Television Business International

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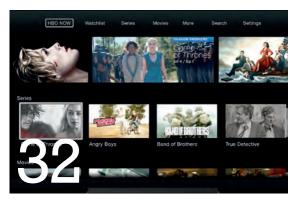
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EDITOR'S NOTE



STEWART CLARKE

he deal that brings Banijay and Zodiak together is the latest in an ongoing round of consolidation in the TV business, a trend that appears to be leaving one of the major players behind.

Having failed to execute an agreement for All3Media or make any other transformative deal, FremantleMedia has slipped down the Premier League of producer-distributor groups.

While Endemol and Shine have created a new super group, Banijay and Zodiak have aligned, All3Media landed with Discovery and Liberty, and ITV has bought more production companies than even the most seasoned trade journo can remember, FremantleMedia has been conspicuous by its lack of mega-deal-making.

Backed by RTL, and already comprising an impressive collection of prodcos, FremantleMedia is hardly small-fry, but if scale is as important as the new mega groups would have you believe, there must be pressure to do a deal that can catapult it back to the top of the table.

The problem might be who with, as several of the biggest potential targets have already done their deals.

We look at the Banijay-Zodiak deal in detail in this issue ahead of MIPCOM, the biggest TV get-together of the year.

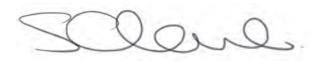
We also select the shows most likely to be hits at the market and have

a special kids Hot Picks for MipJunior, covering the best in animation, live-action and anything else new and exciting for the kids market.

TBI and our sister title Digital TV Europe are also launching something new in Cannes. We had a great response to our call for entries for the first-ever Content Innovation Awards.

We wanted an event to recognise the best in programming, production and distribution, as well as the platform and technology side of the industry, so we created a new awards ceremony covering all of these aspects of the business.

We run the rule over some of those shortlisted for a gong in this issue and look forward to seeing everyone at the Carlton Beach for the event itself.



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STUDIOS GLOBAL ENTERTAINMENT

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Zodiak Media and Banijay Group are set to form television's latest super-group after terms of a merger were agreed. TBI assesses the company's chances and reports on the latest developments

Analysis: Zodiak & Banijay merger

ill television's latest super-group be called 'Banijak', 'Zodijay' plain old 'Banijay-Zodiak Group' or something else altogether?

After agreeing terms of a merger, Zodiak Media and Banijay Group are set to form a powerful production and distribution group with strong assets in the UK, US, France, Germany, Italy and central and eastern Europe among other territories.

Deal confirmation came in July following weeks of speculation over the talks. The new group will count Wife Swap, Stars in Danger, Tipping Point, It's Only TV, Totally Spies!, The Inbetweeners and Wallander among its titles.

This makes it one of the world's biggest production and distribution groups, and puts it on firmer footing against commercially-minded content behemoths All₃Media, Endemol Shine Group and the ITV Studios production fleet.

Stéphane Courbit, who owns Banijay through his LOV Group investment vehicle, will be chairman of the new entity, with Banijay CEO Marco Bassetti becoming chief executive. It's Only TV: driving Banijay's recent success in France

While the exact shareholdings of the firm are not known, Banijay will likely take a commanding position because of its better financial shape, though both companies are thought to have significants debt associated with their various acquisitions.

Banijay's wealthy shareholders include LOV, investment firm GroupeArnault, the billionaire Agnelli family's Exor and Jean-Paul Bize's AMS Industries.

Zodiak CEO Marc-Antoine d'Halluin will leave upon completion of the deal in a

agreement of some sort, due to his background in overseeing media company sales.

When asked point blank last September if a merger with a firm the size of Banijay would make sense in the light of the then newly-announced agreement between Endemol, Shine Group and CORE Media and the sale of All₃Media to Discovery Communications and Liberty Global, he replied it was unlikely just a few years after Zodiak had merged with the UK's RDF Media.

"Of course, it could happen tomorrow or in six months, but the plan we have agreed upon with our shareholders is to develop the company to its full potential," he told TBI. "We still have some way to go there."

This could have been bravado, of course, as could the following from Bassetti when TBI talked to him at MIPTV 2014, where he was dismissive of potential M&A talk. "I don't see a merger coming, as I don't think there is opportunity for us there," he said.

Industry observers have applied the word "opportunistic" to the Banijay-Zodiak tie-up, and in this context it's easy to see why.

COMMON SHAREHOLDER

The fact Banijay and Zodiak have a common

Marco Bassetti will run the new Zodiak-Banijay company. His relationship with Stéphane Courbit is considered to a driving force behind the deal



The pair – friends for more than two decades and former colleagues at Endemol (where Courbit was Endemol France boss and Bassetti group president) – are thought to be the driving forces behind the deal.

few months' time, likely before MIPCOM. Sources have suggested he was not keen on the deal, though it has long been suspected he had been drafted in just under two years ago to help engineer a new shareholding

shareholder, De Agostini, is a key factor in what has come to pass. The Italian firm, which also has shares in Spain's Atresmedia, currently has a majority stake in Zodiak and a minority holding in Banijay through DEA Capital.

Another player is Dasym Investments, the Netherlands-based firm attached to Endemol and Talpa Media founder John de Mol. (Dasym was born out of Cyrte, which de Mol created in 2000 to manage his assets after selling Endemol for the first time.)

Dasym was involved in the creation of Zodiak Media when Zodiak Entertainment and *Wife Swap* producer RDF Media came together, and was rewarded with a minority share in Zodiak. Could de Mol be in line for another pay-out soon after ITV agreed to pay up to £1.1 billion (US\$1.7 billion) for *The Voice* owner Talpa, which he launched after leaving Endemol in 2007? Dasym's shareholding – if indeed it still has one – is unknown.

De Mol knew one thing, though. Last year he told TBI he expected more top-level M&A action: "In the next two to three years, you're going to see further centralisation of about three, four or five bigger global players who have come together to make a stronger global company."

NEW STRUCTURE

Once the structure of the new group is clearer and the merger complete, the story will move on to the structures of the resultant teams. There is unlikely to be much movement in the UK, where Zodiak is strong and Banijay has had no foothold since its disastrous and short-lived ownership of Zig Zag Productions, but elsewhere there could be widespread change akin to the personnel changes at Endemol Shine Group following their merger.

(Zodiak's head of format acquisitions Nathan Gibbs recently left the company, though this is understood to be unrelated; and management at *The Inbetweeners* producer Bwark have also exited to launch a new prodco, Fudge Park.)

Businesses in Russia, Germany, Australia, New Zealand, Ireland, Belgium, the Netherlands and India are exclusive to one and the popularity of its host, Cyril Hanouna, who is also CEO of Banijay France-owned H2O Productions. (Former Endemol France manager, Philippe Stoltz, is now the managing director of H2O, marking another link to Bassetti and Courbit.)

Another big hitter, former Banijay group COO François de Brugada, is now CEO of Banijay France. Gaspard de Chavagnac holds the same post at Zodiak France, which – though traditionally strong in the territory – has been struggling recently.

Notably, it was struck by tragedy when a number of celebrity contestants and Zodiak staff members were killed in a helicopter crash during the filming of TF1's version of reality

Marc-Antoine d'Halluin will leave Zodiak Media after the merger completes, potentially before MIPCOM in October this year



company or the other, and Banijay has no equivalent to the Zodiak Kids division.

There is plenty of overlap in France, where Banijay has been flying thanks in large part to nightly D8 panel series *Touche Pas à Mon Poste* (internationally known as *It's Only TV*)

series Dropped.

Elsewhere, Banijay has made in-roads into the US after Bassetti hired another ex-Endemol colleague, David Goldberg, to run LA production office Banijay Studios North America. Zodiak has formats on air in the States, but according to one well-placed source, "has been quieter since Grant Mansfield left" in 2012. Zodiak Americas CEO Jonny Slow left the group in February.

Both Zodiak and Banijay have operations in the Nordics (Zodiak Nordic, Nordisk Film TV, Banijay Finland, Respirator and Pineapple Entertainment), Italy (Magnolia Italy, Zodiak Active, NonPanic, Aurora TV, Ambra Banijay Italy) and Spain (Cuarzo-DLO Productions, Magnolia Spain).

The firms' respective distribution arms, Zodiak Rights and Banijay International, will also create overlap, with Tim Mutimer in charge of Zodiak's sales team and Emmanuelle Namiech in the same role for Banijay.

These are the areas where restructuring and job losses are most likely.

What will 'ZodiBan' end up looking like when the dust settles? **TBI**



On the move

TBI takes a look at the latest comings and goings in the international television business and reports on who's moving where

Discovery Communications has placed RICH ROSS into a networks group president role as it realigns its US channels structure. Ross, who joined Discovery at the turn of the year after leaving Shine America (now part of Endemol Shine Group), now oversees Discovery Channel, Animal Planet and Science Channel

Endemol Beyond USA president Will Keenan is exiting the Endemol Shine North America firm and has been replaced in the interim by his number two. Keenan is leaving after almost two years at the multichannel network, with Endemol Beyond USA COO Adrian Sexton adding an interim president title to his role

DEAN POSSENNISKIE, A+E Network's managing director of EMEA, has succeeded Tom Davidson as A+E Networks UK MD in a management rejig. Possenniskie has since named RTL Netherlands executive Nicolas Eglau as A+E UK's first COO, and Heather Jones as senior VP, content and creative

Discovery Communications veteran Marjorie Kaplan has been named president of content at Discovery Networks International. Chief creative officer Phil Craig and senior VP, programming and content operations Rosemary Newell will report to Kaplan as a result

NATHAN GIBBS has left his role as Zodiak Media's head of format acquisitions. He joined Zodiak from Endemol Australia last October soon to work on acquisitions with Grant Ross. He departed before news of the Zodiak-Banijay Group merger broke

New Zealand's Pukeko Pictures has named Clive Spink as its new CEO after previous incumbent Andrew Smith took a post as chief executive of mobile services developer Touchtech. Spink was previously COO of *Thunderbirds Are Go* coproducer Pukeko

JANE TRANTER has set up Bad Wolf, a new Wales-based prodco that will bring $\pounds 100$ million (US\$155.9 million) of investment to the UK territory. Tranter, the former head of BBC Worldwide's LA production outpost, will run it with BBC Worldwide Productions colleague Julie Gardner

Australia's Network Ten has appointed a new CEO after the resignation of Hamish McLennan. Current Ten CFO and COO Paul Anderson is the broadcaster's new chief executive, with non-executive director David Gordon becoming chairman

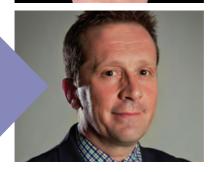
Endemol's former US studios boss PHILIPPE MAIGRET has joined ITV and will run scripted at its US division. Maigret becomes president, scripted programming, at ITV Studios America, overseeing its drama operation. He left Endemol Shine Studios in March













VIEWPOINT



LILLA HURST

All copros great and small

K production companies gapfinanced projects to the tune of £230 million-260 million (US\$360 million-US\$407 million) last year, up from £185 million-215 million in 2013, according to Pact's Independent Production Sector Financial Census 2015.

