought into IPCN via its Gravity subsidiary, a change that saw it assume a 48% stake in the business and then chairman, and former ITV executive, Mick Desmond exit.

Former SMG boss Li Ruigang is a pivotal figure in Chinese media (dubbed in some quarters the Chinese Rupert Murdoch), and Yang and IPCN are working with CMC, of which Ruigang is the chairman, on several of its R&D projects.

One is Whaley Technology, which is backed by CMC, plus Alibaba and Tencent. It makes low-cost smart TVs for the Chinese market. IPCN's role will be to help source content that could sit on the connected TV platform, and to scope out potential content partnerships, notably in lifestyle, docs and movies, both creating and buying content.

"It is a different strategy to that of other smart TV manufacturers in the way it is backed by content," says Yang, whose company is working with creative and indies in the UK and Europe, including Zig Zag and Objective, co-developing original ideas that could travel.

Having started out in the UK, much of IPCN's recent work has been taking content to China. Yang is now hopeful that content will increasingly start to flow the other way.

"We started as a London-based company, so our understanding of this part of the world is good," she says. "It impresses people in China, and our business really picked up there. Now, with the investment, we hope we are a step closer to the original dream, which was to bring things to, and also out, of China and find content that can be syndicated worldwide."

It helped in the early-stage development of *Sing My Song*, the talent show that aired on CCTV-3 and is sold internationally by ITV Studios Global Entertainment, the first time the UK-based distributor had picked up a Chinese format.

The Chinese content-creation sector is far less mature than that in the West, but developing, Yang says. "There is no lack of creativity, but there hasn't been the infrastructure, incentives or industry to encourage that creativity to make a format or show that can travel. The [local] ideas can also be quite local and culturally specific, but that is changing with a younger generation that in some cases will have been educated abroad or have the internet to help them understand the world."

Meanwhile, the next format that IPCN will be taking into China looks likely to be a show inspired by British format *Celebrity Antiques Road Trip*. It is working with Scotland's STV Productions, which makes the original, and the as-yet-untitled Chinese show will centre on the



art of haggling, which is common practice in China. It will be shot in London, with Chinese celebs travelling to the UK to take part in the antique bartering format. It has also optioned Turkish DJ talent format *The Remix* from Global Agency.

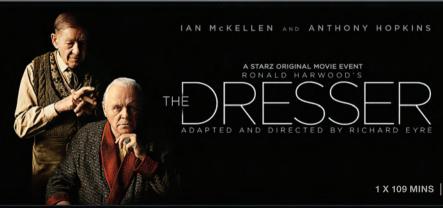
With Gravity behind it, IPCN is focused on TV and more. "We could pick up sport or music rights, or it could be clothing [IPCN has a fashion line]," Yang says, "Or we could even acquire an indie company," she adds. **TBI**















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TRX sets out to revolutionise distribution

David Frank formed Dial Square 86 after leaving Zodiak Media in 2013, he set out to invest in disruptive digital companies. But that has now changed. David's brother Matthew joined Dial Square the following May, sparking the new company to look at the content sales sector. "We looked at large, medium and small companies, and realised the opportunity was not in buying a distributor but in disrupting the market itself," says David Frank. "It became clear that everything else in the content market has changed dramatically in the last ten, or even five years. The one thing that hasn't changed at all is distribution."

This was the rationale for TRX, an online trading platform that will connect buyers and sellers in an eBay-like environment. Management hope the platform, which is now the sole focus of Dial Square, will be ready for a MIPTV 2016 launch

TRX is designed to be a place where secondary rights – those left on the table after the primary broadcast deal and any presales are done – are traded. There will be about 10,000 hours on the system at launch and Matthew Frank says he expects many of the top distributors to participate. TRX has also made an effort to bring the US channel-operating groups on board and Discovery Networks International, PBS Distribution and Turner are taking part in the beta test. Distributors including Cineflix Rights and Sky Vision are also among the beta testers.

There are, according to Matthew Frank, a growing number of acquisitions folk in the content business who need a system like TRX. He says: "When I left Zodiak Rights there were 400-500 registered buyers on the [company] system. We estimate there are now 14,000-15,000 content buyers and a lot of people not even on the radar of distributors."

While not specifically aimed at buyers from smaller territories and services, an online platform does allow acquisitions execs with more modest budgets access to sellers. Equally, for sales execs, a series of online transactions in territories they cannot regularly visit, makes sense. "If you are a smaller VOD buyer, or



smaller platform buyer in a far-off market and you can't actually get a meeting with most of the distributors at a market, then it does not make sense to spend all of that money going," says Matthew Frank. "TRX allows any registered and verified buyer, no matter how big or small, to trade. A lot of people out there want to buy content and struggle because they can't access the libraries of the bigger distributors."

When a deal is agreed on TRX, a 21-day window opens. In that window, buyer and seller must agree payment terms, delivery specs and contractual terms and definitions. Assuming these are satisfactorily concluded, the deal is done and TRX takes its 10%.

At the premium end of the content spectrum, however, distributors do not want to see their product, and a price range, listed side-by-side with that of their peers. That is why TRX has recently added private marketplaces (PMPs) of the kind that exist in some advertising sectors.

"People are happy to have the longertail and back-catalogue content in the open market but for the more premium content, where pricing becomes more sensitive, there are private marketplaces, which are like a private meeting room in a booth in Cannes," Matthew Frank says.

The digital trading space is not crowded, but TRX will not be the first to market. Berlinbased Mediapeers was sold to Deluxe last year and runs the MPX business-to-business marketplace. It counts Lionsgate, MGM and FremantleMedia among its customers. UK-based ScreenHits also has a B2B platform and has launched a consumer-facing service to

allow content companies to test programming with the public and sell directly to them. LAbased Filmtrack, meanwhile, has clients including A&E, National Geographic Channel and HBO.

The physical markets appear to have the most to lose if buyers and sellers move to TRX or any of the abovementioned systems.

Understandably, Laurine Garaude, director of MIPCOM organiser Reed Midem's TV division, begs to differ. "MIPTV and MIPCOM bring together the global content ecosystem and are where television producers, distributors and acquisition executives from around the world come to do deals," she says. "Face-to-face remains a critical element of the business process. In addition, these relationships increasingly involve projects at the early stage, where investments and coproduction alliances are discussed or format deals imagined."

The markets are also, increasingly, about more than just buying and selling. Garaude says: "When you factor in the extraordinary learning possibilities offered by the MIP conference programmes, the opportunities to meet with start-ups that are transforming the entertainment industry and the long-term relationships that are formed at the MIP events on a truly global level, we are confident that they have a healthy future."

Matthew Frank agrees with the MIPCOM chief and says TRX will not replace the need for physical events. "In fact quite the opposite," he says. "TRX allows people to transact very quickly in an online environment, but it doesn't market or promote shows. That is the function of MIPCOM or Natpe or ATF. TRX kicks in as those markets finish."

One issue for time-poor distribution execs is the effort required to get content on a digital system. TRX execs say they can partly automate the uploading of metadata and, acknowledging that it is a chore, will help companies to get their complex rights details on the system. TRX is placing a big bet that it can persuade sellers its system is worth that investment in their time. "The benefits of going through that are worth it if dealing becomes much quicker and then you are monetising content that was gathering dust," says Matthew Franks. **TBI**

AMC'S ORIGINAL MARTIAL ARTS DRAMA into the BHIB **INTERNATIONAL PREMIERE** WITHIN MINUTES OF U.S. BROADCAST **NOVEMBER 15, 2015** ON амс AMC GLOBAL International Distribution by **eOne**

itting in his glass-walled sixth floor office at Turner Broadcasting System EMEA's London base, which looks out over the rooftops of Soho, Giorgio Stock has the air of an executive enjoying his work. "Twenty-fifteen will be by far the best year we've had in terms of reach, ratings and the bottom line, and that's created a wave of enthusiasm that allows us to innovate," he says.

Turner's overall revenues in the second quarter of this year (the most recent available) increased 3% year-on-year to US\$2.8 billion, with the international networks division bringing in higher than domestic rates. Stock's Europe, Middle East and Africa division sits within this, and recent trends point to a sense of renewal at the group.

When Stock joined, the picture was different. Turner's international president, Gerhard Zeiler, had announced that one-third of the EMEA staff were to go as part of a wider international restructure aimed at reducing costs and strengthening regional operating power.

Stock's first real job was to oversee what he describes as a "gigantic" overhaul, recalling his difficult first town years at rival media giant Disney, where he was executive VP and general manager of Disney Consumer Products, Publishing & Retail EMEA and also senior VP and managing director of Disney Channels Italy.

Sources that know Stock say he was initially surprised by the siloed Time Warner model, which keeps Turner, Burbank studio Warner Bros. and premium cable operation HBO largely separate, as Disney is known for its integrated approach to the various elements of its widereaching business. Asked about this, Stock says he has been able to imprint his own vision on Turner EMEA, and feels a "creative freedom" he has not had anywhere else.

"Probably the main reason I came here was I saw a lot of opportunity to deploy some of the experiences I'd had elsewhere in terms of committing to brands and synergy across the company," he says. "I found it much easier to implement than other people thought."

"Time Warner has typically been managed as different entities - that is not a secret - but it is up to us as leaders within the organisation to suggest initiatives and ideas that ultimately federate a common point of view."

Taking stock of Turner

Turner Broadcasting System EMEA is heading for its best year, both in terms of ratings and finances, its president Giorgio Stock tells Jesse Whittock. So how has the business, which cut a third of staff just two years ago, achieved the turnaround, and what's next for the growing unit?

> hall presentation where plans were laid out to staff. Industry sources at the time talked of great uncertainty and upheaval, but it is fair to say these feelings have largely dissipated in the two years that have followed.

> "My first year here was incredibly intense, but I'm thrilled at the speed of the progress because, clearly, the fact that the ratings and revenues are up across the board means where we cut were places the audiences didn't see as particularly valuable," says Stock.

> "The areas where we should be investing, such as programming and marketing – the things that ultimately impact us as a curator of branded destinations of original content – we've actually scaled up.

> "The numbers are better, the leadership in places feels confident it can affect change, and ultimately the results have led everybody to feel much more comfortable about the future that they did two years ago."

> The newly-found feel-good vibe is reflected in Stock's statement that the expected EMEA growth, a figure Turner does not break out in its earnings results, is "pretty much true for all markets; it's not like one is driving it and skewing the numbers".

Stock came to Time Warner-owned Turner after 15

One key strategic move, which harks back to Stock's experience in kids and family franchises, has been to push Boomerang as Turner's second international children's pay TV channel alongside Cartoon Network.

In October last year, the net was repositioned as an allanimation, family-skewed proposition. The move was followed by the announcement of a big inter-company deal with Warner Bros. that includes the latter's animation division delivering more than 450 half-hours to Boomerang. New original shows include Bunnicula and Wabbit - A Looney Toon Production, and many classic toons from the Warner Bros. library will be available.

Stock says the announcement was an indication that the company sees kids as an important global business and that it has a joined-up approach. He adds that it was both a statement to the outside world but also to the internal group "that we see cooperation around this proposition as being a win-win across the board. Most importantly, we're looking at the audiences as our objective together".

"Time Warner is a different company to Disney," he says of the company make-up. "It is not a company united by one brand and is much more diversified. In this space we clearly want to be more united."



The turnaround story at Turner and parent Time Warner is largely based on bets on content. Time Warner rejected 21st Century Fox's opportunist effort to take over its rival last year by claiming its strategic plan would "continue to drive significant and sustainable value" and that the value of its assets was "only going to increase".

To that end, Turner is doubling its investment in programming and content. "If I look at the world we're in right now, it's probably the most exciting time to be in content and media ever," says Stock.

In EMEA, Stock has identified opportunities in children's (Turner kids channels has distribution in 276 million homes) and news (CNN is in 191 million), but says the area with the most scope for growth is general entertainment networks, which are in around 103 million homes. "By the standards of other operators that is huge, but by the standards of our ambitions there is much more to do," he says.

"General entertainment is an area we should have progressed further with in the past," he adds. "Catching up now is more difficult since platforms are relatively well serviced, but with the quality and quantity of shows we have, we can look at longer-term approaches."

The core focus will be the TNT brand, which is already

established in the US and distributed in Germany and Spain. New launches in Poland and eastern Europe follow this month, while the brand is also in the Nordics, where a bigger Turner portfolio is "shrinking around the channel".

Meanwhile, former NBC and Fox entertainment chief Kevin Reilly has joined Turner as chief content officer and president of TNT and TBS, and this is a boon for the entire business, says Stock.

"With the commitment of very significant investment in output from our studios, and with Kevin Reilly joining to give us confidence, we have the pieces in place to develop shows that will resonate in both the American and global marketplace," he adds.

TNT is beginning to offer an original programming opportunity in local markets. In Germany, the pay TV channel "did something unusual" and launched original telemovie *Add a Friend* in 2013. The effort was a massive critical success, winning Germany's prestigious Grimme-Preis award, which free TV channels usually bag.

"Now we're launching a new series that's more ambitious in terms of scale, budget and length called *Weinberg*," says Stock. "To date, we're the one player in the [German] pay TV universe that wants to be known for



our local original programmes."

Weinberg, which comes from Bantry Bay Productions and Twenty Four 9 Films, is for TNT Serie. The mystery-drama miniseries runs to six episodes, and will be sold internationally as *The Valley* by Beta Film.

