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# Prensario *International*

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Especial Report  
The New  
Latin America



by Nicolás Smirnoff

# CEE... time for the next step in media evolution

The recovery of Central & Eastern Europe, awaited for 6-7 years and missed since the 2008 global crisis —ten years ago!— it is already a fact. It is not so strong as it would be wished, but it opens a new step for media evolution facing the digital boom, as it happens in other regions.

At this edition, we provide a deep report about the Hungarian market, showing that the country global economy is 4% up this year, the same as last year, and the ad pie is 11% ahead. Last MIPTV, we talked with some Greek broadcasters and they told that their media market was up about 10% last year, and it is 7% up again this year. We are talking about two of the most problematic CEE economies recently. Russia is again 12% up this year, though the political problems with U.S.A.

Every solid broadcaster is buying and producing again. Not only entertainment formats, but also fictions, which mean important bets. And they are entering the digital environments, with fully international VOD platforms as RTL in Croatia and Hungary.

The challenge of CEE now is to qualitatively evolve in TV and digital convergence. To leave the idea of TV channels and pass to multiple-screen content factories. To grow again in international alliances, to both



access and generate original content that gain global markets. Latin America and Asia are doing this, CEE now have more stability to infrastructure investments.

Of course, this doesn't happen fast. One step takes the next one. But the evolution now is from survival to quality business. Right decisions must be taken this year.

### Print & Online

Apart from this Prensario print issue, you can follow Natpe Budapest and Conecta Fiction through our online daily reports, day by day at our website [www.prensario.net](http://www.prensario.net) or receiving our daily newsletter service. If you want to receive the latter, please contact [info@prensario.com](mailto:info@prensario.com)

### Conecta FICTION

#### Schedule

EVENT	DATE & TIME
Pitch Copro Series	06/19 - 10.30 am - 11.30 am & 2.30pm - 3.30pm
FNG Latin America Screening	06/19 - 11.30am - 12.15am
Pitch Fundación SGAE	06/19 - 12am - 1.30pm
Branded Content Contest	06/19 - 3.30pm - 4.30pm
Pitch Digiseries	06/19 - 4.15pm - 5.15pm
Screening: Señor Ávila (HBO Latin America)	06/19 - 5.3pm - 6.30pm
Case Study: Adaptation of Skam in different territories	06/20 - 10.30 am - 11.15 am
Screening: Colombian series	06/20 - 3pm - 5pm
Case Study: Regional broadcasters from America & Europe	06/21 - 11am - 11.45am

### NATPE Budapest

#### Schedule

EVENT	DATE & TIME
Global Content Business Forum	06/25 - 16:30-17:45
International Drama Production Panel	06/26 - 9am - 10am
A MENA Regional Overview	06/26 - 12am - 1.30pm
A World of Formats	06/26 - 5pm - 6pm
Game-Changing OTT Platforms and Content	06/27 - 9am - 10 am
The Current Advantages of Latin America	06/27 - 12am - 1.30pm
KOCCA Screening & Luncheon (Invitation Only)	06/27 - 12am - 1.30pm
Pitch & Play LIVE! Format Competition	06/27 - 4pm-5:45pm



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BY FABRICIO FERRARA

# Hungarian market takes shape and grows

Prensario's longstanding report on Hungarian television, one of the most important markets of CEE, shows that the country is finally recovered after two good years of the industry: the advertising market is solid again, showing similar numbers to the ones before the 2008 crisis. Fragmentation, content diversification and new programming trends.

In the past 10 years number of the Hungarian-speaking channels has been increasing by almost 75% so currently there are around 120 networks competing for the audience meanwhile the number of viewers has been continuously decreasing. This fragmentation has a serious impact on the key players of the market, primarily the leading cable channels and the big Free TV channels suffered the biggest loss in the past year.

Last year, the Hungarian advertising market grew by 11,52% to a total of 240,98 billion forints (USD 884 millions). Television was up 7,49% to 60,232 billion forints (USD 219 millions) taking 24,88% share of the media mix.

The other challenging point is the audience, which is spreading their viewing hab-

its on different devices. Even though the total TV AMR is decreasing in Hungary — though its extent is less than in many other European countries—, time shifting viewing share is about 1,5% in 18-49 and hasn't been increasing significantly since 2014, so TV remains by far the most watched screen thus linear television is still our core business. What do the main broadcasters of the market think about this context?

## The Protagonists

**RTL Hungary**, which operates the market leader free TV broadcaster **RTL Klub** and seven cable channels is reinforcing its position in the market with big entertainment formats for prime time, expanding fiction production, introducing programming twists and going digital after successfully

relaunching a local VOD offering. Fresh news are yet to come this Autumn.

**Tibor Forizs**, director of content acquisitions says: 'The Hungarian economy is in better shape as the country is growing around 3% again on a yearly level. According to the **Hungarian Advertising Association** spending on advertising in Hungary rose more than 11% in 2017, with online ads taking a very big portion with an almost 17% increase. TV ad incomes grew, too. To keep positions, main TV groups can choose two paths: to bet on volume (launching more channels,



RTL is strong in both, scripted and non scripted with *Our Little Village* —'the Death Star of Hungarian TV' described by one of the top Hungarian journalist because of its smashing audience shares— commissioned for a third season, and *Survivor*, which has been expanded from a weekly format to a daily fare generating great ratings throughout the weekdays, respectively



Tibor Forizs, head of program acquisitions and scheduling, RTL Hungary



Gabor Fischer, program director, Group TV2



Balázs Medveczky, director of Television Services, Duna Media Service Provider Non-profit



John Rossiter, GM, Sony Pictures Television Networks Central Europe

etc.) or to be confident on quality, doing business issues better or differently. We intend to proceed with the latter'.

In the non-scripted arena **RTL Klub** airs shows like *X Factor* (**FremantleMedia**), which year by year keeps itself extremely successful, and *Survivor* (**Banijay Rights**), which has been expanded from a weekly format to a daily fare generating great ratings throughout the weekdays. 'In the upcoming Fall season, we are planning new format hits we cannot announce yet, that will be aired either on a daily or weekly basis', adds **Forizs**.

'We are very proud of our scripted lineup, too. This proved to be a good "game changer". We have our daily soap *Among Friends* on its 20<sup>th</sup> season and we achieved our goal with three locally adapted weekly series so far: the dramedy *Divorce*, which ended recently with its third season, the comedy *Our Little Village* —'the Death Star of Hungarian TV' as one top journalist in the country named it based on its smashing audience shares— commissioned for a third season'.

'Last but not least this year we've added another show to the repertoire called *The Teacher* (*Der Lehrer*), based on a highly successful German format which performed according to our expectations in the Spring season. The last two series aired in a very competitive prime time slot on Saturdays, where they found a very loyal audience and the series became constant rating boosters'.

**Forizs** continues: 'When it comes to our cable channels, films seem to outperform series, so they are getting more slots in the schedule. There are different reasons, generally the U.S. series are not so successful

as they were in the past. American movies, on the opposite, especially the very commercial studio titles, keep or improve their figures even after several runs on the various channels'.

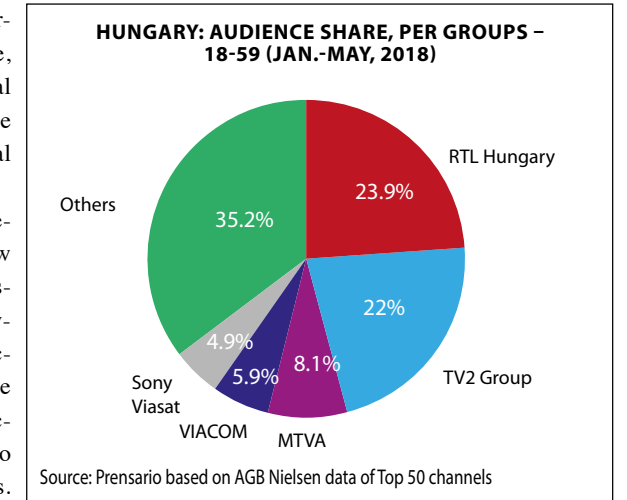
'About foreign language series we are trying to scout new and trendy crowd-pleasers especially from Europe. However some more recent experiences showed it is hard to please mass audiences with fresh acquired content so we decided to better produce stuff ourselves.

This strategy paid off: *Glorious Girls* (*Oltári csajok*) a 100-episodes straight-to-series commissioned Hungarian telenovela based on an original IP proved to be a key hit for **RTLII** which became one of our best rated cable channels in the last couple of months', he completes.

Oppositely **TV2 Group** managed to increase its market share mostly due to its cable portfolio expansion in 2016 launching seven new channels besides the existing four. The difference between the two leading media groups has never been so small since 2010.

Gabor Fischer, programming director, describes: 'Portfolio-minded program strategy is the key to success. In the first month of 2018, we became the #1 TV channel in 4+ during all day and in prime time also. Compared to the same period of the previous year, this means a 9.4% audience share increase in all day and 13.6% in prime time'.

The increase continued and in May 2018, TV2 Cable portfolio had a 1,1% lead be-

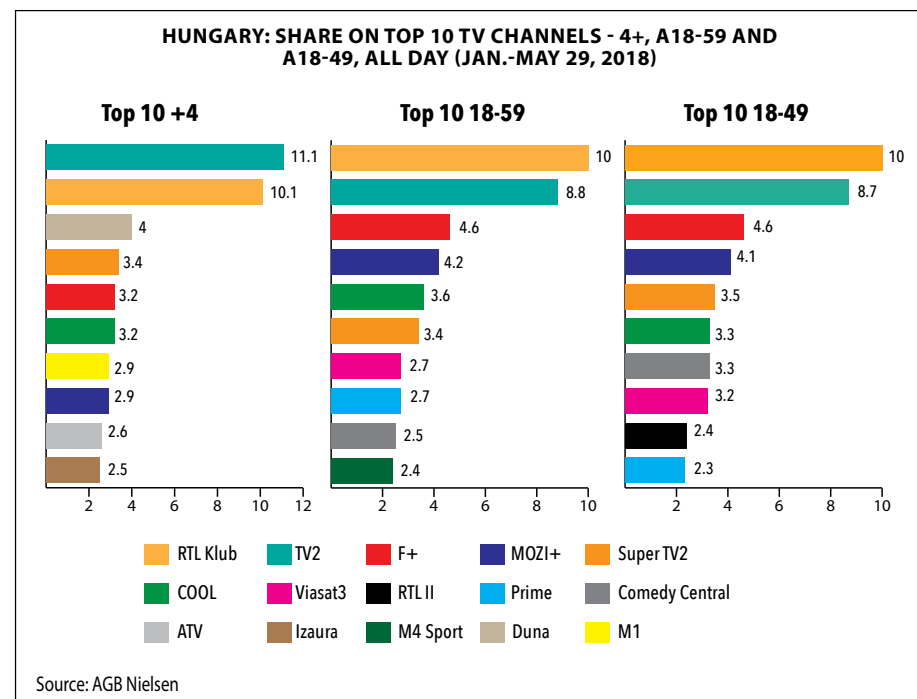


fore **RTL Hungary's** portfolio. The entire Group is also on the way to become market leader, the difference is only 0,2% (18-59, AD) between RTL and TV2 Group.

Looking at the cable portfolio, **Izaura TV** and **Prime** boasts the 'most spectacular' results says **Fischer**, and he added: 'In January 2017 in the 18-59 age group **Izaura's** audience share was 0.4% during all day but this January increased to 1.6% representing a 300% increase over the previous year. The channel's attractive program structure easily found its audience and breaking the records day by day. In April 176% and in May increased its audience share by 200% compared to the previous year'.

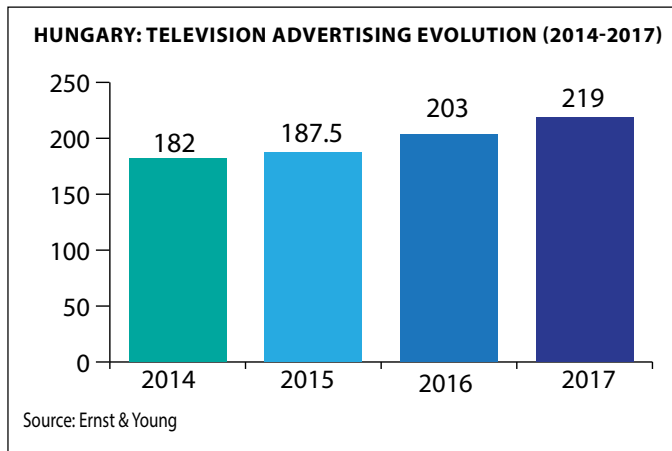
**Prime** was repositioned in the past few months and the results are well-marked. In May it reached a record, the 2,7% (18-59, AD) audience share is the best result so far in the channel's history, and increased its audience share by 50% compared to the previous year.

Last month, **TV2 Group** announced that its portfolio will expand to 15 channels by





## Hungarian market takes shape and grows



the end of the year and the main goal of the media group is reach the number one position on the Hungarian TV market. 'Local productions have key role to reach our goal building the number one television portfolio in Hungary', stands the executive.

Fischer: 'This year's biggest hit is *Pyramid*, our daily game show aired in the 7.00pm slot on our main channel, TV2, followed by a returning success, *Dear or No Deal* (**Endemol Shine**). More-

new and returning shows on its flagship channel: 'We will bring back *Ninja Warrior Hungary* (**Dentsu Aegis**) with its second season which was an absolute success on TV2 last year, and I am happy to confirm that our dramedy series *Step Dave* (**all3Media**) will come back to the screen with new episodes too. Among the new shows the original version of the *MasterChef* brand (**Endemol Shine**) will have its exclusive debut on TV2 as well as the original big shiny floor entertainment show, *I Can Do That* (**Armoza**). And new daily game show, **Vivendi's** *Couple or not?* is also coming to the screen soon.

About the programming, he finalizes: 'If we look at our whole TV portfolio the last year's report's figures show that the most watched program genres are the entertainment shows, feature films and news programs. On the two big main channels though the dominance of the local productions are beyond dispute: in prime time viewers preferences are clearly the locally produced shows so we put a huge effort to invest and develop new entertainment and game show formats, which can offer a real alternative to viewers. On the cable side feature films are still popular as well as a bit older, classic series as viewers continue to show interest in the established brands'.

over, our most recently launched format, *Raid The Cage* (**Sony**) premiered on April 9<sup>th</sup> on TV2 has become a market leader in its slot very quickly. Compared to **RTL Klub's** *The Wall* the program kept its advantage in all three important target groups'.

As for the fall it is planning a number of

The third largest broadcaster of the Hungarian TV market is the State-Owned MTVA. **Balázs Medveczky**, director of Television Services, Duna Media Service Provider Non-profit, explains: 'Generally speaking local audience is looking for entertainment, edutainment; such as *Blue Planet II* and *Planet Earth II* on our cultural and educational channel **M5**. The audience is also looking for shows which are made on the Hungarian market'.

Several original productions are successfully running on the Public Group services: *Csak színház és más semmi* and *Egynyári kaland* series, and quiz show *Honfoglaló*, originally a Hungarian online strategic quiz game on air every evening on **Duna Televízió** since the end of 2017. 'With this show the Hungarian public media aims to fulfil its mission to create value since the game contains questions on national and international topics of culture, history, nature and art. *Honfoglaló* became an international success: French company **Adventure Line Productions** has already bought the TV format', explains **Medveczky**.

Among the hottest programs on the Public service is *Virtuózok*, a music talent show focused on classical training and talent. Scouts look for young talents who can give an excellent performance on a classical musical instrument or are highly talented classical singers. 'This program has been a big success in promoting classical music and classical musical education in Hungary', says the executive.

And he concludes: '*Fölszállott a páva* its a folk music and folk dance talent show jointly organized by **MTVA**, **Duna Media Service** and the **House of Traditions**. Solo singers and singing ensembles; instrumental soloists and orchestras; dancing soloists and pairs compete. The show had seasons with children competing and also seasons with adult contestants'.

Back in 2015, **Sony Pictures Television** acquired **Viasat** business in Hungary, and now operates five networks: **Viasat3**, **Viasat6**, **Sony Max**, **Sony Movie** and **AXN**. **John Rossiter**, general manager, **SPT**



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TV2 biggest hit is *Pyramid*, a daily game show aired in the 7pm, while its dramedy series *Step Dave* (all3Media) will come back to the screen with new episodes too

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## Hungarian market takes shape and grows



Some of the hottest programs on the Public service are *Virtuózok* (credit: Kaszner Nikolett), a music talent show focused on classical training and talent, and *Főszállott a páva* (credit: Levente, Varadi-Lumidance), a folk music and folk dance talent show jointly organized by MTVA, Duna Media Service and the House of Traditions

Networks, Central Europe, explains: 'The Hungarian market has started to focus on Total TV consumption finally. To handle fragmentation and the limitations of acquisition library, original production is the way to differentiate yourself and support 360° deals. Content has to work both on linear, and non-linear platforms and boost digital, marketing and PR'.

Original shows like *Ultraviolet* and *The*



Original shows like *The Real Housewives of Hungary* are exclusive contents available on all Sony Viasat platforms

*Real Housewives of Hungary* in addition to network originals like the series *Carter* and *Absentia* are all exclusive contents available on all our platforms boosting total consumption. It also broadcast hit US series close to their original release date, for example *SWAT* and *Deception* amongst movies, which are an absolute trigger of viewership.

**Rossiter** completes: 'Contents supported by major brands work better (celebrity brands, comics universes, franchises, global formats) – it seems that viewers need help in deciding what to consume and they wish to minimize 'risk'. Full throttle high-season is longer (spring season starts earlier, fall season starts in late August). Trends in data sketch up a story where linear TV is becoming the second screen for given generations, day-parts, segments and genres so the value of local production and other platforms increase further'.

### Digital and future

In the digital field, **RTL** re-launched last February *RTL Most*, transforming a simple catch-up offering into a modern VOD platform, using the **6play** technology from **M6 Group** (France). 'Technological deployments included broadcasted and thematic channels, live streaming, video catchup encoding and playout, video resuming, local ad-servers, etc. We do already see some of the results we were expecting: we've grown 72% in video views compared to last year which is quite impressive', remarks **Forizs**. 'At this moment the idea is to build a free of charge, advertisement funded, VOD platform service for registered users who will be able to indulge a carefully curated and continuously growing long-form and short-form content library together with a rich variety of

catch-up offering from our TV channels', he concludes.

**Fischer** adds about the next steps on **TV2**: 'The current trends show that there is an increasing demand for locally produced drama so one of our main goals for the upcoming years is investing more in local fiction production and introducing and establishing new prime time series on our main channel. Besides local drama big shiny floor entertainment shows still seem to be the most popular genre in the weekend prime time slots and sports live events can still attract viewers to the screen so we would like to keep investing in sport rights also'.

**MTVA** is in the middle of a strategic planning of a new OTT related subscription/advertisement based VOD platform. 'The current solution only covers the aggregated video platform, thus we would like to open towards a more sophisticated video service', remarks **Medveczky**.

Last but not least, **Rossiter** says that on a regional level 'the acceptance of VOD is much developed in Poland than on the Hungarian market'. In Poland users are 'concerned about its price, while in Hungary the service itself is still unknown by most of the population'.

Still, there is a tendency towards content driven consumption on all of our markets. In digital we devote huge efforts to community building, expanded our services with "Digital only" content lineup and second screen interactivities and as part of our content boost strategy we offer unique digital VOD lineup and secondary digital storylines.

He concludes: 'Content driven consumption has arrived and we are happy to serve viewers' demand on every platform. There is a shift in business models, the return on investment of productions is now understood on a total consumption level, but monetization factors propose questions to be figured out by market players. Synergies within conglomerates play a bigger role than ever, in-house distribution and production could be a way to go on the long-run'.



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## bTV Media: storytelling + entertainment + technology

Florian Skala, CEO of bTV Media Group (Bulgaria), describes to PRENSARIO the moment of the leading local media conglomerate, owned by CME Group: 'High quality content, based on first class journalism and powerful storytelling in diverse entertainment and fiction genres, and delivered with state-of-the-art technology, is what Bulgarian viewers appreciate most now'.

And he continues: 'The global trend, in which content and not the channel, drives the market, is here for several years already and was proven again by the latest viewership results of bTV Media Group as the leader and trendsetter. This spring we offered, with great success, several first class locally adapted formats in different genres, and also a brand new daily series, which changed TV consumption habits'.

Premium sports content has always been wanted, as demonstrated by the viewership results of UEFA Champions League matches on the thematic channel bTV Action, as well as on the VOD platform, Voyo. 'In terms of news and current affairs, due to the spreading "fake news" phenomenon and the growing awareness of its damage, the demand for high quality TV journalism is also growing. bTV is the most trusted source of information, according to a recent survey by Market Links (April-May 2018, among viewers aged 18-54)'.

Regarding the content strategy, Skala re-

marks: 'Our core entertainment shows, such as *The Voice of Bulgaria*, *MasterChef Bulgaria*, *Home Makeover* and *Wife Swap* attracted the greatest part of the total audience. Our average primetime share for the season is was 38.5% among all viewers. The diversity of genres covered (music, culinary, reality) was backed by uncompromising quality of the production. *The Farm* was the most memorable TV event in 2017, according to 11% of the respondents in our nationally representative annual survey, conducted with Market Links (April-May among people aged 18-54)'.

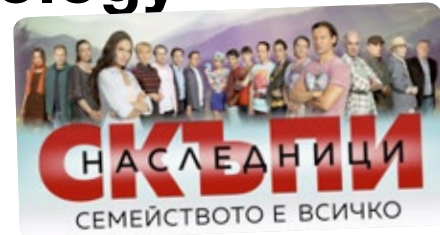
'Fiction, both local and acquired, is a vital part of our successful program mix, and our quality series this spring once again had great impact with the audience. The TV phenomenon of 2018 in Bulgaria is undoubtedly our original daily dramedy, *Dear Heirs*, and its launch in January introduced a new trend in local fiction consumption'.

'We extended primetime for TV viewers an hour earlier, now starting at 6pm on weekdays, and the series reached an average share of 38.7% (for All4+) and 38.0% (for 18-49), which is an impressive result. At the same time, since the it is suitable for multiplatform watching, each episode attracted tens of thousands more fans online on our free catchup platform, *btvplus.bg*, which is generating more than 4.6 million views, seven times more than the same period last year'.

bTV local fiction portfolio this spring was strengthened by season 12 of the longest-running and most successful Bulgarian series *Capital Hillbillies*. 'Our focus and most of our efforts are clearly on local content, but acquired fiction will remain very important for the diversity of our program. We offer the best movie and series titles from Warner Bros., NBCUniversal, 20th Century Fox, Paramount and trending titles from Turkey, Europe, and many others', states the executive.