Why is this happening?

Part of the problem is all too familiar: commissioning fees are on the decline, while costs of production go up. A gap that was once comfortably covered by a modest distribution advance is now a rare thing and more frequently producers are opting to take the risk of going into production with a deficit in the hope that sales of the finished show will keep the wolf from the door.

However there is a growing trend, courtesy of the 'Netflix effect' that is also threatening the traditional coproduction model.

US-based channels that previously were open to coproductions with the UK are aggressively moving towards an all-rights model, where premium commissioning fees are paid for global rights.

This means that mid-range budgets that

The challenge for indies wanting to produce programmes with international appeal is to develop ideas that either appeal at a global, premium level, or offer volume at a lower cost

could previously have been financed by a UK/US coproduction are losing out as the America moves to an all-or-nothing scenario. The knock-on effect of this? Programme financing is being pulled in two separate directions — either an all-out global commission, or a low-cost prebuy.

At Drive we are now noticing the effect that this is having on budgets, where some projects are heading towards movie-cost territory and others are offering modest budgets in return for longer running, returnable formats.

The resulting challenge for indies wanting to produce programmes with international appeal is to develop ideas that either appeal at a global, premium level, or offer volume at a lower cost.

An additional side-effect of this is the influence the trend is having over quality. At the top level we are seeing hugely ambitious projects using A-list directors and talent (and all the CGI you can throw at it), while at the other extreme we see the most simple 'through the round window' TV that employs archive, voice over and simple graphics.

This means that we find ourselves pitching more frequently to US channels, but negotiating with them for a global rights package for high-budget shows, and pulling together three or more international partners for the cost effective, long-running shows.

While the type of projects we are currently working on have changed in terms of budget and subject matter, the requirement for coproduction expertise in piecing together multiple partner deals is by no means diminishing; if anything we are seeing more partners on certain projects.

At this point it's hard to say how long this current trend will last, and another unknown is how channels that are spending all their budgets on commissioning 'premium' content are going to fill the rest of their schedules, while maintaining core brand appeal across the schedule. If you are not an SVOD channel can you really get away with this model? **TBI**

Programme financing is being pulled in two separate directions – either an all-out global commission, or a low cost pre-buy. Some projects are heading towards moviebudget territory and others are offering modest budgets in return for longer running, returnable formats





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TV says 'Eh-oh!' to the new Teletubbies

The players that have brought back Children's BBC mega-hit *Teletubbies* tell TBI about how the project came about and paying homage to the original

inky-Winky, Dipsy, Laa-Laa and Po (and Noo-noo the Vacuum Cleaner) are back. The suited stars of preschool hit *Teletubbies* became household names in the late 1990s and early 2000s, and not just in homes with young kids as they generated a cultural impact in the mainstream.

Their success in the UK on Children's BBC and further afield led to it becoming the first international kids show legitimately sold into Chinese primetime (as *Tianxian Baobao*). This knowledge was a key part of DHX Media's thinking in 2013 when it paid US\$27.5 million for the *Teletubbies* rights, as part of a wider deal for Anne Wood's Ragdoll Worldwide catalogue.

The Canada-listed producer, distributor and channel operator planned on bringing *Teletubbies* back all along, although what form the four colourful characters would take was less clear, says DHX president and COO Steven DeNure.

"The first step was to have a look at the various options, and we took several of those to testing, using different creative approaches and solutions," says DeNure. "We looked at a number of things, including what *Teletubbies* would look like if we went to animation."

UK indie animation producer Darrall Macqueen had worked with DHX senior VP, distribution Josh Scherba on DHX-distributed toon adaptation *Topsy and Tim* and was soon alerted to the plan. The pitch to the UK prodco suprised Billy Macqueen and Maddy Darrall, who asked: "Why re-do something that was done so well the first time?"

The producers, however, came round and ultimately created a new vision for the show. "They came up with a visual approach that is respectful of the original, but brings it into 2015 and beyond, and the test showed a bit of magic," says Scherba.

The new approach involves the original costume characters acting out their adventures on a blue screen and composited onto a scale model of the set, before a layer of computergenerated imagery is added.

"It's common in the feature film world, but has never been done in a preschool series," says



DeNure. "It is taking the technology of *Lord of the Rings* or *Harry Potter* and adapting it for the TV series world."

In a nod to modern times, the screens on the *Teletubbies*'s tummies are now a touch-screen and the DHX execs promise a further "few surprises along the way". There will not be, however, a new *Teletubbie* character added to the line-up. "Things have been updated and there are new costumes, but there won't be a fifth Beatle," says Scherba.

Kay Benbow, controller of UK preschool network CBeebies, bristles slightly when asked about the show, perhaps mindful of the channel's profile as a commissioner of the new programme and the fact she has recently invested in another reboot in *Clangers*.

Quizzed by TBI at this year's Children's Media Conference, she said that the *Teletubbies* remake was going to happen with or without CBeebies's involvement.

"It felt right to me that it stayed on the BBC, its home," she said. "The truth is we were going to have to stop running the original shows as they were 4-3 [screen ratio] and they weren't HD. We think that it is a brilliant show, which is still relevant to a very young audience and it should

stay with the BBC, and specifically CBeebies."

In Canada the new series will play on DHX's Family Jr. channel. With worldwide rights in hand, DHX has also been selling it to international channels, notably with a US deal in place with Nick Jr.

Elsewhere, buyers include Italian pubcaster Rai, which will run it on its YoYo channel, and in France (and several French-speaking territories), where it will air on Lagardere's Gulli.

The Ragdoll deal has allowed DHX to bundle older episodes of *Teletubbies* with new ones. Nick, for example, wanted to control the library and picked up 365 eps of the original series as part of the deal for the new show. Rai took 14 seasons of the classic show, which is still on its air, alongside the 6ox12mins new offering.

The big question is whether the new *Teletubbies* can match the achievements of the old. "Success in 2016 looks different to 25 years ago, but kids consume more content than ever," says Scherba.

"Teletubbies has a unique background and is a unique package," adds DeNure. "There is a belief in a show like that because it is so well known, and there are so many new content distribution opportunities outside of traditional TV." TBI



THE SEA IS DEEP AND FULL OF SECRETS

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A battle over the future of content licensing agreements in Europe has been developing this year, and the outcome could change the future of programme distribution

Rights war brewing in Europe

he biggest change European rights distribution has seen in many decades may be coming.

On one side of a fierce philosophical and legal debate are politicians and 'Digital Single Market' campaigners intent on allowing viewers from one territory to watch their acquired content across Europe. On the other are distributors, producers and pay TV platforms desperate for that not to happen.

The European Union's plan for the Digital Single Market involves "tearing down the walls" between the organisation's 28 member states and ending geo-blocking, which would mean companies have to make pan-continental deals that give buyers access to content everywhere. This, it claims, would contribute €415 billion (US\$458.3 billion) a year for Europe's economy and create "thousands" of jobs.

Such a system would be a disaster for television programming distributors, who have built their businesses on a single-territory licensing model. The EU is aware of this, and in May Günther Oettinger, European commissioner for the digital economy and society, said the new system could allow "a degree of territoriality" for video rights distribution.

However, in the same speech at the Cannes Film Festival, Oettinger added: "We want to ensure that legally acquired content is portable. A European consumer, who buys a film from a video-on-demand catalogue from their home country, should be able to watch it wherever they travel in the European Union."

This middle-ground system may be a good comprise, but it's still one pay platforms and distributors would like to avoid if possible, as it means lucrative exclusive content siloed by territory will lose value.

In July, the European Commission launched an antitrust case into the country-specific programming deals pay TV platform Sky had with six Hollywood majors, namely The Walt Disney Company, NBCUniversal, Paramount



Pictures, Sony Pictures Entertainment, Twentieth Century Fox and Warner Bros. Entertainment. This came after a probe that had lasted more than a year.

Caveats within these multimillion dollar deals allegedly require Sky UK to prevent EU consumers not resident in the UK or Ireland from viewing its pay TV services. According to EU rules, rights that grant 'absolute territorial exclusivity', preventing cross-border competition, are in serious breach of rules.

The EC has previously expressed concern about deals between the studios and other broadcasters, including Canal+, Spain's DTS/Canal+, Sky Deutschland and Sky Italia – the latter two are now part of the wider Sky organisation.

"European consumers want to watch the pay TV channels of their choice regardless of where they live or travel in the EU," said EU competition commissioner Margrethe Vestager.

"Our investigation shows that they cannot do this today, because licensing agreements between the major film studios and Sky UK do not allow consumers in other EU countries to access Sky's UK and Irish pay TV services, via satellite or online. We believe that this may be in breach of EU competition rules."

Disney and NBCU immediately issued statements condemning the investigation, while Warner would only say it was "cooperating fully" and Sky simply acknowledged the developments. Neither Viacom-owned Paramount nor Sony has commented publicly.

British trade body Pact was more than willing to go on record, however, issuing an unprompted statement on August 10 claiming any changes would threaten original programming creation and ultimately, jobs in the TV and film industries.

Pact alleges a pan-European system would kill the concept of preselling, which for many medium-sized and small production companies is a vital part of their programming financing models.

"Without the ability to fully finance shows through pre-sales by individual territory, some projects simply wouldn't be able to secure the full funding to go ahead," said John McVay, Pact's chief executive. **TBI**





A Philosophy Teacher Finds Off-beat Ways to Impact and Change the Lives of his Adolescent Students



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The first Content Innovation Awards is set to be the latest addition to delegates' diaries at MIPCOM this year. The ceremony, which TBI is hosting in conjunction with our sister title, Digital TV Europe on the eve of the Cannes event this year, will celebrate the best new series and channels, top producers and distributors and innovations in the content and platforms industries. Ahead of the awards, we speak to some of the competitors...