TruTV is another channel set for further international roll out. After launching in the UK last year with acquired series including *RuPaul's Drag Race*, it has been steadily improving its ratings share, even as the British market has become more crowded with the launch of Viacom's Spike. "We will go beyond the UK," says Stock.

When Zeiler brought Stock into the Turner fold, he cited the executive's significant experience in the "digital retail space" as a key motivation.

It's this experience that led to Turner striking an innovative agreement to launch a curated version of popular US cable service Adult Swim on streaming music service Spotify.

Much of Adult Swim's recent buzz has been around anarchic animated series *Rick and Morty*, which people had begun asking to acquire. Instead of selling the series in a

programming deal, the decision was made to take Adult Swim global with the show as the fulcrum.

"From the data we've seen there is real momentum internationally, audiences want to see the show and operators want to buy it from us," says Stock. "But we've decided we want to build the whole [Adult Swim] brand, and not just that show. It is a brand we're trying to break in non-traditional ways."

Adult Swim will soon debut in the UK, where a brandedblock on pay TV channel Fox has been secured as a multiyear partnership, and there is also distribution in France on thematic channel Enorme TV. Elsewhere in Europe, Turner will continue to target cinephiles with its TCM channel.

It is fair to see the Giorgio Stock of Turner Broadcasting as a catalyst for change and creative renewal. With new management coming in at the top at Warner Bros. (Kevin Tsujihara), HBO (Richard Plepler) and Turner itself (John Martin) following his appointment in February 2013, the wider group has indeed been exploring new avenues and ideas.

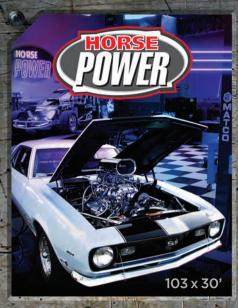
Stock says he and his EMEA team were "advocates of the two-channel strategy" for the children's TV division and that he used his influence within the wider Time Warner group ("I have a seat at the table") to "sell" the approach.

"I see the positives of the fact there's value that can be generated, and there's no ingrained reason why the company would be hostage to old organisational structures," he says.

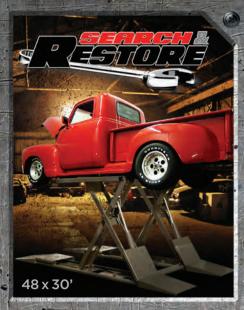
Stock is also open to following the template HBO took to the OTT space, but warns this would only happen if conditions were right. The premium cabler's decision to launch a standalone SVOD service HBO Now in the US has not so far significantly cannibalised its core pay TV subscriber base.

"We are a curator of great content with compelling destinations," says Stock. "Curator means we understand our audience very well. If there are markets where we might be skewed by other peoples' initiatives, we might consider going solo." **TBI**











401 x 30' 1

13 x 30'

OVER 1000 EPISODES

OF =

AUTOMOTIVE

• PROGRAMMING •



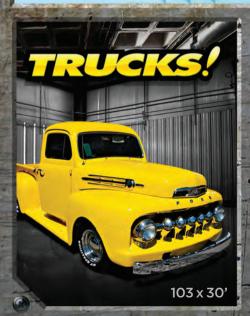


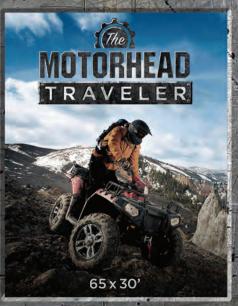


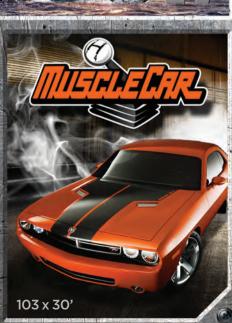
SL# SENSE

34 x 60'

130 x 30'









esley Snipes is the latest Hollywood actor to transition from film to TV. The *Blade* star says the lines between the different mediums are blurring. "They are amalgamating into one, and with home theatres, you can have a movie experience in your home," he says. "The digital technology we now have access to has also expanded the possibilities, allowing the TV artist and cinematographers to create work normally seen in a feature film. Then, with the landscape opening internationally, it is a great opportunity for a very creative, out-of-the-box, and in some ways less [financially] risky, exploration of content."

Snipes plays Mr Johnson in *The Player*, a mysterious character who works for a secret society whose super-rich members place high-stakes bets on the outcomes of real-life crime. Snipes' character is effectively the pit boss (manager) of this illicit gambling operation, but also dons disguises and takes on new personas as he helps the outside-the-law operation run smoothly. *Strike Back*'s Philip Winchester plays Alex Kane, 'The Player', a former FBI agent attempting to prevent the crimes on which the organisation is betting. *Wolf Hall*'s Charity Wakefield co-stars as an inscrutable agent working alongside Mr Johnson.

US broadcast network NBC has given the show a prized Thursday-night



slot in its fall grid, a sure sign it believes The Player could become a fixture.

Snipes says he initially thought he had been lined up to play the Alex Kane character, but the producers offered to make the Mr Johnson role meatier if he came on board. "They said, 'yes, if you are interested, we'll expand the role and the concept to take advantage of some of the things you are known for, and some of the things you would like to do'," he says. "I thought that was an interesting proposition, and [Mr Johnson's] mystique and enigmatic nature let me explore a lot of different things: accents and disguises; creating the other characters that Mr Johnson uses to navigate the underground world he is a part of.

"Some people only know me as an action artist, the action guy; some only know me as the drama guy; and some are familiar with my comedy work. This was an opportunity to display and build on all of those tools."

The Player combines episodic and serialised elements in the same way as *The Blacklist*, and executive producers John Davis and John Fox, plus several of the writers came over from the James Spader show to work on *The Player*. Another connection between the series is that both are out of the Sony Pictures Television stable.

Not only do *The Player* and *The Blacklist* share much of the same DNA, they will also be on NBC on the same night, with *The Blacklist* at 9pm giving a strong lead-in to *The Player* at 10pm. The story-of-the-week-meets-serialised formula worked for *The Blacklist*, and Snipes says: "We tried to create a movie a week that stands alone and also to have through-lines that can carry from season to season or episode to episode. If you didn't see the first episode it's OK, because you can become a fan based on seeing the fifth, or the seventh."

RTL in Germany and TF1 in France are among the early buyers of *The Player* and internationally procedurals are in short supply. The series will be in demand, according to Keith LeGoy, president, international distribution, at SPT, which is selling it. "*The Player* fits perfectly with the needs of international buyers," he says. "As a crime procedural, it hits the most highly demanded and viewed genre around the world. It has a highly recognisable, star-powered cast, which gives it fantastic marketing edge in a world where audiences face a myriad of competing entertainment options and the need to break through is paramount."

What does having a movie star like Snipes on board do for the sales effort? "It makes it a lot easier and a lot more fun," says LeGoy. "Wesley Snipes is an iconic global movie star and an amazing actor. His brand cuts through to allow a broadcaster in any country to gain enormous marketing muscle and a compelling competitive edge."

Snipes says that viewers will get satisfactory answers to some of the mystery elements that unfold in the serialised part of the show. He does not give away spoilers, in part because he knows only so much about where his character is headed. "We're in the dark on a number of backstories and plot," he says. "We get some pieces, but not everything. I think that is part of the magic and excellence of these writers, who can think that far ahead about story, character and motivation, and also execute week to week."

LeGoy says the procedural hybrid offers buyers the best of both worlds. "A casual viewer will enjoy great action, thrills and a fantastic resolution each week," he says. "At the same time, there is a deeper, longer-running story, and the journeys of the characters that will run through each season and the series add a further layer of fun and intrigue for loyal viewers."

Snipes' deal on *The Player* is formulated such that he can carry on making movies – *Blade* fans are particularly excited about the possibility of a fourth installment of the Marvel franchise. The actor clearly still has a keen interest in making movies. Has *The Player* whet Snipes' appetite to do more TV? "Well, that still remains to be seen," he says. "From a producer and business perspective, TV is a wonderful space to be in, and we're going to stay in it for a while."

The next move for the star, who has his own prodco, could indeed be in a producer role. He has two projects, one cable and one network, in active development, he tells TBI.

Shorter term, Snipes' main goal is to become Sony's and NBC's most valuable player. TBI

25 NEW SHOWS FOR MIPCOM



ROYAL SECRETS 10x30

TVT Productions

Each half hour will reveal a series of secrets about members of Britain's Royal Family; which has at its head the world's oldest monarch, Queen Elizabeth II.



MEDIEVAL MURDER MYSTERIES 6x60

Like a Shot Entertainment

We try to solve what really happened all those years ago and separate which amazing stories are real and which are pure legend.



INSIDE JAGUAR: BUILDING THE CAR THAT MONEY CAN'T BUY 1x60

Arrow Media

The Jaguar Lightweight E Type, this is a car that no amount of money can buy – you have to be invited to purchase it.



MEGA-YACHTS 1x60

Icon Films

We meet the people who design, build, buy and sell the biggest mega-yachts on Earth; revealing a world where money really can buy you everything.



DEALS, WHEELS AND STEALS 6x30 Attaboy TV

We go behind the scenes at Britain's independent car auctions as some of the country's wittiest and wackiest car dealers compete to bag unbelievable bargains.



COMBAT TRAINS 8x60

Woodcut Media

These trains were a vital cog in the military machine and this series explains why and highlights the extraordinary human stories alongside them.



41 DOGS IN MY HOME 1x60

Middlechild Productions

Can a love for animals go too far and turn into an addiction? Amongst the millions of doting owners is a small minority whose love has reached extreme levels.



LOVE ME, LOVE MY CATS 1x60

Middlechild Productions

In this extraordinary programme we meet some of the most fanatical kitty lovers who have taken their love one step further. For some, one just isn't enough.



CHANGING FACES 6x30

412 Entertainment

A brand new plastic surgery series looking at the transformation of people wishing to make the most of themselves and their journey to get there.



BORDER PATROL 8 series 84x30

Greenstone

We are given a fascinating opportunity to see what really happens in the fight to protect the border against the entry of drugs and harmful diseases.



SINATRA & THE JACK PACK 1x60

Circle Films

Sinatra and Kennedy first met in 1956. The two men liked the good things in life and thrived on their mutual ability to attract women and admirers.



BONDI RESCUE 11 series 149x30

CJZ

In a mix of high drama, great characters and an exotic location, *Bondi Rescue* follows the work of the elite, professional lifeguards who patrol Australia's busiest beach.



COPYCAT KILLERS 13x60

Story House Production

Hollywood made them do it... This new series chronicles the real-life copycat crimes and criminals inspired by blockbuster movies and TV series.



SURVIVORMAN 7 series 60x60

Les Stroud Productions

No food, no shelter, no fresh water, no tools...no camera crew. One man – alone in the wilderness. Join us as we follow filmmaker and survival expert Les Stroud.



sales@tcbmediarights.com +44 20 3735 5222 www.tcbmediarights.com Thomas Benski is intent on turning multiplatform producer Pulse Films into a key television programming supplier. He and new unscripted chief Roy Ackerman tell Jesse Whittock about their plans

Pulse quickens



homas Benski says the coming years will establish his firm, Pulse Films, as a key television producer, in the same way the firm has carved out niches in independent filmmaking, music videos and branded content. The London-based firm is lauded as an organically multiplatform production group for young-adult and emerging audiences.

Pulse Films turns ten this year. By far its biggest television production was *Pineapple Dance Studio*, the Sky I docu-series that launched the media career of dance expert Louis Spence, but this may not be true for much longer. Earlier this year, Benski hired former NBCUniversal deal-maker Patrick Vien as president as part of a strategy to significantly push into TV.

"It was key to bring in a partner at a very senior level who has gone through very big international growth in the media space, taking businesses from where they are to where they want to be," says Benski, who launched Pulse with Marissa Clifford while still in his twenties.

"Television is at the core of our expansion plan; you're going to see a very big evolution for the company in the next few years, and Patrick will be at the forefront of that. He's been a fantastic asset for me and the business – people really look up to him, but he also understands the opportunity at Pulse."

Vien's hire was soon followed by the announcement of former Fresh One Productions chief Roy Ackerman as managing director, unscripted programming.

"I had some other opportunities running existing indies within consolidated companies, and their business models are fine, but I really like the way Thomas has built his company," says Ackerman of his new role. "The classic indie model relies on the lottery-ticket win of a big, returning format. Pulse has a number of different revenue streams."

Channel 4 factual commissioner Emma Cooper has been drafted in as creative director ("She is one who is really interested in what young people want to watch," Ackerman says), while Objective Productions' Nathan Eastwood (*The Cube*) came on-board to run a new formats development firm, East Entertainment, which Pulse is running as a joint venture with Israeli creator Abot Hameiri.

"Nathan was at the point of his career when he'd done all of the big shows, and had a real hunger to do something more," says Benski. "He completes the triangle; he's bringing reputation and security to broadcasters."

"This is to really try to create the next generation of formats," says Benski. "We're using UK as a launchpad, then thinking about it on a global scale."

Pulse is best known for its factual entertainment and factual programming such as Channel 4 doc *When Bjork Met Attenborough* and ITV1 *The Cruise Ship*, and to this end Benski acknowledges there will be "some crossover" with East. He adds, however: "We like the idea of going to the market with two propositions for IP and formats."