About digital, bTV Media Group is focused on creating 'superior content'. It has improved the performance of its digital portfolio since last year: 'Users are spending an average of over 23 minutes watch-

Florian Skala, CEO of bTV Media Group



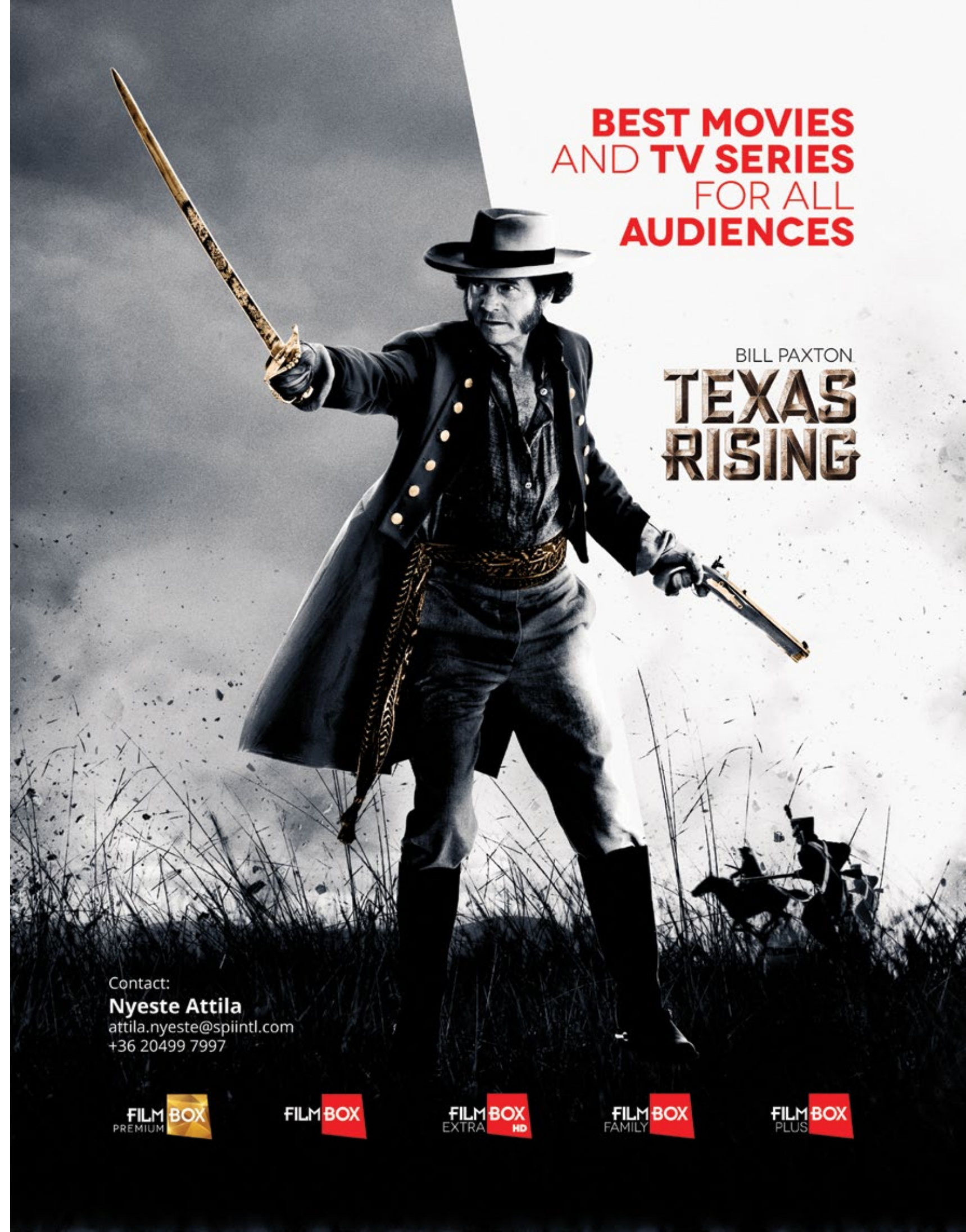
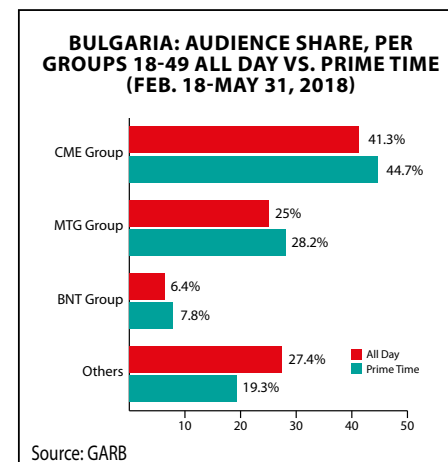
The TV phenomenon of 2018 in Bulgaria is bTV original daily dramedy, *Dear Heirs*



*The Voice of Bulgaria* and other key prime time shows attracted the greatest part of the total audience: bTV average primetime share for the season is was 38.5% among all viewers

ing our offerings. *Dear Heirs* receives big interest, and also *bTV News*, current affairs and entertainment shows both live and up to seven days after broadcasting. *btvnovinite.bg* was created to host these last three contents, specifically. As it is also a mobile device, it has attracted Bulgaria's most active population segment: some 88% of the platform's users are aged 18-44, while 77% live in the capital Sofia or one of the other big cities'.

Skala concludes: 'We are focused on state-of-the-art technologies, balanced and objectively verifiable news programming instead of fake news, and world class storytelling in a rich variety of TV genres. This is the healthy TV business formula which bTV Media Group applies to remain the leading media group in the country. And it is this quality programming and journalism that keeps TV as the most trusted medium for advertisers'.



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## Markiza: foreign formats, local tastes

Owned by CME, **Markiza Group** is a leading television operator in Slovakia, where it obtains 30.7% of audience share on its three networks: the flagship TV channel **Markiza** (22.6%), **Doma** (4.3%) and **Dajto** (3.8%), according to data from PMT/TNS (Q1, 2018).

PRENSARIO interviews **Michal Borec**, PR & Marketing Director: 'We have had great success with fiction, especially lighter comedy and family series. After years of local concepts, we tried various foreign formats such as *Dear Daddies* from **Viacom Telefe** (Argentina) and we are very happy with the results. It was a big hit as we adapted the original scripts to local needs. In entertainment, we continue with proven hits such as *Idols* (**FremantleMedia**), *Chart Show* and *Who Knew*'.

About the top shows recently released, the executive explains: 'We are happy that in the spring season we were able to strengthen our leading position in each segment. As mentioned the scripted series *Dear Daddies* was a big hit in access prime time this year. We also completed the reboot of our legendary series *Neighbours*, which opened each week during the spring season with great audience shares'.

At **Markiza**, the balance of original vs. acquired content was about 60-40% in all day.

Acquisitions are most important for our niche channels. 'The audience is always looking for good original content. In the fall and spring season almost all of prime time on our main channel is based on local production. There are no rules or patterns: we achieve above average ratings with local comedies, entertainment or even prime time quiz shows. Our viewers usually prefer light entertainment, but drama series can also be successful in attracting an audience', adds **Borec**.

Regarding the digital world, the executive highlight the Group's OTT subscription service, **VOYO**, in which the viewer can find all of our local production, as well as an extensive film library from the distributors with whom it cooperates as a TV broadcaster.

'VOD distribution of our content is a key digital product for us. Within Slovak TV broadcasters we have historically been the only provider of a full-fledged VOD platform. The plan for the future is to offer exclusive VOD content through the widest range of devices, while continually improving the distribution and consumption of VOD content.'

To conclude, **Borec** refers to the future & health of the TV business in Slovakia: 'We don't anticipate a radical change in the TV business in the short term for smaller markets with a certain language barrier and lower purchasing power compared to Western Europe, as is the case with Slovakia'.

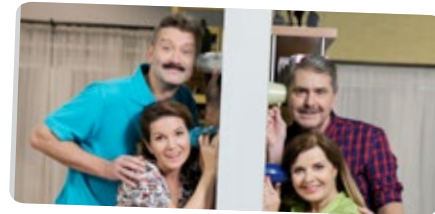
'While there has been a tendency of large advertisers to divert some media spending towards the online environment, quite often we encounter the fact that without television they will not build a quality campaign with a strong impression. Therefore, we would not under-estimate TV, especially not with active target groups of 25-55, which advertisers want to reach most', he adds.

'We think television will preserve its space in the media market as a medium that can deliver a message in a short space of time to a wide audience. To do this, it needs high-quality local production that also attracts a younger viewer,

Michal Borec, PR & Marketing Director, Markiza



*Dear Daddies*, local adaptation of Argentine's format *Sres Papis*, from Viacom Telefe, is a huge success on Markiza



The channel completed the reboot of its legendary series *Neighbours*, which opened each week during the spring season with great audience shares



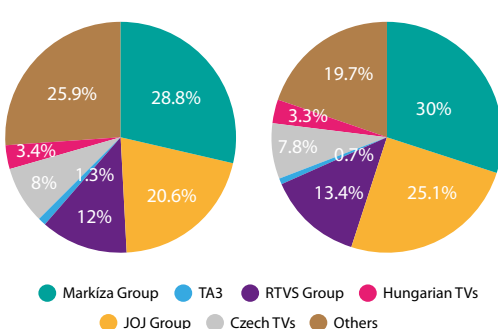
*Superstar* is the local adaptation of *Idols* (FremantleMedia), which is a proven hit on Markiza

and we are the leading producer of local content in Slovakia to do this', **Borec** affirms.

'That said, we do see the online environment as an important means of distribution and, in this respect, it will behave like a classic television channel that will share its top content online. So the traditional revenue from GRPs on TV will be partly shuffled into the online environment. Consequently, the basis should be market-wide measurement of e-GRPs and classic TV GRPs, and the difference between online and classic TV will eventually disappear', finalizes.



SLOVAKIA: MARKET SHARE, BY GROUPS 12-54 - ALL DAY VS. PRIM TIME (JAN. - JUN. 3, 2018)



Source: PMT/TNS

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# FTV Prima, the perfect mix

BY STANISLAV KIMCHEV, CEETV



FTV Prima is leading media group in Czech Republic, operating the third largest television conglomerate comprised of six networks: **Prima**, **Prima Cool**, **Prima Max**, **Prima Krimi**, **Prima Love** and **Prima Zoom**. CEETV interviews **Jan Rudovsky**, Head of Acquisitions and Business Affairs, who describes its moment in the local TV market, while it shares the content trends.

'Czech viewers, and I think in this regard they're not that different from viewers in other countries, they prefer local content, so that's what's on our main channels', remarks the executive.

But there is also a strategy towards the acquired content for the smaller networks, like **Prima Cool**. On it, **BBC** contents such as *Top Gear* or the documentary *Planet Earth II* were some of the top-watched foreign factual on that specific channel and on the main channel, too. Other titles from the distributor are *Maigret* with Rowan Atkinson.

**Rudovsky** explains further about this show: 'We had the first season last year, with the new



one this year, and in both cases it was one of the most viewed non-local titles on the main channel. So, these are the type of shows Czech viewers like'.

He continues about the local market: 'Czechs are not too keen on the newer darker stuff, which is something we're trying to change, but none of the channels on the Czech markets has recently been able to successfully launch any of the ambitious new shows. These are the shows they've got everybody talking about, but it's not necessarily the ones that would work in Czech Republic'.

The trend in CEE is that viewers enjoy new prime time drama, but the executive says that in Czech Republic this it's quite different: 'We are a rather conservative country and viewers in general prefer stuff they are familiar with. They don't like trying new stuff too much, which is challenging for us, as we would like to bring in new content, keep viewers up to date with what's trending in the rest of Europe. But Czech really is a very specific market, I would say'.

**Rudovsky**: 'We shop for specific channels: the factual series go to **Prima ZOOM**, while series such as *Top Gear* to **Prima COOL** and crime shows to the main channel **Prima**. Whenever we buy something it's always channel-specific, it's

not that we would buy something first and then look for a place to put it in the schedule'.

'Mostly we buy factual content, mainly natural history, science, travelling, because we have a dedicated factual channel which air a lot of these contents. We are constantly on the lookout for the next crime show, light crime show. We're not much in the market for the dark and gritty stuff, we are always looking for the next *Midsomer Murders* or something similar'.

**Rudovsky** was interviewed during the **BBC Showcase**, so

Jan Rudovsky, Head of Acquisitions and Business Affairs, FTV Prima



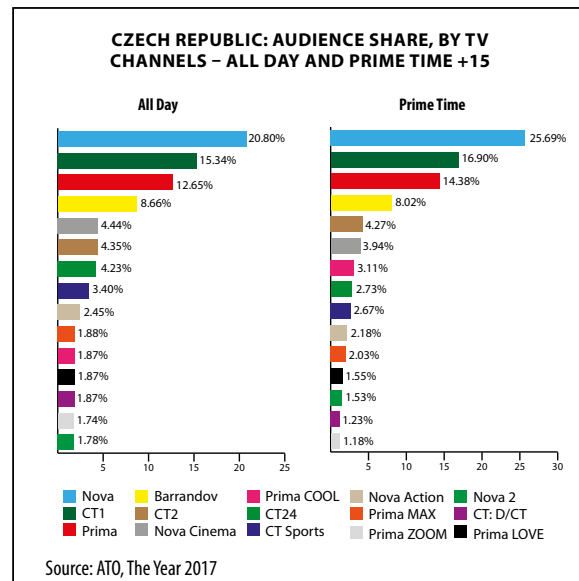
Local drama leads Prima's prime time like the medical drama *Modrý kód*



BBC's contents are doing very well on FTV Prima thematic channels: *Planet Earth II* was a big success on Prima Zoom

he describes the opinion on this year edition: 'It's much more compact. You get to see the breadth of the spectrum of the programs that they can offer and it's much more quiet, it's much more relaxed because at the MIPs and NATPEs you just run from meeting to meeting, you're just constantly talking to people, and you don't have the time to sit down and focus on what really matters, which is the content'.

'In here, you get the right mix of being able to focus on the content, meeting people you want to talk to and getting some inspiring talks and presentations. You realize how big BBC is and how valuable a partner it is, so I think it works in that regard very well', concludes the executive.

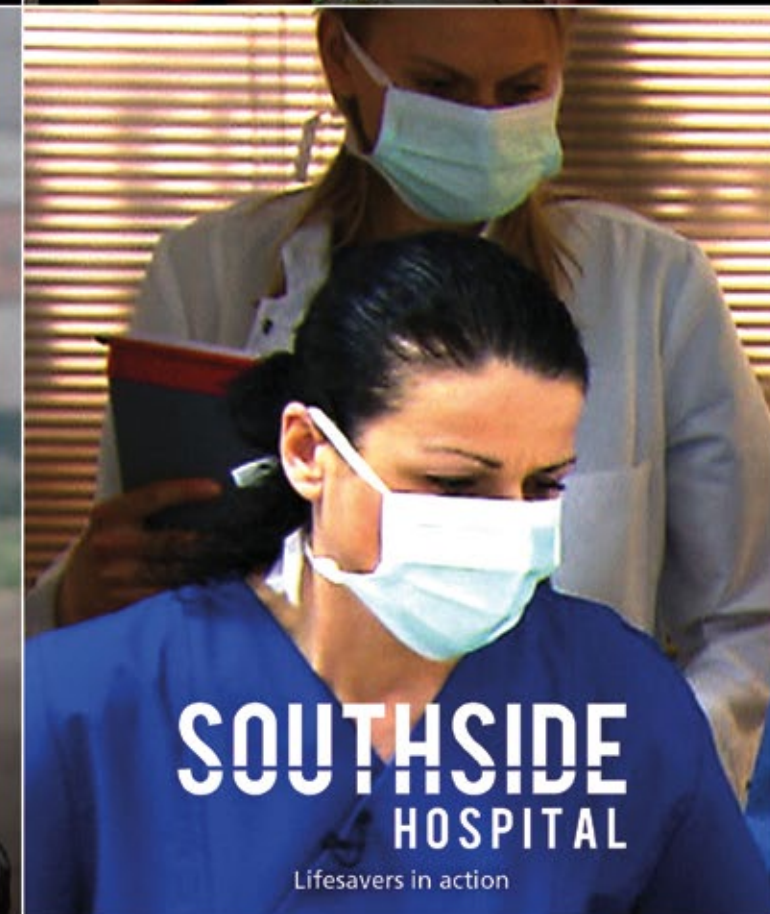


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BY RODRIGO CANTISANO



# Natpe Budapest International: unifying differences

After near a decade of crisis, the TV markets in the CEE region have experienced a growth in recent years and setting up the bases to an stability; a reality that is expected to be reflected on **NATPE Budapest International**, which comes to Hungary for third time in a row between June 25-28.

The organization expects the presence of more than 420 buyers from 55 countries (+5% vs. 2017), and a total of 130 exhibiting companies from 30 countries. Among the former, CEE represents the majority, followed by Europe (15%), MENA (8%), Asia (3%), and USA (0.5%). 'There is an increase in digital buyers, which already represents 10% of the total', explains **JP Bommel**, CEO of NATPE.

## The market

Once again, a robust schedule of business sessions is one of the top basis of the 2018 edition, with global industry experts converging topics such as "International Drama Production: Maximising Cross-Regional Partnerships", "New Opportunities and New Audiences in MENA", "A World of Formats: Distribution Insights and Strategies", "All The World's a Stream: Game Changing OTT Platforms", and an in-depth look at "The Current Advantages of Latin America". The first session on Monday evening kicks off the 2018 event with a Global Content Business Forum, designed to provide buyers and sellers with an overview of the latest



Second Pitch and Play organized by CEE TV and Natpe: The Land is singing (Slovakia) won the price as the most innovative show. The jury included Okros Gergely, program director, TV2 (Hungary); Levina Negi, VP Global Acquisitions, FremantleMedia, and Bence Trunkó, CCO, Paprika Latino (Hungary)

international trends and data at the start of the market.

Another highlight is the third edition of the *Pitch & Play Live!*, which highlights original format ideas with international potential from the CEE and MENA regions. Entries which have been received from Lithuania, Serbia, Hungary, Ukraine, Russia, Turkey and Romania will be evaluated by a pre-selection committee, and the finalist will be picked by **Damien Porte**, **Vivendi Entertainment** (France); **Nelly Feld**, **Reshet TV** (Israel), and **Andrew Sime**, **Banjay Rights**.

JP Bommel: 'NBI continues to grow and build on its extremely solid foundations. It remains the pre-eminent content marketplace for CEE and by extending our remit to include EMEA we have been able to encourage even more of our clients to attend making it a truly international event. The market has always offered a robust learning and networking opportunity with a series of specially devised and relevant sessions alongside screenings, receptions and parties which unite the content and platform communities in one place in the centre of Europe'.

## The Region

Unlike other regions, CEE is a complex union of 'fragmented markets', but according to buyers like **Tibor Forzisz**, director of content acquisition, **RTL Hungary**, 'it's starting to be what it used to'. 'Companies are buying again and searching new formats for their own markets, especially in countries like Hungary, Ukraine, and Poland', he emphasizes.

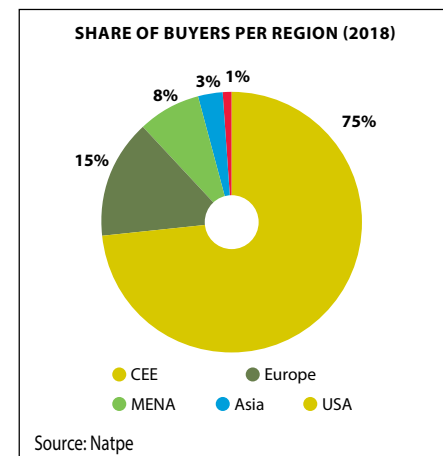
But despite each country has its singularity the entire region is starting to change. The market is again opening to some regions like Latin America but also new ones, and public broadcasters are more open to new opportunities and strategies similar to commercial networks, but under its own rules: while most of the countries are programming more and more Turkish dramas and betting on co-productions, CEE goes in the opposite direction.



JP Bommel, president & CEO, NATPE, with Elina Nesterova, buyers network director, NATPE; Nidal Monzer Garcia, MD, Lucha Distribution (Lebanon); Yana Vlasova, VOD Business Development at Megalabs (Russia), and Dmitry Horolev, director, Media Content Distribution (Russia)

Regarding the first, Turkish dramas started to lose ground in most of the countries with some exceptions like Czech Republic or Slovakia, and territories like Europe and Latin America are recovering their strength. Tracks records do not ensure the success in CEE; what works in a country most of the time does not have the same results in its neighbor; moreover, the diversity of history, culture, language and idiosyncrasy makes it very difficult to think in strategic partnerships, according to several players surveyed by Prensario.

And explains **Johnathan Young**, VP original programming, **HBO Europe**: 'It's very difficult to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far'.



Zurab Gegenava, general director of Innovator, and Giorgi Gachechiladze, head of acquisition of the pubcaster GPB, both from Georgia, with Anton Khilman, producer of Atlant Media (UK)



NATPE Budapest International is attracting more global players, especially from MENA and Asia: Kai Gahler, acquisition executive, Kanal 2 (Estonia); Takeshi Murakoshi, coordinator, Nippon TV (Japan), and Kenichiro Hiruta, TV program, TBS (Japan)



Polish buyers: Marta Swiat, VOD Licenses at Kino Swiat; Leszek Wasiuta, head of development MMB; and Barbara Bilinska, director of programming, Telewizja Polsat

## Content

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like **Netflix** aren't having the same results than in other territories such as the US, where it surpassed the cable TV. 'The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand', says **Felix Wesseler**, All3media.

And regarding original content in general, there are some issues too: 'Companies are afraid to invest and take risks. They prefer to be trend followers than trend setters', said to Prensario one programming executive,

and added **Michaela Sabolcakova**, **RTVS** (Slovak): 'Original dramas are high-rating but they're very expensive. Local production is increasing, but the most significant portion of the regions slot is covered by acquired formats'.

On linear TV, most of the primetime shows are adaptations or remakes of successful brands, even in countries like Poland, a commonly producer of original scripts. Broadcasters aim to save money and play safe, while they acquire stories from big Western markets like France, Italy or Germany, and follow a strategy that has propelled Turkey with the adaptation of Japanese and Korean formats. Game shows are other mayor success on the primetime, and Pay TV offers crime, dark and Nordic dramas as main shows.

## Screen Fragmentation

Like other territories, CEE is going through an explosion of new channels and digital platforms and opening the game to new competitors, especially in Slovenia and The Balkans, small but very tech-advanced countries.

According to **Jan Rudovsky**, **FTV Prima** (Czech), linear TV consumption not only has not gone down, but it has grown during the past years. 'The difference is that before, audience used to consume only three channels; now they watch 30'. But for **Elzbieta Saciuk**, **TV Spektrum** (Poland), there are a few

challenges ahead: The first one is to overcome fragmentation. 'The 30% of the market share in Poland is composed by channels that have less than 1% of audience'. The second one is the increasingly competition, with new SVOD players like **ShowMax**, launched last year. And lastly, audience is asking for higher quality content.

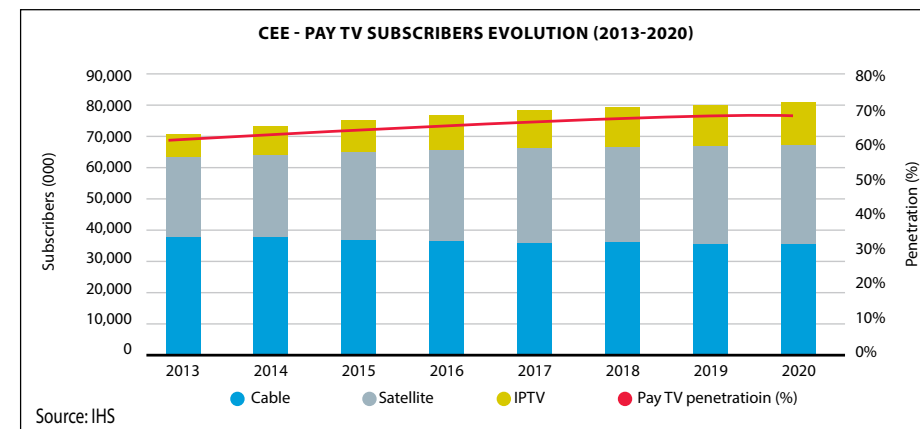
According a report of Digital TV, SVOD subscribers in Central and Eastern Europe have grown by about 2.25 million in 2016 to a total of 5.58 million subscribers in 2017, with Russia leading the market with 44% of the region's SVOD subscribers. Almost 12 different platforms were launched in the country, while Poland launched **ShowMax**, which is investing strongly in local content and, and **Netia VOD**, from the independent telco; and in Slovenia, where the size of the VOD market is still small with just a 7% of household penetration, companies like **Pro Plus** are betting on the digital windows with services like **Voyo**. Also, **RTL Croatia** released **RTL Play** in close cooperation with **Groupe M6**, **FNG** launched a new VOD platform in Greece and Denmark in December 2017, and the Slovak national commercial broadcaster **Jojo** is planning to expand its online video presence by launching a new VOD service during this 2018.

## Cable and Telcos

Continued growth from emerging markets and the emergence of linear OTT services can provide opportunities for satellite operators to continue to stay relevant in the video business despite an overall trend towards IP delivery and away from broadcast in the region.

According to **Rob Cerbone**, VP and general manager of media services at **Intelsat**, there were seeing more linear distribution from OTT players, where satellite had a role to play because terrestrial CDN delivery is still not as reliable as satellite. But for **Frans-Willem de Kloet**, outgoing MD and CEO, **UPC Poland**, there's still a biggest challenge facing operators in the CEE region: 'their footprint'. 'Operators had looked at this over the last couple of years, and most of them can only launch mobile services if they have 40-50% footprints. Consolidation is key', he says.

Nevertheless, for **de Kloet**, the CEE territories have more in common than anything that separates them: 'All customers need a good set of products'. That's why companies like **Vodafone** are planning to introduce quad-play offerings and may sell off its newly-acquired DTH satellite services in central and Eastern Europe, according to some experts.







## Where are CEE broadcasters going to?

Prensario and NEM publish this special report about where some of the leading CEE companies are going to, especially in an ever-changing scenario dominated by the digital transformation and an increase of original productions. Trends and future plans.



**MTG**  
David Chance,  
MTG chairman of the board

Modern Times Group (MTG) entertainment and studio businesses are now combined with Nordic telecommunication company TDC Group, having created Europe's first fully convergent media and communications provider. MTG is now focusing its resources on the expansion of its global digital entertainment operations.