In association with TBI The contenders

BEST DISTRIBUTOR

BOMANBRIDGE MEDIA

Boutique vendor and producer Bomanbridge (Haute & Saucy, below) sells global programming into the Asia-Pacific region, representing the likes of Sky Vision, Small World IFT and Peace Point Rights



THEY SAY: "Bomanbridge makes a complicated market profitable for its clients in the region, offering guidance and providing confidence to producers who want to enter the lucrative, emerging Asian market"

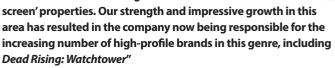
WE SAY: Singapore-based Bomanbridge has upped its public profile this year, while closing a number of standout deals

CONTENT MEDIA

London and LA-based indie Content sells scripted and unscripted programming, and is a pioneer in digital distribution

THEY SAY: "Content Media has built a solid reputation within the distribution business





WE SAY: Telemovie Dead Rising: Watchtower (pictured) is now in 117 territories just a year after its launch MIPCOM 2014, cementing the firm's reputation in digital



The merged Endemol and Shine Group sales team has one of the largest catalogues in global television, totaling 38,000 hours

THEY SAY: "Endemol Shine International is part of Endemol Shine Group, the new joint venture bringing together Endemol, Shine and CORE Media, to create a global content creator, producer and

distributor with a diverse portfolio of over 600 revenuegenerating titles"

WE SAY: In a vear of consolidation for the Endemol Shine Group, ESI's full-service approach has kept format and finished sales on track







ENTERTAINMENT ONE TELEVISION

Globally-focused indie studio eOne sells cable's biggest show, *The Walking Dead* (above), and new companion show *Fear the Walking Dead*

THEY SAY: "eOne TV recently established its biggest and boldest slate to date, ramping up investment in original television content, including DirecTV's You Me Her, Starz's Havana Quartet, and WE tv's Growing Up Hip Hop, as well as complementing its third-party line-up with AMC's scripted programming such as Into the Badlands, Halt and Catch Fire, Hell On Wheels and Turn"

WE SAY: With its parent company intent on doubling its size by 2020, eOne has significantly ramped up its focus on high-end scripted content, and is now getting into blue-chip factual

GLOBAL AGENCY

Izzet Pinto's fast-growing firm is the best-known Turkish sales house

THEY SAY: "Global Agency was founded in the second half of 2006 with only one project and a team of two people. It now has 120 projects and a team of 25. Our company slogan is content that creates buzz, and we live up to it through distribution of our hit content"

WE SAY: Focusing on entertainment and Turkish drama, Global Agency has carved out a significant niche regions, and is developing its own formats

KESHET INTERNATIONAL

Keshet has made a business of taking Israeli content around the world

THEY SAY: "Keshet International has grown significantly in both reach and turnover to become a significant new player in the global content business. The international distributor, development and production arm of Keshet Media Group boasts a lean, flat structure of executives who collectively punch above their weight to compete with some of the world's biggest players in television"

WE SAY: A consistent dealmaker since launch three years ago, *Prisoners of War* firm KI recently added a business development and acquisitions boss to spearhead a push into third-party content

TALPA GLOBAL

Now part of ITV Studios, John de Mol's Talpa remains a key player in the formats business

THEY SAY: "Talpa has gone beyond thinking about content formats as mere television formats, but instead as IP that comes in the form of applications and platforms that deliver revolutionary content experiences"



WE SAY: The firm behind *The Voice* (pictured) recently launched *Utopia*-inspired reality show *The 15 of Us* on Chinese on-demand platform Tencent Video, a project billed as the largest of its scale for a digital platform ever

TCB MEDIA RIGHTS

Boutique unscripted distributor launched in 2012 by former Cineflix Rights chief Paul Heaney

THEY SAY: "Proof that our vision of relationship-driven,
360-degree distribution has a place in today's complex and
competitive market can be seen in the fact that TCB regularly
competes with the distribution superstores for content and clients –
it's not just about the huge advance"

WE SAY: Heaney has used his network of contacts in the UK, Australia and the US to build a disruptive factual-focused vendor with a fast-expanding porfolio of revenue-driving programming

BEST SERIES LAUNCH

LIP SYNC BATTLE – SPIKE

The media campaign around US cable channel Spike's hit *Lip Sync Battle* helped the Viacom network record its best-ever unscripted launch

THEY SAY: "In the three months since Lip Sync Battle hit the international radar, the series is a ratings and multiplatform superstar for Spike in both the US and UK, and is the most-watched original series in the network's history"



WE SAY: A format hit on both sides of the Atlantic, *Lip Sync Battle* was launched internationally at MIPTV in the same month as its broadcast debut, and several deals have been struck since. In the US, the show took 198 million cross-platform streams and has 711,000 Facebook fans, while YouTube views currently total 121 million



WATAHA – HBO EUROPE

HBO Europe created a concentrated multiplatform campaign to promote its original drama, *Wataha*, which was shot in the Polish Bieszczady Mountains region

THEY SAY: "The Wataha campaign was the most successful in HBO Poland's history with 1.6 million viewers, 175 print cuttings, 501 internet articles and more than 1,000 social media stories. To summarise, we achieved our marketing goal; to protect essential communication borders, you have to cross boundaries"

WE SAY: Living in Poland and missing Wataha last year would have been tough: an on-air campaign starting six weeks before series launch, a limited edition Wataha-branded beer and a pullout supplement in a leading newspaper were all part of an extensive operation

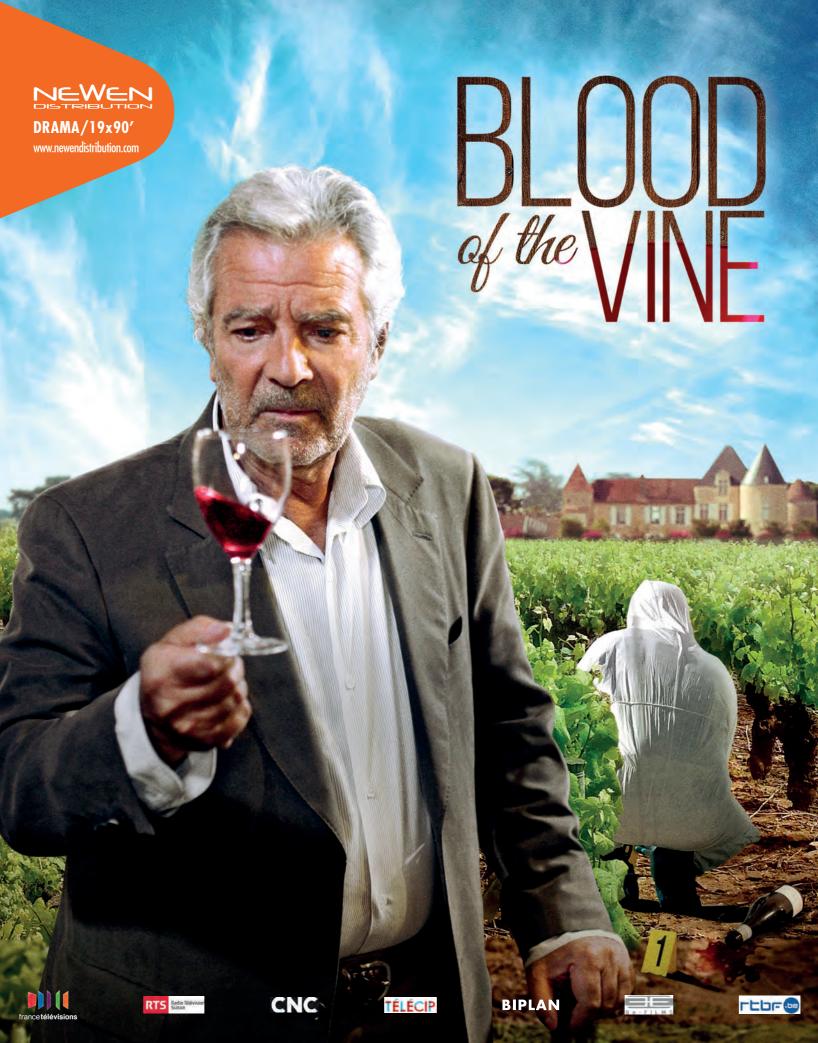
DYNAMO: MAGICIAN IMPOSSIBLE (SEASON 4) – DISCOVERY NETWORKS CEEMEA

In response to consistent audience interest about Dynamo's magic, Discovery brought the astounding British performer to five key markets (Poland, Hungary, Romania, South Africa and Italy)

THEY SAY: "In the fall of 2014, Discovery Networks CEEMEA executed an outstanding 360-degree marketing and PR campaign to support the launch of the final season of *Dynamo: Magician Impossible* on the Discovery Channel. The goal was to raise awareness for the show and drive tune-in through promotional activities, as well as to strengthen distribution and advertising client relationships in multiple markets"

WE SAY: Successfully bringing Dynamo on tour was a coup in itself, but the resulting social media engagement, television appearances, press coverage and performances for clients and the public made this campaign a triumph





MOST INFLUENTIAL PRODUCTION COMPANY

MARVISTA ENTERTAINMENT

The LA-based indie telemovie house hit the headlines this summer with its Lifetime film *A Deadly Adoption*, which stars A-list comic actors Will Ferrell and Kristen Wiig

THEY SAY: "From its origin as a distributor of third-party programming, Marvista Entertainment has steadily expanded its operation and is now producing, coproducing or co-financing 50 movies annually and supplying most of the US cable and network outlets"

WE SAY: The 2014-2015 period has been prolific for Fernando Szew's prodco, with A Deadly Adoption joined by titles such as An En Vogue Christmas, Bad Blood and Pants on Fire. Also in development are two telemovies for Hallmark Channel and for Disney XD, the second property from a multi-picture development deal



Skins and Shameless producer Charlie Pattinson and All3Media launched New Pictures in September 2013 as a premium British drama label



THEY SAY: "Charlie Pattinson, Willow Grylls and Elaine Pyke – the key executives at New Pictures – together are acclaimed producers in their field of compelling and relevant drama"

WE SAY: New Pictures-produced period drama *Indian Summers* was Channel 4's best-performing drama in more than two decades, with a second season in the works for the UK broadcaster and WGBH in the US. Also coming is season two of *The Missing*