The first fruits of this partnership are to come soon, Benski says, while another strategic agreement with hipster brand Vice Media has helped Pulse move into the US. The brands' sensibilities were linked many times in the media before the November 2013 deal was confirmed.

"We are more talent-focused than Vice, and there's a good distinction between us, but there's also a good simpatico and a shorthand that doesn't happen a lot between different companies," says Benski.

The pair have been working on opportunities for nearly two years. "We identify opportunities that make sense from a cultural, strategic and financial point of view," Benski says. "That's what happened there, and the future is going to be even more exciting there over the next few months."

Everything that is added to the Pulse slate in coming years will have the company's trademark cool, indie sensibilities, regardless of genre. "Everything we've done has been very narrative-led and cinematic – even in some of the feature documentaries we've done," explains Benski.

"The consolidation of the marketplace - and



Furthermore, the firm is moving into scripted television, with Benski noting that the firm has "acquired IP, set projects up and packaged projects with big talent".

"The ambition in scripted has always been there. We're making independent films already, and television is next," he adds.

The other area of focus is short-form episodic digital content. "Given our background and our talent relationships, we think there's an opportunity to package that and become the best digital-first company out there," he says.

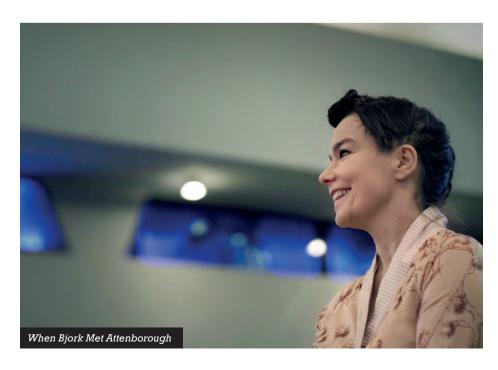
the similarities of a lot of content – means it is crying out for new voices coming through, and we think we are one of those voices."

"We think it's a great time for a larger independent like us, because if you are not entrepreneurial and reactionary, and if you can only produce in specific verticals or genres, or only use a specific distribution method or platform or company," he adds.

"It's tough to be truly independent and small because the market is challenged, and to be at the top level because a lot of it is about integration, synergy and things that can be a hurdle for creativity. We're trying to make the most of being a bullish mid-sized company. We can take risks and make mistakes, and that's right for the company."

With a new pipeline of Pulse content coming, distributors' interest may be piqued. To this point the firm has worked with various vendors such as ITV Studios Global Entertainment for *Pineapple Dance Studios*, which last year sold into the US for the first time on arts-themed network Ovation.

"With that in mind, for the medium term, we do not have intentions of selling TV rights ourselves, but are excited to continue to work with the best distributors in the world," says Benski. "Having said that, given our digital-first focus we are able to incubate IP digitally, which means we can reverse engineer the process to sell to TV. This enables us to sell certain rights ourselves or in partnership with our broadcast partners." TBI





Going (digital) native



Why are television's biggest groups spending millions of dollars on YouTube talent-focused multichannel networks? Jesse Whittock speaks with key players to build a picture of this emerging ecosystem and identify where the digital dollars are coming from

esearch released this summer suggested the top 100 YouTube multichannel networks are worth nearly US\$10 billion, with the entire ecosystem now valued at

twice that amount. The leading 100 networks were notching up a combined 100 billion views a month, according to Ampere Analysis.

Impressive numbers – especially since the average MCN with 100 million monthly views

is worth US\$97 million and generates US\$21 million in gross revenue – but where exactly is the value for the traditional players when most of what's made in ad-funded revenue is split between the channel creator and YouTube?

According to Arnd Benninghoff, CEO of play and ventures for Modern Times Group's digital investment arm MTGx, the value is locked in a desire to reach viewers "on their own terms".

"This means offering them the content they want, where and when they want," he says. "Young generations of viewers and millennials are digital natives, and a lot of their viewing is done online. This has created not only an ecosystem of content driven by new talented video creators, but also significant business opportunities."

MTG, a European broadcast, production and distribution group, has this year moved into the MCN space by taking control of fast-growing Sweden-based start-up Splay and Netherlandsbased Zoomin.TV, the former a deal that brought its 41% shareholding up to 81% and the latter a 51% stake for around €44.9 million (US\$48.7 million).

"Our strategy is to invest in relevant, complementary and scalable digital brands, content and communities," says Benninghoff. "MCNs like Zoomin and Splay have been frontrunners in connecting to millennial audiences and support the talent that creates the content that these viewers consume. The growth that these companies have been able to achieve is a testament to that."

To illustrate that notion, he says Zoomin, which claims to be the world's fifth-largest MCN with more than two billion monthly views and 100 million subscribers, had a growth rate of 70% last year, and that Splay has become the Nordic region's "undisputed" market leader in less than two years.

Almost every major broadcast and production group now has some form of investment in a multichannel network. Key deals include The Walt Disney Company paying up to nearly US\$1 billion for Maker Studios, ITV buying into parent-skewed Channel Mum, and Peter Chernin-backed Otter Media investing in Fullscreen, which is now launching is own SVOD platform.

This investment is in part based on a belief within the ranks of television executives that they are missing young audiences on traditional television channels and that MCNs have a better grasp on this potentially lucrative demographic.

"Television is changing," says Reza Izad, CEO of Collective Studio 71. "People are consuming differently and that is changing the economic model."

"There is certainly a sound logic underpinning this series of deals," says Adam Thomas, principal analyst at Ovum, "But the acquisition of MCNs is just the start of the process, as their owners seek to move beyond YouTube and transform their assets into multiplatform networks that are active across as many outlets as possible."

Collective Studio 71, valued at US\$240 million, is the result of a merger between Studio 71, the MCN arm of another European broadcast group, ProSiebenSat.1 Media, and

benefits the other with direct sales to specific client bases. "As we build a network of sales and talent around the world, there are lots of synergies and lots of opportunities. Plus the world is going multiplatform – and not just on YouTube – and it has gotten really interesting. That means you need smart people around the world, and the nice thing [about Collective Studio 71] is this is going to be highly synergistic. We're going to be coordinated and controlled."

Philipp Bernecker, COO of Germany-based MCN Divimove, has also seen his three-year-old company join a bigger media group this year. FremantleMedia paid an undisclosed amount for a 51% stake in the firm, which is another that can claim around one billion views

growth and building an actual business, and that's something that's very important for us [regardless] of what's happening in the market around us," says Bernecker.

He points to three key elements behind the recent M&A activity: access to talent, access to niche demographics and distribution channels, and accrued data. For the MCNs, the play is simpler, sources argue: immediate scale and investment, and experience with professional production. "We profit a lot from that," says Bernecker, who argues that the term MCN "means nothing", adding: "We are actually a digital-native company."

Divimove's key talent includes EnzoKnol and makeup-focused Nikkie Tutorials.

Endemol Shine Group has taken a different approach with its digital content arm, Endemol Beyond. The parent firm invests €10 million a year in its own network, which is focused on premium original programming through locally curated digital channels such as Icon and Legends of Gaming.

"Launching our own MCN has allowed us to build up our own properties, formats and content and so was always going to be the best fit with the broader focus of the group," says Georg Ramme, who has run the operation since its launch in 2013 and was recently promoted to group managing director.

Essentially, the core idea is to replicate Endemol Shine's formats-development business through local production hubs manned by creative digital producers that understand the requirements of different platforms.

"We invest in content that is engaging, sellable and brand friendly, achieves a high number of views and has the potential to travel internationally," says Ramme.

"There are three key areas we consider in scaling the investment: first the size of the market, second the capacity to monetise in the market and third the growth potential of



LA's Collective Digital Studio.

The deal, closed over the summer, saw ProSiebenSat.I take a 75% stake, with Izad and his Collective Digital Studio co-founder Michael Green jointly managing the company with Christof Wahl and ProSieben's Sebastian Weil and Ronald Horstman. The firm's leading channels include Good Mythical Morning, Cyanide and Happiness, and VitalyzdTv.

"ProSieben's Studio 71 was a combination of really great TV content distributed online such as for *The Voice Kids*, leveraging their shows into social, short-form video, and talent: they had five of the top ten German YouTube stars," says Izad. "They were leveraging their media skill to drive revenues, and that's something we could identify with."

Izad says each side of the new company

a month. This came after RTL-owned producer FremantleMedia had acquired fashion and beauty-focused StyleHaul and BroadbandTV, which itself went on to acquire kids- and teenskewed MCN YoBoHo.

"In the case of Divimove, we're investing in



"Television is changing.
People are consuming
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Reza Izad
Collective Studio 71



the market."

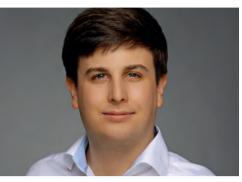
Ramme says the emergence of the MCN market was a natural evolution. Looking at the wider ecosystem, he says: "The digital world and online video market has simply opened up new

Izad says it has become a "very competitive market" for premium digital content, both for the social web and OTT platforms. "We have to make sure content gets to the market correctly," he adds. "We want to maximise every deal."

"We're building an actual business. That's very important for us [regardless] of the market around us"

Philipp Bernecker

Divimove



ways of distribution and reaching audiences, and the way that today's young generation are choosing to consume content means that online video is becoming increasingly central to what we do."

"Obviously the market is still young and has a long way to go, but it is growing and the monetisation and budgets are increasing," he adds. "And we actually are already making profits in this space. More broadly, online video is a rapidly growing market for content, and one that producers have to be part of if we are to be equipped for the future."

Both Endemol Beyond and Collective Studio 71 see MCNs as a breeding ground for television formats and content that can be sold to more established digital platforms such as Netflix and Amazon Prime Instant Video or broadcasters.

A show based on CS71's Cyanide and Happiness channel has been sold to an undisclosed OTT service, and talent from the LA side such as Fred Finklehorn and The Annoying Orange have had huge success transitioning to US children's cable channels.

The deal with ProSiebenSat.1 is also feeding a strategy to launch digital formats internationally, which is similar to the Endemol Beyond localisation plan. A Studio 71-shot German show titled *Last Man Standing* will soon be turned into an international effort, as Izad believes it would work "as much in the US as in Europe".

"We have a whole team of folks that identifies talent," he says. "Some people want to grow audiences, while some want ad sales, and we look to see if we can build a plan around that. We do launches, content creation and ad sales very well. We also have technology that we use to identify talent early."

MTG's Zoomin will also benefit from being in a group with a major TV producer, namely Nice Entertainment, says MTGx's Benninghoff. "Zoomin's strong background in digital videocontent creation will enable it to work closely with Nice in order to continue evolving our content products," he says.

MTG has also acquired a 74% stake in Cologne-based 'e-sports' gaming specialist Turtle Entertainment, which distributes more than 16,000 hours of live content from events including Intel Extreme Masters via channels including Twitch and YouTube.

"Gaming video content alone already attracts 468 million online viewers, and is a US\$3.8 billion revenue opportunity, according to a recent report by Superdata," says Benninghoff.

Ampere Analysis estimates that typical MCN valuations are between 25 and 35 times annual revenues (this compares with between eight and 15 for typical TV producer acquisitions), but that this still represents good value thanks to the huge growth rates, global reach and the future-proofing opportunity.

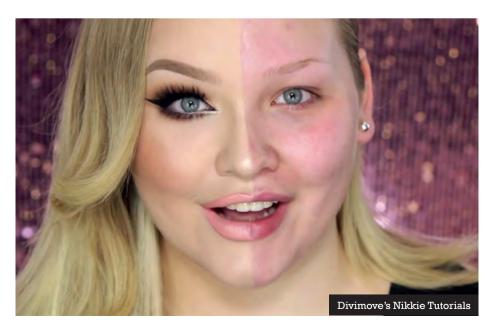
"Many MCNs are seeing 100-200% or more growth year-on-year," says Ampere research director Richard Broughton. "This is a big contrast to slow – or contracting – growth at traditional broadcast businesses."

Furthermore, "To use the 'S' word – 'synergies' – ad-sales, production expertise, rights buying and cross-promotion, are all reasons for the combined company to be stronger", he adds.

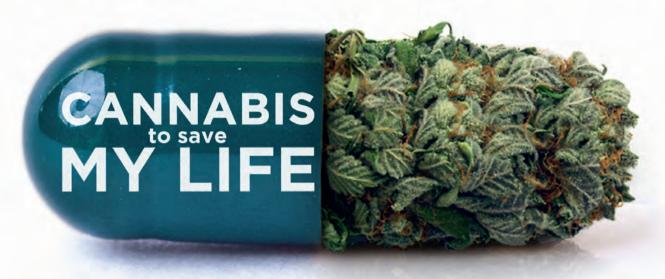
"Lastly, they permit rapid innovation and experimentation with formats and shows at low direct cost and low opportunity cost – format experimentation in traditional broadcast can be expensive, as there are finite broadcast slots to use. The same isn't true for online."

With most major MCNs now part of larger groups, there is a sense the land grab is over, but firms are still eyeing investmenmt. "We are always on the lookout for relevant investment opportunities that are in line with our strategy," says Benninghoff. "We already have our own portfolio of popular digital SVOD and AVOD services, and these businesses complement our existing reach and content offering perfectly.