The newly created conglomerate, which reaches 10 million households in the Nordic region, includes mobile, broadband and TV distribution businesses, plus content creation, production, broadcasting and streaming. It also has a prominent Nordic portfolio of third-party content partnerships, having 2.8 million TV subscribers in Sweden, Denmark, Norway and Finland, with already known brands as Viasat, Viaplay, Viafree, YouSee TV & Film and Get Play.

Viaplay's costumers streamed 32 hours a month during last year, an increase of 25%. More original content is the reason of this growth, with eight originals premiered: *Hassel* was the top watched drama in Sweden and Finland; *Veni Vidi Vivi* was the second in Denmark; *Occupied S2* was the second most watched in Norway; *Alex* was the second most watched new series in Sweden and the fourth most watched in Finland. MTG also offered 50,000 hours of live sport on Viaplay. In parallel, Viafree, the free streaming app service for the Nordic region has been downloaded close to 2.6 million times.

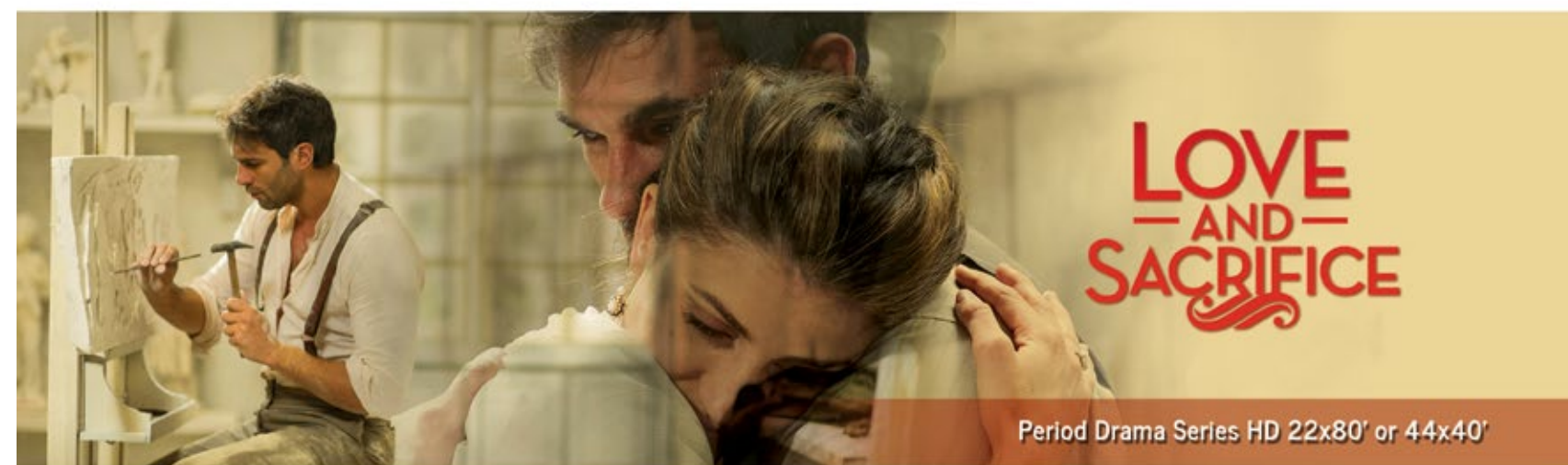
**Ceska televize**  
Jan Maxa,  
Content Development Director

Czech TV is the Czech public service broadcaster, founded 65 years ago. We have actually six free-to-air channels: CT1, our flagship and mainstream channel; CT2, mostly focused on the acquisition of dramas and documentaries, both international and local titles; CT24, news channel, our sport channel CT sport, CT :D, for the kids channel, and the cultural broadcaster CT art. Average total share of the group of channels is 30%.

On the digital side, we also run an extensive web and mobile services, including video catchup and video archive, news and sports coverage and dedicated kids and arts sites, trying to reach all the audiences, no matter where they are.

Czech Republic has long been a heavily TV fiction-oriented market, both for public and commercial broadcasters. CT has three nights of premiere drama in primetime, and three nights of repeats. Commercial channels also fill most of their primetime with locally produced fiction series.

In terms of content, the most successful formats are crime series on all three main channels - CT1, Nova and Prima. Crime series work usually well regardless of the exact type - channels had great results with standard police procedurals, personality-based, rural, period-based etc. Episodic crime series also have a very strong repeat factor.



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**Where are CEE broadcasters going to?**





**Kanal D**  
Ozge Bulut Marasli,  
CEO & Production Companies

Once part of Dogan Holding, Kanal D is a leading broadcaster in Turkey, now operated under the Demiroren Group. It is not only a referent in the domestic market, but also in the global market, where the company has a powerful distribution business, to which it has added a department fully dedicated to co-productions and new businesses, headed by Nilufer Kuyel

Co-productions are a fundamental business in this era, and we are working in 10 projects. We are looking for top partners prepared to reach higher production requirements. With new OTT platforms being launched, the need for different stories and narratives increases. Considering this, we are now creating and developing new stories, working with top writers in Turkey and partnering with global production houses.

Audience is more sophisticated and demands drama series of major quality and disruptive stories. There's a latent digital transformation and it getting stronger, that's why action and crime series are becoming more popular. Nevertheless, it is crucial not to lost the romantic essence.





**1+1 Media**  
Anna Tkachenko,  
Head of Digital Media

1+1 Media (Ukraine) started to cooperate with Russian OTT services Megogo and ivi as part of the Group's content strategy on digital platforms.

Under this partnership, we will add to the video libraries of the two largest East European online theaters, 600 episodes of content, both in Ukrainian and Russian.

Today, the OTT market is experiencing a new stage of development: if earlier video services bought films and series from Western majors, today they try to satisfy the demand for local product. As practice shows, we produce content that is interesting not only to linear broadcasters but also in the OTT/VOD segment.

In working with foreign partners, we are focusing on countries with a large number of Ukrainian diasporas. The next steps include alliances wit the OTT platform of Canadian Telco Group Bell Media, and on Amazon Prime Video. In the local segment, we signed a cooperation with Kyivistar and Lifecell that gives access to our VOD platform in the 3G networks.





**Pro TV**  
Aleksandras Cesnavicius,  
General Director

The Romanian TV market is a dynamic one with highly demanding audiences and strong competition. Pro TV leading position is driven by the quality of its programs, both news and entertainment.

However, each day we have to reinvent and outperform ourselves: Pro TV appeals to a wide audience, thus they expect a variety of programs and this is what we are proposing to them every day. In regard to entertainment, we propose a good mix of fiction series, entertainment and reality formats. We have well established, shows such as Romania's Got Talent, Las Fierbinti and The Celebrity Farm, as well as new programs

When watching TV, Romanians seek an emotional connection, they want to empathize with the content they see. Whether we talk about news, series or shows, they look for this content contextualization and localization.



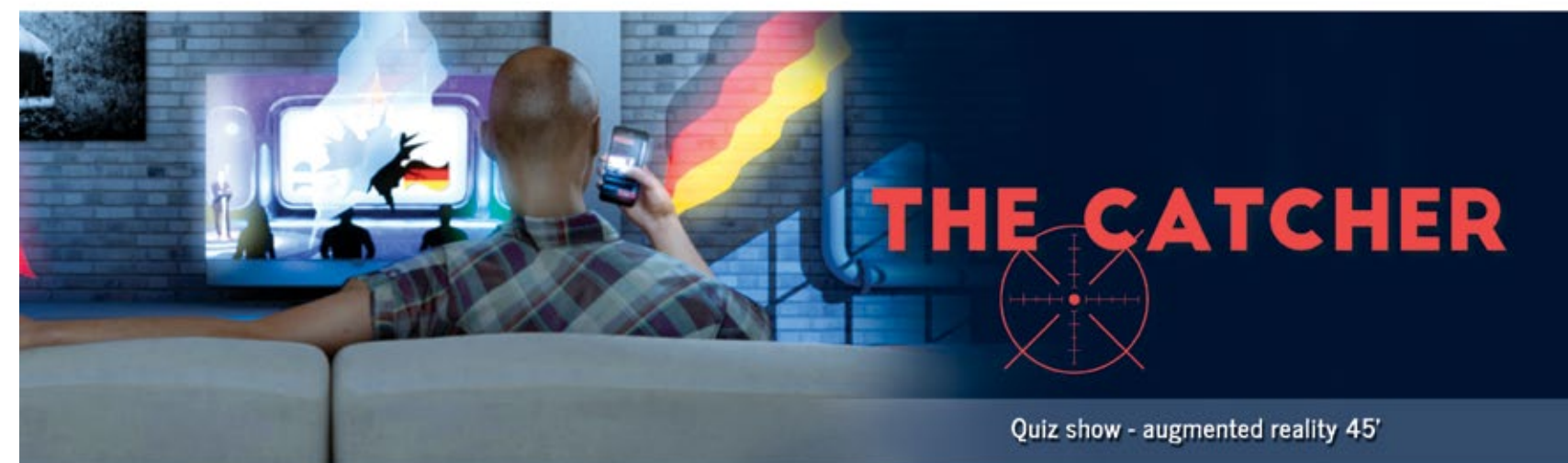


**TV3**  
Valery Fedorovich,  
CEO

TV-3 (Russia) covers 91% of the country's population with a weekly audience of close to 30 million viewers, and 2017 was a year full of bold experiments.

We did things nobody has done before either in Russia or anywhere in the world. We were the first in Russia to run the show where the viewers could vote for the pilot episode and choose, which series they would like to see on our channel: *To Be or Not To Be*. In August we launched the *Gogol* project, the first part of an unprecedented project: the first ever TV series designed for cinema'.

Our trials allowed us to increase our share from 3.5% to 4%, though even more important for us were the conceptual changes of the channel. We've reconsidered our business model and this year we've moved from experiments to strategic transformation. Out of a mere broadcaster we are now becoming an omnichannel production hub, a sort of a power place for Russian TV series.





## Where are CEE broadcasters going to?



**NTV-Plus**  
Konstantin Smimov,  
Head of digital products department

We are growing through a moment of full expansion on the digital scenario, and at NTV-Plus (Russia) we work constantly on evolve in terms of presence within that scenario and improving our offering.

That's why we partnered last May with the OTT service Amediteka, home of HBO in Russia, to present a new product titled Kino Premium, for the users of online TV of the provider. The service includes 30 channels of the Kino package as well as all series from the premium library of the OTT service.

The viewership of movie channels on our TV platform has been demonstrating the highest growth, with over 40% a month since May 2017, when the thematic packages Kino, Education, Children's and Night were added to the sport ones. Les than one year later, the number of subscribers exceeded 20% of the total audience base.



**TV Markiza**  
Matthias Settele,  
General Director

Markiza Group is the leading TV Group in Slovakia with Markiza, the flagship channel with News, magazines, entertainment, reality and shows, the female series channel Doma and the younger more male oriented film channel Dajto. We offer several websites and Apps and run a SVOD platform (Voyo). Markiza started in august 1996 and is a strong and independent voice in Slovakia's media landscape.

Format rights for shows and reality programs, scripts for adaption of comedy and drama series, all for the main channel Markiza.

Our daily series Oteckovia (Daddies) is rocking the market with an average share of more than 35% at the 18.00 access slot, it is one of the best performing daily programs ever on the Slovak market. The stories evolve around four daddies who meet first time in the Kindergarten. It is a local adaption of the Telenovela "Senores Papis" from Argentina (Telefe).



**HBO Go**  
Hervé Payan,  
CEO HBO Europe

With the launch of an HBO Go direct to consumer service in Poland late March, now all 17 countries under the HBO Europe umbrella now offer subscribers a full HBO OTT service.

The HBO service is already a great success across our territories within Europe. With this further expansion, we are making it even easier for series and film lovers to become HBO subscribers. We believe new subscribers will be very satisfied with our unique offering of internationally-acclaimed programming and locally-produced drama and documentaries. We will also continue to increase our investment in local programming across all territories in Europe.

In Poland, HBO Go currently offers Polish language versions of over 800 movies and 200 series. The direct to consumer offering is in addition to the already established HBO channels and services in Europe. HBO Go will continue to be available through local distribution partners with TV, internet or mobile packages.



**TVP VOD**  
Maciej Stanecki,  
Member of the board at TVP

TVP (Poland) plans to launch its first production created specifically for TVP VOD users and ABO Zone (Strefa Abo) users.

Users of the TVP VOD platform and new subscription service Abo Zone will receive access to the first production realized specifically for the Internet. This will be the second part of the implementation of the online strategy of the public broadcaster - the first one is being implemented and consists in expanding the Abo Zone with the premium content. The second edition of the online strategy is already being created. We are talking to several producers at the same time.

These will be shorter forms dedicated to internet audiences, probably miniseries. The length of episodes will not exceed 8-10 minutes. Even when we don't know which distribution model to broadcaster we will choose, I'm convinced that they will have a very wide resonance in the network, mainly in communities.



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# Ukraine production industry gains momentum

Ukrainian content production and distribution industry is booming. It is a fair statement both for TV content and feature films, as well as for animation and documentaries. There are more than 300 original scripted projects on different stages of production, which is 3 times more than a couple of years ago.

One of the main reasons for the local feature films production boom is constant growth of state financial support volumes. The overall state support for content production this year is planned to reach about USD 38 million compared to USD 19 million last year and only USD 2 million six years ago.

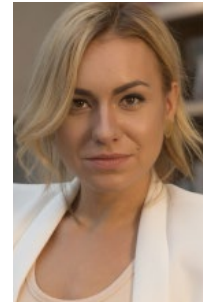
To understand the situation better, note that in 2011 Ukrainian cinemas released only one locally produced film, in 2015 29 local films were released and in 2018 this number will presumably grow to 49 (during the first 5 months of this year 21 local films and almanacs were already presented in cinemas).

But more important is the growing interest to Ukrainian films among cinema-goers that results in new box-office records. In 2017 four

local releases earned about USD 770,000 each: comedies *Dzidzio Contrabass* and *Servant Of The People 2*, war drama *Cyborgs: Heroes Never Die* and family fantasy *The Stronghold*. This year Ukrainian-Latvian comedy *Swingers* earned more than USD 840,000, and feature animation *The Stolen Princess* set a new national box-office record in the entire history of Ukraine, having earned more than USD 1.4 million.

It's worth mentioning that more and more Ukrainian films are co-produced with foreign partners, mainly with Europeans. At Marché du Film 2018 *A woman at War* (Island, France, Ukraine) by **Benedikt Erlingsson** got two prizes in Semaine de la Critique programme and *Donbass* (Ukraine, Germany, France, Netherlands, Romania) by **Sergey Loznitsa** was awarded for best direction in Un Certain Regard programme.

Several more Ukrainian co-productions already won various awards this year: drama *When The Trees Fall* (Ukraine, Poland,



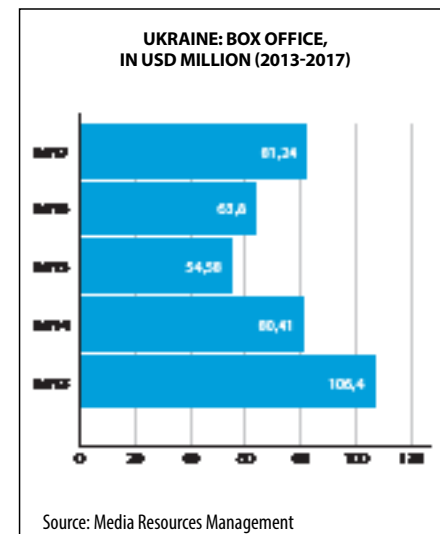
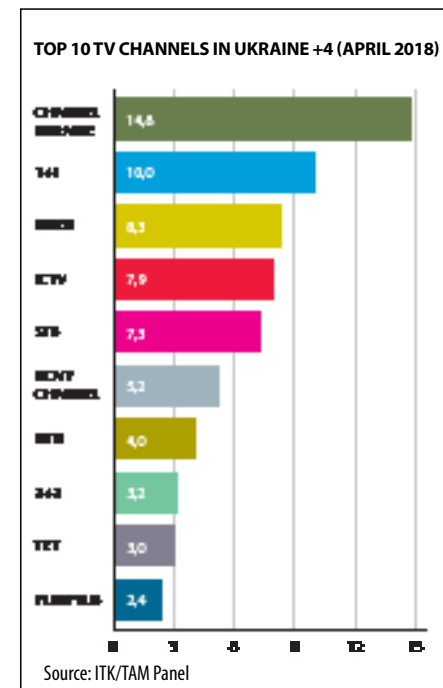
Kateryna Udut, Executive Director of MRM, organizer of Kyiv Media Week

Macedonia) by **Marysia Nikitiuk**; war drama *Frost* (Lithuania, Ukraine, France, Poland) by **Sharunas Bartas**; thriller *The Line* (Slovak Republic, Ukraine) by **Peter Behjak**; comedy *Easy* (Italy, Ukraine) by **Andrea Magnani**, etc.

The list of international co-productions currently being produced with Ukraine includes several dozens of films. Among the most anticipated ones are biopic *Gareth Jones* (Poland, UK, Ukraine) by Agnieszka Holland with James Norton starring; thriller *The Last Step* (France, Ukraine) by Frédéric Petitjean with Jean Reno starring; adventure fantasy *Polina* (Ukraine, Belgium, France) by Olias Barco; thriller *Nematoma* (Lithuania, Ukraine, Latvia) by Ignas Jonynas; drama *Luxembourg* (Ukraine, Germany, France, Norway) by Myroslav Slaboshpytskyi; action *The Big Fight* (Ukraine, Germany) and historic adventure *Willy-Nilly Hero* (Ukraine, Poland) – both by Aleksandr and Vyacheslav Alyoshechkins, etc.

It is important to add that more and more world famous movie stars come to Ukraine to film and star in different projects. For example, Robert Patrick is set to topline the feature drama *THE Rising Hawk*, which is now in production by **Kinorob (FILM.UA Group)**, while the rest cast includes Poppy Drayton, Tommy Flanagan and other well-knowns actors.

Ukrainian producers became much more active in search of foreign partners beyond Europe. In 2018 Ukrainian stand was opened at Beijing Film Market for the first time ever. It led to signing the agreements between Ukrainian **FILM.UA Group** and Chinese filmmakers on two co-productions: adventure romcom *Ukrainian Treasure* (budget USD 2.5 million) and historic war drama *Flaming Eagle* budgeted at USD 25 million. For the



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## Ukraine production industry gains momentum

second time Ukrainian national stand will work this September at Toronto Film Market. Bilateral agreements on coproduction with Canada and China are underway.

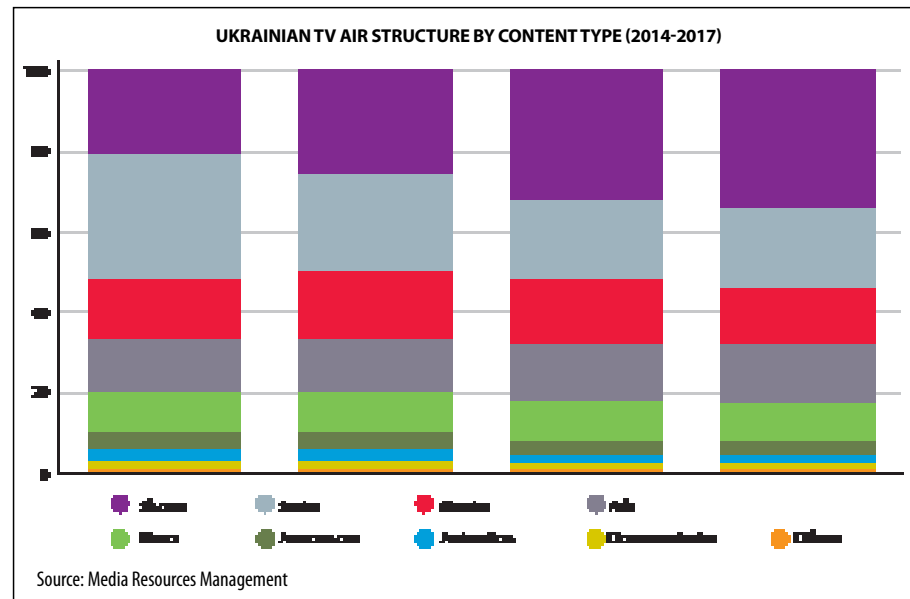
Ukrainian content continues conquering international markets and is being sold worldwide. In 2016 Ukrainian feature animation *The Dragon Spell* was sold to a dozen of territories. At the same time *The Stolen Princes* cartoon was licensed to more than 40 territories and continues its international voyage. Upcoming Ukrainian animation release *Mavka. The Forest Song* (Animagrad) has been already pre-sold to several territories (thus its release is expected only in 2020). Ukrainian epic fantasy *The Stronghold*, produced by **Kinorob**, sold to China, India, France and French-speaking territories, South Korea, Belarus, Kazakhstan,



Ukrainian series are gaining momentum in the global marketplace: format of the comedy series *Servant of the People* (Kvartal 95) was sold to FOX Studios (USA)



Animation is a strong genre in Ukraine with the feature animation *The Stolen Princess* set a new national box-office record in the entire history of Ukraine, having earned more than USD 1.4 million



Moldova, and Kyrgyzstan. Feature comedy *Dzidzio Contrabass* was licensed to China.

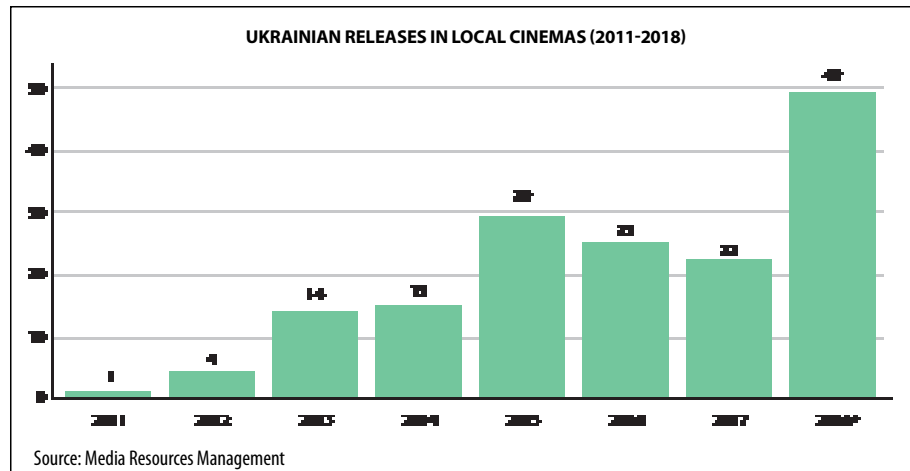
As for Ukrainian TV series – hundreds of projects were sold abroad as a ready-made content, mainly to Kazakhstan, Russia, Belarus and Baltic States. Several projects were acquired as formats: detective series *The Sniffer* – to **TF1** (France) and **NHK** (Japan); comedy series *Servant Of The People* – to **Fox Studios** (USA), one more comedy *The In-Laws* was adapted as format in Estonia and Kazakhstan; multi-episode medical drama *Dr. Baby dust* was adapted in Kazakhstan; youth drama *School* was sold at MIPTV 2018 as a format to these territories. Moreover, Ukrainian drama is recognized by international VOD-giants **Netflix** and **Amazon Prime** (dozens of series produced by **FILM.UA**, **Star Media** and **Kvartal 95** are already available on these platforms).

Local drama production in Ukraine is also

on the rise. It was partially caused by ban of large portion of Russia-produced content in mid-2015. From that time the number of original Ukrainian scripted content has tripled. The research conducted by **MRM** indicates that in 2013 there were 24 premiere series (298 new episodes) of Ukrainian origin in the air of Top-6 Ukrainian broadcasters, while in 2017 – 57 (893 new episodes in total).

‘Global content trends today say that non-English language content gains momentum worldwide. Witnessing the growing success of our media industry both on local and global levels, we’re sure that Ukraine could become powerful player, because its creative potential and level of quality meet high international standards’, remarks **Kateryna Udut**, Executive Director of **MRM**, organizer of Kyiv Media Week.

‘We want to tell the world more about us: we are happy to provide Ukrainian and international media community with a unique networking platform Kyiv Media Week. Already the 8<sup>th</sup> edition of the media forum will host the traditional content market and very intense conference program this September in Kyiv. Over 50 sessions will day by day cover global content trends, including TV and film business, drama co-production and new burning formats development, animated features creation and FAANGS as an inescapable part of our daily life. Substantial part of all events will have a special country focus, unveiling cooperation opportunities. Surely, best practices from around the world will also be a part of the event’, she concludes.