NEW MEDIA VISION

It has been a bumper period for Todd Lituchy's NMV, which broke into US network TV by selling Spanish procedural format *The Mysteries of Laura* to NBC

THEY SAY: "New Media Vision was formed in 2009 to help international media companies with format scouting, product distribution, and expansion of their international channel portfolios. In 2014, NMV launched its successful production arm which has bolstered the company's position in the global TV landscape"

WE SAY: Laura was the only new NBC series to get a season recommission earlier this year, and UK-based NMV now has scripted projects in development with Sony Pictures Television, Electus and ABC Studios



BEST NEW CHANNEL LAUNCH



AMC GLOBAL

AMC Global's rollout began in October last year after AMC Networks had rebranded the MGM Channel Global

THEY SAY: "AMC has an exceptional track record for creating and broadcasting acclaimed original programming. The launch of this new network allowed us to enrich programming with our road map of consistently innovative original series and a broader selection of movies"

WE SAY: Using drama Halt and Catch Fire as an introductory vehicle, AMC Global is now in Europe, the Middle East, and Africa. On August 23 it debuted the muchanticipated Fear the Walking Dead as a simulcast with the US, and then launched in the UK for the first time via BT

SPIKE UK

Viacom International Media Networks began rolling out the wellestablished US entertainment network globally with a UK launch in April

THEY SAY: "Spike is a driven, high-energy channel offering a point of view and programme mix different from anything else on British TV right now. Just three months on air, the channel has achieved consistently exceptional numbers"



WE SAY: Spike's mix of formats (*Lip Sync Battle*), US acquisitions (*Breaking Bad*, pictured), movies (*The Transporter*), MMA programming, original commissions (*Tattoo Disasters UK*) and Channel 5 factual shows have led to a strong 0.31% UK DTT share, providing competition for rivals such as CBS Action and truTV

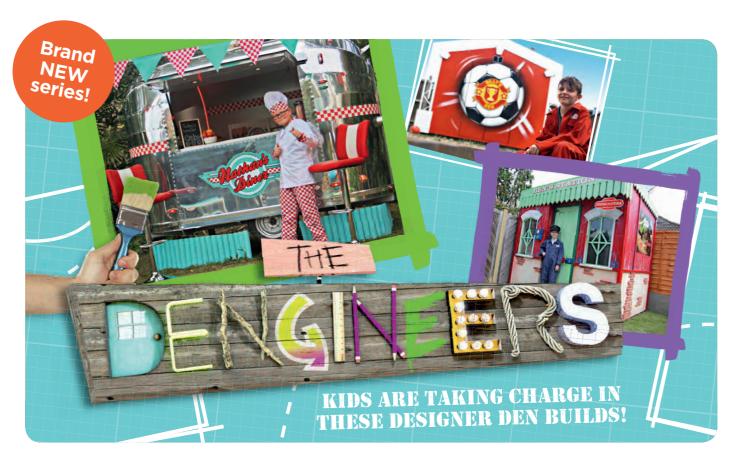


FIX & FOXI

Germany's Your Family Entertainment brought on seasoned channel builder Paul Robinson to distribute its new multicultural-focused children's channel

THEY SAY: "The channel delivers an ideal mix of entertainment and educational content of 24-hour programming along with monthly highlights, with two popular and beloved German fox characters as presenters"

WE SAY: Fix & Foxi launched in December 2014 after YFE claimed all rights to the character brand. It has since launched in Europe the US, Latin America, the Middle East and Africa, and will target Asia, Australasia, Scandinavia, the Baltics, the CIS region and Russia in the next three years TBI









Robert Redford, a noted student of American history, introduces and exec produces The West, the latest docu-drama out of the Stephen David Entertainment stable. Originally for Discovery Channel in the US, it is now set up at AMC and the cable net will launch it next year.

Banijay Group acquired US prodco Stephen Davis earlier this year, meaning the latter's content will be distributed by Banijay International moving forward. *The West*, however, will be sold internationally by DRG, which picked up the rights before the Banijay-Stephen David deal.

DRG, which is part of the Modern Times

Group and has been on a programme acquisitions drive in the past year, will start selling *The West* at MIPCOM.

"It is the definitive guide to the first group of people to follow the American dream," says Noel Hedges, executive VP, content, at DRG. "All of the key figures are in there, such as Jesse James and Wyatt Earp."

Filmed in Utah and Virginia, the 8x60mins series will go out on AMC in the US, the same channel that screened Stephen David's mafia series. *Married to the Mob.*

The drama-doc style of the producer's shows does provide some of the appeal of

scripted, but at factual prices, and are still likely to work for factual buyers.

"It could crossover into some [scripted] slots, but is really for factual buyers as it gives them a great way to migrate into drama, and allows them to move into a new area," says Hedges. "This is not a 'scripted drama,' but the drama is pushed to the fore."

The DRG exec adds that this period of US history has built-in international appeal. "A lot of Americana doesn't travel, but the West is almost a brand in itself."

DRG will have an extended promo for buyers at the market.

Halo: The Fall of Reach is the third of the Halo spin-offs, after Forward Unto Dawn and Nightfall, that Content Television & Digital has taken to market, as each installment of the video game franchise spawns associated video content.

These are packaged in deluxe editions of the game, with Content handling the sales effort to broadcasters and SVOD and digital platforms, effectively creating a revenue stream out of *Halo* marketing spend.

"The previous ones have set a template," says Content's executive VP, sales and distribution, Jonathan Ford, of how *The Fall of Reach* will be launched with the collectors' edition of *Halo 5: Guardians* in October.

A major change between new video companion piece and its predecessors is that

it is animated, not live action. "It is based on one of the novels and the animation is very relevant to the feel of the game; we think *Halo* fans will buy it," says Ford.

The story does not track the one played out in the new game, but is an adaptation of the eponymous novel by Eric Nylund, the first in a series and a prequel to the first game in the *Halo* franchise. It has also been made into a comic series.

Electronic-sell-through and download-to-own sales will start the push to buyers outside of those getting it with the game and Content will then take it to TV and SVOD buyers. The previous live-action show sold well, to buyers including RTL2 and Syfy in Germany and Netflix in France and Scandinavia.

THE SHOW: Zapped: The Buzz About Mosquitoes
THE PRODUCER: Alan and Jean
Burke in assoc. with CBC
THE DISTRIBUTOR: Scorpion TV
THE BROADCASTER: CBC (Canada)
THE CONCEPT: Even-handed
science doc about one of
humanity's most-consistent foes,
the mosquito

Scorpion TV will be in town with a documentary focusing on everyone's favourite hate figure, the mosquito. Originally going on out as part of season two of Canadian broadcaster CBC's *Nature of Things* strand, it repeated this year in May to strong ratings.

The doc mixes science, stunning close-up imagery and animated sections to explain the mysteries of the insect, painting it in a sympathetic light, while explaining the research done to nullify its dangerous disease-carrying properties. *Nature of Things* narrator David Suzuki follows the story from Pakistan, where dengue fever is widespread due to still water, to California, Canada and London's Natural History Museum and School of Hygiene and Tropical Diseases.

Scorpion is already the distributor of another *Nature of Things* title, *Survival of the Fabulous*, which takes a scientific look at whether people are born gay or not. Thanks to this, Cornwall says, he and producers Alan and Jean Burke worked out a deal to take *Zapped* global.

"This is the first time it's gone out in international distribution, and it's interesting how few documentaries about mosquitoes there are out there," says Scorpion's founder and managing director, David Cornwall. "Very few take a scientific look at them in the market place."

Shot in 1x45mins format, Scorpion will focus on commercial factual networks, thematic science channels and science slots on public and other broadcasters.

Potentially a buzzy title for MIPCOM.





The fact A Deadly Adoption has already sold into many key territories without having launched at MIPTV is testament to the attention the telemovie is driving.

That many viewers and journalists can't quite pick if it's a spoof of the Lifetime TV movie genre or a straight attempt has worked in its favour, garnering good media reviews of differing opinions and positive ratings from various audiences.

"The confusion has been overplayed on both sides of the coin," says Fernando Szew, CEO of the show's producer and distributor, Marvista Entertainment. "We'll leave that choice to the audience."

Much of the confusion has been centred on the stars, comedians Will Ferrell and Kristen Wiig, who play a couple that take in an expectant mother in the hope of adopting her child. Ferrell has carved a niche in pastiche through series such as IFC miniseries *The Spoils of Babylon* and films such as *Casa Mi Padre*, while Wiig is known for comedies including *Bridesmaids*.

LA-based telemovie specialist Marvista is attached as both producer and distributor, with National Picture House on board as a



producer and Rachel Goldenberg directing.

The film was the fourth-highest rated US original cable telemovie of 2015 among adults 25-54 when it launched in June on Lifetime, scoring 2.1 million overall viewers (128% above its primetime slot average), and was a social media hit with 35,000

tweets the evening of its first broadcast.

"The opportunity from a broadcast and audience point of view is that it offers something different," says Szew. "Everybody is looking for that, and this will get attention. We still have a large portion of the world to clear it in, and we expect to do that."



It is fair to say Bahraini television documentaries are not ten a penny, and also fair that even fewer of those make it to the international market. *Deals in the Desert* is one series that breaks the mold.

The 13x30mins series comes from JEO

Productions, whose CEO, Joseph Tito, is described by DCD Rights head of sales Rick Barker as "a great producer with great access" to Gulf region talent. JEO has been on UK-based DCD's radar since the distributor narrowly missed out on a previous series from the prodco in 2009.

Deals in the Desert follows real estate brokers in the Middle East, who sell homes and mansions to the rich and powerful for millions of dollars. "International audiences have a fascination with glamour and going behind the scenes to look at other peoples' lifestyles," says Barker.

Furthermore, "there has quite clearly been a huge upsurge in the international property market", says Barker. "Plenty of people will want to know a bit more about that world, especially those considering investing over there."

The series mixes traditional documentary, reality and MTV *Cribs*-style formats, all shot with glossy, warm filters that play up the exclusiveness of the clients the agents are servicing. "These are glamorous, no-nonsense characters," says Barker.

DCD will be targeting lifestyle channels at MIPCOM. "So many channels have slots available at the moment, and I expect male and female coviewing-focused channels to go for it," says Barker.

DCD will have a couple of finished episodes ready for the market, where *Deals in the Desert* will be a key priority for the vendor, which has become an increasingly important part of the DCD Media business in recent years.





