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NATPE BUDAPEST INTERNATIONAL SPECIAL ISSUE

CEE: ups & downs at the new digital era

Central & Eastern Europe is going forward through the new digital era with its own tips. The region has suffered a deep crisis from 2008 to 2017-2018, with many economies just standing up. This has meant rare investment power and long-term plans, but at the same time the change moves fast and comparing to other territories, CEE shows strong digital poles and development appeals.



In favor, most of the biggest broadcasters are group of channels that include many countries, so it is easier to set up cross regional plans and to generate high-scale moves. On the opposite, there are many different languages and audiences, so it is difficult to spread solutions that work to every context.

Russia is a big Internet pole and now it is also a big production hub for international companies setting up studios or coproduction, co-development projects. This will push the whole region from now. The broadcasters are quite advanced in OTT, catch up services, especially when they have 1-2 free TV and 5-8 pay TV channels.

Is it fine to set up so big groups? The opinions are mixed. Some broadcasters have the opinion that others are doing wrong launching so many outlets, as the market is not so big and they cannibalize their own channels. It is good for free TV channels to develop

OTT platforms? It is what main broadcasters of the world are doing, to compete better in the new converged market and to generate proper synergies. If content business moves to franchise management, it is important to be flexible enough to any formula.

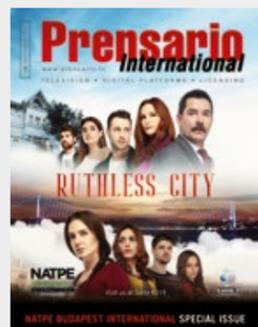
This Natpe Budapest? It promises to be better than last ones, with the region going up and the need of pushing more and more collaborations. Another main concept of the new era is that you can move yourself faster or slower, but never alone.

Print & Online

Apart from this Prensario print issue, you can follow Natpe Budapest through our online daily reports, day by day at our website www.prensario.net or receiving our daily newsletter service. If you want to receive the latter, please contact info@prensario.com

NATPE Budapest International 2019 Schedule

Event	Day & Time
A Chat With STUDIOCANAL's Françoise Guyonnet	06/24 - 4pm-4:45pm
Data For Buyers (TRX)	06/24 - 5pm - 5.45pm
International Co-Production & Creators Forum	06/25 - 9am - 10am
China Pavilion Luncheon - Audio-Visual China	06/25 - 12pm - 1.30pm
MENA Regional Overview	06/25 - 4pm - 4.45pm
A World of Formats	06/25 - 5pm - 5.45pm
All the World's a Stream (Parrot Analytics)	06/26 - 9am- 10am
Trends and Opportunities in Latin America	06/26 - 12pm-12.40pm
Latin American Luncheon & Networking	06/26 - 12.45pm - 1.30pm
Pitch & Play LIVE!	06/26 - 4pm - 5.45pm



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Hungary: local + digital, the formula to evolve

Prensario shares another edition of its longstanding report about the Hungarian TV, analyzing its major trends: local content and the launch of new digital services give a new shape to one of the most important markets of CEE.

The appearance of new players in one of the most fragmented markets in the region - with more than 120 channels-, has forced to both Free and Pay TV channels to redesign their strategy. Local content, own digital services and diversification of the offer including new genres seems to be a good possibility.

And the growth of the Hungarian advertising market during the last couple of years seems to accompany this strategies. According to AGB Nielsen, there was a growth on the average daily number of broadcasted spots from 27.232 in Q3 2017 vs. 33.585 in Q3 2018, with 2 more minutes of average daily spot-viewing time per person (28 vs. 30), but also on advertisement spending, which saw a growth of 7.77% last year.

Each media type managed to keep hold of the position it achieved in the previous two years; in fact, they all increased revenues compared to last year. TV ad spending grew less than 1%, most of which came from the market as state ad spending decreased by 2% for the first time in the past two years, explains MRSz's report.