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PROFESSOR FOR MARKETING AND MARKET RESEARCH -  
FILM UNIVERSITY BABELSBERG KONRAD WOLF, POTSDAM/BERLIN GERMANY



# CEE markets continue to thrive and see strong growth ahead

Central and Eastern Europe comprises 22 countries and a population of around 300 million or 120 million TV households, being one of the most diverse in histories, cultures, languages and tastes. Thus, singular countries of this region cannot necessarily be directly compared with one another.

What the CEE countries have in common is their impressive macroeconomic growth and the major transformation and development of their television markets. The economies of most of CEE are set to expand rapidly in the coming years, thus additionally offering a number of attractive opportunities for TV channels and networks, producers and program and ad sales houses alike. The demand for content to satisfy viewing needs, whether it be local, domestic or regional or international is resilient.

Given the great diversities of the CEE markets, there are other numerous traits that all of the countries have in common and which will, in future, fuel the ceaseless quest for content. TV channels and networks are open more than ever before for partnerships, co-productions and co-operations, for program buyers and sellers, all embracing story lines and shows that find their audiences, ready for experiments and innovation and permanently on the outlook for spearheading content.

The reasons for the growing demand in content are the availabilities of increased

broadcast and content quality alike and growing audience desires. Needless to say, higher household incomes and production budgets, as well as technological and infrastructural advances such as with HD, DTH, DTT, IPTV, OTT, mobile, SVOD, etc. have also had their impact in making content easily accessible and omnipresent. For example, multichannel TV households have grown to over 50% of all TV households within CEE.

Viewing times have not yet saturated and will continue to grow, with linear television enjoying continued and growing popularity with the advent of digital mobility and broadcast content on all screens such as TV, PCs, tablets and smartphones.

Nevertheless, the CEE markets remain demanding in terms of revenues achieved from advertising and program sales, yet at lower levels in comparison to some of the more developed world television markets.

However, television clearly dominates and advertising spend remains the growth driver

for the CEE media industry. TV and video advertising are set to remain the largest segments in CEE growing from about € 7.7 billion in 2015 to hit and exceed the € 10 billion mark for the first time in the year 2020, representing a growth of more than 30%. The CGAR beyond 2020 is expected to be at least 5% for the region.

CEE market distinctions clearly need to be addressed: In Russia the TV ad market is the largest, however it strongly fluctuates; Poland and Czech Republic have the highest TV ad per capita; Romania, Slovenia and Bulgaria have the largest TV market share of all media advertising in CEE, whereas in some instances in periods of very favorable macro-economic conditions, robust private consumption and resulting above average retail sales even TV ad inventory is sold out; and, Czech, Estonia, Slovak (and others) online ad revenues have or are on the verge of overtaking TV ad revenues.

Even though each of the CEE countries can boast of their own national SVOD providers, a most decisive trend in CEE are the entrance, growth and “game changing” effects of both the younger US world media market leaders Netflix and Amazon Prime Video, which will substantially impact the SVOD sector in CEE.

Interestingly, the growth of Netflix in the CEE region is taking place in the environment of a rather mature and saturated pay TV market. Penetration of pay TV in CEE is actually higher than in Western Europe, whereas broadband penetration is lower. Netflix, for example, began localizing content in Poland in 2016 with many of the CEE countries following.

According to Digital TV’s recent “Eastern Europe OTT TV & Video Forecasts Report”, Netflix will have more than 3 million subscribers in CEE by the year 2022. These figures, however, will exclude subscribers in Russia because regulators introduced a 20% foreign ownership equity limit on platforms with more than 100,000 subscribers. If regulators maintain their current position, then this would eventually force both Netflix and Amazon Prime Video to discontinue their platform services in Russia. Instead, Amazon and Netflix might license their original

content to a local Russian platform, similar to the way Netflix did in China with IQiyi.

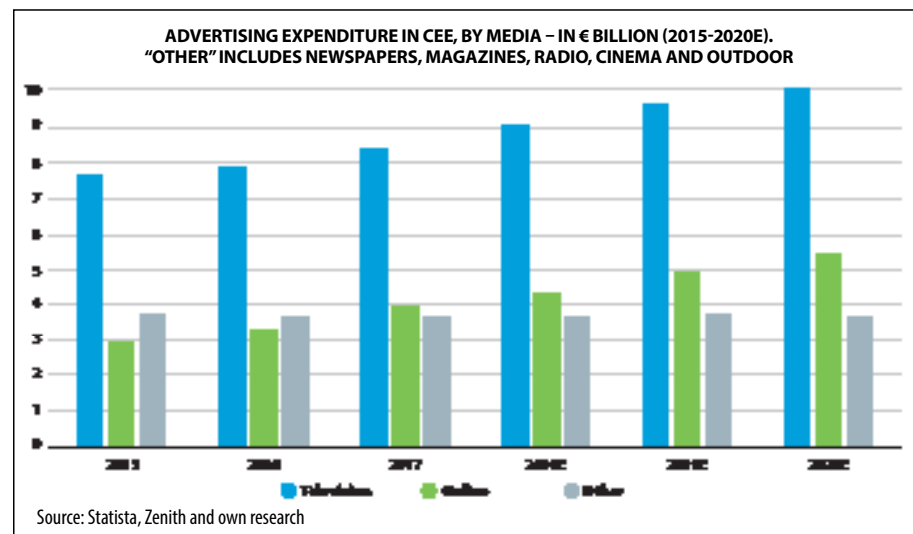
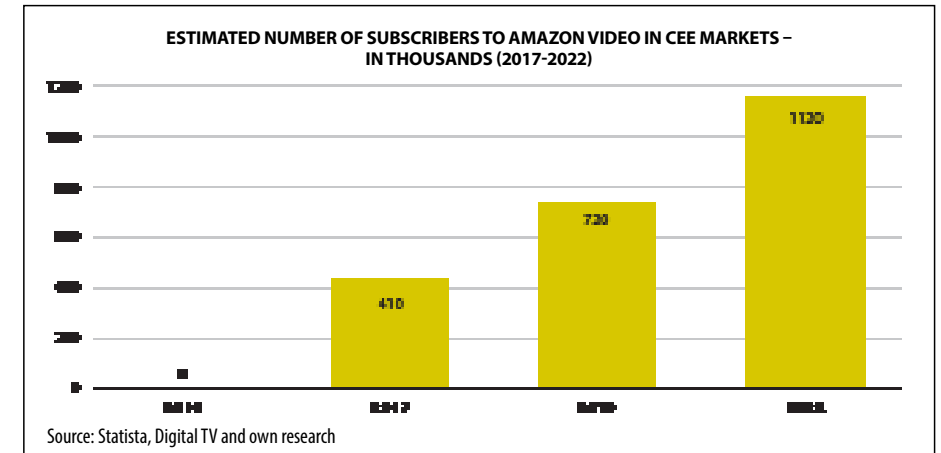
Also referring to Digital TV’s research and excluding Russia’s 7 million SVOD subscribers by 2022, Netflix is expected to contribute 35% of SVOD subscribers in the remaining 21 countries, Amazon Prime Video a further 12%, making in total nearly 50% of SVOD subscribers, showing the prevalence of both US market penetrators into CEE.

Digital TV furthermore forecasts that there will be nearly 17 million SVOD subscribers in the whole of the CEE region by 2022 making SVOD the largest OTT revenue source totaling € 1.1 billion or 60% of the OTT revenues, fourfold compared with today’s.

OTT TV series and movie revenues will reach nearly € 2 billion by 2022, nearly tripling from 2018 and Russia will account for close to 50% of the region’s OTT revenues, with Poland the second largest of the CEE markets generating a further 20%.

Summarizing, a new paradigm evolved in the sense of TV content openness and acceptance by audiences never seen to date which has made possible a highly dynamic content industry within CEE, as demonstrated by the expected record attendance and buyers’ interest in this month’s Natpe Budapest International. Creativity, output and innovative concepts have virtually erupted in domestic CEE companies and countries within the whole bandwidth of program productions and possibilities.

The CEE markets should certainly not be underestimated. Researchers anticipate a continued healthy economic expansion. This growth will boost both content and advertising spend across the whole region making it very attractive, also compared with other partially saturated world markets. As CEE market players continue to innovate, television is expected to thrive in viewing participation and hence in revenues and opportunities.



Country	Subscribers
Russia	2,500
Poland	203
Romania	96
Czech Republic	93
Hungary	67
Ukraine	42
Slovakia	35
Bulgaria	30
Lithuania	26
Croatia	22

Source: Statista, Digital TV and own research

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## Georgia: format franchises take the scene

Georgia is a small, but dynamic television market with three media groups operating, one public and two privates. Prensario interviews them for this special report, about the current programming trends, top shows and media evolution.

Leading broadcaster is **Imedi TV**, a privately owned TV station launched on March, 2003, as part of **Georgian Media Production Group**, which also owns two other networks: **GDS TV** and **Maestro TV**. Imedi TV's average share for April-May was 25-30%, according to TNS Global Kantar Media.

Currently, the company employees over 700 hundred professionals and is the largest broadcaster in Georgia. 'When it was founded, it became the first independent TV station in the country, which quickly climbed to the top of the most watched channels due to its programming diversity and innovative local shows. We strictly adhered to the international media standards and we were the first station that confronted serious piracy issues in the country by licensing its entire content and by forming a long term productive cooperation with many leading international TV and distribution companies', describes **Natia Tchelidze**, head of acquisitions.

There was a time in 2007 that the network was a part of **News Corp.** It was the year when the station was raided by the government forces and temporarily shut down for its fair and critical coverage of the political situation in the country.

About the market, **Tchelidze** explains: 'Despite being a considerably small market, Georgian television boasts an impressive selection of top entertainment format franchises. Over the span of the last seven years, these shows have garnered the largest audience in the country to date. We



Natia Tchelidze, head of acquisitions, Imedi TV



Giorgi Lominadze, head of programming and acquisitions, Rustavi2



Tinatin Berdzenishvili, director of Media and Communications, Georgian Public Broadcaster



have produced global hits like **BBC's** *Strictly come dancing*, **Talpa's** *The Voice* and *The Voice Kids*, **Endemol Shine's** *Your face sounds familiar* and *So you think you can dance*, **FremantleMedia's** *Got Talent* and *X Factor*, etc.'

**Imedi TV's** main programming pillars in its current schedule are entertainment formats, drama series, local factual talk shows and a local series. 'Domestic drama production is, of course, in high demand and a number one priority for the company. Since the day it was launched, the channel's goal has been to encourage a high quality domestic production and up to this date, it has managed to produce over 20 domestic series in genres like action, mystery, drama, comedy, and sitcoms', she adds.

'One of the trademarks has been an overwhelming popular sitcom, *In city center*, first launched in 2007 and counting 16 seasons of unsurpassed ratings success so far. Last season a local drama *Big Break* was introduced to TV viewers that garnered a huge

audience share. Our primetime is led by two talk shows that are a hybrid blend of politics and social issues - *Face to Face* on Tuesdays at 10pm and *Imedi's week* on Sundays at 8pm followed by entertainment talk shows *Prime Show* and *Another angle* leading 10pm slot on Wednesdays and Thursdays, respectively', remarks **Tchelidze**.

Late night show on Thursdays and a local



Imedi TV combines the best global formats such as *The Voice of Georgia* (Talpa) with original entertainment talk shows such as *Prime Show*

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## Georgia: format franchises take the scene

game show on Saturday with a variety of off prime and access prime time programs such as *Cooking battle*, *Morning* and daily show, which are 'hugely popular'. Approximately 60% of Imedi's schedule is acquired content - series, miniseries, feature films, animation features and series, formats, etc. (aired daily, both in off prime and prime time) and 40% local programs.

The executive points out: '2013 marked the year of the Turkish drama invasion. As in many European countries, Turkish drama filled in traditional Latin American telenovela time slots. Telenovelas had enjoyed a great success and guaranteed high ratings for ten long years before Turkish dramas entered our market and replaced them'.

Another country with a great drama catalog to offer is Italy. **Tchelidze**: 'Italian series and mini-series have long been our favorites. Some of the titles we have aired are **Mediaset's** *Intelligence*, *Blood Ties*, *Ultimo 3* and *Ultimo: the Hawk's eye*, and now we are broadcasting *A Matter of respect* with the audience share of 32%. Last season was marked with a success of a Spanish drama *El Principe*, from **Mediaset España**, and a couple of Korean programs that recorded surprisingly good results'.

The second largest broadcaster in Georgia is **Rustavi2**. Founded in 1994, it is one of the most popular and successful channels, currently reaching 85% of Georgia's population nationwide. It provides a diverse range of top quality licensed programming from up-to-the-minute daily news and political talk shows to a range of original entertainment programs, sports, and international hit productions translated into Georgian.



GPB bets on entertainment with twist, such as the original musical show *Ranina*, and *Bookshelf*, a literary show for younger generation viewers

**Rustavi 2's** programs are consistently top rating throughout the country. It is also a trend-setter becoming the first to use digital hardware, to go on satellite and to conduct live foreign transmissions, while it improves the quality of broadcasting. It was also the first to become an associate member of the **European Broadcasting Union**. On the content side, it has first embraced the concept of interactive TV and brought the first political talk-shows to Georgian audiences.

**Georgian Public Broadcaster (GPB)** operates two channels: **First Channel** since 1956 and **Second Channel** since 1971, as well as two radio stations. GPB mission is to reinforce democratic values, raise the level of public education, and encourage diversity and social integration as well as to uphold historical heritage and cultural traditions.

The new season's strategy was the audience expansion to attract new target groups and maintain the existing ones. 'For this purpose, we have founded modern formats, where the priorities of the Public Broadcaster are successfully combined with entertainment formats', highlights **Tinatín Berdzenishvili**, director of Media and Communications.

'Our goal was to get interested and attract the age categories that are the most passive TV viewers and generally watching TV is less considered in their lifestyle. Such categories are 10-15 and 16-24 age groups that prefer the Internet, social networks. Coordinated



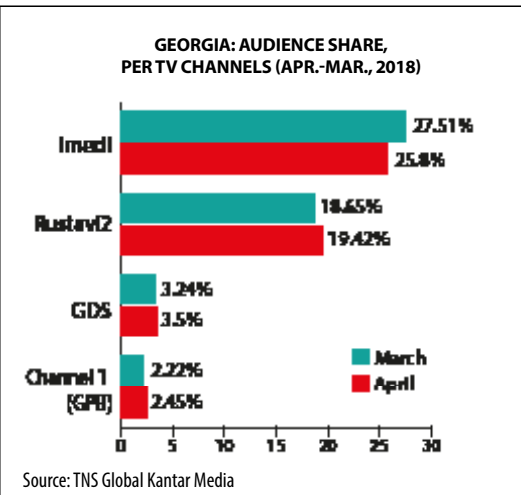
Rustavi 2 programming offer is based on a mix of entertainment, with leading show *Georgian Got Talent*, and variety programs as cooking show *Tekunas Culinarium*

work of all platforms and interesting formats of the new projects got the specific results, and in the 2018 TV season, the First Channel audience grew, and it was mainly affected on low age groups. 4-10 age category ratings have increased by 21%; 10-15 age categories have increased by 18%. Ratings of 16-24 age categories have increased by 17%', she adds.

These varied programs offer brings a range of alternative choices for its diverse pool of TV viewers and radio listeners. Among the top shows are *Moambe*, key news program in a new format; *Bookshelf*, a literary show for younger generation viewers; *Ranina*, an intriguing musical mega-show for 8-13 year-olds; *Are You Smarter Than VI Grader?*, the local version from **MGM's** format; and *Smart Logic*, a quiz-based entertainment show.

**GPB** acquires only premium class movies and TV series documentaries and fiction, Kids animations and transmissions of international events. Preferences of the audience are mostly sport, cognitive, documentary, movie, drama and kids.

**Berdzenishvili** concludes: 'Public broadcaster is now functioning in a competitive environment, where we confront the scandalous and "noisy" production of commercial televisions with the high quality programs prepared by the public broadcaster's principles. In the programming schedule it is considered program preferences, needs and requirements of the target audience. All of these are formulated by a systematic study of TV audience, through the constant monitoring of the TV market'.



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## HBO Latin America: global stories



Xavier Aristimuño, VP Licensing, HBO Latin America

It has been 14 after **HBO Latin America** produced its very first original drama series, *Epitafios*, and now, the company owns a catalogue of +20 drama series of different genres that **Xavier Aristimuño** as VP, Licensing, is presenting for global players, both linear and digital.

Aristimuño: 'We represent series, documentaries and specials of all genres, which stand out for their daring themes and for taking risks, no matter the genre or story'.

Some of those shows include the thriller *Sr. Avila* and the drama *El Negocio*, both with 4 seasons confirmed for this year, while *El Jardín De Bronce* is another hot series: the show broke audience records on its first season and counts with the participation of the Oscar nominee Norma Alejandro.

'We are also working on a very attractive Group of projects in Latin America. They range from adaptations of global stories that have been very successful, to high-cost productions based on important historical events. They include talent of the highest caliber, who tell high quality stories, which will attract international distributors and new audiences in the rest of the world', emphasizes the executive.

'More than 15 of our local productions have reached more than 100 countries globally, mainly through HBO platforms around the world. That's because we tell universal stories with which all audiences can relate. Our



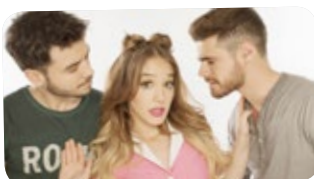
*Sr. Avila*, Winner of the International Emmy Award on its 3rd season

Latin American productions are no exception, and have been very well accepted by audiences around the world, being recognized with more than 100 nominations and more than 60 awards, including an International Emmy in 2017 for the third season of *Sr. Avila*', he completes.

## Pol-ka: more disruptive

**Pol-ka Producciones** (Argentina), one of the most recognized content developers in Latin America, is evolving with the industry. The company recently launched its new series *El Lobista*, coproduced with **eltrece**, **Turner Latin America** and **Cablevisión/Flow** as part of a new strategy that seeks to generate high budget series with multiple windows.

Like previous projects (*La Fragilidad de los Cuerpos*, *El Maestro*), this new production premieres with the same model: first in open TV and the next day in **TNT** for the whole region, and then for the OTT **Flow** clients. 'It is a winning model, and we are very happy with the results. The plan includes making two series a year in a decade. *El Lobista* is the first of 2018, and we are already delineating the second', describes **Manuel Martí**, head of development and international business.



*Simona*, tween series

Another interesting project for

the región is *Simona* (120x'60), a kids and teens series broadcasted on **eltrece**: 'It is a disruptive project since it's a teen series in prime time and it works very well in audience. Over 150 episodes were aired and will continue for a few more months. More amazing are the digital results: in its YouTube channel it is seen by 1.5 million people every day', adds the executive.

Also, are the 39x60' series like *El Puntero*, *Tratame Bien* or *Para Vestir Santos*, all with 3 seasons and very requested both as finished shows and format, mainly in Europe.

Lastly, the company is developing a new show with **FNG Latin America** starred by **Adrián Suar**, director of **Pol-ka**. It will 'It will be 13 episodes in a genre and format that never before had produced and that has its complexities. We like to venture into new things', completes Martí.

## RCN: La Ley del Corazon

**RCN TV** is one of the leading television and production companies in Colombia with a track history of acclaimed series and soap operas that over the years has licensed to over 120 countries worldwide. 'Years of experience in the creation and production of television make us experts in soap operas and series of all kinds: classic melodrama, musical, biopics, thrillers, humorous soap opera and all the different tendencies that exist in the world today, therefore our commitment is to offer our clients a portfolio with quality productions, high impact and successful in their genre', describes **María Lucía Hernández**, director of international sales.

This year the company has directed all its potential to make available to the international market a solid portfolio comprised of the best and most impressive productions with the highest values of production and universal stories such as *La Ley del Corazon* (131x60'), based on real criminal or family cases, sold to Honduras, USA, Ecuador, Mexico as format, Puerto Rico, Panama, Costa Rica, Chile (format), Spain and Andorra, Bolivia, El Salvador and Pay TV in Latin America. The second season is considered the biggest bet of the company and it will be launched during the second semester. 'At this season, our lawyers will face a crisis that they never imagined: bankruptcy.

Lastly, the executive recommends for the region *Zumba* (60x60'), a biopic based on the life and dreams of Beto Pérez, *Zumba's* creator. 'It's a story of the conquest of dreams, of believing and trusting in talent', completes Hernández.



María Lucía Hernández, director of international sales



*La Ley del Corazon 2* is the big bet of the company for 2018



Manuel Martí, head of development and international business

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## Caracol: content that transcends



Paloma García, international sales executive

CEE has become a key region for **Caracol International** (Colombia) during the last years thanks, and **Paloma García**, international sales executive, arrives to NATPE Budapest with the objective to keep promoting the Latin content with strong players.

'In CEE we have very important clients for the company, such as **Puls TV** in Poland, **TV2 Hungary**, **Nova Bulgaria**, and the Greek pubcaster **E.R.T.**, among several others, where titles like *La Esclava Blanca* and *La Ronca de Oro*, were very well received. For this reason, one of our goals is to strengthen our presence in markets like NATPE', says García.

Even when the executive emphasizes that 'being in CEE represents a great challenge because it deals with very demanding and sophisticated markets with a consolidated production of fiction and entertainment formats', she is confident that there're many opportunities for the Colombian productions, which transcend the classic soap operas. 'Soap operas were broadcasted at the time in the region, but, nowadays, our company proposes new contents, such as great series of fiction and entertainment formats, from which we market both the finished product and the format of scripts', she remarks.

A good example is the Greek version of *El Desafío*, *Nomads*, which has a great success in Europe. Locally, the format is celebrating its 15<sup>th</sup> anniversary at Caracol.



Aired on AN1, *Nomads* is the Greek version of *El Desafío*

'We want to make visible in these territories our level of quality in production, production design, locations, budgets, etc., and become part of their programming grids. It is not easy, but we are achieving it', she completes.

## Dori Media: epic stories and comedy

**Dori Media Group** recommends at NATPE Budapest a slate of drama and game shows headed by the Argentinean romantic comedy *Las Estrellas* (120x60'), about five daughters facing a challenge, written in the form of a clause, which they will have to fulfill in order to claim the inheritance he has left for the sisters. The series was already sold to Italy, Spain, Russia, Israel, India, Slovenia, El Salvador, Albania, Kosovo and Middle East GCC.

*The New Black* (12x30') is a comedy about a group that lives and study in the most prestigious orthodox yeshiva, without interest in studies



*The New Black*, comedy series

without the courage to leave as well, and *The Road to Calvary* (13x45) is an epic periodic drama commemorating 100 years October Revolution based on the famous novel of Alexey Tolstoy.

Sold to **TV Azteca** Mexico,

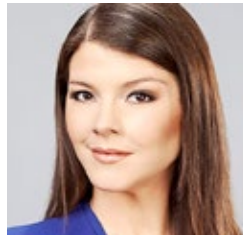
## TV Azteca: setting precedents

After a big reorganization in 2017 focused both in strengthening its original production and its international presence, **TV Azteca** (Mexico) arrives to NATPE Budapest with a fresh slate with strong brands.

'The Latin product has evolved enormously in the last 10 years. We represent strong brands with a high level of production. We continue to have classic, modern and iconic telenovelas that have set a precedent in Mexico, Latin America and the entire world but we also offer a wide range of genres including formats, factual, lifestyle, movies and drama', states **Melissa Pillow**, sales representative for Europe.

And the success of the company in Latin America is well reflected in Europe as well, with a good track record. Some examples include the sale of *Lo que Callamos las Mujeres*, *Entre correr y vivir*, *La Teniente*, *Drenaje Profundo*, *Sexo Amor y Cachondeo* to an OTT platform in Germany, *Cocinísima* in Russia, *Los Rey* and *Tanto amor* in UK, and *Siempre Tuya Acapulco* in Hungary, Latvia, Lithuania and Poland.

'We sold *Vivir a Destiempo* in Romania and Italy, and *Pasión Morena*, *Cielo Rojo*, *Vuelveme a Querer*, to an Italian OTT platform, and our Super Series *Desaparecida* and *Malcriadas*, in Albania', adds Pillow. The executive also recommends at NATPE a catalogue that include the *Indomable por Naturaleza* franchise, the drama series *Dos Lagos* and *Nada Personal*, the cooking show *Cocinísima*, and a slate of nostalgic Telenovelas that still work well in the region like *Cuando Seas mía*, *La Hija del Jardinero*, *Pasión Morena*, *Pobre Diabla* and *Mirada de Mujer*.