The content and formats that our new companies provide let us reach more viewers with more content, and also explore the opportunities for cross promotion and on-going evolution of all of the services."



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However, some of the deals of recent years have had "a whiff of undue haste about them", says Ovum's Thomas. "There are only so many large-scale MCNs in play, so anyone wishing to enter the sector had to act quickly or risk being left out. At US\$500 million-plus, Disney has paid a serious price for Maker and there are indications that the assimilation process has not been particularly smooth. But that's understandable when old media and new media are thrown face-to-face and, after these teething troubles, the benefits for franchises like Marvel and *Star Wars* will easily outweigh the negatives."

For most MCNs and their new families, YouTube is the most important distribution platform. However, other on-demand sites are also factored into business plans, and some are now seeing the financial sense in launching their own platforms – an MCN equivalent to premium cable channels launching over-the-top distribution services.

UK-based production group Barcroft Media is not an MCN in the traditional sense, but does runs the first British YouTube channel to reach one million subscribers. It has a suite of thematic YouTube channels following deals with the likes of Bear Grylls. Recently, it launched its own platform, Barcroft.TV, which focuses on the firm's particular brand of popular factual and includes original long-form documentaries such as *There's a Polar Bear in My Pool!*, 1-800-AUTOPSY and Landing Sharks.

"We have been trying to find somewhere for the content that was getting hits to have its own space and to build a brand around free-to-air factual via online," says Barcroft Media CEO Sam Barcroft. "Barcroft wants to focus on producing for broadcasters, but as that becomes more challenging we have this [digital] stream," he adds. "Documentaries have lots of potential outlets, and we can decide how to use that content; we could pitch it to broadcasters, or use it as part of our news coverage or as a long-form special."

Barcroft says this proves a new maxim for television producers: "Producers can and Looksy also to be added.

Endemol Beyond USA's interim president, Adrian Sexton, said in September that GetBeyond.US would streamline "our consumer experience with strong branding, promotion and distribution".

However, content is reaching the market, the groundswell of interest of the past few years looks set to continue, and MCNs seem set to play an even more important role in the evolving converged-media landscape.

"We see online video as an additional and complementary market to traditional television," says Endemol Beyond's Ramme. "Both areas have their own relevance and purpose; the two aren't mutually exclusive. However, I believe that the MCNs are becoming the 'broadcasters' of the digital world."

"I think it's safe to say that there are no longer any 'traditional TV companies'," adds MTGx's Benninghoff. "The businesses that do not make the transition to being digital entertainers will not be here when we look around us in a few years."

Ampere's Broughton says the MCN space could ultimately prove vital for the broadcat



should be thinking like channels now."

Endemol Beyond's American arm, Endemol Beyond USA, has also created its own direct-to-consumer platform, GetBeyond.US. This includes programming from the fashion-focused Icon channel, with content from upcoming gaming and sports network Smasher and pop culture channel industry. "There's always an element of risk, but the high growth means that if rates are maintained, the prices paid could look like bargains in three to five years."

It's safe to say this disruptive online space will remain a point of discussion for some time, whether we're calling it the MCN or digital native market, or something else altogether. **TBI**

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he miniseries market could do with its own version of the metric system. Depending on who you talk to and where they are from, a miniseries is anything in length from four to 13 hours, with some execs plumping for six, eight or ten hours as the upper limit. The situation is not helped, says FremantleMedia director of global drama Sarah Doole, by the different terminology in use. One person's miniseries is another's serial – unless

it's a 'limited series' or an 'event series'.

For Doole, the confusion arises because miniseries "have traditionally been associated with event scheduling, but now we are seeing longer series like *True Detective* [eight hours] also being used as events. In my mind, the closest we can get to a definition is that a miniseries is a closed-end story with one long story arc and a denouement in the final episode. From our slate, I'm thinking about original, authored pieces like *No Offence, Deutschland 83* and,

coming soon, *Modus* [shows originating in the UK, Germany and Scandinavia, respectively]."

If there's a catch with this definition it's that two of the above-mentioned titles were renewed. "However, I don't think that's a problem with the definition," says Doole. "There's a long tradition of returning miniseries like the BBC's *Sherlock*. The key to them is still the idea of a closed ending to the story."

As for the role of miniseries, there's more of a consensus among executives. "They make a



noise," says Sonar Entertainment CEO Gene Stein. "At a time when so many channels are commissioning or acquiring drama, a good miniseries or limited series will grab attention. We're working on *Mr Mercedes*, a thriller based on the book by Stephen King. With David E. Kelley [*Ally McBeal*] writing the script and Jack Bender [*Game of Thrones*] directing, that's the kind of stand-out project channels love."

The market has various examples that underline Stein's point. In the US, cable

Return of the miniseries

Miniseries are back and increasingly being made so that they can stretch to more than one season. Andy Fry looks at trends in the minis market

channel Spike has just aired Egyptian epic *Tut*. A six-hour piece, broadcast over three consecutive nights, the purpose of *Tut* was to reposition the channel in the minds of the audience. Interestingly, *Tut* was licensed to Channel 5 in the UK, making the point that minis work on free and pay TV.

Lionsgate's *Houdini* did something similar, airing on History in the US and Channel 4 in the UK, and this flexibility is also evident with Canal+'s *Versailles*, a lavish ten-part production that centres on King Louis XIV as a young monarch. Distributed by Zodiak Rights, it has just been acquired by BBC Two in the UK, with BBC head of programme acquisitions Sue Deeks calling it "a delicious treat for BBC Two viewers... the historical setting is magnificent, the costumes are stunning, and the series tells a fascinating story with intelligence, wit and stylish Gallic flair".

"Treat" is also a word used by Joel Denton, managing director, international content sales and partnerships at A+E Networks. Denton has been in the miniseries business since the last big boom in the late 1990s and says "they are tent-poles... high points in the schedule that generate a lot of pre-launch press".

As a broadcaster, A+E has taken the miniseries very seriously in recent years, says Denton, with notable titles such as *Hatfields & McCoys* and *Texas Rising*. "Now we have a

remake of *Roots* coming through," he says. "A+E has also come on board the new *War And Peace* miniseries, which it will simulcast across all three of its channels in the US [A+E, History and Lifetime], and Lifetime has joined the BBC as a coproducer on the Agatha Christie two-parter *And Then There Were None*. For me, these are great examples of how miniseries can be used as part of a strategy to change audience perception."

It's worth noting that the miniseries is not a new form. Playground Entertainment founder and CEO Colin Callender recalls making a Nicholas Nickleby miniseries in the 1980s and, as president of HBO Films, overseeing numerous examples, including Angels in America, a US\$60 million 2003 miniseries with Al Pacino and Meryl Streep. Musing on the current mini revival, he says: "TV is a cyclical business, so when you get a few hits it tends to revive interest in a genre or form, but I think we are also seeing the impact of SVOD/digital platforms."

On the one hand, says Callender, the likes of Netflix and Amazon are investing in new dramas to drive subscriptions, in much the same way HBO has always done. On the other, "We are seeing a shift in audience viewing patterns", he says. "I know that a lot of people chose to watch *Wolf Hall* in one or two sittings because that way they could become really



engrossed in the story. Historically, the risk with miniseries was that it was easy to miss an episode, but time-shifting has changed that."

Increased competition and changes in audience behaviour are not the only factors driving the miniseries revival. There is also a creative-driven component to this trend. With the market in medium-sized features imploding and the global pay TV market becoming more ambitious, talent usually associated with the movie market is increasingly willing to make minis. Kevin Spacey and Matthew McConaughey are onscreen examples, but there is a similar migration occurring among writers and directors. This is significant for miniseries because "the top talent don't necessarily want to commit to projects that are going to run for six or seven years", says Sky Vision CEO Jane Millichip, whose current slate includes a sophisticated six-part thriller called The Last Panthers. "A strong mini or limited series will fit more easily into their work schedule."

Endemol Shine International executive director of EMEA Mark Lawrence says his company has had success with miniseries such as UK two-parter *Code of a Killer*, which sold to



the US and France. However, he adds that the resurgence of the miniseries is not without its downsides. "The brand-defining qualities of miniseries need to be weighed against high production costs and the fact they don't accrue audiences over the long term like returnable

drama series. You'll find a lot more people living on their nerves in case their miniseries don't rate well."

In Lawrence's mind, this explains "the rise of the returnable miniseries". "Here, broadcasters and distributors are trying to get the benefit of

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having a scheduling event, but also looking for ways to create long-running drama franchises," he says.

Broadchurch, one of the most successful shows in ESI's catalogue, is a classic example. Initially presented to the market as a closedended eight-part crime series, the show's success on ITV in the UK has subsequently spawned two more series and the third is currently being written. *The Missing* and *Safe House* are similarly structured while, in the US, the rise of the anthology series is a way of 'eventising' returnable franchises.

One recurring theme is the idea that miniseries with strong, recognisable constituent parts have the best chance of breaking through the clutter. Having a *Downton Abbey* connection, for example, creates cut-through, with ESI currently marketing a Victorian-era serial-killer mini starring Golden Globe winner Joanne Froggatt (Anna Bates in *Downton Abbey*). Elsewhere, distributor Hat Trick International is making its first foray into the mini market with period drama *Doctor Thorne*, scripted by *Downton* scribe Julian Fellowes.

HTI sales chief Sarah Tong says: "It's a great story with a fantastic cast, and to have Julian Fellowes' first TV project after *Downton* is a real asset. Broadcasters will see it as the kind of project that will help them stand out in the EPG."

Content Television & Digital president Greg Phillips is not so convinced that casting is the decisive factor in distributing miniseries. "For me, the key is having an impressive, exciting creative premise; strong characters; curiosity that carries episode to episode; strong execution; and a clear resolution," he says. "We had that with productions like *The Great Train Robbery, The Driver* and *Serangoon Road*, all of which sold well."

Either way, there is definitely a sense in the market that the resurgence of the miniseries is





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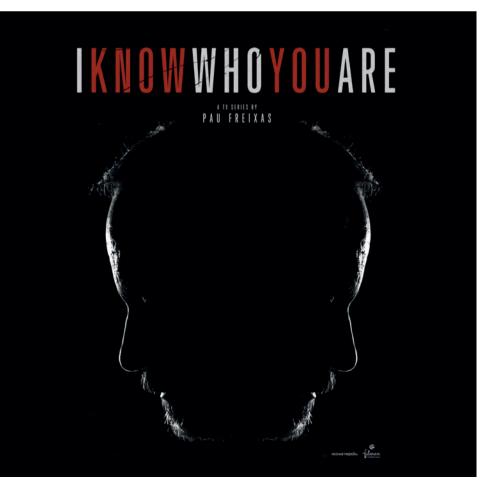
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benefiting UK drama. "The British have always tended to write auteur-driven shorter series," says FMI's Doole, "unlike the US writers' room model of the long-running series you see coming from some other markets. A few years ago that wasn't really what buyers were looking for, but it is more in demand in the new landscape."

Ben Donald, who splits his time between working for BBC Worldwide and his own indie company Cosmopolitan Pictures, is working on War and Peace and SS-GB, an adaptation of Len Deighton's classic novel. He echoes Doole's assessment but also Lawrence's caution. "The six-hour European-produced miniseries, based

on a book, or a famous figure, or a moment in time, is the mainstay of a lot of schedules around the world," he says. "But I wouldn't want too many of them in the catalogue, and I'd probably favour something that is six hours or above. Singles or two-parters present more of a conundrum in the sales market."

The view from mainland Europe is similar, with Beta Film's senior VP international sales and acquisition, Oliver Bachert, saying: "There is a tradition of miniseries in Europe dealing with subjects such as Napoleon, Les Miserables, the Bible and War And Peace [a previous version of the famous Tolstoy novel, not the current

iteration], but I would always argue in favour of a mix of drama types. You have to have formats that appeal to different audience groups."