The challenge? re-convert that good moment and build a solid based to keep growing.

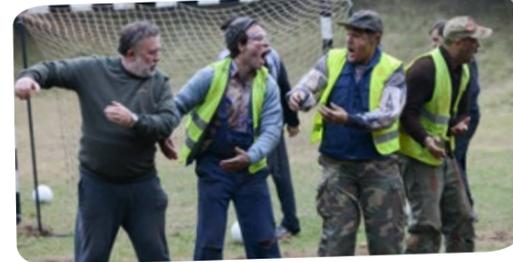
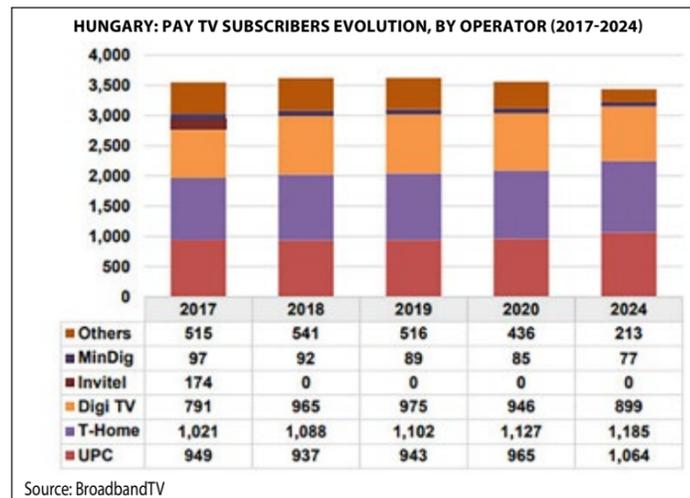
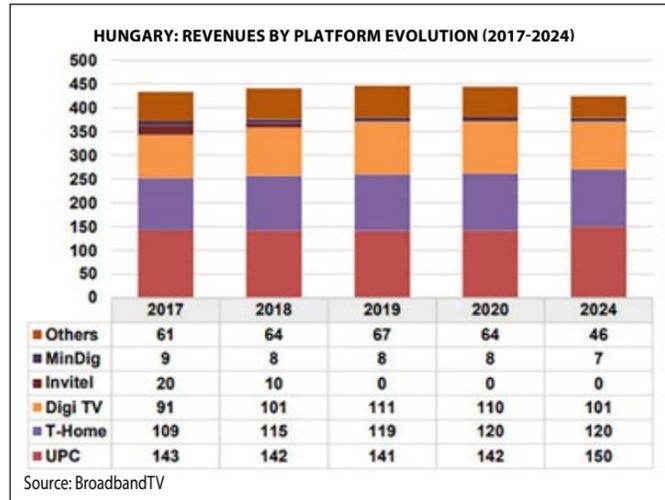
The protagonists

RTL Hungary, which operates the leading

free TV broadcaster RTL Klub and seven cable channels, is evolving to the next level: due to the very good numbers of its AVOD service RTL Most, it is launching soon RTL Most+, an empowered on-line platform that includes AVOD plus new premium services. What do the digital audiences like most? The same own local prime time TV shows, but at any time and device.

Tibor Forizs, director of content acquisitions: 'Our strategy is 'TV', but not simply television, in our case it also means 'Total Video'. Instead of launching more linear channels in an extremely fragmented market, we prefer to bet on digital. RTL Most currently has 2.8 millions of registered users, from a total Hungarian population of 9.8 mil-

ions people. The active users (on a monthly basis) are more than 0.5 million, some 300.000 video starts are initiated each day and the average streaming time is 60 minutes. About 70% of the registered people are 18-49 years old so we can definitely count



RTL Klub moved its hit show *Budapest Day and Night* to RTL II after six years and turned into the flagship product of the Pay TV channel. While during the spring season, the company launched new shows and saw the return of big series, such as the third season of the comedy *Our Little Village*



Tibor Forizs
head of program acquisitions and scheduling, RTL Hungary



Gabor Fischer
programming director, Group TV2



Balázs Medveczky
director of Television Services, Duna Media Service



Elena Balmont
SVP, interim general manager, VMN Central and Eastern Europe and Israel

on younger demographics. Our aim is to become a digital powerhouse in Hungary'.