Melissa Pillow, sales representative for Europe



*Dos Lagos*, drama series



Nadav Palti, CEO

Albania, Germany, and a tape to Poland, *Dumb* (50x35') is the story about a 30 year old frustrated and stoned actress who is stuck with a body and appearance of a teenager and hates it; while *El Marginal 2* (13x45') is set three years before season 1, when the Borges brothers get into prison and get involved into a war of power with El Sapo, a bloody prisoner who rules San Onofre.

Lastly are the romantic comedy *Ciega a Citas* (140x60'), locally produced in Chile, Spain, Russia, Poland, Germany and now in production in China and Lithuania; *The Best of All*, which tests the theory that states that the average of the answers to a question of a large audience will be a more precise evaluation than professional, and the format *Power Couple*, a format that puts love to the test like you've never seen before. The couple's emotions, humor, tensions and love come into play.



2 MUST SEE SERIES



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## Televisa: comedy and melodrama



Claudia Sahab, sales manager

**Televisa** (Mexico), company well known globally as one of the top telenovela producers, arrives to NATPE Budapest with a slate of new shows headed by *Sin tu Mirada* (112x60'), about a woman who, despite her lack of sight and being obliged to learn to know and enjoy the world in a different way, doesn't lose the hope of finding the real love.

*Me declaro culpable* (92x60') follows a prestigious lawyer with a long and successful career while facing one of the most difficult cases when defending a woman who decided to disconnect her terminally ill husband. Whereas in *Papa a toda Madre* (90x60') the life of the owner of a toy emporium accustomed to having others solving his problems, will change after he has to take care of a daughter he does not even know.

Lastly, are *El vuelo de la Victoria* (72x60'), which follows a woman whose dream is to be a professional sprinter, and who will have to overcome many obstacles and make decisions that will mark her destiny for life; *Mi marido tiene familia* (100x60'), about a couple that lives the best moment of their relationship until they meet the husband's peculiar family, and *La Doble Vida de Estela Carrillo*, the story of a woman who to save her life and the of a small girl who passes for her daughter, crosses the Mexican border as undocumented and buys a false identity to be able to remain in the American Union, under the name of Estela Carrillo.



*Papa a toda Madre*, comedy series

crosses the Mexican border as undocumented and buys a false identity to be able to remain in the American Union, under the name of Estela Carrillo.

VB31

## Latin Media: a bridge between Europe and Latin America



José Escalante, managing director

**Latin Media Corp.**, Jose Escalante's 10 year production and distribution company, presents at NATPE Budapest its catalog of diverse international titles that continues expanding with new acquisitions including the huge Latin American phenomenon *Estrella* (80x45'), the story of a little girl that struggles to become a singer.

Escalante also recommends the Peruvian titles *Little Woman* (80x45') and *My Three Daughters* (80x45'), in addition to a wide range of Turkish series including the worldwide success *Little Bride* (263x45'), about a fourteen-year girl who has huge dreams, stepped as an exchange bride to the residence of a clan leader, and also highlighting *Slovaks* series like *Wild Horses* (90x45'), and *Zoo* (72x45').

## Record, a market generator

**Record TV** (Brazil) has managed to stand out in the global scenario: it created a subgenre that almost did not exist, and became a great success on Free TV in Brazil and then took it to international markets, achieving recognition and rating figures difficult to emulate, even in the most demanding territories.

They are the biblical series. The company takes timeless famous stories with high budget and very good capacity for reconstruction of the time, and combines telenovela with event series, as so much sought today. In times where the Latin novel struggles to win against series from Turkey and other origins, Record lives its best moment in the market.

**Delmar Andrade**, head of international sales: 'Thanks to the biblical series, Record has been in second place in Brazil for 5 years. The new premiere is *Apocalypse*, which generates 14 to 18 points in prime time. In total we have been with the genre for 8 years, in progressive and constant growth. Another of the premieres, *Rico & Lazarus*, Nro 1 on **Univisión** (US Hispanic), a milestone unthinkable some time ago'.

And completes **Andrade**: 'Despite the great impact, we strive to be very selective in the distribution of the product, to ensure that when it is exhibited, it works well, in the schedules and the right audiences. It takes a little longer, but it always moves forward'.

Today the distributor leads ratings on Univisión and Unimás in the US Hispanic, on **Televisa** (Mexico), **Caracol** (Colombia), **Telefe** (Argentina). In the world, the arrival goes from Portugal and the Portuguese-speaking countries in Africa -Cabo Verde, Mozambique, Angola, etc- to Poland and Eastern Europe. Now the focus is to gain markets in Western Europe and promote new business alternatives.



Delmar Andrade, head of international sales



*Apocalipsis*, new biblical series



*Estrella*, new series

'We are very happy that our dramas and series are working very well on the screens of our customers in America, Asia and Europe', said Escalante. 'Programmers need reliable providers that can nourish their grid with different content with proven success in other territories. Latin Media Corporation has offices not only in US, but also in Malaysia, Korea, and Spain, where it monitors dramas/telenovelas that are being broadcasted in the different regions. This is what gives us the chance to have direct access to successful products, and offer them to our clients'.

'Latin Media Corporation has become an excellent provider of content from different parts of the world, guaranteeing top of the line products of immense quality, high ratings and great love stories', completes Escalante.



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TO FALL IN LOVE  
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BY FABRICIO FERRARA



# The new Latin America: series, formats and co-production opportunities

Telenovela is a strong name in the global content market. But now, the Latin dramas have evolved and the region also provides entertainment fresh formats, co-production advantages, production services. Welcome to the new regional scenario.

The Telenovela appeared in three main Latin American markets: Brazil, Cuba and México. The genre was the evolution of the “Radio-novela” and it was born with the “new media”, television, that emerged in the main regional markets at the beginning of the fifties and sixties. Initially, these dramas were a boom on the local screens; to the countries mentioned, Argentina and

Venezuela joined the group. Nowadays, some of the most talented creators, directors and drama producers came from those countries.

The genre rapidly expanded to the many key Latin American broadcasters and also to Europe and other global markets. Telenovela has reigned over 50 years. But in the last 10-15 years the genre needed to change and adapt because of a new global drama competition, consumption habits and platforms. Nowadays, Latin producers and broadcasters are offering a much more sophisticated and diverse drama in the global marketplace, far away from the classical Telenovela. Let’s take a look into this evolution.

## Global success

Historically, there were some global suc-



NBCUniversal/Telemundo (US Hispanic) has shown since the last years the importance to evolve with the audience. The company took the classic Telenovelas to the next step, adding action, budget and less but more dynamics episodes, creating the Super Series. Thanks to them, Telemundo managed to recover the first position in the prime time of the US Hispanic after a long period of dominance of its main competitor, Univision, and enter into new territories with titles like *Iron Lady* or *The Lord of the Skies*.



## LATIN DRAMAS BIG ADVANTAGES FOR THE GLOBAL MARKET

- 1) A SIGNIFICANT STORYTELLING TRADITION
- 2) A WELL-KNOWN TRADEMARK BUILT IN THE MARKET WITHIN THE LAST 60 YEARS
- 3) A GREAT BALANCE BETWEEN PRICE AND QUALITY
- 4) A WELL ORGANIZED PRODUCTION AND BUSINESS MODELS
- 5) A GREAT CAPACITY OF EVOLVING TO NEW SUBGENRES

cess on the Latin America Dramas like *Los Ricos también Lloran* (Televisa Mexico, 1979), sold in 120 countries and dubbed into 25 languages; *Topacio* (RCTV Venezuela, 1986), with three international adaptations (two in Mexico, one in Brazil); *La Extraña Dama* (Canal 9 Argentina, 1989), sold in 20 territories from Latin America and Europe; *El Rey del Ganado* (Globo TV, Brazil) and the most successful of all times, *Yo Soy Betty La Fea* (RCN Colombia, 1994), seen in 180 territories and the telenovela with more international adaptations: 24.

In 2007, the genre celebrated 50 years and Televisa (Mexico), an emblematic company in this genre, broadcast *Amor sin Maquillaje* to celebrate the more than 700 dramas produced since then. The company sold its titles in 70 countries, dubbed in



Televisa (México) is well known as one of the biggest drama producer with an impressive track of developing and distributing its content both in Latin America and the global market. But even when historically it has had a strategy focused on the in-house development, in January 2018, it launched with Univision an international pilot program to encourage the creation of new original series with and without script by independent producers as part of their strategy to develop unified content.

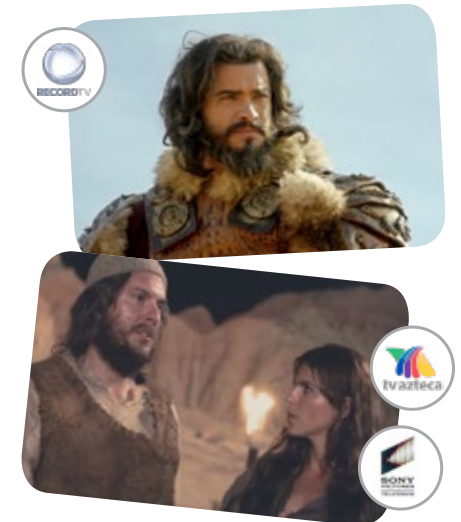
cess of *A Força do Querer* with a daily reach of 48 million people on prime time. Most recently, *O outro lado do Paraíso* reached 50 million people. It is considered the fifth largest broadcaster worldwide. And a great example because of its content. diversification: from classical love telenovelas to high end drama offered in many formats and lengths (TV movies, series, miniseries, short telenovelas, etc.).

## Sizes, themes and players

During a period of time, which can be situated between the end of the ‘90s and now, the Telenovela looked for new identities, creating new concepts, bringing new storytellings and subgenres that captivates local and international audiences. It is reasonable: the genre had at that point close to 50 years of existence and become necessary to evolve.

There are many evolving points and a true fact: Latin dramas have become shorter. From 150-200 episodes in the ‘90s to 80-100 episodes, and most recently, 60 episodes on what has been called the “Super Series”. Many regional companies have been awarded the creation of this new type of drama, but two stand from the rest: **Disney Media Distribution Latin America** and **NBCUniversal Telemundo**.

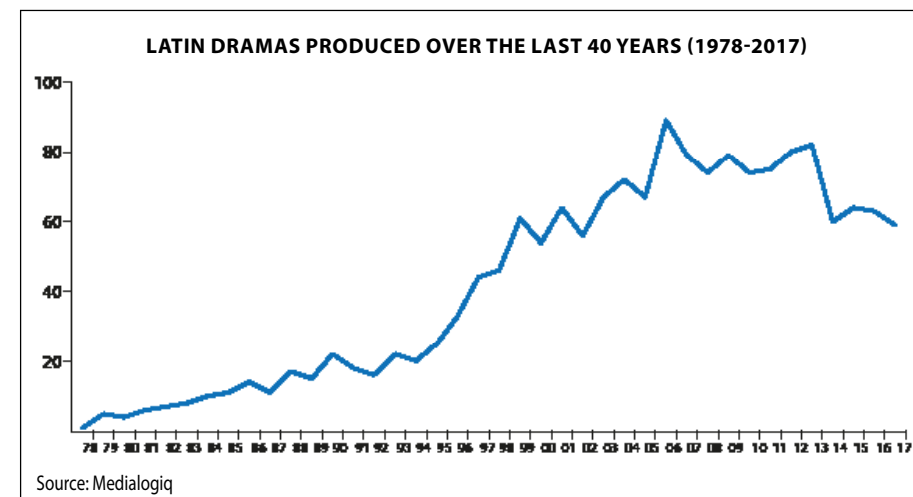
These productions have added new elements following the market trends and coinciding with a global market fluctuation that brought new audiences and platforms, new consumption habits, and new drama producers competing in a bigger marketplace.



The evolution of the Telenovela: epic/biblical series such as *Josué y La Tierra Prometida* (Record TV) and *Maria Magdalena* (TV Azteca, Sony)

Topics and stories also changed. New types of stories were created, adding more action, suspense, and real histories to the classic romantic telenovela. In Argentina, for example, two subgenres spin-offed from traditional Telenovela. On one side at the beginning of the 2000s a new social-telenovela about the conflictive Seventies, Military Dictatorship, disappeared persons, etc.: they were a huge success, with titles such as **Viacom Telefe’s *Montecristo***, adapted in 8 markets.

On the other side, the country specifies in a type of comedy with twists, which has been very successful with series like *Lalola*, the top rated scripted format from Underground/Dori Media with more than




TV Azteca (Mexico) launched in October 2017 *Dopamine*, a content-generator company set for big co-production projects, as symbol of the transformation of the company. From a drama producer (120+ episodes) to a creator hub focused on high-end stories and biopics like *María Magdalena* (Sony) or *Hernán Cortez* (Onza).

Some of the most successful Latin Dramas of all times: *Los Ricos también Lloran* (Televisa), *Topacio* (RCTV), *La Extraña Dama* (Canal 9), *El Clon* (Globo TV) and *Yo Soy Betty La Fea* (RCN)



## The new Latin America: series, formats and co-production opportunities



Globo (Brazil) is one of the top producers of melodramas in Latin America, with a strong tradition in creating and distributing Telenovelas worldwide. In recent years, it has developed new kinds of drama creations for distribution, as well as invested in the diversification of different formats. Globo also continues to bring new talents, authors, directors and actors, in technology, innovation and production infrastructure, including the three new studios at Globo Estudios in Rio de Janeiro, exclusively for dramaturgy.

12 global adaptations. Also, *Los Roldán*, *Graduados*, *Sres. Papis*, all them from **Viacom Telefe**. Argentina is the leading formats seller in Latin America, named the fourth largest exporter in 2010 by FRAPA, behind UK, USA and The Netherlands.

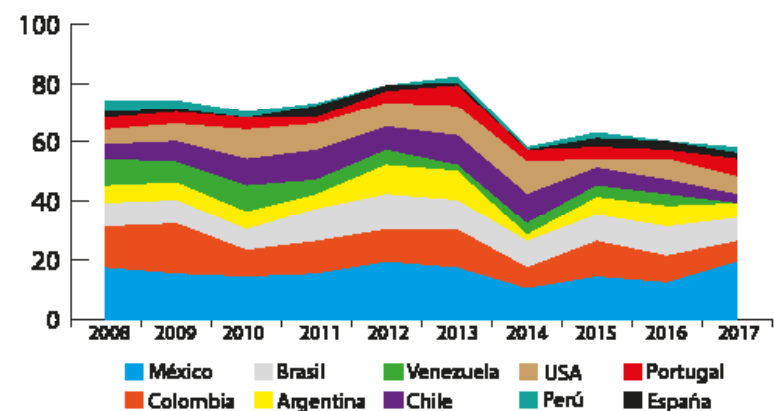
Colombia, the other big production pole shaped within the 2000, created the “narcotelenovela”, headed by Colombian producers **RCN** and **Caracol**. Many key character of the real life were fictionalized, such as *Escobar*, *El Patron del Mal*, or other based on different situations, like *El Capo* (RCN), *El Cartel de los Sapos* o *Sin Tetas no hay Paraíso* (both from **Caracol**). **Sony** is a key co-producer in this genre with titles such as *Rosario Tijeras* (RCN, **Teleset**, **TV Azteca**) and most recently, *El Rey del Valle* (Sony, **ClaroVideo**). **NBCUniversal Telemundo** is a big producer of the genre for the US Hispanic, with *El Señor de los Cielos* (five seasons), *Seño-*

*ra Acero* (three seasons), among other top titles.

All these productions full of violence and dramatic situations, tell real and conflictive stories from Latin America. After a couple of years in which they were very successful, the majority of the Latin American broadcasters stopped broadcasting them; in some territories from Central America and the Caribbean they were banned or the channels were obligated to emit them after 11pm. Internationally, sometimes it was very difficult to sell them.

A gap between the classical daily romantic telenovelas to these new “narco”

LATIN DRAMAS PRODUCED, PER COUNTRIES OF ORIGIN (2008-2017)



Source: mediaiogiq



With over 35 years, SBT is the second broadcaster in Brazil in terms of audience, according Kantar IbopeMedia and one of the main producers of family shows. The channel based on the pillars of family, entertainment and information, is behind some of big kids and teens telenovelas such as the local version of *Chiquititas* and *The Adventures of Poliana*; hidden camera pranks, and action series like *The Motorcycle Girl*.

or social-themed, series was born. In that space the melodramatic content from Turkey, Korea and other origins started to gain space in the Latin American screens. Local producers were astonished. New competitors appeared from everywhere.

### Times Are A-Changin’

Undoubtedly, the Telenovela has built a unique brand in the global market. After 60 years selling them all across the world, there are no executive in the industry that do not know about it. And almost no market in the world that has broadcast one of it once.

Dramas are in general the backbones of the majority of FTA channels with 3-4 key slots dedicated to them. No matter if it is

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# EDGE OF DESIRE

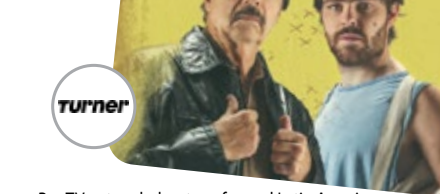
WOMEN AS STRONG AS THEIR DESIRES.



The evolution of the Telenovela II: biopics such as *Hasta que te Conoci* (Somos, Disney), *Luis Miguel* (MGM, Gato Grande, Netflix, Telemundo), and *Sandro de América* (Viacom Telefe, Telefilms)



## The new Latin America: series, formats and co-production opportunities



Pay TV networks has transformed Latin America in a key hub for high-end series: teen series *Heidi* (Nickelodeon/Mondo TV Iberoamerica), historical series *Sitiados* (FOX), thriller *Jardín de Bronce* (HBO) and *Un Gallo para Esculapio* (Turner)

prime, access or day time, the genre has built the way Latin Americans watch television. They represent big advertising incomes for those channels, and also a good product for international distribution.

But of course, the international business is not the same as some years ago. In the last 20 years, new drama producers appear in the marketplace: Turkey, Korea, Israel, India, and the offer changed dramatically.

Every year, more countries are becoming drama exporters, like China, Indonesia, Ukraine, Poland, Czech Republic, Russia, among others. It is said we are going through the “Golden Era” of drama, so competition is stronger and can come from every were. Especially since the launch of

TV Record (Brazil) has found on the biblical series the key to stand on the international market, achieving great success not only in Latin America but also in markets such as Poland, USA, Africa, Portugal and Japan. To *Moisés* and *Josué*, the company added titles such as *El Rico* and *Lázaro* and *Apocalypse*; series with a great production value and powerful stories.

TOP LATIN DRAMAS PROVIDERS IN 5 KEY CEE MARKETS, BY MINUTES AIRED (Q1, 2018)

RUSSIA		UKRAINE	
Globo TV	2	Dori Media	1
Telefe	1	Globo TV	1

ROMANIA		HUNGARY		POLAND	
Televisa	5	Televisa	5	Televisa	3
NBCUniversal	3	NBCUniversal	3	Disney	2
Disney	3	Caracol	1	Pol-ka	1

Source: Medialogiq

the digital titans, back in 2007.

Latin America has also evolved in this time: it used to be an insurmountable border for foreign drama. But from the beginning of the 2000, Korean dramas started to be aired in rare time slots in Mexico, Central America and other countries with some success. The sea change occurred when Chilean station decided to air the first-ever Turkish product locally dubbed in Latin America, *Las Mil y Una Noches* (*1001 Nights*, **Global Agency**).

**Mega** director of contents and international business **Juan Ignacio Vicente** once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consider-

ation to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (*1001 Nights*, *Fatmagul*, **Kanal D**), instead of the social (rich/poor) controversy’.

In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. *Pituca sin Lucas*, *Ambar*, *Pobre Gallo*, *Perdona nuestros Pecados*, *Eres Mi Tesoro* and *Te doy la Vida*, among others, are since last month part of **Mega Global**



Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players. Good examples are *La Fragilidad de los Cuerpos*, *El Maestro* and *El Lobista*, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión/Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are *The Stars* and *Simona*, a kid and teens’ series with 1,5 millions of views on YouTube per day.

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## The new Latin America: series, formats and co-production opportunities




RCN is a main channel in Colombia and one of the leading production companies in Latin America. With *Betty, la Fea* (*Ugly Betty*) as one of the most remarkable titles from RCN, the company has licensed its content to more than 120 countries worldwide, including classic melodramas, musical, biopics, thrillers and comedies.

Entertainment, the new distribution arm headed by Esperanza Garay, CEO, partner in this enterprise.

After *1001 Nights* a huge amount of dramas from that origin, plus Korea, China, Hong Kong, India, The Philippines, and other countries were emitted in the regional screens. What allowed the Turkish content distributors to gain advantage over other nations was that they have been always willing to adapt their manners and strategies to each ongoing situation. Their actors are similar to a Latin-average, rather than Korean and Asian.

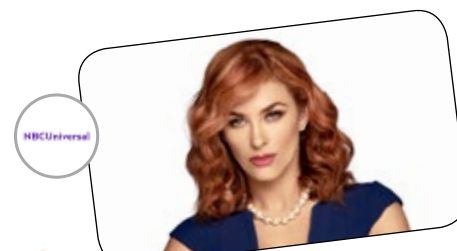
This, at a time when the rest of the International producers (a wide range of companies covering from Hollywood to Europe and the leading Latin American



Caracol is the leading broadcaster in Colombia and a good example of the evolution of the Latin productions following the main trends of the region. With a mix of "narco novelas" like *Pablo Escobar* or *Alias JJ*, biopics like *La Ronca de Oro* and *Bolívar*, and super series like *Bronx*, Caracol has a strong presence in the CEE, especially through alliances in Poland, Hungary, Bulgaria and Greece.

broadcasters) remained so assured about the value of their existing content inventory that they did not feel the need to change their corporate culture. To complicate even more the situation, Netflix emerged to shock the entire industry.

The Latin American industry as a whole is now under pressure because competition is larger and diversified. Latin Drama does not only compete with Turkey, Korea,



Leading Latin Dramas aired in five Top CEE countries, by number of runs (Jan. 1-Apr. 30, 2018): NBCUniversal's *La Doña* (Romania), Pol-ka's *Sos Mi Vida* (Ukraine), Teletel's *Muñeca Brava* (Russia), Televisa's *Along Came Love* (Hungary) and Pol-ka-Disney's *Soy Luna* (Poland)

India or US series. It also competes with digital dramas, short digital series, or high budget productions from Netflix, Amazon or Hulu, as well as the Hollywood Studios, BBC (UK), ZDF (Germany) or TF1 (France), among others.

In this context, it is important to highlight that the drama competition is no longer in the international space, this is content distribution. It is also in the domestic markets. Because the opening to foreign drama has changed the grids of the top Latin broadcasters, which have broadcast many hours of new types of dramas.

### New dramas arising

Other answers to the strong local and international competition in the drama field,



Mega Global Entertainment (MGE) is the distribution arm of Mega TV, the leading channel within the competitive Chilean market. Launched last May and led by Esperanza Garay, MGE seeks offers Telenovelas and formats of series and entertainment, which have been very successful worldwide and with appeal for the region. The company is the next step after the expansion of local production generated during last years.

can be identified in two new subgenres coming from the Latin America. In Brazil appeared by 2010 the epic/biblical productions from Record TV (Brazil), with huge successes such as *La Reina Esther*, *José de Egipto*, *Sanson y Dalila*, *Rey David*, *Jesús y los 10 Mandamientos*, *Josué y la Tierra Prometida* y *Los Milagros de Jesús*, most of them broadcast across Latin America and the US Hispanic, becoming prime time hits in the leading TV channels. They also won some markets in Europe and Asia.



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 **The new Latin America: series, formats and co-production opportunities**



TVN Chile is one of the biggest and most traditional players in Chile and Latin America. In late 2016, the company started a restructuring, adding Jaime de Aguirre as executive director, and Alicia Zaldivar Peralta as general manager, and achieved stability after a period of ups and downs, and reconverted its production, both in terms of quality, and narratives and production models. It started to produce thrillers again and bet on more international and dynamic stories like *La Colombiana* or *Un Diablo con Angel*.

*ta que te Conocí: Juan Gabriel* (Disney, Somos, BTF Media), *Su Nombre era Dolores* (Univision), *Celia* (RCN Colombia), *Luis Miguel* (MGM, Gato Grande, Netflix, Telemundo), *El César* (Disney, BTF Media) and *Sandro de América* (Viacom Telefe, Telefilms), among many more. All them have been huge audience successes in their local and regional markets. There are more to come in 2018: *Maradona* (Disney, BTF Media) and *Secretos Confesables: Julio Iglesias* (Disney, Cinemat), etc.