In terms of the current batch of Beta-backed miniseries. Bachert names a number of sixhour shows including a lavish US\$17 million period drama called Maximilian, a Cold War spy thriller called The Same Sky and Winnetou, a Western based on best-selling books by Karl May. "We also have a six-hour thriller called The Valley, which is the first-ever commission by TNT in Germany," says Bachert. "This is proof that these shorter series still have a key role for channels in establishing their identity." TBI

BROWSING THE MINI-MART

War And Peace: Based on Leo Tolstoy's sweeping saga of 19th century Russia, this epic miniseries is being produced by The Weinstein Co, BBC Cymru Wales, BBC Worldwide and Lookout Point. In the US it will be simulcast on three A+E Networks channels (A&E, Lifetime. A&E Network and History), an interesting way of trying to amortise the high costs of drama

Roots: A remake of the iconic 1977 miniseries, which itself was based on Alex Haley's celebrated novel, Roots is another series being prepped for launch on History, A&E and Lifetime. It is being written by Lawrence Konner (Boardwalk Empire) and has Laurence Fishburne playing Haley. The show is being made by A+E Studios and distributed by A+E International

Maximilian: A three-part coproduction between MR Film, Beta Film, ORF and ZDF, Maximilian is about the romance between Mary of Burgundy and Maximilian, the son of the Holy Roman Emperor Frederick III. Budgeted at US\$17 million, this lavish medieval romance is being shot in Austria and Eastern Europe

The Last Panthers: A six-part event series from Sky Atlantic and Canal+, The Last Panthers will be the MIPCOM 2015 World Premiere TV Screening, Distributed by StudioCanal and Sky Vision, The Last Panthers opens with a daring diamond heist bearing all the hallmarks of a gang known as the Pink Panthers

Versailles: Ordered by Canal+ but shot in English, Versailles is a ten-part series coproduced by Zodiak Fiction, Capa Drama and Incendo. Distributed by Zodiak Rights, "[Versailles] promises a unique take on a defining period of French history. The year is 1667 and King Louis XIV is a 28-year-old monarch on the cusp of greatness. A ruthless leader, he will stop at nothing to achieve his vision of creating the most beautiful palace in Europe and seizing control of France and his enemies"

Olive Kitteridge: Winner of six goings at this year's Emmys, HBO's Olive Kitteridge tells the story of a New England town wrought with illicit affairs, crime and tragedy, told through the



lens of Olive (Frances McDormand). The story, which spans 25 years over the four parts, aired on Sky Atlantic in the UK. Coming up next year, HBO is also making a six-part miniseries about American frontier pioneers Lewis and Clark

The Young Pope: Produced by FremantleMedia-owned Wildside, The Young Pope is an eight-part coproduction from HBO/ Sky/Canal+ in which Jude Law plays a fictional American pope (see TBI Scripted page 34). In production this summer, the series also stars Diane Keaton

SS-GB: Adapted from the novel by Len Deighton, SS-GB is a thriller set in 1940s London, with the premise that the Germans won the Battle Of Britain and London is under Nazi occupation. A Scotland Yard detective working under the SS faces the dilemma of whether to collaborate or join the resistance. Sally Woodward Gentle, Lee Morris and Lucy Richer executive produce

Secret City: Foxtel in Australia will air a new political thriller miniseries called Secret City in March 2016. Produced by Matchbox Pictures, the show is set in Canberra and focuses on a journalist who uncovers a series of conspiracies. Foxtel executive director of television Brian Walsh says: "This event miniseries is further commitment by Foxtel to explore bold and interesting ideas for the screen and commission unique Australian storytelling." Matchbox has previously made miniseries including *Deadline* Gallipoli and Devil's Playground

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South Africa has become a key strategic territory for international players, while local producers seek new ways to retain rights in a constricted market and subscription on-demand services emerge as the latest battleground. Juliana Koranteng reports

ocally and internationally, the South African TV production business is buzzing.

Thanks to an exotic but diverse geography and highly skilled talent, crews and technicians, its producers are able to create a wide variety of on-screen narratives. These have included the fast growing Nollywood films from Nigeria, India's Bollywood movies, Hollywood blockbusters like Marvel's Avengers: Age of Ultron and television series such as Starz's adventure drama Black Sails.

In recent years, international and domestic TV producers have grabbed, developed and enhanced the resulting creative and commercial opportunities. Inspired by the experience introduced by international filmmakers working in the country, local government

incentives and demand for high-end content by the world's growing number of digital terrestrial channels, they have found their mojo.

Furthermore, it hasn't hurt that the exchange rate of the local rand currency has been falling against the US dollar the past decade.

"South Africa was the first place we set up our localised presence on the African continent," says Alex Okosi, senior vice president and managing director of Johannesburgheadquartered Viacom International Media Networks Africa, US-based Viacom's regional division

Ten years after its launch, VIMN Africa is producing across the continent, including in Nigeria and Kenya. However, business in South Africa, which accounts for 50% of its regional production budget, "has always been crucial", Okosi adds.

"The TV industry is just booming," says Louise McClelland, co-founder and chief creative officer at Cape Town-based factual and lifestyle content specialist Okuhle Media. "We have been growing for the past fourteen years and I expect us to keep doing so at speed."

With a population of about 55 million, South Africa's gross domestic product per capita of US\$7,480 is the highest in sub-Saharan Africa. However, it is tiny compared with GDP in most developed markets, and yet global accountancy giant PwC foresees a growing local TV market.

PwC forecasts that ad revenues from TV will increase to US\$1.8 billion in four years' time from US\$1.3 billion last year, led by terrestrial networks like national public broadcaster SABC and the privately owned e.tv. The reach of subscription-funded TV, dominated by Naspers-owned MultiChoice, is set to be 82%-

plus in 2019 from 63% in 2014.

Discop Africa, the biannual regional TV content trade fair, was started by event organiser Basic Lead in South Africa in 2008 to raise international awareness of African-produced shows.

Its Los Angeles office also develops opportunities for African producers and buyers to meet multinational media conglomerates like the UK's BBC Worldwide and Hollywood studios Disney and Warner Bros., which are selling to the emerging African economies by licensing to or coproducing with South African producers.

"The country is one of the world's top production destinations," says Patrick Jucaud-Zuchowicki, Basic Lead's CEO. "It is an industry groomed and brought up to speed in terms of international standards."

Basic Lead has invested in research that confirms its confidence. "Sub-Saharan Africa generated US\$1 billion for international content owners in 2014, double the US\$500 million generated in 2012, and compared to US\$150 million ten years ago," Jucaud-Zuchowicki says. "If our clients [international content owners] return to Discop Africa, it's because they are making money, and much comes from South Africa."

VIMN's Okosi agrees. "Nigeria might produce more in terms of volume thanks to Nollywood, but South Africa has had a head start in terms of sophisticated productions, he says."

In the past twelve months, South African-produced VIMN hits aired on the continent include *Comedy Central Presents... Live at Parker's*, reality talent show *Top Actor SA* on the local version of the BET network, MTV's prank show #YouGotGot and this year's MTV Africa Music Awards, which took place in Durban.

Another international production giant flourishing in South Africa is the regional business of Endemol Shine, the international group behind the *Big Brother* and *MasterChef* hit reality formats.

Reality show *Star Academy* is the format for Endemol Shine Africa's multi-territory *Project Fame West Africa* (coproduced with Nigeria's Ultima Studios) and *Tusker Project Fame East Africa*. Endemol Shine Africa also produces perennial reality hit *Big Brother Africa*, plus has gone more than ten seasons with *Fear Factor* for countries outside Africa, including India, the UK, Malaysia and Sweden.

From its Johannesburg offices, Endemol

Shine Africa CEO Sivan Pillay says: "South Africa is vital to our productions across Africa as we are the headquarters for all creative and production teams. We are ideally positioned to produce multiple shows, including local versions of the company's global hits and formats we develop ourselves."

If the international TV market was Facebook, independent production group Rapid Blue would snap up millions of 'likes' for successfully adapting some of the world's biggest international formats for Africa, a region where viewers prefer local subjects and themes.

Johannesburg-based CEO Duncan Irvine is the visionary behind African versions of the BBC's Dancing with the Stars/Strictly Come Dancing, Dragons' Den and, most recently, The Great British Bake Off; Syco Entertainment's The X Factor (in Nigeria, Ghana, South Africa) and Got Talent (in Kenya); A+E Networks' Pawn Stars; and the ITV Studio/Channel 4-originated Come Dine with Me.

"We also have shows on BBC Worldwide's networks, Food Network, Discovery across Africa, all the South African broadcasters and on most networks in Nigeria," says Irvine.

Despite the rosy picture, Irvine raises a sensitive issue that dogs South African independent producers.

"Because it is really hard to hold on to intellectual property in South Africa if

broadcasters fund most of the production, we have needed to find new funding models to create shows which we can sell internationally," he says. "It has been the interaction with international broadcasters and distributors that has provided opportunities for us to create content for sale internationally."

"I would love to see South Africa adopt legislation similar to the terms of trade the UK industry has with PACT [the British independent producers' trade body], which means broadcasters can't take 100% of a producer's work."

However, the government does help via incentives, says Louise McClelland at Okuhle Media

For the Film and TV Production Incentive, South Africa's Department of Trade and Industry (DTI) offers a 35% rebate for the first ZAR6 million (US\$442,500) invested in any production that meets the required conditions, and another 25% for any amount spent on top.

The Foreign Film and Television Production and Post-Production Incentive, including coproductions that use South African locations and post-production facilities, includes 20% to 25% rebates. There is also the South African Emerging Black Filmmakers Incentive, which can give successful applicants up to a 50% rebate for the first ZAR6 million investment.



"If we want to sell internationally, we have to fund productions ourselves, so the incentives are good for coproductions as long as we can bring some of the budget to the table," McClelland adds.

International demand for South African productions is rising, and the local market is appreciating those achievements. Okuhle is exporting new titles such as cookery show Sarah Graham's Food Safari and documentary Ocean Adventurer via distributor DCD Rights at MIPCOM this year. Last year, the company's Bitten: Sarah Graham Cooks Cape Town was a South African Film and Television Awards (SAFTA) winner.

Another wildlife and documentary specialist, Earth Touch, picked up several SAFTA gongs for *Hippo vs Croc*. The firm expects more such accolades for the new *Snake City* – which is about a snake whisperer who reintroduces venomous mambas, cobras, adders and other deadly reptiles found in residential Durban into their natural environment and is produced for

Nat Geo Wild. *Crazy Monster Frog*, meanwhile, is a Smithsonian Channel coproduction that unearths a host of outlandish amphibians, who are introduced to audiences in a unique entertaining way.

"We see ourselves as exporters who can take

directly by major overseas rights owners.

Urban Brew Studios recently snagged the rights to produce the South African edition of *I Violetta*, a weekly companion series for Disney Channel UK's teen telenovela *Violetta*, currently airing on MultiChoice's DStv pay TV platform.



"If international content owners return to Discop Africa, it means they're making money from South Africa"

Patrick Jucaud-Zuchowicki,
Basic Lead

Africa to the rest of the world," says Lara Cox, Earth Touch's managing director.

In addition to selling internationally, local indie programme makers are being approached

This marks the Disney Channel's first-ever South African production. Urban Brew has a similar format licensing deal with BBC Worldwide's game show *Friends Like These*, which airs on SABC I.

One reason local producers chase after international work is the declining number of commissions by local broadcasters. Therefore, production outfits say they are forced to think creatively outside their domestic market's box.

"Our population numbers cannot support the investment [of local productions], so international investment or consumption is essential," says Gary King, executive producer at TV programme and commercials maker Picture Tree. "The emphasis for me is to be able to sell outside the African borders."

However, producers do not ignore the local broadcast market, a difficult terrain to serve considering South Africa has eleven official languages (and some admit that English spoken in the Afrikaans accent is difficult to sell abroad). That means they need to be adept at creating all kinds of genres and formats with a wide appeal.

Basic Lead's Jucaud-Zuchowicki says that the rest of Africa is a significant consumer of South African productions because the territory's producers and broadcasters "have a flair for understanding what the viewers want".

Urban Brew's African-content productions have been on a variety of the local free-to-air and pay TV networks: they include telenovela *Zabalaza* on DStv's Mzansi Magic, documentary *Mahadi-Lobola* and telenovela *Gold Diggers* for free-to-air platform e.tv, plus *Lekker TV*, which





is a weekly nine-hour slot on the Afrikaans music and entertainment network KykNet Nou!, formerly called KykNet Musiek.

The next goal for some is to create African formats that will attract global buyers. One way this might happen is via the internet.

PwC research indicates mobile internet penetration is set to grow to 38 million subscribers by 2019 from 20 million in 2014, already making South Africa one of the region's most digital-savvy markets.

VIMN Africa, with a global parent company

that creates content with young millennials in mind, is able to exploits those digital assets for its South African viewers.

Earth Touch has launched online channel Earth Touch News Network, which is said to be the first independent news website devoted to natural history and wildlife.

"We use journalists and feature video news stories from around the globe, and we notice that 30% of the return visitors are in South Africa," says Earth Touch's Cox. "It features stories that might not get commissioned by traditional TV networks, but for which there is an obvious demand."

Meanwhile, Rapid Blue executives say online productions also open up new opportunities for discovering talent such as comedian Anne Hirsch, one of the presenters on the company's new domestic version of the *Bake Off* reality show.

Rapid Blue's Irvine also points out that the internet has opened up avenues for brand entertainment videos. "Apart from a handful, digital content tends to be brandfunded entertainment," he says. Rapid Blue's Gentleman's Wager|The Race for the Johnnie Walker whisky brand recently clinched Africa/Middle East Loeries awards for brand communications.

Digitally speaking, there have been setbacks, however. The country's analogue switch-off, set to boost the local DTT sector, has been postponed from the original scheduled date in June this year.

That said, local content consumption can expect a boost from the burgeoning streaming video market. In addition to MultiChoice's recently launched sister platform ShowMax, other local players entering the emerging subscription-funded OTT market are telecoms operator MTN and its FrontRow service, and Times Media Group's VIDI. From overseas, Netflix is scheduled for next year, while Hong Kong telecoms group PCCW threw its hat into the ring in September.

"There are not that many, but the ones that are emerging will be formidable partners for us and for consumers," VIMN Africa's Okosi says. **TBI**

A FOOTNOTE...

Before you turn the page, here's one final thought from a company with a unique perspective and positioning.

We've got more than two decades experience in all kinds of content, from producing award-winning formats like The X Factor, Strictly Come Dancing, Got Talent, Pawn Stars and Come Dine With Me, to running international production hubs and creating bespoke branded entertainment, cutting edge broadcast design and on air promotions. We can do any genre, platform, length or brief. But mostly, Rapid Blue can do it best.