'RTL Most started basically as a catch-up service, but it gradually grew and emerged into a relevant AVOD platform. From the top 25 streamed content, about 90% are our own produced top shows for prime time linear TV, both fiction and entertainment but also news. The rest are varied contents: some Turkish series, Latin American telenovelas, US shows, etc. The service offers a library of 7,000 titles and it has a good balance of long form and short form content. The conclusion is that broadcasters can continue making difference in the digital era, providing a longer lifeline to their linear TV content'.

'I can't reveal many details about our newest premium offering RTL Most+, but it will be launched probably in the second half of the year. Apart from the regular offering of RTL Most we will introduce premium options such as additional exclusive content in HD quality, less advertising, content availability for a longer period of time, etc. This is literally a b2b2c concept that will be offered

by our distribution partners to their subscribers. That's how this new proposition will reach the consumer. Beside that in the next 18 months we plan to produce original content to premiere directly on digital before any type of linear broadcast'.

'About the whole group we should mention something important: RTL Hungary's consolidated EBIDTA reached 8 million euros in its 2018 business year and we are proud of these encouraging results. Linear and non-linear businesses are now going hand in hand and focus towards digital is becoming more and more relevant.

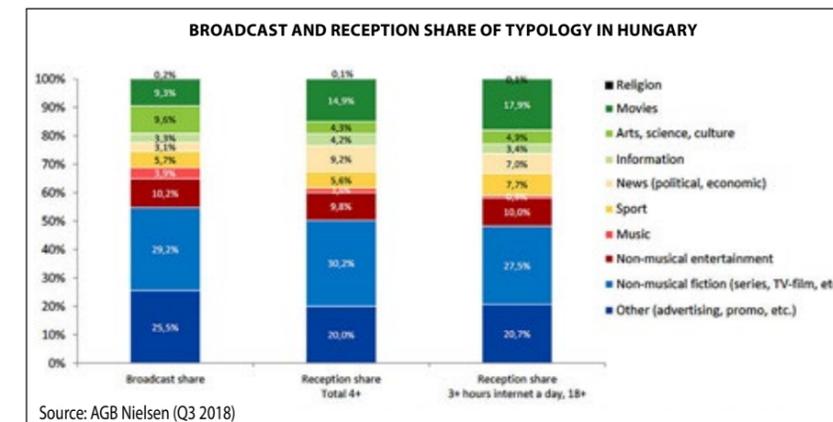
'In terms of linear programming, RTL Klub has a good 2019 so far. In 2018, we led the prime time (7pm to 11pm), in the 18-49 demographics, winning 272 out of 365 prime time evenings. This year, considering the period between January 1st to May 31st, we've won 133 prime time evenings, while our competitors were ahead of us only on 17 occasions. During the spring season we've launched new shows that have performed well. One of the outstanding new hits was

a new 1-hour telenovela based on a Croatian format ('Kud puklo da puklo'), that was scheduled before our traditional half-hour local soap 'Among Friends'. Also the third season of the comedy series 'Our Little Village' performed strongly in the spring becoming again the undisputed number one TV show in Hungary.

'A strategic decision was to move our scripted reality 'Budapest Day and Night' to RTL II, after six years to RTL Klub. This swap became successful turning the show into a flagship content for our cable channel. In regards to future plans 'X Factor'



After the success of entertainment formats like *Exatlon Hungary* TV2 started to bet on own developed formats like *The Bank*, a quiz show spiced with some extra elements



 **Hungary:** local + digital,
the formula to evolve

will return on RTL Klub in the Fall after last season's successful reboot and we will debut the dating reality hit 'Love Island'. Our main production investments will continue to focus primarily on free TV, as this is the cornerstone for the global approach of total video we are adhering to'.