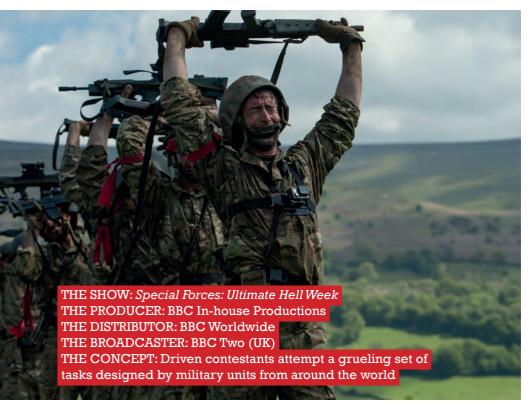
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Basic Lead



Testing physical and mental limits is a trend that's emerged in both the real world and unscripted television over past years. It's perhaps why the survivalist genre, driven by shows such as *The Island* and *Naked and Afraid*, is currently so popular.

The UK's pubcaster, the BBC, has gotten in on the trend with *Special Forces: Ultimate Hell Week*, a six-part primetime series for BBC Two that will launch in the autumn (but hadn't at the time of writing).

The show is going on internationally through the BBC's commercial arm, BBC Worldwide, which will be looking at finished tape sales and format deals.

The original follows 29 ultra-competitive contestants of all ages (including a 50-year-old rugby-playing grandmother) who are put through a week of intense physical and mental challenges – or a series of "living nightmares" such as constant exercise drills, impossible mind 'games', lonely enforced marches and interrogation drills.

Each episode focuses on a different challenge used by international military forces – including the US Navy SEALs, the Philippine's NAVSOG (Naval Special Operations Group), the Russian Spetsnaz (Special Purpose Forces) and the UK's SAS – that separate the weak from the strong.

This element adds information to the entertainment, says Andrea Olson, BBCWW's head of factual entertainment and lifestyle. "Viewers may know about the SEALs and SAS, but the show is also offering them a look into other armed forces that they might have never seen before," she says.

Following the contestants' journeys are larger-than-life former-cricketer-turned-TV-presenter Andrew "Freddie" Flintoff and a military psychologist. Flintoff plays a supportive role, says Olson, while the psychologist contextualises how the drills are affecting the mental and physical states of the competitors.

Interestingly, though there is no formal elimination element to the format, Olson says it is an elimination show. They can go three ways; one, by quitting if it gets too tough; two, if the military experts feel they are not up to the challenge; and three, if they are injured and cannot continue.

"The show has that really broad appeal, with the potential to play in primetime internationally," says Olson, noting there is focus on both the difficulty of 'Hell Week' and team-bonding.

"It has a mix of jeopardy and entertainment, and what makes it stand out is we're accessing a world many won't know about." THE SHOW: 800 Words
THE PRODUCERS: South Pacific
Pictures, Seven Productions
THE DISTRIBUTOR: All3Media
International
THE BROADCASTER: Seven Network
(Australia), TV One (New Zealand)
THE CONCEPT: Comedy-drama in
which a recently-widowed Sydney
columnist moves his family to a
remote Kiwi town

Actor Erik Thomson is well-known to Australian television audiences through his performances in Seven Network ratings smash *Packed to the Rafters*, and to international audiences through his role as *Hades* in the 1990s syndicated fantasy drama *Hercules: The Legendary Journeys*.

His latest outing for Seven is 800 Words, a gentle but comic drama about a Sydney columnist who moves his family to a quaint New Zealand town after his wife dies unexpectedly.

"This is a comic drama that really tugs at the heart strings," says Kelly Martin, CEO of Aucklandbased coproducer South Pacific Pictures.

Martin's prodco, part of the All3Media stable, is a prolific scripted outfit in New Zealand, but 800 Words represents its first effort entirely produced for the Australian market and she hopes it could become a long-running franchise if successful.

Much of the jeopardy comes from Thomson's relationships with his teenage children, who are perplexed by their quieter new life, the townspeople he writes about in his 800-word columns, and the local women who take an interest in him.

"Those relationships with the women build throughout the series, and the audience will want to know if any of them work out," says Martin.

Running to eight one-hours, All3Media International will focus on sales to channels with primetime slots that suit.

Of particular interest to global buyers is co-writer James Griffin, who was behind *The Almighty Johnsons*. That show, also from South Pacific, made history in 2013 by becoming the first Kiwi-created drama to sell to a US network.



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TV Connect MENA

2nd - 3rd November 2015, Jumeirah Beach Hotel, Dubai



TV Connect Africa 17th - 19th November 2015, Cape Town Convention Centre, South Africa



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16th - 19th November 2015, Millennium Gloucester Hotel, London

As About Premium Content's name suggests, the new France-based financing and distribution firm's business model is all about investing in high-end programming. The fact *A Very Secret Service* cost €500,000 (US\$550,000) per half hour – "that's pretty rare for France," says company co-founder Laurent Boissel – underlines the strategy.

The 12x26mins satire for cultural channel Arte France follows a young operative of a Parisian secret service organisation in the late 1950s that still sees France as a colonial superpower and that threats to its power lurk around every corner.

"These guys have no idea about how the world is changing," says Boissel, who is the former chief financial officer and operations boss at Zodiak Media.

The lead rookie agent's confused, chauvinist bosses give him missions such as investigating the US's obsession with Communism and making friends with postwar Germany. His life is further complicated when he falls for an inappropriate girl.

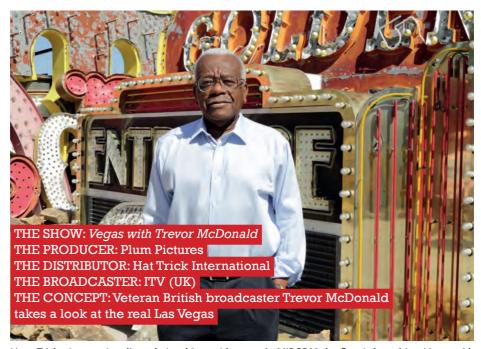
A Very Secret Service, which is being billed as a cross between James Bond movies and The Office, comes from Mandarin TV, which is part of French film producer Mandarin. The cast is



largely made up of young theatre actors, and Jean-Francois Halin, Claire Lemaréchal and Jean-André Terles are the writers.

"Our series definitely has international potential, which is a rare trait in comedy," adds

Boissel. "We expect it to appeal to high-end channels, which have viewers that don't mind foreign language programmes. In the UK, for example, we're thinking BBC Four and Sky Arts."



Hat Trick International's relationship with UK indie Plum Pictures continues to deliver Sarah Tong and her distribution team new programming for market.

At MIPCOM the firm is launching *Vegas with Trevor McDonald*, a 2x60mins documentary special for British broadcaster ITV, following eponymous UK journalist and news reader

McDonald as he seeks the underbelly of the glossiest city the world.

"Plum Pictures make programmes that are consistently of very high level. This is all about characters in Vegas, from bounty hunters to poker players, and includes a memorable encounter with Mike Tyson," says HTI head of sales Tong.

Though McDonald has his travelogue shows sold by ITV Studios Global Entertainment and his previous doc *The Mafia with Trevor McDonald* launch at MIPTV, he is far better known at home in the UK than he is internationally. He is, in a sense, new talent for the international market despite being 66-years-old.

"It is far harder to presell new talent than established talent," admits Tong, adding US buyers are in general not keen on British talent telling US stories, though she is "more than hopeful of sales in the rest of the world".

Tong points to McDonald's laid-back but probing manner as key to getting to the heart of the doc's subjects. "Trevor's questions make for a very in-depth look into those stories and who those people are," she says, adding the tone is "ITV, and not tabloid". **TBI**





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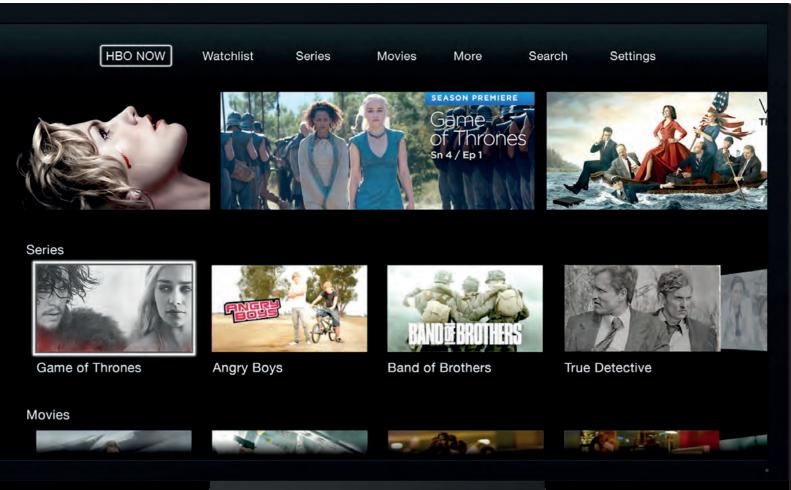




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Channels switch on OTT



Premium, basic pay and free TV channels around the world are looking to OTT and direct-to-consumer services to reach customers who are leaving the traditional TV space, or those that were never there in the first place. Stewart Clarke talks to analysts and execs about how channels are going over-the-top

etting the established pay TV channels to talk over-the-top and direct-to-consumer (D2C) can be challenging, largely because they are mindful that while there is a real opportunity, they need to carefully manage the relationship with the pay platforms that, today at least, pay them a sizable chunk of their revenues in the form of carriage fees.

Several of the biggest players have, however, made the leap into D2C and OTT.

HBO – as the service with perhaps the most to lose from Netflix, which is hooking its

marketing on the kind of high-end drama once the preserve of premium cable – launched its OTT service HBO NOW offering in April. The service has had over one million signups, although how many are taking the free trial and how many are paying the US\$14.99 monthly fee is unclear.

Showtime followed suit in July with its US\$10.99 American OTT service. A third premium service born in the US, Starz Play, has not gone out in the States yet, but launched as an international SVOD service that rolled out in the Middle East in June. The likes of Vice, meanwhile, started out as physical and

online products and are reversing into TV.

A key consideration for channels is how to embrace OTT without eating into their traditional audience on pay TV or over the air. The premium US cablers have mostly replicated their linear offering, banking on reaching bingeing millennials with line-ups of mega-budget programming.