See it all on rapidblue.com.

...OF NOTE.



Buyers Briefing

Top commissioning and acquisitions executives the world's leading linear broadcasters and online services talk about their buying wishlists, and how they deal with rights negotiations. Exclusive interviews from Stewart Clarke and lesse Whittock

Name: Jon Farrar Title: Senior VP, global programing and acquisitions, BBC Worldwide

Jon Farrar oversees the programming and acquisitions strategy for BBC Worldwide's new channel brands, BBC Brit, BBC Earth and BBC First. The executive has had two spells with the BBC's commercial arm, and has also worked in programming at Viacom and NBCUniversal



TBI: How are the new brands different to the previous networks?

JF: We took as our starting point where is the BBC at its pioneering, world beating best and where does that meet audience demand? We alighted on three broad content areas – natural history and science, factual entertainment, and drama. These brands have a tight editorial focus, built around the traditional strengths of the BBC's pipeline as well as the 'best of British' from other suppliers, and will be the driven by first-run content that will be also windowed with our partners.

TBI: Should producers and distributors be seeking out acquisitions people at a local level or is buying handled centrally?

JF: Our acquisitions are handled centrally from our London office so producers and distributors should seek out this team. Our head Of acquisitions is Katie Benbow, who is currently on maternity leave and Richard Acton is acting in the role until her return later this year.

TBI: When are the key times of year for commissions and acquisitions?

JF: We are looking for content all year long – we have a rolling model. Channels like ours need to be disruptive, finding opportunities to make noise outside of the normal seasonal rhythms. Therefore, we take an opportunistic approach and ensure we manage our budgets to be nimble and fast turnaround if the right shows appear.

TBI: What are the key slots for your channels and why?

JF: Whilst we buy for primetime (usually Iopm), the shows we acquire here need to enhance the reputation of the BBC and, more generally, UK creative content, so we are really looking at best in class examples that are big reputation builders for us. However, the holy grail is access prime. This is the ratings battlefield for all our channel brands and we are actively looking at big, established series that we can tease away (for

example, see Comedy Central's great *Friends* strategy) or exciting new projects that will very quickly accelerate up into high volume shows.

TBI: How much of your content comes from the BBC?

JF: A very high proportion comes from the BBC, but we are interested in the best that the UK has to offer, whoever the originating broadcaster.

TBI: You've recently announced a coproduction with Channel 5. Are you looking at more innovative ways of commissioning?

JF: Absolutely. We have commissioning teams, based in London, for both BBC Brit and BBC Earth who are looking at various models for content production. Given that our channel brands don't have a UK footprint, it makes sense to prioritise partners who are looking specifically at acquiring UK rights, but there are many models we can follow and we are creative and pragmatic in our approach.

TBI: What is the model for acquiring content? What appeals most in terms of content and rights availability?

JF: Generally we take a pragmatic approach rather than sticking rigidly to one particular model. That said, as our global footprint expands we are becoming increasingly interested in securing pan-regional deals for key shows. Whilst each of our regional editorial teams bring their own flavour to the schedules, there are some shows that we will target to represent the channel brands globally.

TBI: What are you really looking for at the moment?

JF: We are able to secure a great pipeline through BBC Worldwide at market rates, so our strategy is always to look at how we can complement this, rather than replace it. This usually means one of two things — either a big reputational piece that represents the best of its genre, or a show that delivers in much higher volume than we would expect from the BBC. Certainly series length is really important to us, particularly in factual entertainment. Both BBC Earth and BBC Brit are targeting shows in this genre with ten-plus episodes per series that have the standout characters, brilliant storytelling, and ambition you would expect from the UK. Interesting areas are adventure and survival, making sense of modern life, and clip-based comedy formats.

TBI: Are you interested in acquiring drama?

JF: Yes, absolutely. Although BBC First, our drama channel, is mainly driven by series that come through BBC Worldwide, we have budget to acquire big third-party shows. We are looking for titles that really add value to an already world class slate. This usually means globally recognised talent to represent the 'best of British'

Name: Jeff Ford Title: managing director, Fox International Channels UK

Industry veteran Jeff Ford joined FIC UK after leaving Irish broadcaster TV3 to spend more time with his family. Known for having a keen eye for US acquisitions, his remit includes overseeing the local FOX, National Geographic Channel, Nat Geo WILD and Baby TV channels



TBI: What is unique about the Fox International Channels and what should buyers know in advance?

JF: The FIC channels in the UK cater for different audiences, offering diverse experiences to viewers and many opportunities to providers of content. National Geographic Channel shows broad documentaries covering high end subjects like the recent mission to Pluto (Mission Pluto), through to populist shows like Car SOS and Aircrash Investigation.

Nat Geo Wild is simply the best place for blue chip wildlife programming, while FOX's drama offering is second to none. With the mantra of 'First on FOX' and shows like The Walking Dead we have the best from the US straight after their transmission stateside. We are also creating more of our own content out of LA and Europe.

TBI: Should producers and distributors be seeking out acquisitions people at a local level or is buying handled centrally? Who are the key buyers within your team?

JF: For FOX in the UK it's Toby Etheridge and for Nat Geo its Maggie Rhodes, who buys centrally.

TBI: When are the key times during the year you commission or acquire series?

JF: It's an all-year cycle for commissions and acquisitions. We are always open for business!

TBI: What are the key slots for your channel and why?

JF: Like most channels in the UK, 8pm-11pm are our most important slots; that's where our high profile shows are launched. However, post 11pm on FOX we have always been the home of Seth MacFarlane's animated comedy, meaning 16-24 viewers come to us every night.

TBI: What is the relationship between the local Fox and Fox Networks Group programming teams? Do you work together on projects?

JF: The relationship is excellent. Whatever the channel, globally we are part of the decision making process, or are leading negotiations if that is best for the group.

TBI: What is the model for acquiring content? What appeals most in terms of content and rights availability?

JF: When we acquire we ensure we have rights that our viewers require. They don't always want to consume content when it's scheduled, so we ensure that it is available for them in catch-up, download, side-load or series stack. In terms of what content we buy, it's what fits the brand, although we are looking to take FOX a little broader – hence the recent acquisition of Marvel's Agent Carter from Disney.

TBI: What are you really looking for at the moment, is there a genre or specific type of programme you have on your shopping list?

JF: The best programming that fits the genres we acquire for across the channels. I love events and high profile pieces for

National Geographic Channel and exciting, breath-taking drama for

TBI: Which of the programming markets do you find the most productive?

JF: The LA Screenings are the best, but if the studios/networks commit to all-year-round commissioning then it may well change.

TBI: What was your read on the LA Screenings this year? Where are the strengths and weaknesses of studio shows in a general sense?

JF: I don't think it had the big stand out show as most years do, but generally the quality was good so there seems to be perhaps more to go round for the buyers. However, there are still a lot more shows to see.

TBI: What is the single most successful acquired show across your channels?

JF: From a brand and viewer perspective, The Walking Dead on FOX and the in-house commissioned Cosmos on National Geographic Channel.

TBI: What acquired shows will you launch in the next few weeks/ months?

JF: The most exciting launch will be a commission on FOX through Fox International Studios, our production studios owned by FIC, Outcast. This is Robert Kirkman's new original show which launches in the next year. I've seen it... And it is scary! Viewers will love it.

TBI: What types of on-demand rights do you require?

JF: As I mentioned earlier, all the rights that our viewers need to consume content when they want to.

TBI: What sorts of windows are you buying for?

JF: We don't particularly buy with windows in mind. We like exclusivity.

TBI: What is the key challenge facing buyers in today's market?

JF: There is so much competition in a fragmenting market, not just linear but from OTT services, which is one part of the challenge. Being able to secure rights that are needed for our customers can equally be as much of a challenge.

> Read the latest buyer interviews and news every week at TBIVision.com



Name: Nesta Owens
Title: programming director,
Discovery Networks CEEMEA

Nesta Owens oversees buying for Discovery Networks in what the firm describes as the 'CEEMEA' region – or central and eastern Europe, the Middle East and Africa. The former BT Vision executive is overseeing a push into local commissioning, while Discovery remains a key regional acquirer

TBI: Should producers and distributors be seeking out acquisitions people at a local level or is buying handled centrally?

NO: Programme-sourcing pan-CEEMEA is handled centrally, led by me. Kerrie McEvoy handles sourcing for our factual networks Discovery Channel, Discovery Science, Animal Planet and DTX, and Liz Tang looks after our female networks TLC, ID and Fatafeat. Additionally, we have Dorota Eberhardt, based in Warsaw and reporting to me, looking after Poland, and only sourcing for some of our factual networks.

TBI: When are the key times of year for commission or acquisitions?

NO: We are on the lookout for great shows all year round, but both MIPs tend to be the tent pole events that our sourcing activities are planned around for the year.

TBI: How has the acquisition of All3Media changed your commissioning and acquisitions approaches?

NO: Nothing has changed in terms of our approach. All3Media are at arms' length and we consider their shows as we do all other vendors.

TBI: What are you really looking for at the moment?

NO: We are looking at European content more than ever. While we have historically looked at the UK and US markets for our content, along with other Discovery regions we are casting the net wider.

TBI: What is your single most successful acquired show?

NO: *Dynamo: Magician Impossible* has been a huge hit for us over the past few years for Discovery Channel, as have trash-to-cash programmes. *One Born Every Minute* is also great for us on TLC.

TBI: What types of on-demand rights do you require?

NO: Our needs depend on our affiliates and the territory in question. Our minimum requirement is 30-day catch-up, anything over and above that is dependent on the region.

TBI: What sorts of windows are you buying for?

NO: Varies by channel and country. Ask us!

TBI: What is the key challenge facing buyers in today's market?

NO: Our markets have become incredibly competitive over the past couple of years, meaning we work hard to maintain strong relationships to ensure that they come to us first with their best content.

Name: Helen Cowley

Title: senior manager, Amazon Prime Instant Video UK

Helen Cowley has been with Amazon Prime Instant Video UK (and its predecessor Lovefilm) since 2005. Prior to Amazon's involvement with the SVOD platform she held titles such as head of programming, and since November last year has been senior manger of the merged company

TBI: Tell us about your role as senior manager.

HC: My focus is on TV and film. I work with Amazon Studios and closely with the content acquisitions team and the marketing team. My role is to support new content on the service. We're talking a lot about television, but we also have great exclusive movies on the service that work well.

TBI: Transparent was considered a game-changer for Amazon. How



focused is the company on reaching that level with every part of original content you create, in terms of driving subscriptions?

HC: Our acquisitions strategy is really focused on our customers, and that's where the pilots season comes into play. It allows us to see what type of TV shows people are really interested

in, and the fact the pilot season includes drama, comedy and kids shows we've stayed open.

TBI: Are the originals profitable, or is it a carefully thought-out marketing exercise?

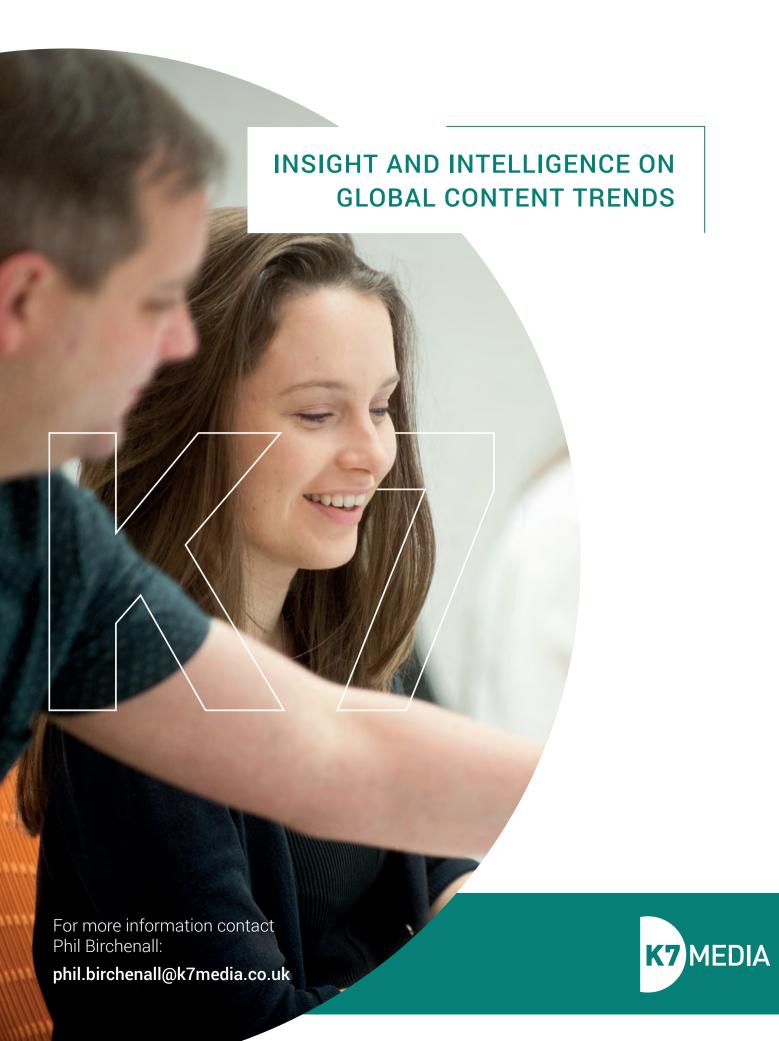
HC: Again, it's customer-focused. *The Man in the High Castle* is a really good example of a show that, without divulging the budget, has a lot of support around it. It's currently being shot in Canada with Ridley Scott producing. That will be a high-end drama and we're committed to making quality scripted programming.