It is also important to highlight at this point that FTA channels are not alone in this genre evolution. Pay TV and digital players are dedicating big resources to produce high-end dramas within Latin America. FOX, Disney, Turner and HBO are the top ones.

FOX has produce from historical (two seasons of *Sitiados*, Chile) to real life stories (*Me chama de Bruna*, Brazil), as well as teen (*Cumbia Ninja*, Colombia) and futuristic series (*2091*, Colombia). For next year, the company is working in *Santa Evita*, based on Argentine' **Tomas Eloy Martinez** homonymous best-seller, and *Santa María*, a religious thriller from award-winner Chilean director **Pablo Larraín**. It produces in Mexico, Brazil, Chile, Colombia and Argentina.

Disney is the best example on teen series, having coproduced with **Pol-ka** three big hits:

*Violetta* (three seasons) and *Soy Luna* for **Disney Channel**, plus *OIICE* for **Disney XD**. The distribution division of the Hollywood studio, **Disney Media**, has been a key player in the adaptation, but also creation and co-production of dramas in different regional markets. Since 2006 it has produced four regional adaptations of *Desperate Housewives* with **Pol-ka** in Ar-



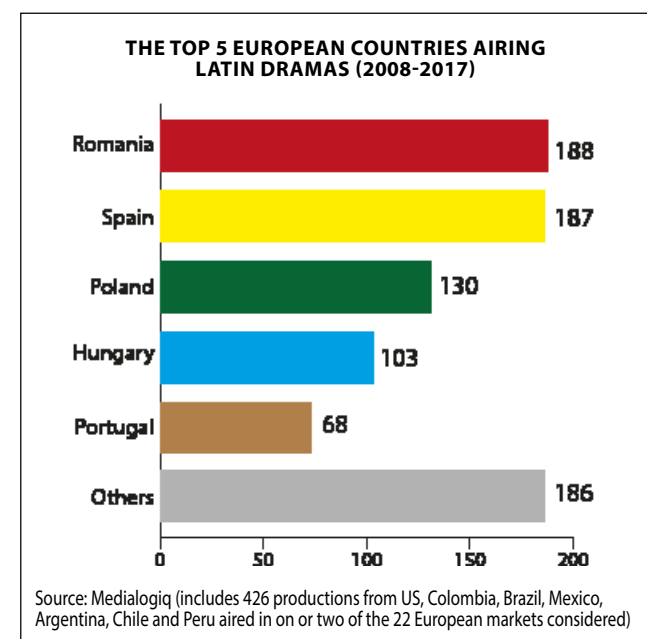
América TV (Peru) has recently joined the group of Latin American countries that produce quality dramatic content, with international projection. It highlights its strategic alliances with Telefe/Viacom for the co-production of *El Regreso de Lucas* (*The Return of Lucas*), and the classic telenovela *Mujercitas*, distributed internationally by **Tondero**

gentina for that market (**eltrece**), Colombia (RNC)-Ecuador (**Teleamazonas**), **US Hispanic** (Univision) and Brazil (**Rede TV!**); *A corazon Abierto* (*Grey's Anatomy*) in Colombia (RCN); *Secretos de Familia* (*Brothers and Sisters*) in Mexico (TV Azteca); and *Los Años Dorados* (*The Golden Girls*) for the US Hispanic (**Telemundo**). A panregional version of *Amazing Race* has been developed with **Turner**, too.

**Turner** has made strong efforts in the last years sealing key deals in Latin America, with special focus in Argentina. First, it signed an alliance with **eltrece** and **Telefe** to broadcast on TNT their prime



Turner Latin America celebrates its 25<sup>th</sup> anniversary in the region but during the last years, the company has been betting on the investment of more regional productions through strategic alliances with local players in Mexico, Argentina, Brazil and Chile, among other countries. Now, the company pushes stories like *Mary & Mike* (Chile), *Un Gallo Para Esculapio* (Argentina) and *O Doutrinador* (Brazil) to the international scenario



Following that success, **TV Azteca** (Mexico) has coproduced *Maria Magdalena* with **Sony**. Other players are interested in investing more in this kind of productions, which are not religious-based: they take a moment in the Bible history and narrate different stories that surround that event.

The other big evolution point in the Latin Dramas history were the biopics, like *Has-*

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**MGE**, with leading content in all telenovela prime time slots in their region, has just joined forces with the Italian biggest commercial branch **Mediaset Distribution**.

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## The new Latin America: series, formats and co-production opportunities

time dramas simultaneously: *Signos* (in which it was the co-producer) and *Historia de un Clan (Underground)*. Second, it keeps producing originals exclusively for its platforms and channels (*Psiconautas*, *Nafta Super*). And third, it closed last year a strategic deal with **Pol-ka**, **eltrece** and **Flow-Cablevision** consisting on the creation and production of two dramas a year: *La fragilidad de los Cuerpos* and *El Maestro* (2017), and the new one *El Lobista*. With **Viacom Telefe**, it has produced two seasons of *Un Gallo para Esculapio (Underground)*.

**HBO Latin America** has given a big step last year: it has built its unique distribution arm separated from HBO Global. It is headed by **Frank Smith**, EVP, Distribution and Media Development, and commanded by **Xavier Aristimuño**, VP Licensing, to sell the original dramas produced in the region since 2004, when appeared *Epitafios* with **Pol-ka** in Argentina. Many more came after: four seasons of *O Negocio* (Brazil), *Sr. Avila* (Mexico), *Prófugos* (Chile), *El Hipnotizador* (Uruguay). They are 20 projects in total summing up 350 hours. That content has worldwide rights and multiplatform. **HBO Latin American** productions received 86 nominations worldwide with 48 awards, and 13 Emmy International nominations.

### Future

For many years, Latin America has been ahead in fiction with the Telenovelas: daily series focused on love and passion. Nowadays, with a bigger global competition, the region adapted its drama productions to the local and international markets needs. It is a strong pole of both fiction and entertainment, which combines the goods of the past —fresh ideas, hot stories, good costs— with great new advantages: top production projects and services, genre variety, business twists, co-productions, 360 ventures.

No matter the huge competition, the “trends waves” or economical fluctuations, the Latin creations in both, scripted and non scripted, are consolidated in the



global arena. International players have understood that the region is not anymore an “Only-Telenovela”, but a full range of audiovisual content provider.

Over this 60 years of dramas, Latin America has added new condiments to its productions transforming them in high-budgeted serials that can compete with any other type of drama that is produced worldwide. And not only that, it is a unique and diverse partner offering fantastic opportunities to co-develop, co-finance or

co-produce any kind of content for TV or any other platforms, as well as offering production services for the global market in a good balance of price-quality. Different from its origins, but with the same essence, what has kept the genre updated and in constant evolution.

Regional players continue rethinking new strategies towards the international market, and good concepts have been created. For instance, **NATPE** implemented in 2017 at Miami the very first “Panel ¡En Español!” with key executives from the region and in Spanish, which continued this year, both moderated by **PRENSARIO**.

Now, the organization is putting strong emphasis in the region for Budapest, with a panel taking place on Wednesday at 12pm, also co-organized and moderated by **PRENSARIO**. It is also under discussion an academic presence for **MIPCOM**, as well as strategic actions as a showcase during **ATF**, in December, with focus in the Asia Pacific region.

Unlike Turkey, Korea or India, Latin America is a region with many different countries, stories, talents, costs. And even it shares a same piece of land and, in some cases, language, the discussion and organization of the actions is much more challenging. With a strong reason in the horizon, these territories will gain again relevance in the worldwide marketplace.



For two years in a row, NATPE has co-organized with Prensario a panel “En Español” with leading media companies from the region, who have highlighted the main trends and explained how the region has evolved and transformed in the audiovisual business



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# INCAA: the Argentine audiovisual industry meets the world

The Instituto Nacional de Cine y Artes Audiovisuales (National Cinema and Audiovisual Arts Institute, INCAA) has launched a new incentive to encourage international co-productions between broadcasters, networks or international digital platforms and Argentine producers. For this, a contest is being opened for international companies that, in partnership with local producers, can be interested in financing series and projects to be produced, totally or partially, in Argentina, to be exhibited in other countries of the world.

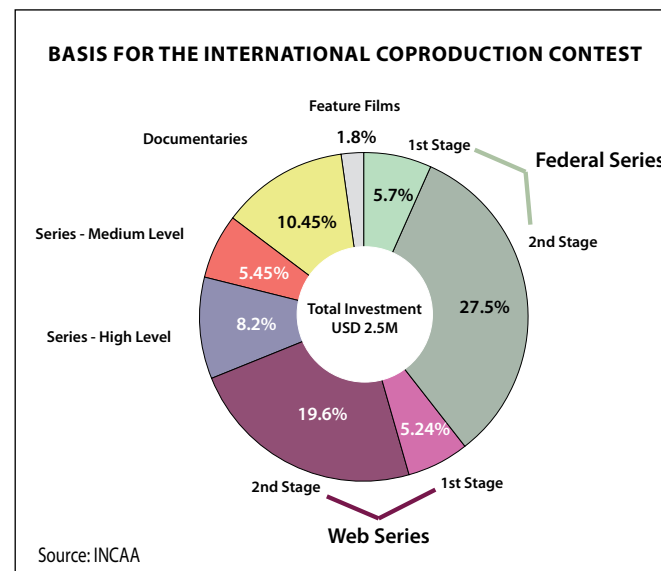


## Contest's basis

To participate in this contest, the local companies must have legal status and produced and aired at least a series of thirteen or more episodes plus/or a fiction, feature film, animation or docufiction.

The projects must be fiction series, docufiction, documentary or animation and the producers must be associated to a broadcaster or network or digital platform of international distribution that participates in the financing of the series and guarantees the exhibition of the same.

The INCAA will allocate to this contest an annual fund of sixty million Argentine pesos, equivalent to approximately three million US dollars. Each winner of the contest will receive as a reward up to 50% of the amount to be executed in Argentina. The prize for a winning project will not exceed ARS 5,700,000, around USD 280,000. 30% of the total amount of the investment in Argentina



should be used for salaries and social security contributions of technical and artistic teams resident in the country, and the project should include a minimum investment to be executed in Argentina of ARS 6,000,000, around USD 300,000.

The call to submit projects will be open until October 31, 2018. A jury composed of professionals from the audiovisual industry will be responsible for selecting projects in regular meetings based on the number of projects presented.

This project seeks to increase the competitiveness of Argentine audiovisual production, with a special incentive for those productions that take place in areas of the interior of the country. The concept, according to **Ralph Haiek**, president of the INCAA, is 'to promote the national audiovisual industry, integrating local production companies with international screens and promoting federal production'.

'The proposed scheme produces a significant reduction in the cost of production of the series and makes Argentina even more competitive as an alternative for the realization of audiovisual content to be used in different markets of the world. This adds to

### SHARE OF INVESTMENT, PER TYPE OF CONTEST

- THE INCAA WILL ALLOCATE AN ANNUAL FUND TO THIS CONTEST OF USD 2,600,000
- EACH PARTICIPATING PROJECT MUST MAKE A MINIMUM INVESTMENT IN ARGENTINA DE USD 260,000
- EACH WINNER WILL RECEIVE AS A REWARD UP TO 50% OF THE AMOUNT TO BE EXECUTED IN ARGENTINA WITH A CAP OF USD 248,000
- MINIMUM AMOUNT AWARD USD 130,400
- MAXIMUM AMOUNT AWARD USD 248,000
- 30% OF THE TOTAL AMOUNT OF THE INVESTMENT IN ARGENTINA IS DESTINED TO SALARIES AND SOCIAL CHARGES OF TECHNICAL AND ARTISTIC TEAMS RESIDENT IN THE COUNTRY.

Source INCAA



Fernando Juan Lima, VP, and Ralph Haiek, president of INCAA, with Teresa Constantini, Argentine director and actress, and Pablo Avelluto, Secretary of Culture



During Conecta Fiction 2017, Ralph Haiek, president at INCAA, and Roman Rodriguez Gonzales, counselor of culture, education and university management of Xunta de Galicia, signed a cooperation agreement between Argentina and Galicia to jointly develop movie and web series projects



Ralph Haiek, president of INCAA, during the welcoming cocktail at Conecta Fiction 2017 surrounded by Dolores Meijomin Rodriguez, Agadic; Jesus Oitaven, secretary general of the Counseling of Xunta de Galicia; Paola Pannicelli, Rai Fiction (Italy); Rafael Bardem, RTVE; Julian Izquierdo, ICEX; and Geraldine Gonard, director of the market

the existing technical facilities in the country, the landscapes of all kinds and the existence of qualified talent to guarantee results of first level of quality'.

## Going abroad

This initiative and those related simultaneously with other competitions open to Argentine creatives of productions for television and Web, are complemented with the international strategy of promoting these contents in various international markets, having already been done at NATPE 2018 in Miami and continued in Conecta FICTION in Spain, MIPCOM in Cannes,

\*\*\*  
 NATPE BUDAPEST PRESENTS ITSELF AGAIN AS A VERY GOOD HUB BETWEEN ARGENTINE AND CEE, WEHRE ARGENTINE PRODUCTS HAVE MANAGED TO PENETRATE THANKS TO ITS FRESHNESS AND PRODUCTION QUALITY. THE MARKET IS HEALTHIER AFTER SEVERAL YEARS OF CRISIS AND THE LATINO PRODUCT IS BEGINNING TO RECOVER GROUND SLOWLY.  
 \*\*\*

France, and the next NATPE at the beginning of 2019.

The actions in these markets include screenings that present the winning initiatives of the different competitions organized annually by the INCAA, with the participation of the winners of the same. Agreements have also been made and continue to be signed with different government entities of several European and Latin American countries to promote audiovisual production in general, through co-production agreements and agreed development plans.

## The 'pyramid'

According to the strategic definition that is guiding the

INCAA on its management, a pyramid related to the costs of development and production can be established: different types of content production for television and the Web, with the 'high end' realizations in the vertex, productions and co-productions 'of medium level' like those that are being promoted internationally in the central part, aiming at the producers with some experience, and promotion to the production of Web series, with competitions open to creators with no background in matter, at the bottom of the pyramid.

The promotion process is comprehensive, comprising a training stage so that the filmmakers, beyond the artistic quality of the contents they have created, can be able to present them to the buyers of programming and international screens interested in their project.

To this, a mentoring program is carried out throughout the development and production process, with the winners of the various local competitions at the federal level being called for this year, being able to offer a pitch in English language during Ventana Sur, next November. The call and international market takes place annually in Buenos Aires, and counts with outstanding participation of figures and executives of the industry of the different countries of America and Europe.

\*\*\*  
 MARIANA DELL ELCE ARRIVES ONCE AGAIN TO CONECTA FICTION AS REPRESENTATIVE OF THE INCAA AFTER PARTICIPATING IN ITS FIRST EDITION, IN WHICH ARGENTINA WAS INVITED AS A "GUEST OF HONOR", FEATURING SCREENINGS AND PANELS DEDICATED TO THE COUNTRY. THE EXECUTIVE LANDS TO SANTIAGO DE COMPOSTELA WITH THE AIM OF CONTINUING TO STRENGTHEN ITS INTERNATIONAL RELATIONSHIPS AND PROMOTING ARGENTINA AS A STRATEGIC ALLY OF CO-PRODUCTIONS.  
 \*\*\*





# Conecta Fiction evolves and grows

BY FABRICIO FERRARA



Conecta Fiction, the global hub for co-production organized to bridge Europe and the Americas, takes place on June 18-21 at Ciudad de las Artes, Santiago de Compostela, Spain. More than 500 participants are expected, showing a growth of 25% compared to the first edition last year.



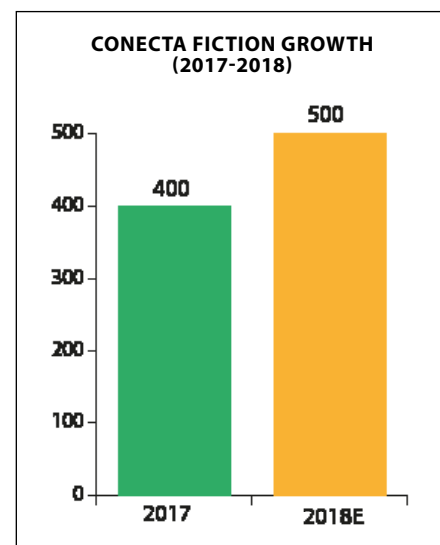
Jesús Oitavén, secretary general of the Consellería de la Xunta de Galicia; Inés París, president of Fundación SGAE; Geraldine Gonard, director of Conecta Fiction, and Javier Serra Guevara, director general of internationalization of the ICEX at Conecta Fiction 2018 presentation in Madrid

**The event has gained the support of regional and national entities in Spain, becoming an strategic hub to received the most talented and renowned executives of the industry**

In only one year, this meeting has made enough noise to attract the attention of the global content business. This 2018 edition is seeing much more international and European presence, while the Latin Americans remain being the same key executives from last year.

Conecta Ficiton joins the efforts of many Spanish organization, such as the **Axencia Galega das Industrias Culturais** (Agadic) from the Xunta de Galicia, **ICEX Spain Export and Investment**, **SGAE Foundation**, and it is produced by **Inside Content**.

Its growth cannot only be measured in numbers. There is much more to show at Conecta Fiction: there are five different pitching sessions and



a creativity contest to boost the co-production and talent market; two countries under “Focus On: Colombia and Germany”, and series projections such us *Bad Banks* (Letterbox Filmproduktion/Federation Entertainment) or *Ku'damm 59* (UFA Fiction/ZDF), and *La Ley Del Corazón* (RCN) and *La Ley Secreta* (Caracol), among many more.

Both countries that

are the main protagonists on Wednesday 20<sup>th</sup> with a program that includes an overview of the production, programming and talent of each of them. In addition, a meeting of each of these delegations is scheduled with producers of the **Galego Audiovisual Cluster**.

At the opening gala, **TVE**, proving its support once again for the event, premieres a chapter of a forthcoming series: *Limbo*; and **Telemundo International Studios** offers an exclusive screening of its first premium series *El Recluso*, which features the production design of Oscar-winner **Brigitte Broch** (*Amores Perros*, *Babel*) and photographic direction of **Jaime Reynoso** (*Aquí en la Tierra*, *Bloodline*). It is produced by **Inna Payan**, who won the International Amnesty Award of the Berlin Film Festival 2017 with *La Libertad Del Diablo*.

Outside the conference area and wrapping up the activities agenda, “La Caja de Ficción” (The Fiction Box) continues to be the place for professional meetings and one-to-one negotiation. In order to guarantee all participants, the opportunity to make contacts, the event website includes under this same name an online matchmaking platform specially designed to request and close meetings between participants and manage their agenda during Conecta Fiction according to the interests specific to each professional.

Conecta Fiction’s main aim is to promote and encourage creation, development, production, and co-production of fiction series. To do so, it offers an extensive program of activities that will facilitate networking and will once again connect the fiction industry for television from both sides of the Atlantic.

With 500 professionals from 17 countries in Europe, USA and Latin America, the event is attended by producers, OTTs, investors, creative minds, distributors, scriptwriters, agents representing talent, and more



Focus On: Colombia and Germany offers several productions from each country, such us *Bad Banks* (Letterbox Filmproduktion/Federation Entertainment) and *La Ley Del Corazón* (RCN)



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## Conecta Fiction evolves and grows



than 35 international television channels. In addition, the main Spanish TV groups are in Santiago de Compostela: **RTVE**, **Atresmedia**, **Mediaset**, **Movistar +**, as well as the collaboration of **Televisión de Galicia** and **Grupo Secuoya**.

**Geraldine Gonard**, director of Conecta Fiction, summarizes the main goal for the second edition of the international gathering: 'Our first edition was very useful for its participants, offering a networking opportunity between producers and talent and we know that it really worked. Our priority for this edition is to maximize Conecta's usefulness as a contact platform between Europe and America'.

'To achieve this, we are creating and implementing activities that improve the culture of co-production and foster a unique and intensely productive work environment. This is the formula with which we want to identify ourselves and with which we want to help companies improve their results', she completes.

The event opening is on the evening of June 18 at the Auditorio Abanca located in the historic center of Santiago de Compostela, with the presence of representatives of the promoters and collaborators of the event. During this Opening Gala and after the official presentation of the second edition of Conecta Fiction, a chapter of *Limbo*, the web mini-series from TVE's **PLAYZ** platform, is being showed to the audience. It is a co-production between Argentina and Spain, the series features performances from Ingrid García Jonsson, Eloy Azorín and Demián Salomón.

### Program Highlights

The world of co-production of fiction series is analyzed in depth by leading international speakers through panels and case studies. On Tuesday 19<sup>th</sup>, a part of the program is reserved for pitching projects, and on Wednesday 20<sup>th</sup>, the outlook of the audiovisual industry of Colombia and Germany, the countries to which the Focus On section is dedicated, is being addressed.

Among the confirmed panelists of the second edition of Conecta Fiction are **Francisco Cordero**, founder and CEO of **BTF Media**; **Alberto Fernández Torres**, Subdirector of Transmedia Content of the **TVE Playz** platform; **Eduardo Basarte**, director of **Secuoya Nexus** (Grupo Secuoya); **Deirbhile Ní Churraighín**, Head of Acquisitions **TG4** (Ireland); **Peter Nadermann**, Managing Director of **NADCOM**, and **Maria Iregui**,



Roberto Ríos, Corporate EVP original productions, HBO Latin America and Miguel Salvat, VP original productions, HBO España (borders) with Paola Pannicelli, from Rai Fiction (Italy)

**Pay TV is playing a key role in the original production market within Latin America, but also globally. HBO Latin America is showcasing its Mexican series Señor Avila**



Geraldine Gonard, director of Conecta Fiction surrounded by Ralph Haiek, president of INCAA (Argentina), Jesús Oitaven, secretary general of the Consejería de la Cultura de la Xunta de Galicia, Julián Izquierdo, from ICEX, Paola Pannicelli, from Rai Fiction (Italy); Rafael Bardem, from RTVE (Spain), among other organizers at last year welcome party in Santiago de Compostela

**Conecta Fiction has opened a new era for the content business between the Americas and Europe, offering a unique space to discuss traditional and new business formulas for the ever-changing global market**



Top broadcasters from Europe and Latin America: José Navarro, international content, RTP (Portugal); Ana Celia Urquidí, general director, strategic development and talent, TV Azteca (México); Fernanda Tabarés, director, Voz Audiovisual (moderator); Fernando López Puig, head of fiction, RTVE (Spain); Jaime de Aguirre, CEO (Chile)

**At Conecta Fiction Europe meets The Americas and viceversa. It is expected much more European attendance in this edition**

VP of Strategic Businesses and Channels of **RCN Televisión** (Colombia).

Some of the highlighted panels are focused on presenting a "Case Study" of the series *Vivir Sin Permiso*, produced by **Mediaset Spain**, represented in Santiago de Compostela by its executive producer **Aitor Gabilondo**; *Hierro*, produced by **Portocabo** and **Movistar+** (Spain) plus **Atlantique Productions** and **Arte**, both from France; and the co-production *El Sabor de las Margaritas*, by Galician producer of **CTV** and **Televisión de Galicia** for whom **Comarex** is an international distributor; and are presenting the new international partner of the series at Conecta Fiction.

Another strategic panel is the one dedicated to the adaptation in different territories of the series *Skam*, led by **Marianne Furevold**, executive producer of **NRK**, **Christian Gockel**, EVP international sales & acquisitions of **Betafims**, **Nathalie Biancolli**, director of Acquisitions and Co-productions of **TF1** (France), and **Francisco Rubén Araujo**, Head of Original Content of **Movistar+**.

A new section under the format of "Meet Them" shows three company presentations: **Sociograph Neuromarketing**, which holds a live demonstration on neuroscience and the analysis of audiovisual content; **Weekend Studio**, a Spanish production company that is embarking on its international journey; and the presentation of the new Mexican fund for

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## Conecta Fiction evolves and grows



audiovisual financing VCS Capital.

In the chapter of Masterclass, two sessions are confirmed, headed by **Javier Olivares**, showrunner and executive producer of **Globomedia-Mediapro** (Spain), and the Colombian showrunner **Juliana Barrera**, executive producer of *La Esclava Blanca* by **Caracol Televisión**.

Wrapping up the content preview of the official program, it is highlighted the screenings of the series *Señor Avila* from **HBO Latin America** and the showcase of **Fox Networks Latin America**. Following all the screenings, a requests and questions session to the heads of each company is being held.

### Pitching Sessions

With five pitching sessions in different formats, the market reinforces its commitment to discovering and supporting authors, writers, producers, and talent within the universe of TV series.