At the lower end it is more of a challenge for the basic channels, without that layer of premium programming or a deep library of rights. Discovery Communications, which runs a large family of basic channels, is somewhat different in that it wholly owns a large catalogue that it can deploy where and when it wants. It is thusly embarking on an ambitious D₂C offer with Dplay, which is expanding on initial distribution in the Nordics, in a move reported by TBI in June.

"It's not in our best interest that OTT undermines the pay TV business, so we're evolving it in a way that we think, based on pricing; the way it is packaged and accessed enables it to exist in a multi-model ecosystem of pay TV, free TV and OTT," JB Perrette, president of Discovery Networks International, told TBI at the time.

The Discovery boss highlights a crucial point: a greater challenge for pay channel operators than eating into their existing audiences is managing the relationship with the pay TV operators that pay them carriage fees, and who are also fretting about bleeding subs to OTT services.

"Cannibalising audiences is less of a problem than jeopardising carriage relationships – the effects on carriage deals are likely to be felt well before the impact on audiences are noticed," says Richard Broughton, research director at media research business Ampere Analysis.

A middle ground is the system used in the US, whereby channels can offer subs over-the-top services, but that can only be accessed via a protected system. "Ultimately, a US-style 'authentication' system may well prove to be an acceptable middle-ground, allowing channels some degree of freedom without risking the carriage fees," Broughton says.

What OTT does give channel operators is leverage in carriage talks at a time when operators are playing hard ball, a trend highlighted in August when Liberty Global boss Mike Fries told investors that the multicountry pay TV operator would be shifting spend from linear channels to online and digital rights. Liberty had already sold out of its linear channels business Chellomedia.

While looking to drive down fees, the pay TV operators are also concerned about 'cord-cutters', 'cord-shavers' and 'cord-nevers'. Tony Gunnarsson is a senior analyst at research house Ovum, part of the same media group as TBI, Informa. He says these are real threats, but that the OTT opportunity must be seen in perspective.

His research shows that in the most developed OTT market, the US, OTT revenues are about 15% of total pay TV revenues and only increasing 1% or 2% a year, meaning that

even in several years' time OTT's market share will still be just 25%.

Clearly a problem in the US, cord-cutting is not, however, a global issue. Pay TV numbers are decreasing in Europe, but not consistently by territory, and throughout Asia and Latin America there is growth.

Asia is a hive of channel-based OTT activity. A+E Networks is rolling out a History Plusbranded OTT service on the 4ME OTT platform, which is a free service that was launched by Filipino broadcaster TV5 and Singapore-based channel operator Brand New Media earlier this year. It will be programmed with short-form History fare.

Fox International Channels is also getting into the OTT space, rolling out Fox, Fox Sports and National Geographic in China, Japan, Malaysia and the Philippines. Prakash Ramchandani, vice president and head of nonlinear products at Fox International Channels Asia, says the new services are programmed with a mix of new and library programming.

"Unlike the US, pay TV penetration is still relatively low in many markets across Asia, so there's still much growth potential," he says. "Offering options, whether by a traditional player they are on the go. As a channel provider it is the next logical step."

Channels can go OTT in one of several ways: through the OTT extensions run by their existing pay TV platform partners such as Sky's Now TV, Dish's Sling TV and Foxtel's Foxtel Play; via a third-party aggregator; or straight to the consumer.

CTE is taking the first route. "We recognise that some major programmers are looking more direct-to-consumer, but when pay TV in southeast Asia is growing nicely, we want to support that ecosystem with our key partners. For the platforms, OTT fills a gap in the market and the likes of Kix 360 will provide more touch points between them and consumers. You become more valuable to the platforms."

Miller adds he has been taken aback at the lack of industry learning on the subject of channels, platforms and OTT. "Everyone is trying to figure it out and is making assumptions. It is surprising that there are not a lot of benchmarks or reference points to guide us as to what is optimal," he says.

FIC Asia has adopted different strategies, making its OTT services available via existing platform partners Astro and Cignal in

"If ESPN follows HBO and creates a standalone sports service it would be a big move given how important sport is to pay TV platfoms"

Simon Murray,

Digital TV Research



or a new player, will only enlarge the pie and bring more pay TV viewers into the ecosystem. Cannibalisation isn't really a concern."

Saban Capital Group, Lionsgate Entertainment and Astro-backed Celestial Tiger Entertainment is another well-known operator of pay TV channels in Asia, and is about to launch an OTT version of its Kix action channel called Kix 360, which will have its Bellator fighting coverage and series including *Top Gear*.

"We're creating a dedicated, customised, linear feed for OTT," says Todd Miller, CEO of CTE. "We trying to go a step further and think about the user experience, especially when Malaysia and the Philippines, respectively, and new partners in Avex and Tencent in China and Japan. It has not, however, gone D₂C.

Ramchandani says the firm likes the business-to-business model. "This works well for us at the moment as our partners often have extensive experience in the consumer model and a proven track record of distributing our products and content in the most effective way possible."

He underscores an important point: channels have the ability to go D₂C, but pay platforms are long-term specialists in marketing and subscriber acquisition and management. As Ampere research director



Guy Bisson puts it: "Platforms are especially good at deriving value from consumers."

While there are still distribution costs in the OTT and D2C worlds and the returns are not yet clear, it is increasingly a space that channel brands need to inhabit, adds Bisson.

"It gives channels a hedge [as platforms attempt to negotiate down carriage fees], but is also about having a brand in that space and reaching consumers. Regardless of making money, you will need to be in that space to reach millennials," he says.

Having launched linear TV channels, Jeffrey Elliot of new group TableRock Media (pictured above) says rolling out the OTT equivalent is a much more cost-effective process. "You miss a huge swathe of expense in the middle, the regulatory [costs], distribution and other infrastructure. In TV you need infrastructure to look after your infrastructure."

Some channel operators are experimenting with full D2C OTT services. "A growing number of channel groups are exploring D2C opportunities to gauge the viability of unbundling their channels and selling them outside the pay TV bundle," says Ted Hall, research director at IHS Technology.

"At present, D2C services are providing a means of targeting cord-nevers or those that have cut the pay TV cord in favour of OTT alternatives. However, in the long term, they could serve as channel groups' primary revenue generator in an increasingly a-la-carte world."

Hall adds that while channels risk losing ad

revenues by fragmenting their audiences, they might be able to pursue better terms with new D2C partners than with the traditional pay platforms.

"Direct subscriptions and more-favourable distribution deals with video-streaming device manufacturers could see major channels better monetise their content than they currently do through carriage deals with pay TV providers."

Discovery is aiming for one million D2C customers via its new Dplay service

provides access to films that have aired no less than a year earlier on the Lifetime cable network. Though the service is designed to be complementary and is low-priced, at US\$3.99 a month, it does not appear to serve a need that could not be satisfied by Netflix or another OTT aggregator that provides access to archive movies."

Whether thematic and narrowly-focused D₂C services can build a head of steam is a moot point when, as Ovum's Tony Gunnarsson notes, "Netflix offers something for everyone, from kids right through to indie cinema".

New players are, however, taking channels to market without ever having had exposure on a traditional EPG or pay TV platform. Out of Canada, TableRock was created by former GlassBox TV founders Jeffrey Elliot and Joseph Arcuri, the latter of whom is also a former president of AOL Canada.

Former Discovery Channel Canada president and HDTV founder Ken Murphy heads the new company's board, and with the team in place TableRock is now planning super-niche OTT channels.

"We saw that there is an opportunity in delivering niche content over OTT," Elliot says. "At the start of pay TV people said it was absurd to have a one-genre channel, but they worked, and in 2015 people are willing to pay for well-produced, curated, niche content delivered on-demand."

TableRock's first offerings, launching early

"All major developments in this area see the content owner win out. It is a great time to own content"

Guy Bisson

Ampere Analysis



and the Eurosport Player. The factual and entertainment offering on Dplay and strong sports line-up on Eurosport Player – bolstered by the Olympic rights, which Discovery has just acquired – give it a good chance of success, says IHS's Hall.

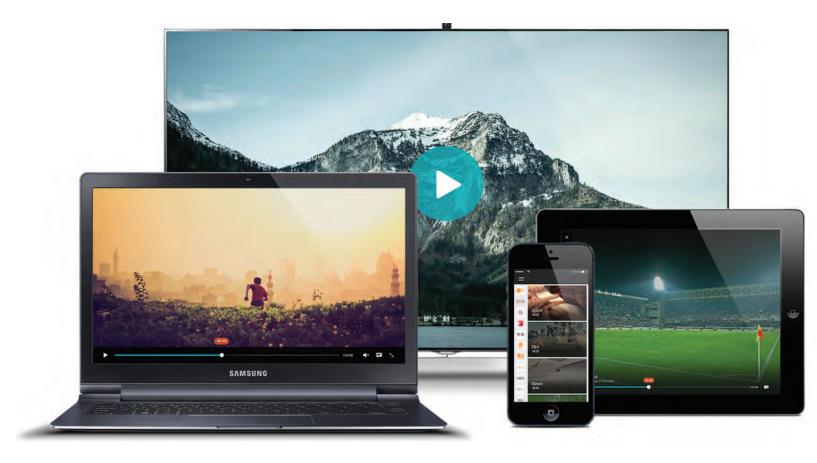
"The appeal of some other more-niche D2C offerings is less clear," he adds, however. "A&E's Lifetime Movie Club, for instance,

next year, will focus on specific interest areas including aviation, guitars and motorcycles. "Each of these are multi-billion dollar industries and cover subjects that go under the radar in terms of conventional TV. They are too niche in the old way of doing TV, but work in OTT."

The company plans to make about 80% of its content, with a guitar show with Rush's







Alex Lifeson and a motorcycle show with David Hatch, one of the TableRock exec team and the host of TSN series *Motorcycle Experience*.

Arcuri says TableRock's OTT channels can co-exist alongside pay TV, Netflix and YouTube because each fulfils a different purpose. "We liken it to breakfast, lunch, dinner and snacking," says Arcuri. "Netflix is dinner and YouTube is snacking. We are breakfast and lunch."

For the big TV brands to survive outside of the platforms in a D2C space, channels need a strong brand and content consumers know as well. HBO ticks both boxes and its HBO NOW service has got off to a strong start (its OTT services in Europe, meanwhile, have struggled).