TBI: Why do you make original kids shows?

HC: The kids pilots are again servicing a need. We provide a real range – preschool, teens, and a mixture of animation and live-action, and the fact we've just gone into season two of shows such as Annedroids is brilliant. We've got a broad customer base and audience and kids are no different to that.

TBI: Amazon is currently in the US, UK and Germany, so you don't need a huge amount of the rights, correct?

HC: We're currently in three territories, and though I can't divulge what our plans are, we are looking and thinking about we ensure our content is seen by lots of customers and, indeed, worldwide customers. **TBI**





There is a perfect storm brewing, whose gale-force winds suggest that the future of TV is as much about densely packed pixels as it is about great shows. Gary Smith reports



he news in late August that manufacturer Chinese TV Hisense had slashed the prices of its 4K sets to US\$750 for the entry-level 40" model, and a very reasonable US\$1,050 for the 55" set, was another benchmark in the growth of an installed base of UHD hardware and services. The tactic led to similar moves from leading Korean manufacturers Samsung and LG. What's more, satellite operator SES has reserved five channels for UHD services; Insight, a major new general entertainment UHD channel, is holding its global launch at MIPCOM; and SPI International is also launching Funbox 4K, a worldwide UHD service, in Cannes. In Germany ARD affiliate Hessischer Rundfunk has debuted a UHD service, and in the US, Comcast has declared itself UHD-ready, while Verizon is testing fibre-based delivery of 4K content and programming (see box).

On the hardware side, things are moving pretty fast, but programme-wise, you most probably won't be assaulted by great waves of UHD programming this week in Cannes. That said, significant amounts of programming in the format are being produced but most usually finished in HD, because that's what the market demands right now. And while the bulk of current UHD programming is in the documentary field, dramas, the look of which has been seen only before in movie theatres, are in the pipeline.

Five years ago, the launch of *Grand Hotel* from Spanish producer Bambu Productions with its sleek, neo-cinematic look, achieved on a relatively low budget, caused a sensation. It was a well-cast show, likened favourably to *Downton Abbeγ*, but, initially, it was the look that got people talking. Considering what can be done in terms of sleekness with four or even eight times that pixel density, it is a given that UHD will revolutionise TV drama. It will level the playing field, giving all producers the ability to create series that look as if they were filmed on high-end movie cameras.

Cosmic Pictures' 4K documentary *Jerusalem* for iMAX is sold on UHD. Director George Duffield says: "I absolutely believe that UHD is a game changer for the industry. Especially when you start running the cameras at high frame rates such as 60 frames per second. At that point, UHD is almost movie quality, and UHD cameras allowed us to make a show that we simply could not have done if we had

only had 70mm movie cameras, because the cameras are relatively light, whereas 70mm cameras are extremely heavy and static."

Pioneer Productions managing director Kirstie McLure agrees. "UHD absolutely breathes creativity," she says. "This is a really exciting time for the industry. There's currently a lot of caution around the format, but we all need to sit up and take notice, and I'm not just talking about documentary makers. My guess is that within a year we are going to be seeing significant numbers of drama series being produced in UHD, and at that point the industry is going to see how enhancing it is and just how much of a creative opportunity it is. This is the beginning of a major 'refresh' for the whole industry."

McLure has just been working with the BBC on a yet-to-be-announced 2K docu-drama project, which she now sees very differently."If that job had come up three months later, I would have insisted that it was done in 4K, especially since I've had hands-on experience with Panasonic's 4K VariCam," she says. "They are amazing and there are none of the constraints we had with 3D cameras." Pioneer has recently opened an office in Korea, where UHD is much more common, in order to leverage that country's greater expertise in the format. "There are several 4K channels broadcasting there already, and technically Korea is very strong in both 4K and CG, so we opened Buzz Media, a joint venture with Pan Media, in order to produce UHD series such as Treasures of the Earth and Mutants That Made Us," she says.

"What 4K really needs," says Atlantic Productions CEO and creative director Anthony Geffen, "is a show like Madmen. UHD undoubtedly is a highly exciting creative medium that allows you to capture images in more exciting and better ways, but that's not what pulls an audience." Geffen has been working with UHD for the last four years, on projects ranging from a current shoot of the Great Barrier Reef and 16 virtual reality shoots for Oculus Rift. He has also been involved in a filming a drama series in 4K, but cannot reveal full details yet. "What I can say is that the project was shot in 4K as a direct result of the producers seeing our UHD docs, after which they committed straight away."

Cost are still an issue, but not as much as might be expected given the leap in quality. "Currently filming in 4K is about 20% more



expensive, but there are ways to get that down," says Geffen, "because post-production houses are very keen to show they can work with UHD, so there is some flexibility there."

"In terms of pure quality, 4K is more than enough detail for viewers," he adds. "You could argue that it is, effectively, glasses-free 3D, and is a more significant qualitative leap than the move from SD to HD. That said, it isn't right for every production because up-resing doesn't work, so a show with a lot of old or stock footage is better off being shot in HD in order to avoid too much of a contrast between old and new images."

Some of the first UHD dramas to appear on the market come from Colombian broadcaster Caracol, whose last two telenovelas, Fugitives and Soul Sisters, were filmed in 4K. "Caracol has always been an early adopter," vice president, international sales, Berta Orozco says. "We were shooting in HD in 2008, considerably earlier then other South American broadcasters. We used feature film lenses and the shows were entirely shot outdoors, but then, ironically, the post-production was in HD, because 4K is still quite hard to place. The market is growing, but I think it will be at least two years before we go straight to clients with a 4K production." In terms of budget, however, these were not Caracol's most expensive shows. "Of course 4K is more expensive than HD," says Orozco. "We chose it partly because we see it as an investment in the future. The HD version of Fugitives has been sold in to 50 territories to date.

One of the main concerns when shooting

in UHD is storing the vast amount of data generated, but there is, says Atlantic's Geffen, a bigger challenge, for sports broadcasters at least: ball judder. "One of the reasons why we're suddenly not hearing more about the launch of UHD services from companies like Sky is that in sport coverage, the ball judders, so clearly

for any company placing a heavy emphasis on exclusive sports coverage as a lure for premium services, it's back to the drawing board."

You could reasonably expect bandwidth to be a concern for 4K channels as well, but in the case of both Insight and SPI international, deep links to satellite companies mean that, for the

4K NEWS MONITOR

Netflix will launch its streaming service in Spain this quarter with Ultra-HD content available from day one. Meanwhile, satellite operator SES has reserved five channels for 4K/UHD launches and Sky Deutschland has reserved 4K capacity. Fashion 4K is now transmitting from SES with a reach of 116 million potential homes.

France's Canal+ is testing the technology, and German shopping channel Pearl TV is due to launch imminently on Eutelsat. On May 20 the Coppa Italia final featuring Juventus vs Lazio was captured with the latest Sony HDR (High Dynamic Range) 4K cameras, the first football event ever to be shot in 50p HDR. The game was filmed by DBW Communications, and since then the company has shot *The Barber of Seville* in 4K-HDR.

HDR is a hot topic, and is seen as the next step for Ultra-HD transmissions. The IBC technology

show recognised the importance of the medium by awarding its 2015 Conference Prize to a paper from two BBC research and development staff, Andrew Cotton and Tim Borer. Japanese satellite operator B-SAT, backed in part by public broadcaster NHK, says its latest spacecraft, B-Sat 4a, now on order from Space Systems/Loral, will be ready for wide-scale 4K and 8K broadcasts.





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moment at least, carriage cost is not issue, especially as both channels are regarded as UHD evangelists. "SPI's relationship with Eutelsat is much more than skin deep," Berk Uziyel, executive director at Filmbox International/Mediabox Broadcasting International, says. "We have 18 channels on the platform and were the first company to broadcast an HD movie channel into central and eastern Europe, so we have worked together for many years. Our 4K channels are regarded as a showcase for the technology, and we have partnered with Eutelsat and TV manufacturer LG to launch our new service. We see 4K as a powerful new trend, especially when you see the numbers of 4K sets being sold. Alongside our satellite delivery, we are also developing a set-top box that we regard as a key to future growth. We have developed a form of encoding that means we can deliver 4K via the internet on a connection of 8MB without any buffering."

Uziyel believes widespread UHD drama is still some distance away. "Our 4K fight channel is broadcasting, and there's no shortage of simple programming material like nature docs, music videos and concerts," he says. "But I think it'll be at least two years before we see a constant flow of top-quality drama content. We are being very pro-active about this, though, by partnering with both content producers and brand partners to get the supply of high-end dramatic content moving, and there will be a significant announcement during MIPCOM about this."

Equally determined to make a splash in Cannes is UHD broadcaster Insight, part of TERN/General Satellite. The operator is launching HD and UHD channels, plus a non-linear service to India, Russia, and Europe, with Asia and South America to follow. Head of production Marjolein Duermeijer is responsible for commissioning 200 hours of programming. "When we started looking



morethan a year ago there was pretty much nothing [in 4k]," she admits, adding: "Even now not many companies are producing programming in our broadcast standard. There are now more nature, science and adventure documentaries, but precious little story-telling."

Having to commission so much material has resulted in a steep learning curve for everyone involved. "The cameras are heavier than HD ones, but they're getting lighter very quickly," says Duermeijer. "In terms of storage, we've developed our own technology to make our producers' lives easier when they're filming in extreme places like the Sahara.

"For the moment we're focused on factual and entertainment, but we will be commissioning drama as well as soon as Insight is established. One of the first shows commissioned by Insight was *Around The World in 80 Tricks* from Woodcut Media. Joint creative director Derren Lawford takes up the story. "We filmed the show in 4K primarily because that's what Insight wanted, and what we found is that it's genuinely exciting for the viewer to see that level of detail," he says. "On the downside, of course there are the storage issues, and also editing and transcoding rushes take longer. But overall it was a positive experience, and we're up for more when clients ask for a series in UHD."

Around The World in 80 Tricks features Magical Bones, a breakdancer and magician who has also danced on tour with both Kylie and Madonna. "He uses street culture and dance to connect with a genuinely multi-

"UHD absolutely breathes creativity. There is currently a lot of caution around the format, but we all need to sit up and take notice"

Kirstie McClure, Pioneer



We firmly believe that drama in 4K will be really something, but we're not rushing at it and we're absolutely determined to stick to productions in 5op. It won't be long before anything less will simply be a commodity, consequently we believe it's really important to maintain standards both in the quality of the shows and broadcast standards."

cultural audience, and each episode feature a reveal where he demonstrates how to do some of the simpler tricks," Lawford says.

It is one of a growing number of entertainment and factual shows in UHD. By this time next year, you can be sure drama will also be a 4K staple, too. **TBI**









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Leaps in Evolution





France is a market in the throes of enormous change. Bob Jenkins went to Le Rendez-Vous in Biarritz to get to the heart of the matter

n many ways the French market is a mirror of the new realities sweeping through the TV business in general: demand for quality is increasing, the willingness of broadcasters to pay for content is falling, and the difference is being made up through new technologies and international sales. The just-published sales figures for French content in 2014, released during Le Rendez-Vous in Biarritz, underline

this, with the highest ever total of international sales at €153.8 million (US\$171.1 million), which, when pre-sales and coproduction financing is included rises to another new record of €210.3 million, an increase of 17.1% over 2013.

But that's not the real story, part of which lies in a more detailed analysis of the bald figures. Drama is a case in point. In 2014 international sales of French scripted hit €38.9 million,

an eye-watering rise of 49.3% over 2013. By contrast sales of animation fell 3.9% to €45 million even though France is second only to the US as a producer of animation. Both numbers have their roots in what is happening in the French domestic market.

Traditionally French animation goes through a three-year production cycle, and that cycle is currently at its nadir. So, with production levels lower than has been the case for a number of years it isn't really surprising that international sales of French animation have also fallen, Pierre Belaisch, CEO of Gaumont Animation, is not alone in suggesting that "without a doubt, the biggest challenge facing animation producers in France is financing". This is echoed by Emmanuele Petry-Sirvin, producer and partner at Dandelooo, a much smaller French animation house. She sees the difference between her company and giants such as Gaumont as being one of franchises, saying, "The large companies such as Gaumont are very much focused on building brands. Not only does this help them with their merchandising and other ancillary rights, but it is also what the broadcasters want".

Marc du Pontavice, president of Xilam Animation, sees several key changes underway in the French kids' market. The first is the move by France Télévisions to go head to head with TF1 in the 4-8 demographic. Traditionally, TF1 has had this demo to itself and France Télévisions has targeted the 6-11 age group, but this is a move Pontavice believes makes

perfect sense for the group, as France 5 targets preschool and leaves Gulli free to attract an older kids audience.

He reports "a growing demand for kids programming that is not necessarily animation," and, in response to this Xilam will be launching a new wildlife series narrated by kids called *If I Were An Animal* at MIPJr.