*Pitch Copro Series* sees 10 projects selected in search of international co-producers, while *Pitch SGAE* is a professional showcase for seven projects from the laboratories for TV series. In conjunction with **RTVE** kids OTT **Playz**, *Pitch Digiseries* shows five projects designed for different platforms and devices available to all audiences; *Pitch Clip* offers four original fiction stories recorded and told on screen by their creators; and



Juan Parodi, The Magic Eye (Argentina); Jaime de Aguirre, CEO, and Isabel Rodríguez, executive producer, TVN (Chile); Guillermo Borensztein, VP Sales & Co-productions, Viacom Telefe (Argentina); Marcelo Tamburri, VP & Channel Manager, Turner Latin America; Sebastián Aloy and Julián Rouso from producers Aeroplano and Anima Films, respectively

Latin America plays a key role at Conecta Fiction, with the participation of the top producers and broadcasters from the region looking for co-production and co-development partnerships in Europe



Oriol Uria, BTF España, Leonardo Aranguibel, director of production, Disney Latin America; Cristian Gabela, Univision Story House (USA); Francisco Cordero, BTF Mexico; and Ana Paula Valdovinos, VP development and production, Telemundo International Studios

Hollywood studios, producers and broadcasters continues to be a winning formula: a great global network joined huge local expertise and brand recognition

*Branded Content Contest* selects from five projects an audiovisual story that identifies with the **Estrella Galicia** beer brand.

On Tuesday 19<sup>th</sup>, during the special Gala which is being held at the Main Theater of the city of Santiago de Compostela, representatives of **TVE** and **Playz**, apart from **Movistar+** and **Estrella Galicia** announce the names of the projects selected for the various categories.

**TVE's** support is also reflected in the selection of at least one fiction project to finance its development, and this year, as a novelty, it will also include the selection of a digital series project through **Playz**. **Movistar+** offers a development agreement and **Estrella Galicia** rewards creativity, originality, and innovation with €3000 for the development of the project and the winner or winners also receives their weight in beer.

### Conecta Fiction Fest

*Conecta Fiction Fest* is organized on June 22 at the Abanca and Main Theaters of the city of Santiago de Compostela with a monograph dedicated to the **Movistar+** series, in order to connect Santiago's audience with the international event. A festival of fiction series has been the preferred formula. This first edition is exclusively dedicated to the **Movistar+** series and, in addition to screenings, it offers two workshops dedicated to special effects in the *La Peste* series and to the transmedia universe of the *La Zona* and *La Peste* series.

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*El hijo de la Novia / Pájaros de Papel / Edha*  
FERNANDO CASTETS

*Mujeres Asesinas / Se Presume Inocente*  
LILIANA ESCLAR - MARISA GRINSTEIN

*La Candidata / Ladrón de Corazones / Primicias*  
LEO BECHINI - TATO TABERNISSE

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BY NICOLÁS SMIRNOFF & RODRIGO CANTISANO



# LA Screenings 2018: the future shows its present

With near 1,500 global buyers and Natpe's contribution to the organization of the independent days, the **LA Screenings** completed its 2018 edition with positive results and fresh tips for the industry. By one hand, the market saw 30% more people than usual, including more important buyers from Latin America, better presence of U.S. domestics and an assortment of European and Asian buyers, specially from countries like Croatia, Moldova, The Netherlands, India, China, Japan, Kenya, and South Africa.

**21st Century Fox, CBS, NBCUniversal, Warner, Sony** and **Disney** provided major screenings, plus **Lionsgate** and **eOne**, which called the attention with a screening of *The Rookie*. According to buyers, volume and quality of product were similar from last year. The studios looked for combining the U.S. network traditional demands of one hour dramas —focused on doctors, lawyers, cops, etc.— with plot twists to make fresh product. At the same time, they produce more for premium Pay TV and OTT platforms, generating complex and niche product, which makes free TV players difficult to program a good portion of the offering.

In terms of content, two German broadcasters —**ProSiebenSat.1** and **ZDF**— have chosen *FBI* from **CBS** because it is one of the 'procedural' dramas very demanded on free TV, but not easy to find these years. While the other big German group, **RTL**, has stressed Disney's *TakeTwo*, coproduced with them, **BBC** and **France2**, as a good proof of the new 'cross-region production era'.

**Channel Zero** from Canada agreed with many Latin American buyers —**Viacom/Telefe Argentina, FNG, RCN Colombia**— to remark good emotional stories as NBCUniversal's *New Amsterdam* and CBS's *A Million Little Things*, going back to the basics. Many European and Asian buyers —France, UK, Japan, Finland, The Philippines— mentioned as a trend the vampire series, as there were many in town from different studios.



Nordic buyers at Disney: Tina Moreton, senior content acquisition manager, TDL Group (Denmark), with Nina Bergan, product manager and Marit Aaro, content manager, both from Canal Digital (Norway)

Especially, we checked a multi-buyer wave stressing Fox's *What we do in the shadows*, a half hour comedy with vampires, mentioned as one of the most original and irreverent series of the whole screenings. From Sony it was chosen *Deadly Class*, which meets *Harry Potter* with *Pulp Fiction* around a young killers' academy. And about Warner buyers commented well *Whiskey Cavalier*, very fresh combining spies with comedy. Most of the buyers like plot twists and claim for 'out of the box' content, but attending mainstream audiences at the same time.

The multiple screen era? Facing **Netflix, Amazon** and now **Apple**, players as **HBO, Fox Networks Group, Turner, Viacom**, as main traditional broadcasters as **TF1 France, ProSiebenSat.1** Germany, etc., are developing quite similar global strategies nowadays: to leave behind the 'TV channel' concepts to turn into strong brands which surf through all screens and platforms. They are 'content machines' that cover the live circle of the product —production, distribution, broadcast— with quite controlled environments, and vary partners and business models according to every project. The main focus is to handle original and local product, to make difference and bring business from media chaos.

Other major products mentioned by buyers? From Fox, *Proven Innocent*, about lawyers, and *The Passage*, about vampires; but both with human twists. From NBCUniversal, also *The enemy within*, a spy thriller,



Josephine Julner, acquisitions and rights manager, and Regnhild Torbech, SVP programming and acquisitions at HBO Europe (borders), with Franca Rossander, general manager, and Peter Torkelsson, senior manager, both from Disney Nordics



Buyers from Sky UK with the talent of *A Million Little Things* (CBS) during LA Screenings: Jamie Morris, Head of scheduling, Sarah Wright, director of acquisitions, Lucy Criddle, senior acquisitions manager, Zai Bennet, CCO, and Rebecca Segal, SVP

and *The in between*, about a woman that can talk with dead people. From Warner, *God friended me*, about a non religious person who receives a friendship request from God, and *Manifest*, supernatural series *Lost* alike. From Disney, *Station 19*, about firemen, which is good for global audiences. And about Sony, buyers stressed also the comedy *Schooled*, spin-off of *The Goldbergs*.

More trends noticed in LA? • Netflix started to search for factual and non scripted content in Spanish for Iberia and Latin America, in charge of Rob Smith's team in The Netherlands. **Amazon** and **Apple** are following their steps. • The big European broadcasters are searching the next big talent show; but in the meanwhile they bet for classic formats • Big Production companies from the US are planning to move their businesses to other territories through local partners but skipping global distributors.

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## NBCUniversal: classics with twists

NBCUniversal International Distribution (USA) celebrates its Screening on Tuesday 26<sup>th</sup>, at 1pm, where the company will release the new shows of the integrated catalogue that includes both titles from the Studio and super series from **Telemundo** and animation shows from **DreamWorks**.

Among the top titles for the region, it stands the new scripted series *Abby's* (13x30'), a hilariously aspirational new comedy about the best bar in San Diego, where everything is the opposite of everything annoying about today's party scene, while *Magnum P.I.* (13x60') is an action-packed reboot of one of TV's most iconic series.

Based on the "creepypasta" short story "Hidden Door" by Charlotte Bywater, *Channel Zero: The Dream Door* (6x60') follows newlyweds Jillian and Tom, who have each brought secrets into their marriage. And *The Enemy Within* (13x60') is a fast-paced, spy-hunting thriller well sressed by the international buyers during the las LA Screenings, along with *The Inbetween* (10x60'), centered on a woman that can see and communicate with the dead, helping them with their unresolved problems, and *New Amsterdam* (13x60'), medical drama with a human twist.

From DreamWork's slate are the animations *The Adventures Of Rocky And Bullwinkle* (26x30'), where the world-famous talking moose and flying squirrel are back; *The Boss Baby: Back In Business* (52x30'), where Boss Baby and Tim while they continue to navigate the cutthroat corporate jungle gym of Baby Corps, and *DreamWorks*



Enemigo Intimo, Super Series from Telemundo



New Amsterdam, medical serie



The Village

*Where's Waldo?*, which brings the iconic character to life in a new animated series.

Heading the slate of **Telemundo's** Super Series are *Al Otro lado del Muro* (76x60'), about a humble Mexican baker that arrives in Los Angeles with her two children and the illusion of reuniting with her husband, but she is unable to find him; the Season 6 of *El Señor de los Cielos* (94x60'), and *Enemigo Intimo* (53x60'), where, as a child, a police captain witnessed the cold blooded murder of his parents and the disappearance of his little sister. Lastly is *Mi Familia Perfecta* (94x60'), a series that follows the five Guerrero siblings live together in Houston, Texas, having been left alone in the United States after their father's death and their mother's forced exit from the country.

On the unscripted side, the company highlights the reality shows *Married to Medicine: Los Angeles* (8x60'), a series that expands the fan-favorite *Married to Medicine* to the West Coast; the competition format *The Titan Games* (10x60'), a format inspired by Dwayne Johnson's desire to motivate global audiences to reach their potential both mentally and physically; *Top Chef Junior* (28x60'), from *Magical Elves*, and a spinoff of the long-running cooking competition show, now featuring 12 young chefs aged 9-14 competing against each other in a variety of culinary challenges for the sought-after junior title, and *Unanchored* (10x60'), a brand-new docuseries that follows a group of best friends as they embark on their next travel adventure – an exclusive floating festival in the Bahamas where they join 30 yachts. The group leaves behind their high-level careers to travel the breathtaking Bahamas and embrace a subculture of elaborate costumes, eccentric rules and hallowed traditions.

Other highlights are *The Long Song* (2x120'), period drama; *Safe Harbour* (4x60'), thought-provoking drama series, and *Suits: Second City*, a spinoff of the long-running hit legal drama, *Suits*.



Belinda Menendez, president & Chief Revenue Officer, Global Distribution and International

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## ORF: Fast Forward



Marion Camus-Oberdorfer, head of content sales

**ORF-Enterprise**, the commercial subsidiary of **ORF**, the leading Austrian broadcasters, arrives with a slate documentaries and series with proven success in the region. According to **Alexandra Hopf**, sales manager, there are two reasons for that success. By one side, the similar cultural environment with the CEE region, and by the other, that 'the sales of fiction content rise after some years of stagnation in the market'.

'We sold a documentary package to **HRT** (Croatia) and we have deals with **TVP** (Poland), **RCS-RDS** (Romania) and **United Media Group** (Russia) that will be concluded in the near future. Furthermore **Hungarian Project Management** purchased 50 episodes of *Fast Forward* and 30 episodes of *Suburbia – Women on the Edge*. The hit series will be broadcasted on **TV4**, **Story4**, **Galaxy4** or **Film4**. **Prima TV** (Czech Republic) acquired seasons 4-11 of the long running crime series *K-Files* and will broadcast it later this year', she adds.

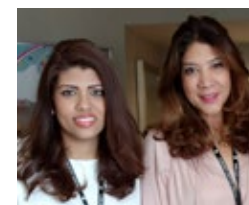
On the scripted side for this season, she recommends the crime series *Fast Forward* (60x45'), about a divorced single mother and a successful investigator at Vienna's criminal investigation department, and the comedy series *Suburbia – Women on the Edge* (30x48').

On the documentary side, one of the cores of the company, it stands *Fall of the Habsburgs* (52'), centered on the dynasty that has ruled large parts of Europe and the world for 650 years; *Untamed Albania* (52'), about a country dominated by high peaks and crystal-clear water, home to a cast range of wild animals. And *Wild Caribbean – Rhythms of Life*, a three part series about spectacular action in paradise, volcanic eruptions and caribbean coral coasts and islands.



Fast Forward, sold to the Hungarian Project Management

## RMViSTAR expands its international footprint



Luisa Amanda Padilla and RoseMarie Vega

**RMViSTAR** (USA), distribution company led by RoseMarie Vega, consolidates its position as a global company: Its crime-series *La Chica que Limpia* (aka *The Cleaning Lady*) has been pre-selected by the International Emmy Awards to compete in the Drama Series Category and its format is in negotiation with major studios for an English language version and another for Spanish language for LatAm. The series also drew interest for around the world and is under consideration in Spain, Germany, India and Philippines as format for development.

Describes Vega: 'We are more and more present in each market with better exposure and have partnered with other independent distributors to expand our reach with high quality programming. As a Boutique distributor, we hand-pick content that serves best our clients with our extended offer of large collection of mystery, romantic

## Telefe: stories to fall in love

**Telefe/Viacom** arrives to NATPE Budapest after the appointment of **Elena Antonini** as Sales and Coproduction Director for Europe and Africa, and with the objective to keep promoting the company as one of the biggest content generators of Latin products, with global appeal.

The executive arrived to **VIMN Americas** after 12 years at **DORI Media Group** (Israel/Argentina), where under her last position she was responsible for content sales for the territories of Europe, Mexico, US Hispanic, Argentina and Nordic. Previously, he also worked in the Content Distribution area of **Claxson**.

Among the main titles that the executive and **Rosario Cosentino**, content sales manager, are pushing at NATPE it stands the new comedy series *100 Days to fall in Love* (80x60'), where after 18 years of marriage and trying to improve their relationships, two friends decide to propose their husbands a deal: they are to take a break from their married lives for 100 days during which they can do as they please as long as they follow 10 strict rules. And *Porta dos Fundos*' new series, *Borges Importadora Ltda* (10x30'), which tells the story of four employees who find they have been cheated by their former boss' proposed partnership, and that in reality the company is bankrupt and sunk in debt.

Produced by **The Magic Eye/Telefilms**, *Sandro de America* (13x60') is a biopic that gives a deep look at the life of one of the most renowned Argentine singer-songwriter, not only in the country but in the continent: Roberto Sánchez, known as Sandro, while *Vikki RPM* (60x60') gives a new and amusing twist to the story of Romeo and Juliet.



Elena Antonini, Sales and Coproduction Director



100 Days to fall in Love (Telefe)



La Chica que Limpia was picked by a Hollywood studio for a US adaptation

comedy, crime and foreign movies, as well as a new line of kids programming besides our life-style series and documentaries'.

'At NATPE Budapest, we are looking forward to establishing stronger relationship with regional players in Central & East Europe, Middle-East and Africa with our lead program *La Chica que Limpia*. It's a crime-series whose log line is "even the spotless place can hide something dirty", about a single mother forced to clean crime scenes for a crime organization, available as finished series or as format. We also present *Eden* a drama saga that takes place at the iconic Eden resort in Argentina bought by the Eichhorn brothers in 1912 and served as haven for Nazis and their supporters until the end of WWII'.



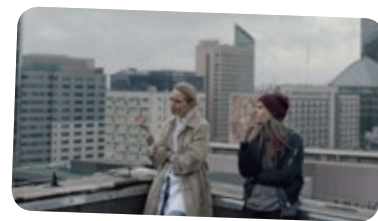
## SPI: global expansion and eGaming

SPI International/Filmbox is a global media company that operates 35+ television channels in more than 50 countries on six continents. The SPI channel portfolio includes thematic and movie channels like **FilmBox**, **FilmBox Art House** (launched in March on Ålcom, Finland), **FunBox UHD**, **DocuBox**, **FightBox**, **FashionBox**, **Fast&FunBox**, **Gametoan** and **360TuneBox**.

In addition to its channels, SPI is the major shareholder of **Kino Polska S.A.** in Poland which also operates two DTT channels: **Stopklatka TV** and **Zoom TV**. 'We have been pioneering innovative new concepts and technologies to deliver a content library which now numbers over 6K titles worldwide', says **Berk Uziyel**, director, and emphasizes: 'While Pay TV still plays a major role across Europe, content consumption from digital platforms is growing fast. We are also following the new trends with UHD and eGaming'.

For this reason, the company also introduced two digital products: **Filmbox Live**, which operates from own applications and servers, and **Filmbox On Demand** a platform that creates branded digital corners, already available via **Vodafone Mobile TV** service in Turkey.

In terms of contents,



The Best Fireworks Ever



Young Pope



Doctor Doctor



SPI/Filmbox premium channels continue to broadcast premium movies series such as *The Young Pope* and *La La Land* in CEE, while thematic channels feature extensive hours of own content (10% of original production vs. 90% from third parties). 'We have produced global live fighting events along with local series in Poland and we are starting to produce our very own eSports events, which will be featured in our gaming channel **Gametoan**', remarks Uziyel.

On the distribution side, **SPI International** has been a one of the top supplier of theatrical films and TV programming for over 25 years, thanks to a solid alliances with major license suppliers provide like **Focus Features**, **The Weinstein Company**, **Summit Entertainment**, **Studio Canal**, **Pathé**, **Lakeshore Entertainment**, **Wild Bunch**, **Beta Film**, and **FremantleMedia**, among others. 'We offer over 6,000 movies and TV series for television networks in key territories across Central and Eastern Europe, adding compelling content, with strong recognition and high demand to our partners', says the executive.

'SPI started its journey from CEE. While the company operated successful local movie channels, it started to release its products in different parts of the world. Distribution of its global products has increased drastically in the past 5 years with the introduction of global channels. Today SPI has two important goals: expanding the territories where its channels are distributed and increasing the number of households the channels reach. While mastering traditional broadcasting business, SPI has become an innovative challenger from its introduction of new products, such as UHD and digital products', completes **Uziyel**.



Berk Uziyel, director at SPI International/Filmbox

## Global Screen: undercover stories

**Global Screen** (Germany), international sales & distribution company for theatrical films, TV programs and formats, arrives to Budapest with a catalogue that ranges from TV fiction, series and documentary to theatrical movies that stand for successful exploitation on TV, video and online around the globe.

Heading the slate for this season is *Sherazade – The Untold Stories* (26x24'), a contemporary animated series based on the world famous Arabian Nights stories, that embarks on a whole new epic adventure.



Zombielars, Norwegian series

In *Zombielars* (26x15') four young friends with supernatural characteristics have a series of strange adventures in the fictitious town of Bekkebakken, where conformity is a



virtue. While *Dementia* (10x45') follows a young journalist from Spain that goes undercover in a Mexican psychiatric hospital where her grandmother died under mysterious circumstances, risking her own life to find out the truth. Other highlights are *Charité* (6x48'), a six-part miniseries that portrays the world's most famous hospital in Berlin as a microcosmic reflection of late 19th century Wilhelmine society; *The Weissensee Saga* (24x48'), a sweeping and gripping family saga of conflicting loyalties, love, hope, faith and betrayal set behind the Berlin Wall, and *Rivals Forever – The Sneaker Battle* (2x90' or 4x45'), set in the 1920s and about the competition of two brothers: Adi and Rudi Dassler, creators of Adidas and Puma.



Alexandra Heidrich, Head of TV Sales & Acquisitions

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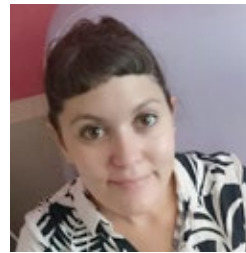
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## DHX Media: the power of brands



Sophie "Kido" Prigent, territory manager

**DHX Media** (Canada) has become one of the world's leading independent kids' content company thanks to strong brands such as *Teletubbies*, *Degrassi*, *Caillou*, *Yo Gabba Gabba!*, *Inspector Gadget* and more, understanding the importance of connecting with kids with familiar "faces".

Following this strategy, **Sophie "Kido" Prigent**, territory manager, highlights at NATPE Budapest *Polly Pocket* (22x26'),

series based on the famous toys that follows a 11 year-old Polly Pocket that shrinks to four inches tall and discovers a world of unlimited adventures where the smallest person can make the biggest difference.

Aimed at kids 6 to 11, as well as their parents who grew up loving the video games, the new *Mega Man* (52x11') animated series features new technologies and robots, as well as the introduction of Mega Man's alter-ego, Aki Light. Aki is a normal, upbeat, schoolboy robot who has nano-core technology that allows him to transform into the mega powered super hero Mega Man! With his Mega Buster arm cannon and iconic helmet, Mega Man defends Silicon City from all threats.

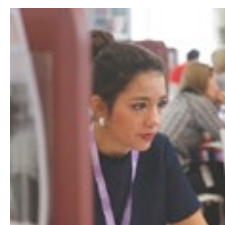
Other top titles that Prigent recommends are *Massive Monster Mayhem* (22x22'), the ultimate action-packed, sci-fi action adventure game show starring the greatest Massive Monster Superstars in the universe versus three real kid heroes; *The Zoo* (30x11'), kids' series produced by the



Mega Man: Fully Charged, series based on the classic videogame

award-winning team from the **BBC's** Natural History Unit (*Planet Earth*, *Walking With Dinosaurs*) and shot in a mockumentary doc style, and *Degrassi: Next Class* (40x22'), a scripted drama series that explores real issues facing today's teens with equal doses of humor and heart, in a way that neither trivializes nor sensationalizes.

## Millimages: adventure and edutainment



Lise Cosentino, sales manager

With 27 years in the kids' industry, **Millimages** (France) has produced more than 1 000 hours of premium animated contents, with the bestsellers are being broadcasted on the main CEE TV channels.

'NATPE Budapest is the occasion for us to meet new partners and to distribute our contents available in local languages directly to TV channels and non-linear platforms', emphasizes **Lise Cosentino**, sales manager.

Among the main titles, Cosentino the non-dialogue and Emmy Award nominee series *Molang* (156x3'30), which follows an affectionate humorous look at the relationship between an eccentric, joyful and enthusiastic rabbit, and a shy, discreet, and emotional little cheeck.

Another highlight is *Pirata & Capitano* (52x11'), a 3D CGI comedy

## Gaumont expanding its footprint

**Gaumont** (France) keeps expanding its footprint globally: Over the last 18 months, it has developed its corporate structure in the Americas, with 14 executives appointed, this summer is opening offices in Germany and the UK, co-producing projects in Canada.

And now, through the presence of **Cecilia Rossignol**, as VP, International TV Sales, and **Anthony Reboul**, TV Sales Manager, seeks to grow in CEE as well.

In terms of content, the company highlights three drama series: *The Art of Crime* (12x60'), with a second season currently in production, to debut later this year; the six-part murder-mystery *The Frozen Dead*, and the linear TV rights to partners for the first time this year for *Narcos*, with a fourth season in production. 'When *Narcos* season three premiered in September 2017, it dominated the month as the #1 most in-demand Netflix title in the U.S. and #5 most popular global title, according to Parrot Analytics', says **Vannesa Shapiro**, president, worldwide TV Distribution and Coproduction.

The company also presents to the market three new movies ready for this holiday season 2018: *48 Christmas Wishes*, *A Christmas Village* and *Shoelaces for Christmas*, and new kids' shows that include *Furiki Wheels*, aired on **Disney EMEA** on May; *Belle & Sebastian* for kids ages 5-9 (52x11') and based on an original live-action TV series from the 1960s by Cecile Aubry, and *Trulli Tales* (52x11' and 13x1'), which blends the ancient arts of magic and cooking.

Lastly, Shapiro recommends *Hetty Feather*, a 2017 Banff Award-winner for Best Children's Fiction Program and nominated for two BAFTA Children's Television awards, based on the best-selling book by popular author Jacqueline Wilson.



Vanessa Shapiro, president, worldwide TV Distribution and Coproduction



The Art of Crime, series with a second season in production



Molang, non-dialogue animation

series where is all about never-ending quest for treasure with great adventures, fun and team spirit; and *Mouk* (104x11'), about two globe-trotting friends who explore the World on their bikes.

On the *edutainment* side, the company presents *Louie* (117x7'), a series that teaches children how to draw while having fun, and *64 Zoo Lane* (104x11'), about a little girl who lives at 64 Zoo Lane, right next door to the local zoo. Every night, Lucy meets with the animals who impatiently await their turn to tell her about their colorful adventures.

Lastly are *Corneil and Bernie* (104x13'), a multi awarded show that stages a hilarious couple: Bernie, an eccentric teenager and Corneil, a dog of exceptional intelligence, and *Me and My Robot* (52x13'), that explores the everyday life of a bunch of kids in a high-tech robotic school.