"HBO NOW is the one to watch," says Digital TV Research principal analyst Simon Murray. "HBO's message to the pay TV operators is that people won't cancel for the service, so it is targeting people who never had cable in the first place. However, if the likes of ESPN follow HBO and do what they are doing with a standalone sports service it would be a big move given how important sport is to the pay TV platforms."

An ESPN move would be huge for the industry, Murray adds. "Talk of ESPN OTT

could be them trying to get a stronger negotiating position with the platforms, but HBO has done it and maybe the likes of ESPN are looking at that," he says. "Also, what is Netflix missing compared to traditional pay TV? Live content and sports."

So should the traditional pay TV platforms be running scared? "Yes, but at the moment the [OTT and D2C] economics don't stack up for most channels. Longer-term, it could be an issue, but the platforms are still well-positioned to perform an aggregator role," says Ampere's Broughton.

One company taking that aggregator role to the OTT space is Magine TV (above). It started in Sweden before launching in Germany and is now rolling out in the UK.

Michael Turner, Magine's chief content officer, says: "The first thing we did was talk to channels and work out the challenges for them over the next five to ten years. We found their profitability was still good, but they were leaking audience to new services and to the content warehouses."

Convincing free and pay channels to move onto Magine and treat it as they would a cable or satellite pay platform has been the challenge, says Turner. "There is an initial phase of protective behavior, and our job is to convince channels to treat Magine TV as a pay service with distribution terms and partnership agreements," he adds.

Magine is set up against the pay TV operators such as Sky, not the SVOD players such as Netflix. The channels inevitably feel pressure from their existing platform partners when a new player enters the fray, but in the basic cable space are largely free to join new services.

"The basic channels do experience tremendous pressure, especially where there is a dominant platform in a territory, but they also recognise it is good for them to have alternatives to the existing platforms," says Turner. "We think we have a shot at becoming a global pay TV provider."

While there are as many questions as answers in terms of the right OTT strategy for existing channels, there is a clear winner with each development and each platform or channel launch: content owners. More windows means more ways of extracting value from programming, more buyers and more people chasing exclusivity.

"All major developments in this area see the content owner win out," says Ampere's Bisson. "It is a great time to own content." **TBI**







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Go Jetters hails from BBC In-house Production and BBC Worldwide, the commercial arm of the UK pubcaster. It started out as an online game on the CBeebies website but has been developed into a fully-fledged 52x11mins series.

"The game was developed first, at the front, and that is the first time that has been done in the UK," says Henrietta Hurford Jones, director of children's, content at RRCWW

The look of the series has been refined from that of the game, she adds, with

Dublin's Boulder Media and Gian Animation sharing the service work.

The show follows four 'Go Jetters': Xuli, Kyan, Lars and Foz. They are fresh out of training and explore iconic locations around the world. "It's a fun, animated comedy adventure with some disco funk thrown in," says Hurford-Jones.

"It introduces preschoolers to accessible geography concepts, and there is a funky disco grooving unicorn, Ubercorn, thrown in," she adds. "There are "funky facts' in every episode, but it is done with a light touch. It is learning through geography, but done through comedy and adventure, and there are vehicles and gadgets."

BBC Worldwide is handling international sales and will launch the series at MIPJunior, with a *Go Jetters* party on the Tuesday of MIPCOM itself. The show will play on the CBeebies channel where it has rolled out, but as Hurford-Jones says, "we're a newbie channel compared to the big, global channel brands", so there are plenty of territories left where first-window rights are available.

The Secret Life of Boys hails from Anthony Q. Farrell, the writer best-known for his work on the US version of The Office. Originally, three years ago, it was billed as a straight-up comedy-drama about an American girl who goes to stay with relatives in the UK. The final incarnation is, however, a fully interactive comedy about Ginger, an 11-year-old Australian girl, who heads to England.

The clue to the change of nationality of the lead is in the co-commissioning broadcaster, Australia's ABC. But how did an otherwise straightforward kids series become the multi-interactive short- and long-form piece it is now?

"We took it to CBBC and they were interested in the project although full up with drama, but they did want digital projects," explains Steven Andrew, creative director of The Foundation, which made the show, "so we changed the nature of what we had and essentially added a collection of games.

With this new approach, the producers set out on a two-fold interactive plan, adding 'in-timeline interactivity' and 'out-of-timeline interactivity', which are mostly jokes.

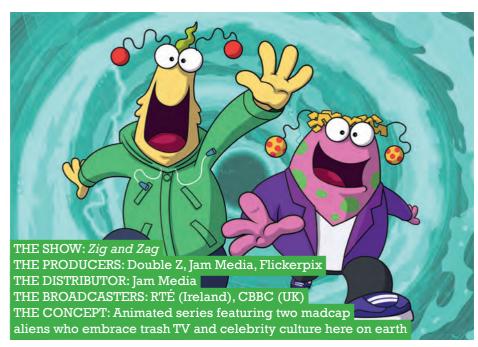
In reality that means viewers watching the five- or six-minute episodes on a connected



device are offered options at various points to interact and go further into the story, where they will see jokes played out, or funny alternative replays of events, or scenes seen through the eyes of other characters.

The out-of-timeline interactivity comes at the end of the show and gives viewers, depending on how much they interacted throughout the episode, boxes they can unlock that give them secrets about key characters and events. Ginger herself has a big secret and more details are revealed through this out-of-timeline piece.

Packaged as 25x5mins and as a commercial half-hour, Zodiak Kids will be launching the series internationally at MIPJunior. It launches in November and there will be finished episodes for buyers in Cannes.



Madcap alien puppets Zig and Zag are well-known to viewers in the British Isles of a certain age, having been incredibly popular in Irish broadcaster RTÉ's kids schedules in the 90s and then becoming a fixture in popular Channel 4

morning show The Big Breakfast in the UK.

Now the pair are back, but in animated form. "Creatively, the idea was to a young generation," says John Reynolds, chief commercial officer of Jam Media, coproducer and the distributor of

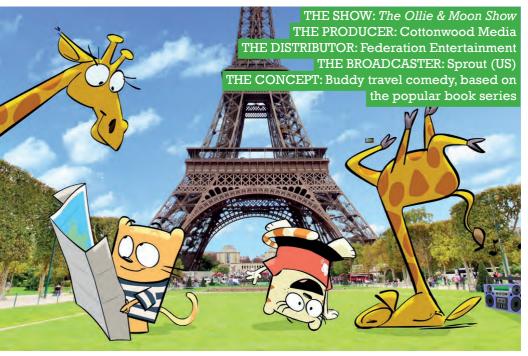
the new show, titled *Zig and Zag*. "RTÉ wanted to do it and because of its connection with *Zig and Zag* the BBC came on board."

Zig and Zag creators Ciaran Morrison and Mick O'Hara, who run Double Z, are writing the new 26x11mins offering and will once again voice the characters.

Double Z and Jam are complemented by Flickerpix on the production roster, with Jam handling all international sales. As well as CBBC and RTÉ, Northern Ireland Screen, The Irish Film Board and The Broadcasting Authority of Ireland have all contributed to the budget.

The animated show follows the titular aliens as they travel to earth. "They are basically two teenage boys from a planet called Zog, who have grown up on trash TV from Earth, and think it is wonderful. It's a slapstick sitcom for 6-9s," says Reynolds.

"There is a lack of good quality animation for that age group, and so much is driven by America," he adds. "In Europe, we will start with the public broadcasters because they have the slots. In the US it is different as we don't yet have enough episodes for the pay channels, which need 52, so we may look at other options."



Kids industry veteran David Michel's new animation company, Cottonwood Media, has got off to a flying start with a commission from Sprout in the US for hybrid series The Ollie & Moon Show.

Based on the book series from Diane Kredensor, whose TV credits include Clifford the Big Red Dog, the show targets preschool and older kids with a mix of 2D animation and live-action. It follows two globetrotting cats as they have adventures in, on and around famous locations around the world.

"It's a high-energy character show, and it is very entertainment-driven, which is in line with Sprout's rebranding and new positioning," Michel says.

"It is about two best friends who learn about the world through travelling and is about serendipity, stepping out of your comfort zone and following your instincts, which are all core values for preschoolers. It's not a travel show; it is character-driven and the locations are secondary."

The Ollie & Moon Show was developed by Kredensor, Robert Vargas (Wonderpets), and Michel. There will be scripts and some video in hand at the market, with the full show starting to deliver in 2017.

Pascal Breton's Federation Entertainment will be selling the 52x11mins kids series at MIPJunior after Cottonwood partnered up with the fledgling Paris-based group.



Fred is a housecat with pretensions to be an intrepid explorer, finding out anything and everything about nature and the outside

world. That is why *Nature Cat* will appeal to kids and, by association, buyers, says 9 Story Media Group managing director Natalie

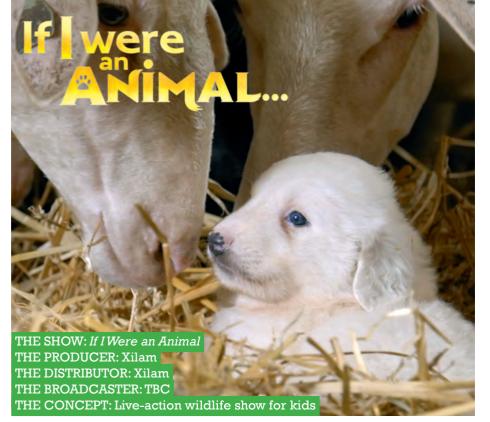
Osborne.

"Kids still love the outdoors, but there is maybe not as much opportunity for them to explore it nowadays," she says. "Like Fred, there is a little bit of trepidation about being an explorer extraordinaire, but they want to try and that's why kids can relate to the show."

In his attempts to find out more about the outside world, Fred is joined by a cast of animal friends including Hal the Dog, Daisy the Rabbit and Squeeks the Mouse (the most fearless of the bunch). Like Fred, who is voiced by Taran Killam, several of the other animals are brought to life by *Saturday Night Live* stars such as Kate McKinnon and Bobby Moynihan.

Canada-based 9 Story is launching the show internationally at MIPJunior with two complete episodes. It launches on PBS Kids at the end of November.

David and Adam Rudman's Spiffy Pictures is on production duty on the toon, which has a look that harks back to some classic shows, says Osborne. "It's 2D animation and a throwback to a classic style, which is really refreshing. It's a fun action-adventure that inspires kids to go outside and explore their own backyard, parks and nature," she says.