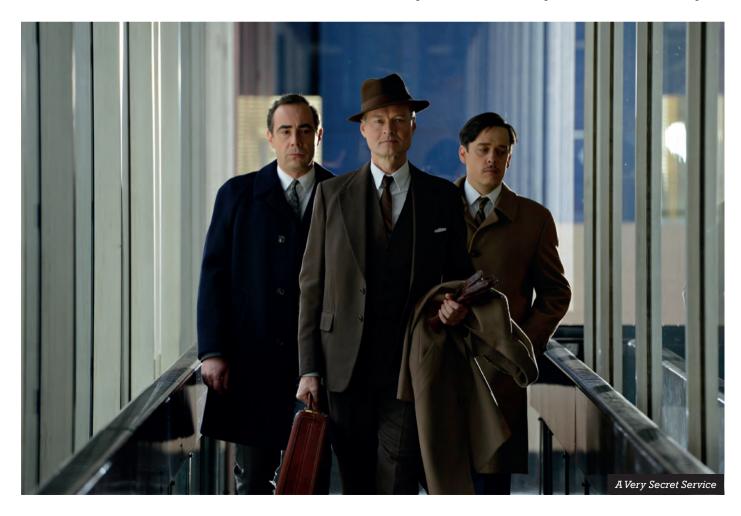
Change is also sweeping French drama. Again, the roots of international sales success lie in changes apparent in the domestic market. Last year, for the first time in decades, French domestic drama outrated US imports, and that success is unequivocally down to a significant improvement in quality.

Jean-Michel Ciszewski of French drama producer Federation Entertainment firmly believes that the current upsurge in French drama is down to a new focus on writing, a focus that his company, currently producing *Marseille* for Netflix France, wholly endorses. As Ciszewski explained in Biarritz, "We work very much on the US model with a writers' room of about ten writers all of whom operate around

a showrunner. We believe it all starts with the writing, and operating in this way also gives you the best chance of getting the strongest story."

Cecilia Rossignol, head of sales and acquisitions at 100% Distribution, agrees that French drama is on the up, pointing to series such as Un Village Français, the story of a rural French village under occupation during the Second World War, as an example. She also attributes some of the rise in sales of drama to better marketing by French distributors, citing the way her own company has rebranded its hit series Captain Sherif. This was a point underlined by Christophe Tardieu, director general of TV content body the CNC during Le Rendez-Vous. He stressed that supporting distribution with money for marketing and publicity was a key goal for the body, which is charged with spending French government subsidies to promote France's audiovisual industries.

But while it is true that great drama might fail to sell because of poor promotion, it is also true that poor drama is unlikely to become a hit because it is well promoted, and there have been quite a



few international hits lately for French drama. Chloé Horgues, international sales manager at Calt Distribution, cites *Chefs* and *Les Disparus* as recent examples, with the much anticipated *Versailles* yet to hit the market. She is one of many to highlight the fact that the difference between what French broadcasters are willing to pay and the cost of what they want to see on the screen is increasing, and this means producers need more international partners.

The presence of bodies such as the CNC provide a degree of stability to the French market that many would envy, but there is no doubt that this is a market in flux. Frédéric Vaulpré, vice president at French analyst Eurodata sums it up this way: "The French market has traditionally been very stable and, compared to many markets, continues to be so; nonetheless, it is in a state of transition." Illustrating his point, Vaulpré goes on to highlight the recent changes at Canal+, which "has seen virtually every head of department changed".

One possible consequence might be seen in the move of comedy drama Au Service de la France







XITE

Q&A: Marius Brok, XITE

Marius Brok, director of distribution partnerships at XITE, talks about the future of music television and bringing a millennial audience back to TV.

What are the main challenges in keeping millennials watching TV?

The main challenge is taking away the limitations that exist today to ease of content consumption and interactivity on TV.

To be frank, neither linear TV nor video-on-demand fully fit the needs of millennials. They are much more demanding. Television needs a product that combines the strength of linear television and VoD services, combining the following elements: interactivity, personalisation, curation, a lean-back experience, availability on all screens and a full content catalogue.

What, in outline, is XITE's solution to the problem?

To bring back millennials to the big screen, XITE developed Personalised Music TV.

XITE's Personalised Music TV is an interactive television channel that's included in the regular channel line-up or in the operator's app store.

The viewer can personalise his or her music video channel simply by skipping or liking videos. For deeper personalisation the viewer can watch curated and mood-based channels, create his or her own channel or search for music videos in XITE's full catalogue library.

Is the future of TV all about apps?

The future of TV is not all about apps; it is about the internet.

In fact, the concept of linear TV still has an enormous attraction for the masses, and that's because it's a perfect example of a modern social gathering. However, it's clear that millennials are much more demanding in the digital age, and they expect all the interactivity they can get on internet.

For broadcasters and operators, it is important to combine both the strengths of linear television - great curation and branding - with internet technologies that meet the needs of millennials.

To adapt, we, the TV business in general, should add more internetlike features to our products, adapted to TV's lean-back experience, to keep millennials and other consumers from cord-cutting.

What particular challenges are involved in personalising music channels and how can they be overcome?

Actually personalisation is not the challenge. It's a solution to a challenge. Three years ago XITE faced the question: "If you have all the music videos in the world, how are you going to serve consumers the right music video?" The answer is, obviously, personalisation!

XITE developed the entire 'Personalised Music Television' product from the ground up: a highly curated music video database, the proprietary personalisation algorithm, the user interface and the complete back-end of the application. The result is a music channel that automatically adapts to the consumer's interaction. First results show that viewing time increases dramatically, by up to over 300% per session. We are therefore proud that we can say that we reinvented music TV.

How important is the element of curation in developing personalised services and how much can be left to algorithms?

An algorithm is a great tool to help humans create the best personal music experience. But let me stress that although the algorithm is important, the element of human curation in developing personalised services is still key.

Our personalisation algorithm is great to process vast amounts of data and user interaction with our product, and generate in real-time an extraordinary personalised TV experience. However, our music experts are better at spotting new and upcoming artist, way before the algorithm recognises it as a potential hit. That's why XITE uses the best of both worlds in our Personalised Music Television product.

When will XITE launch the new service and on which platforms?

XITE is an operator-only product and is distributed within traditional pay TV packages. At the end of October we will launch XITE Personalised Music TV with KPN and Ziggo in the Netherlands and Unitymedia in Germany, reaching more than two million households. We have global ambitions and are currently in advanced talks with several major European and US operators for additional distribution.

(A Very Secret Service) from Canal+. The comedydrama is set in the French secret service of the Sixties and is from the same producer, Mandarin, as the highly successful OSS 117 feature-film franchise with a similar setting. Emmanuelle 50% of our income from the internet, where

camera content. "There is very little demand for this content in France and we derive about we have about 800 million views a month," he says. "About 19% of our income derives

"There is very little demand for hidden camera content in France" François-Xavier Poirer, Novovision

Guilbart, co-CEO at distributor About Premium Content, stresses it is not a spin-off.

Nathalie Bobineau, executive VP, TV and consumer products at France Télévisions says: "The French content market is being totally disrupted by the arrival of SVOD," adding: "Kids in particular are simply not buying into traditional TV, though France Télévisions still has its 'appointments to view', such as the 8pm news. It is difficult to say what the effect of SVOD will be, but what we can say for sure is that it is here, it is not going to go away, and it is very likely that its effect will be profound, even if that effect is difficult to predict."

Vaulpré isn't so sure. He maintains it is not yet clear how successful new players such as Netflix have been.

One thing of which he is sure is that advertising is moving to digital. While he accepts that moves by established players, such as the launch by Canal+ of DTT channel D8, have had some success in stemming this flow, he believes the move is ultimately unstoppable.

Accordingly, You Humour was at Rendez-Vous for the first time. It is a subsidiary of the Philippe Vaillant organisation, whose catalogue of 880 hours of comedy fare is, director general Philippe Vaillant says, "mainly exploited online, from which we derive the majority of our income, generating about 85,000 views a day on Dailymotion and YouTube. Sales to traditional broadcasters are becoming more and more difficult".

A very similar story is told by François-Xavier Poirer, founder and CEO of Novovision, one of the world's largest producers of hidden from the Middle East, where we are one of the best-known brands and where we had three different shows on in the region over Ramadan. The rest of the company's income largely derives from Asia, where we have an office, in Beijing."

Despite the significant percentage of the

by companies such as You Humour and Novovision, as they do from the state of the market. In the case of documentaries, Betty Nocella, international sales manager at Doc En Stock, reports that "so far in 2015 there has been an increase in demand for documentaries from French broadcasters". There has, however, "been a change in the nature of the documentaries they are commissioning, with much greater demand for wildlife, environmental subjects and travel, history and science, and far less for political subjects and current affairs".

Nocella highlights Arte and Canal+ as the French channels registering the biggest demand for documentaries, although she says France 3 "has a good number of slots, but these tend to be focused on history - although not the two world wars".

Nocella's observations are reflected in the comments of Roch Bozino, managing director and president of current affairs and investigative journalism specialist Java Films. Bozino describes documentary as "very tough". "Not only are there very few slots in France for our kind of programming, but, there are very



company's income coming from the internet, Poirer highlights the conundrums facing companies in France and around the world when he says: "Despite the breakdown of Novovision's [French] income, our shows still have to be funded by traditional broadcasters, albeit not French broadcasters, as they are far too expensive to fund from the internet."

Of course, it could be argued that the challenges outlined above arise as much from the particular nature of the content produced

few slots on broadcasters across the world. Where these slots do exist, broadcasters tend to want very parochial subject matter, which significantly reduces sales potential."

That the French market is changing is clear, and some of these changes are dramatic and likely to have profound long-term implications. It would be a mistake, however, to think that these changes are across the board. For some, depending on the area of specialisation, things will be staying much the same. TBI





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LAST WORD



KERI LEWIS BROWN

The Seven Deadly Sins of scripted formats

n television, we can spend so much time talking about formats that we risk viewing them as an end in themselves. When talking about formats, particularly in drama and comedy, often what we really mean is character. It is the characters, not the story, which travel best and can be adapted to new cultures and situations. The plot – what we traditionally think of as the bones of the 'format' – is simply what happens to the character, and how they react to it.

Those reactions are often defined by their flaws. A flawed character is an interesting character, and interesting characters are appealing in any country. Consider ITV's curmudgeonly *Doc Martin*, whose personality may not be monstrous by most standards, but whose flaws continually generate new storylines.

For a flaw to work, however, it needs to be deeply rooted in the writing. Surface quirks exhaust themselves quickly, while ingrained personality traits are a gift that keeps giving. *Doc Martin* just began its seventh season in the UK, and has spawned remakes such as *Doctor Mateo* in Spain and *Doktor Tinus* in the Netherlands.

This sort of dramatic truth has been around since the days of Shakespeare, and the Bible even gives us a handy shopping list of the most common human failings, in the form of the Seven Deadly Sins. It is no coincidence that we still see these timeless themes reflected in successful TV dramas and comedies on the international market.

Greed has been the engine driving some of the most notable dramas of recent years. Given its title, it's no surprise that Norway's breakout noir hit *Mammon* made greed one of its key plot points, while Danish financial drama *Follow the Money* has been snapped up for an Englishlanguage remake before broadcast. The waves from the global crash have been felt further afield too. JTBC in South Korea just debuted *Last*, a drama about a corrupt banker who ends up homeless in Seoul.

The reverse of that are shows such as Danish dramedy *Bankerot*, currently being remade in the US, in which characters crushed by the greed of others assert themselves and try to achieve their dream.

Lust is the throbbing heart of more successful telenovelas than can easily be counted, but also propels shows such as HBO's steamy thriller *The Affair*. Yet when tamed a little, the same passion can lead to long-running success — as with *Last Tango in Halifax*, in which the

irresistible attraction between an older couple has led to three series so far, with a fourth anticipated. Meanwhile, a deadly combination of wrath and greed put siblings in conflict with one another in Danish hit *The Legacy*. It is the motivation that makes the show compelling, not just the subsequent actions.

Similarly, how many great comic characters are defined by their sloth, pride or gluttony? The Office's David Brent is a perfect example, a character strong enough to inspire over 200 episodes of the US remake. Swedish dramedy Small Town Love is driven by the friction between capable female leads held back by their slovenly boyfriends. A second season has been commissioned, with remake talks underway outside Europe. Norwegian sitcom Side By Side pits equally flawed neighbours against one another, a timeless rivalry that has seen CBS pick up the format for the US.

Identifying the key characters, and the traits that drive them, can be a clue to which shows have the most universal appeal. Is one of the reasons that *Broadchurch* struggled to work in the US as *Gracepoint* because it was a plot-driven remake, not character-driven? Yet while *Breaking Bad* seemed like an unlikely candidate for the remake treatment, the Mexican adaptation worked because Walter White and Walter Blanco share a tragic downward trajectory relatable in any language.

Of course, this isn't to say that all TV drama must slavishly model itself on the same handful of archetypes. The booming market in international scripted sales proves that drama producers certainly don't need to be told how to craft compelling human-interest stories.

It's not only those in production who should pay attention to such things, though for content buyers, an awareness of universal human frailties can be a useful signpost for the characters – and stories – that will lend themselves to successful imports and remakes. **TBI**

It is the characters, not the story, which travel best and can be adapted to new cultures and situations. The plot – what we traditionally think of as the bones of the 'format' – is simply what happens to the character, and how they react to it



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