## Kanal D: stomping in the CEE



Deniz Cantutan, sales manager, MENA

**Kanal D International** (Turkey) arrives to NATPE Budapest with some hot news: the company will become an exclusive partner of Antenna Group and will represent 600 hours of Antenna's content across the globe.

'Our international distribution arm has long-standing relations with important TV stations from different regions. We believe this partnership will expand Antenna's content footprint in the whole content world',

say **Deniz Cantutan**, sales manager, MENA, and **Salmi Gambarova**, sales executive, and completes **Antenna International's** Head of Distribution, **Tatjana Pavlovic**: 'It is great to be in business with like minded professionals like KanalD International'.

Regarding the importance of the region, as for many Turkish players, the CEE & CIS territories are key: 'We work closely with Croatia, Serbia, Montenegro, Romania, Greece, Slovenia, Slovakia. Recently, we closed a volume deal with **Nova TV** from Croatia, they will be airing *Flames of Desire* very soon following 2 other titles later; while **Doma TV** in Slovakia will have *Family Secrets* during summer programming'.

The company also entered on **POP TV's** upcoming program grid in Q3 with their recent title *Price of Passion* in Slovenia. As for CIS, the highlight



WildRose

has been the increase of presence in Ukraine with *Tales of Innocence*, airing on **1+1** and in Kazakhstan with *Borken*, airing on **Qazqstan TV**.

'We are aiming high penetration in every country in CEE & CIS and also to work with the biggest TV stations to reach larger TV audience in the markets', remark the executives, and recommends

the dramas *Price of Passion*, *Tales of Innocence*, *Wounded Love*, *Broken* and *Wildrose* as top titles for this season.

## Universal Cinergía: moving forward



Gema Lopez, Luciene Andreotti, Elisa Aquino and Liliam Hernández

**Universal Cinergía**, dubbing house led by **Liliam Hernández** and **Gema Lopez**, continues its global expansion, now with the official inauguration of the studios at the new Villa Madalena location in São Paulo, Brazil.

Under the artistic direction of Luciene Andreotti, the new venue has already started working on its 4 studios with the first season of, *El Señor de los Cielos* (**Telemundo / NBCUniversal**). Hernandez and Elisa Aquino will continue to be in charge of the company's sales, while Lopez will be in charge of everything related to Operations.

## Globo: family-oriented



Raphael Corrêa Netto, international TV sales

**TV Globo** (Brazil) has found in the "family-oriented" content a way to draw the attention of its partners in the region, but also 'as a tool that works as a gateway for productions with more dense and daring plots, such as case of *Verdades Secretas*', says **Raphael Corrêa Netto**, international TV sales.

'We bet on our soap operas and also on some series in key territories such as Croatia, Hungary, Albania and Bulgaria, as well as Romania, where we present Globo contents with the premiere of the telenovela *Totalmente Demais* on the Anthena TV's **Happy Channel**', he adds.

At NATPE Budapest, he also highlights the telenovelas *Querer Sin Limites*, which achieved an average daily reach of 48 million people in Brazil; *La Trampa*, a romantic police comedy; and *Rock Story*, already sold to 30 countries and about a former rock star who must reinvent himself when he sees that his career and personal life are falling apart. 'Other contents that we think will be very interesting are the Super Series *Los Días Eran Así*, about a young questioner and an idealist doctor, and the miniseries *La Fórmula*, romantic comedy'.

'The quality and versatility of our content offer comply with the most different programming strategies. **Visionary Thinking**, one of the main distributors of content in the region, bet on the epic miniseries *Nada Será Como Antes*, about a great love story that happens behind the scenes of the creation of television in Brazil. In addition, the Bulgarian **BTV Group**



Verdades Secretas, sold to BTV Bulgaria

has just obtained licenses for three productions: *La Trampa* and *Querer Sin Limites*, which were selected for the pay TV channel **BTV Lady**, and the Super Series *Verdades Secretas*, which will be broadcast on the OTT **bWeb**', completes Corrêa.

With this inauguration, the dubbing house continues to consolidate its growth. The company continues adding new projects and clients in different territories. 'With competitive prices, customer support and quality of services, we position ourselves as one of the most important studios in the competitive dubbing market,' says Hernández.

'Participation in markets that occur throughout the year is a very effective way to establish new contacts and find the clients with whom we are working. We are still in the vanguard with Turkish productions, reaching all Turkish distributors, and we also close 2017 with the signing of a contract with **Lionsgate** and **Deluxe** as "Preferred Vendors", she adds, and completes: 'By 2018 the company continues to expand its activities, and adding new languages to its portfolio. Being close to the customer, knowing their needs and demands is key to delivering good quality and maintaining a good business relationship'.







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## The *White Dragon* of All3media



Ben Packwood, Sales Manager EMEA North, Finished Programmes

All3media International (UK) arrives to Budapest to strengthen its presence on a key region for the company. In April, the company announced the incursion in the Nordic drama business, investing in *Blinded*, its first non-English-language drama project, coming from FLX, the Stockholm-based producer behind Netflix's first Swedish original *Quicksand*, while announced the sale of the scripted series

*Escape to FTV Prima* (Czech Republic), *Viasat* (Scandinavia and CEE) and *YLE* (Finland), among others.

At NATPE, the company seeks to reply that success with titles like the new drama *Mystery Road* (6x60'), where detective Jay Swan is sent to a remote town in Australia when two young farmworkers go missing from an outback cattle station, and *White dragon* (8x60'), a drama where Jonah Mulray's world is turned upside down when his wife Megan is killed in a car accident on a mountain road outside Hong Kong. However a web of conspiracy deepens as the evidence points to murder.

From the factual side, Ben Packwood, sales Manager EMEA North, Finished Programmes; Lucy Roberts, sales Manager EMEA North, Formats, and Anna Maslowska, Inflight sales Executive /Coordinator EMEA, recommend *Salvage Squad* (8x60'), where, looking at the time critical work of the men and women of Western Australian based Geographe Marine Salvage and Rescue (MSR), the series explores what happens when the Australian landscape collides with home and humanity.

While in format it stand *24 hours to Hell and Back* (60'), where a legendary chef works around the clock to bring a failing restaurant back from the brink of disaster, and *Best in Shop* (60'), about over seven heats and a finale this uplifting, knock-out business challenge, pits small scale artisan food producers against.



White Dragon, drama

## Mondo TV: building brands

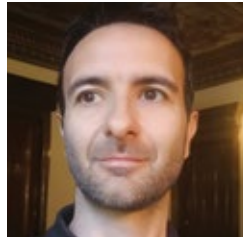
Founded by Orlando Corradi in 1985, Mondo TV (Italy) is among the leading European names in the production and distribution of animated TV series and full-length feature films for TV and cinema.

Alessandro Venturi, international sales manager, stresses: 'As a leader in the production and distribution of animation, Mondo TV has a strong presence in this region, working with many important partners across the CEE. The company is in a phase of fast expansion. We are strengthening and enriching the portfolio we offer to broadcasters from all over the world'.

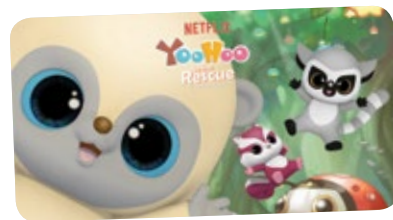
'We are engaging with experienced, creative partners, as well as producing in-house, and this approach is already bearing fruit, allowing us to produce a number of big hits per year and to build strong top distribution and licensing programmes on top of these successes'.

In Budapest Venturi is pushing a new slate headed of the animated series *Adventures in Duckport* (52x11') and *Cuby Zoo* (52 x 11'), and the more adventure-focused *YooHoo to the Rescue* (52x11'). For school-age kids there's *Invention Story* (104x11'), an ingenious animation combining science, comedy and fun characters. 'We're also highlighting the very successful first two series of *Sissi the Young Empress* (52x26') and the third series (52x11') in 3D, which is on its way soon. And of course there are now two series of our first-ever live-action show for tweens and teens, *Heidi, Bienvenida a Casa*, our first live action show', he adds.

And completes: 'Our primary aim is to build a good TV presence with strong broadcast partners and, having established that presence, to support the brand and the channel with the aim of creating successful properties with sustained licensing potential'.



Alessandro Venturi, international sales manager



YooHoo to the Rescue, adventure-focus series

## MyContent: renewed on its 10th anniversary

INDEX Conferences and Exhibitions, organizers of MyContent, unveiled their groundbreaking plans for its 10th anniversary: for first time the event will offer a seamless convergence of media, entertainment and technology at one of the most iconic international conference venues in Dubai, Jumeirah Beach Hotel Conference Centre, from December 9th to 10th.

With the evolving nature of technology, pushing the limits of innovation, MyContent challenges the existing norms, embraces disruptive technology and delivers it par excellence, in order to meet the expectations of industry partners, exhibitors and all key stakeholders.

This year, the event features the all new *Plug & Work* solution, which avoids the need to carry and make additional installations

onsite and enables a hassle-free, on-the-spot, ready-made solutions for exhibitors. *Plug & Work* concept also answers to the new demands of the industry and looks after the ROI of clients. In addition, all exhibitors can expect guaranteed pre-scheduled meetings and choose their pre-designed exhibit units that are tailor-made to suit the requirements of attending clients in order to boost visitor engagement, collect real time data and offer a more personalized experience to everyone attending the event.



Eng. Anas Al Madani, Vice Chairman & Group CEO of INDEX Holding

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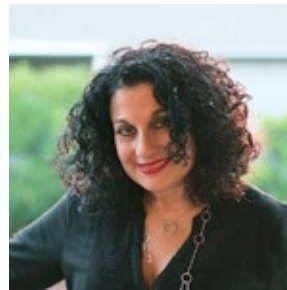
Since 2011 KMW has been an **excellent networking platform** for industry professionals from more than 30 countries, building a solid bridge between CEE, CIS and other parts of the world.

**Among KMW participants are:** representatives of key media groups and production companies from Ukraine and the CIS region, international distributors and powerhouses from all around the world, state authorities and organizations related to TV and film industry regulation, etc.

**The organizer** – MRM company, boasts 11 years expertise in media consulting.



## The Kitchen expands to Hungary



Deeny Kaplan

One year ago, **The Kitchen** (USA) introduced The Kitchen EMEA and announced the appointment of **Yoram Chertok**, as Managing Director of the new venture. In addition to its studios currently operating in Caracas, Venezuela, partners have been added in Germany; Turkey; Russia; Africa; Moldova; Morocco; Italy and Spain.

And last May, the company introduced its newest studio: The Kitchen Hungary, offering full service language services

for this unique European dialect, located in Central Eastern Europe.

The team is headed by **Gabor Somogyi**, who headed **Nokia Telecommunications** in the Middle East, prior to starting in television and broadcast media over a decade ago with **RUL-IKO group**; and is joined by **Balazs Garami**, who has almost two decades as chief sound engineer;



The Kitchen Hungary: Balazs Garami, Gabor Somogyi, Norbert Szucs, and Sanyi Bajer

**Sanyi Bajer**, the studios sound engineer who chose to operate this studio close to the biggest theatre in Budapest; and **Norbert Szucs**, a producer and composer who is well known throughout Hungary.

Gabor Somogyi: 'Working together with the international Kitchen's, we are looking toward creating a synergy between Hungary and our sister

companies worldwide, opening new doors and working with new clients. This is a tremendous challenge and an even greater opportunity'.

## ATV: the success of Turkish dramas



Ziyad Varol, Licensing and Digital Manager, Acquisition & Sales, Platforms ATV

**ATV Distribution**, international sales arm of the leading Turkish channel ATV, arrives to NATPE Budapest with great expectations for its dramas, top on the domestic prime time.

Last year the broadcaster had a great year in Turkey, where finished first with an average audience of 9.87% share during the whole day and 10.20% in the prime time thanks to dramas like *Lifeline*.

Earlier this year, the channel completed January as a leader among individuals +5 with a 9.6% share in full day; in February it was first again with 11.45% in full day, when its main competitor obtained 8.37%; and in March he was leader with 11.39% share.

And *Lifeline* is a big part of mentioned success: it reaches 40% of market share locally and reached 1 million of subscribers on digital platforms on its 7<sup>th</sup> episode. The series tells the story of a little girlfriend

## Mediaset Distribution, reinforced

For the first time, **Mediaset Distribution** (Italy) will distribute **Mega's** (Chile) catalogue and in particular, at NATPE is pitching 4 titles from the Chilean broadcaster, after signing an strategic deal with **Esperanza Garay**, CEO.

Titles include the telenovelas *Hidden Truths*, about a poor mother of 2 little girls is forced to sell her youngest daughter to a rich restaurant chain owner; *Amanda* (170 episodes), a story of revenge and love; *Forgive our sins*, currently airing in Chile, and the reality show *Would you take your ex back?*, in which 12 former couples are going to spend a period time together on an isolated location and can re-examine old relationships and get a second chance.

Other big titles that **Manuela Caputi**, Head of International Sales, is pushing in the market are *Wind of Passions* (8x80' or 16x40'), a family saga set in the early 60s: the story of a young Neapolitan in search of her true origins, intertwines with that of the Licata family, southern migrants who live in the slum of Lido Ligure and who want to bring to justice the killer of Vito Licata.

*Love and Sacrifice* (22x80') is a period drama series set in the striking scenery of the Carrara marble quarries, while *Love Snack* is a sketch-com that shows what happens when he is single, she is as well and they share a 50 square meters flat.



Manuela Caputi, Head of International Sales



Hidden Truths, drama from MGE

and a man, both from the Black Sea region. She was a victim of domestic violence and from the moment she decides to escape from home, nothing will be the same, but she will have the support of this shop that wants to save her from that life.

'Its good local performance is complemented by the great reception it had in Cannes with the first episodes on the air. We have confirmed the sale of the series in 4 territories so far', confirms **Ziyad Varol**, Licensing and Digital Manager, Acquisition & Sales, Platforms of ATV.

Other hot titles are *Love and Hate S2* (111x'45) which brings together a man who spent his youth in prison and did not learn to love, and a woman who never loved anyone; *Don't Leave Me*, which gets an average of 15% during the day and has a good potential for the international market.



Lifeline, is one of the main launches for this season

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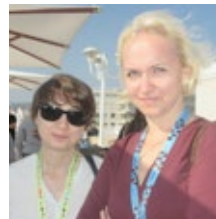
CENTRAL AND EASTERN EUROPE // ATTENDING BUYERS



TV-3 Russia launched its new drama slate and wants to do global co-productions at MIPTV: Leonid Godik, content executive VOD, Beta (Germany); Patrick Nebout, MD & executive producer, Dramacorp (Sweden); Evgeniy Nikishov, general producer, 1-2-3 Production (Russia); Anna Arutyunova, manager international relations; and Valery Fedorovich, CEO, TV-3



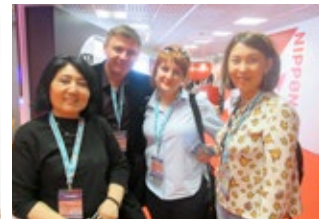
Anna Tarada, TV Licensing, Disney, con Inga Koshavtseva, programming director, TV3, and Zoya Bado, senior programme manager, Viasat



Buyers from First TV (Russia): Maria Zolotovskaya, leading acquisitions manager, and Tatiana Palamarchuk, head of programming



Natalia Ivanova, head of animation at CTC Media (Russia)



Buyers from Channel 31 (Kazakhstan): Nurzhan Muhamedzhanova, general producer; Alkhovsky Denis, programming director; Galina Redkina, programming director of CIS, CTC Media (Russia); and Assel Toyanova, executive producer



Tomasz Mazur, deputy director, TVP 2 (Poland); Leszek Wasiuta, head of development, Multimedia Bank (Poland); Natalya Stogova, sales manager, Marina Kataya, head of international, both from NTV (Russia); and Pawel Ninkiewicz, key expert for foreign markets, TVP (Poland)



Polish buyers: Joanna Popowska, deputy director of online service, Cyfrowy Polsat; Ewa Walkiewicz, producer, Taco Media; Slawomir Cyra, head of programming, Cyfrowy Polsat; and Tamara Aagten-Margol, owner, Taco Media



More Polish buyers: Maria Slomkowska, managing director, BTI Studios; Elzbieta Saciuk, acquisition director, TV Spektrum, and Anna Zielinska, new business director at ITI Neovision



Acquisitions from SPI/Film Box, Poland: Pawel Kowalsky, Lukas Nowak, Rafal Mala and Piotr Wall



Digital buyers from Russia: Anastasia Khrab, head of VOD acquisitions, Yandex, with Marina Levochkina, CCO, and Yana Vlasova, VOD business development, both from Megalabs



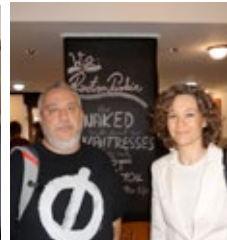
Russia and Ukraine: Maria Istomina from the broadcaster RBC (Russia), Vlad Ryashin, from Star Media (Russia) Nataliya Turanska, senior format Manager, Novy (Ukraine), Peter Shepin, commercial director, Channel 1, and Bill Peck, Star Media



Asia Batayeva, senior format at Novy TV (Ukraine)



TV2 Hungary: Gergely Okros, program and creative director, Andrea Zaras, Head of Content Management, and Gabor Fischer, programming director



Varga Attila Sixo, Index2, and Eszter Solymosi, acquisitions, SPT Networks Central Europe



Bulgarian National Television: Camelia Doncheva, head of acquisitions; Sevda Shishmanova, director of program BNT1, and Vyara Ankova, general director



National TV (Romania): Anamaria Popa, acquisition manager, and Diana Stanciu, acquisition analyst, and Larisa Mohut, acquisition coordinator



Croatian buyers: Martina Vlasta Rajsel, editor and buyer and Ranka Horvat, head of acquisitions, both from HRT, and Mirela Pammer Glavan, acquisition coordinator and Andreja Sertic, acquisition executive, both from Media Acquisitions



Greek buyers: Georgios Karavokiris, business affairs, and Marielena Karagiannis, business and legal affairs, Kapa Studios; Louis Alexis Xenopoulos, program director, Skai; Nathalie Woodfield, programming director, Karolos Alkalai, general manager, and Koralia Georgakopoulou, Greek program manager, all from broadcaster Star



Viacom Hungary: Csilla Mási, junior program planner, and Gabor Szollosy, program director, Digital Media/Story 4 and 5



Hungarian: Tibor Forizs, director of content acquisitions, RTL Klub, and Nikolett Blau, acquisition manager, and Szilvia Albert, head of Scheduling



RTL Hungary: Judit Kohán, senior broadcast planner; Emese Iras, acquisition manager; Nikolett Blau, acquisition manager, and Szilvia Albert, head of Scheduling



Profour Media (Hungary): Andrea Sebestyen, finance; Rita Jónás, programming; Andrew Sebestyen, CEO, and Máté Tóth, acquisitions



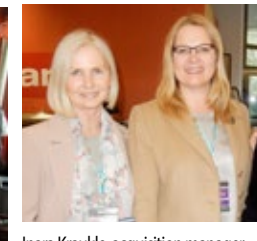
Cecilia Hazai, managing director, Twin Media, with and Klára Paszternák, senior program acquisition manager, and Kalas Róbert, program strategy coordinator, both from TV2 Hungary



Buyers from Latvia: Ilze Korjusa, head of digital content acquisition, Sia Lattelecom; Megan Kimberley, Lionsgate (USA); Inara Kraukle, acquisition manager, MTG, and Anita Petrovska, acquisition manager, Sia Lattelecom



Buyers from CEE at MIPCOM: Indrė Zelbaitė-Ciesiuniėnė, deputy program director, and Marijus Gradauskas, acquisition manager, both from LNK TV Group (Lithuania), with Kai Gahler, acquisition executive from Eesti Meedia (Estonia)



Inara Kraukle, acquisition manager, AllMedia Baltics (Latvia), with Junita Budvytiene, head of acquisitions, LRT (Lithuania)



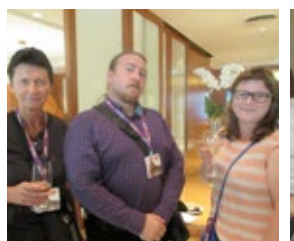
Buyers from Belarus: Tatiana Staselko, programming director, and Victor Dudko, both from the TV broadcaster CTV; and Erik Skurjat, director, and Alina Tyushko, manager, both from Media Kontakt, company that distributes channels for cable, on-air TV, IPTV and OTT



Fox Networks Group, Central & Eastern Europe: Olga Zhurova, head of channels, Ribere Lia, head of programming, Vessela Dimitrova, programming director, Balkans, Yadir Metin Belbuken, VP of Thematic Channels, Turkey



Gita Peterson, acquisitions manager; and Ieva Grovedate, acquisitions executive, both from MTG (Sweden); Elvyra Dunauskaitė, VP, acquisitions of TV3 Lithuania, Andy Jan Rudovsky, media manager at Prima TV (Czech Republic)



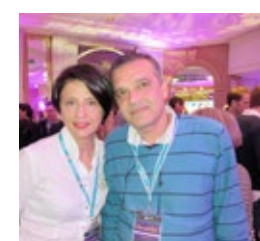
FTV Prima (Czech Republic): Zdenka Chrzova, director of program; Pavel Nemeč, acquisition producer, and Simona Goddardová, acquisition manager



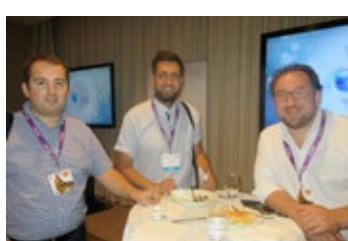
Česká Televize (Czech Republic): Zdeno Kubina, feature films and series acquisitions; Klara Paulinyova and Jitka Bodlakova, both acquisition executives



Olga Kishchenko, format manager, and Olga Slisaren, head of entertainment programs, both from 1+1 (Ukraine)



Georgian Public Broadcaster (GPB): Tinatin Berdzenishvili, Director of Media & Communications, and Giorgi Gachechiladze, Head of Acquisitions



Kushtrim Gojani, managing director, and Alaudin Hamiti, director, both from Klan Kosova TV (Kosovo), with Hamdi Rashiti, program director from Alsat TV (Macedonia)



Buyers from Moldova for first time at the Latin LA Screenings, at the Intercontinental hotel, Century City: Veaceslav Pislari, executive director, TV8, Rustam Kasymov, NATPE, Dorin Pavelescu, acquisitions, GMG Media Holding, Silvia and Eugeniu Sirbu, acquisitions from Radio Star



Micaela Boklund, acquisition executive, Swedish Film; Magdalena Lofstrom, acquisitions, Swedish education broadcasting company, UR; Joanna Zawistowska, programming manager of NC+ (Poland); Susanne Folkesson, acquisitions, UR; and Sandra Ortiz, Swedish Film



Buyers from Slovakia: Michael Sabolčakova, program buyer, and Katalina Slavokova, head of acquisitions, both from RTV (Slovakia), with Jana Malirová, VP of programming acquisitions, and Monika Halounová, acquisition manager, both from HBO Europe (center)



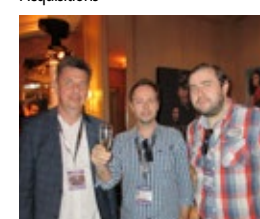
Erika Tothová, head of acquisitions, JOJ Slovakia; Lubos Kriz, head of Telexport/Czech TV; Elza Strapková, acquisition manager, TV Markiza (Slovakia), and Peter Adamik and Eva Dzuroucinova, both acquisition executives from JOJ Slovakia



Pop TV Slovenia: Pavel Vabec, general director, Ana Wakzak (Disney), Branko Carmis, programming director, and Daria Korsova (Disney)



Vladana Cirovic, VP, and Tatiana Rankovic, both from the kids' leader channel in Serbia, Happy TV



Margus Pass, head of research, Olle Mirme, head of TV channels, and Jaanus Noomets, acquisitions executive, all from Kanal2, Estonia



Vladimir Gordic, acquisitions SBB Serbia, and Zejko Perkuć, director, CEO, Foxvision Serbia



Matthias Settele, general director, Markiza (Slovakia); and Alfred Grinschgl, CEO, RTR (Austria) with Marion Camus-Oberdorfer, ORF Austria



Katarina Slavokova, head of acquisitions, RTV (Slovenia); Zvezdana Djuranek, programme acquisition, business affairs, HRT (Croatia); Mark James, director of sales, Lionsgate (USA); Ewa Dabrowska, head of film acquisition, Telewizja Polska (Poland); and Aleksey Kruzin, head of international/new business, Creative Arts (Russia)