Xilam has a well-deserved reputation for animation, counting Oggy and the Cockroaches and Zig & Sharko among its cartoon series. Its latest offering for the market is, however, a foray into live-action and the kids wildlife genre made in partnership with Emmy Award-winning

French doc director Frédéric Fougea.

"We discussed it and noticed that most wildlife is for primetime and family, but there is nothing specifically for kids; there is nothing in the short-form wildlife space," says Marc du Pontavice, boss of France-based Xilam.

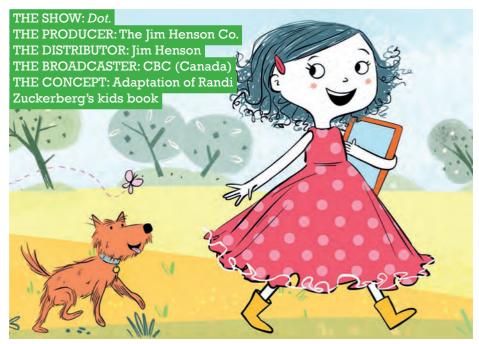
Each episode of If I Were An Animal follows a different species from its infancy to adulthood. Rather than a purely factual take on the lives of the growing animals, the show adds a narrative layer with a voiceover delivered by a boy and a girl.

"We describe it as docu-fiction because we take deal with it as a story, not a straight documentary," says du Pontavice. "The idea is we see each animal as a kid among its family and as it grows. With the signet episode we see the young bird first spread its wing and as it learns to fly."

The footage is a mixture of that shot in recent years combined with specially-filmed parts. The final product will have some small animated elements inserted between sequences.

Billed as a €6 million (US\$6.6 milion) 39x7mins series for 5-9s, Xilam has self-funded three finished episodes. As well as the signet, there are installments on a fawn and a lynx. Multiple episodes could be run back-to-back to fill a commercial half-hour.

Xilam will be pitching If I Were an Animal at MIPJunior. It is making a bet that will fill an unmet need. "Wildlife shows are almost never programmed in kids TV; they are in primetime or on specialist channels," says du Pontavice.



Randi Zuckerberg is a tech entrepreneur (it runs in the family; her brother is the founder of Facebook) and author of Dot., a story about a technology-loving little girl who uses her electronic devices as a jumping-off point for colourful adventures.

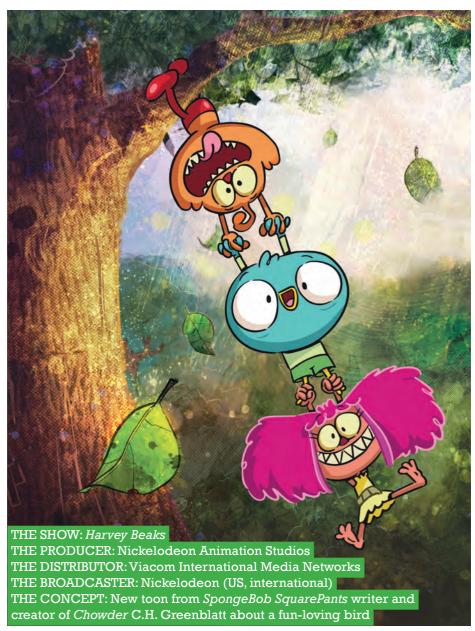
The Jim Henson Company president Peter Schube was a fan of the original book. He left it on the desk of company executive VP Halle Stanford and she duly picked up the baton. Henson took the book rights and it is now in development with Canadian public broadcaster the CBC on the TV adaptation.

"We were looking for a little girl character and we wanted a real kid in the same way as Sid the Science Kid is [for boys]," says Stanford. "Dot is a modern child, and we saw that we could do a show that takes the idea of technology and integrates it with real kids' play."

Parents are often concerned their offspring are having too much screen time, making the notion of a screen-loving heroine a challenge. "The book actually encourages kids to move outside and we think you can do that and celebrate technology, and show how it can be used to deepen experiences and passions," says Stanford. "The digital experience becomes one that is active and playful."

"The series will also teach kids how to be digital citizens, and responsibility in the digital world," she adds. To that end, Yalda Uhls, author of Media Moms and Digital Dads, is advising on the series.

Zuckerberg is also actively involved. Her original motivation for creating Dot. was to provide a strong role model for tech-savvy girls. "She wanted a female lead because there is a need to promote women and girls in the tech industry," says Stanford.



From C.H. Greenblatt, the creator of Cartoon Network's *Chowder* and a writer on *SpongeBob SquarePants*, *Harvey Beaks* is Viacom International Media Networks' big MIPJunior launch.

The show is being used as a companion piece to *SpongeBob* on Nick in the US, where it launched in March. It started rolling out on Nick's international channels in June and is now being offered to global kids buyers.

The series, which runs to 52x26mins after an early second season order, follows the titular Harvey, a little bird who tries to be good, but invariably gets involved in scrapes and adventures with his two less well-behaved friends, Fee and Foo.

"We conduct a lot of research and it has told us that young viewers want to do good, whereas for previous generations it was all about rebellion," says Caroline Beaton, VIMN, senior VP, international programme sales. "Harvey is very good, but he has naughty friends in Fee and Foo."

The VIMN team will be reiterating Greenblatt's credentials with buyers. "He did *Chowder* and *SpongeBob* and this has the quirky feel those shows have, although it looks very different," says Beaton.

The 2D-animated series for 4-10s has been designed to resonate with girls as much as boys and be a scheduling companion piece to *SpongeBob*, Nick's toon juggernaut.

THE SHOW: Danger Mouse
THE PRODUCERS: Boulder Media,
CBBC, FremantleMedia Kids &
Family Entertainment
THE DISTRIBUTOR: FremantleMedia
International
THE BROADCASTERS: CBBC (UK)
Netflix (international)
THE CONCEPT: Contemporary
version of the classic toon about a
secret agent mouse and his mole
sidekick

Danger Mouse was a huge hit in the UK in the 1980s and was also popular in Australia, France and Germany among others. The super-spy comedy was also on in the US, winning a cult audience on Nickelodeon.

That show's producers look to have lined up an international hit for the modern era, with children's channel CBBC commissioning a 26-part CGI-animated comedy action reboot and Netflix coming on soon after as a very early prebuyer.

FremantleMedia owns the *Danger Mouse* IP. Its FremantleMedia Kids & Family Entertainment division has a copro deal with BBC Children's in the UK, and this is the latest joint project from that pact. Having been about two years in the making, it debuts on CBBC in September and will be on Netflix around the world next year.

Bob Higgins, FMKFE's executive VP, creative and production, says that after the 'why don't we make a new *Danger Mouse...'* conversation with the BBC, there was a degree of nervousness about getting the look and feel right with such a well-loved property.

"Everyone involved said, 'great idea, but let's make sure we're not the ones that ruined it," recalls Higgins. "Today's audience and the competitive landscape are very different, and we wanted the best of the original and to bring a freshness." **TBI**



SANTA MONICA



LAST WORD



OLI HYATT

EU plan could harm animation funding

hat do I love about Europe? There are so many elements: the varied climate and scenery, the melting pot of ideas that both compliment and contrast and the cultures that can thrive and do business under a single market.

The European Commission's objections and probe into country-specific TV rights deals (see page 12), however, will not only destroy the rich diversity of content, but will also greatly impact the very way in which we have funded our animation projects for years.

The days of marching into the BBC and being given a cheque for the full value of your project are long gone. As a result, many of us hardy and adaptable souls sometimes willingly, or at times out of necessity, form complicated European coproduction structures, and fund our shows largely on a territory-by-territory basis.

The proposed changes will threaten territory-specific deals putting the funding model for original content in jeopardy. There will be less cash for new programming and jobs will be at risk.

There is much to celebrate in the cooperation we have with many of our European partners, and none of that is more evident than at the Cartoon Forum. It's a wonderful melting pot of European animation talent and programming, and a place where we get together with broadcasters and try and shape deals on a territory-by-territory, channel-by-

channel basis.

These deals form the backbone of our budgets. Should these be removed there is a possibility we will be disincentivised to work with European partners, which is clearly not the intention of the European Commission.

Without the ability to fully finance shows through individual territory presales, most projects simply wouldn't be able to secure the full funding to move ahead.

Even the bigger animated shows that already have the US and other international territories on board are still unable to secure financing without several EU partners, a large overdraft and bit of luck.

Another possibility will be that without these exclusive deals, broadcasters will pay less and producers will have less money to invest in quality content for the consumer. This applies even more so to the significantly under-funded kids market where our local broadcasters often at best can only supply us with 30% of our budgets.

Many of our shows are funded by presales and private money, and the last thing our industry needs is to be made less investable. Tax credits and enterprise investment schemes have helped a resurgence in the UK animation market place and the long-awaited children's TV tax credits will hopefully provide the same boost. If we are unable to secure the presales as well as the media funding, we could see our industry slide back into decline.

This is not just a UK problem. The smaller producers from around Europe rely heavily of

the larger territories to help get their shows off the ground.

With a need to protect their content this could force the producers to find alternative models of financing or risk being put out of business. Unfortunately in a European market place with many countries tightening their belts, I do not see what other route to market they have.

With British Screen Advisory Council, PACT and other organisations now in full lobby mode, I have high hopes we can secure concessions on this. However, with the looming EU referendum here in the UK, I wonder what the appetite is at Number 10 to fight this?

The UK government has been broadly very supportive of our creative industry with the wonderful work done by Ed Vaizey at the Department of Culture, Media and Sport and the inspired creative tax credits from [UK Chancellor] George Osborne. Let's hope they fully understand the implications of these proposals and fight it with required amount of vigour.

Perhaps a good compromise would be to adopt portability in licensing arrangements, while still protecting the fundamental principle of territoriality of rights.

This would mean that we would still be able to license our shows to an online or broadcast service provider on a territory-by-territory basis, and yet consumers who subscribe to a particular service in one EU country would still be able to access that service in another.

If we don't reach a compromise then I have no doubt current plans will harm diversity and the quality of content for the consumer and will have the biggest impact on mediumand small-sized producers, who will have less ability to adapt than larger companies.

While the impact will be felt in the other TV genres and indeed the film sector, I fear that it is children's, and in particular animation, that may suffer the most. **TBI**

The European Commission's objections and probe into country-specific TV rights deals will not only destroy the rich diversity of content, but will also greatly impact the very way in which we fund our animation projects





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