Oppositely, TV2 is going through a transition to a new management, after József Vida confirmed purchase of the company, which is currently reviewing the company's online positioning and strategy, 'so it would be too soon to say anything about our future plans', according to Gabor Fischer, programming director, Group TV2.

Nevertheless, the company is betting strong in linear TV with new format shows that shown very positive responses, like *Exatlon Hungary*, based on *Acun Media's* format and that finished with 81 episodes with a 13,5% average market share in the target group 18-59 in prime time in a highly competitive environment.

'Also in prime time slot, we are currently airing *Raid the Cage* (Sony), one of our most successful game shows from last year, with an average market share of 16.2%, beating RTL Klub's cooking competition show, *Konyhafőnök*'.

But the results of titles like *Exatlon Hungary* and *Raid the Cage* not only were beneficial in advertising terms, but also made the company bet on the launch of a completely new, own developed format: *The Bank*, a quiz show spiced with some extra elements.

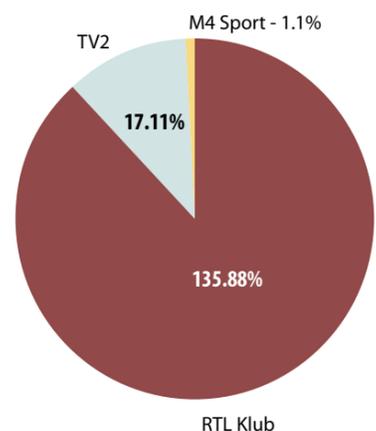
'Looking back at last year's trend we can certainly say that audience's appetite for original, locally produced shows hasn't decreased in the past 12 months, so big key TV players in the market are trying to cope with this demand', says Fischer.

With regards to the balance of original content vs. acquired programmes at TV2, the executive highlights that weekday primetime slots are dominated beyond question by local productions: 'Between 19.00 and 23.00 we only air locally produced shows, currently *Raid the Cage* followed by *Bank* and *Guess My Age*, a game show format licensed from *Vivendi*, already in its 3rd season and still delivers solid ratings. The daytime slots – besides the news and our morning show – are primarily filled up with acquired content. While on our cable channels most of our programming is coming from acquisition so the ratio of the locally produced shows is significantly lower than on our main channel'.

'Compared to last year there is no significant change in the viewing trends of linear television: the most watched program genres are still the entertainment shows, feature films and news programs. On the two big main channels, TV2 and RTL Klub though audience prefers original production: local drama series, game shows, entertainment shows. On the cable side feature films are still popular as well as classic, evergreen series as viewers continue to show interest in the established brands', he emphasizes and completes: 'TV2 Group is the market leader in our target group 18-59, and now we want to go even further, so our main goal – besides keeping the market leader position – is to strengthen our position in each segment with an emphasis on our main channel TV2'.

In third place is *MTVA*, which, as a State-Owned channel, is very focused in speaking to local audience with a mix of entertainment and edutainment. The company has a strong partnership with *BBC* (UK) to broadcast documentaries such as *Blue Planet II* and *Planet Earth II*, but also has managed to grow on the entertainment

HUNGARY: PRIME TIME WINS AND PERCENTAGES IN 2019*



*Prime time 19:00-23:00, 18-49 age target group, Live + Cumulated TSV

Source: Nielsen Hungary

side with the format *A Dal*, which achieved its eighth edition in 2019 and is set to select every Hungarian Eurovision representative since 2012.

Several original productions successfully ran on the Public Group services: *Csakszínházésmászemmi* and *Egynyáriakalend* series, and quiz show *Honfoglaló*, originally a Hungarian online strategic quiz game on air every evening on *DunaTelevízió* 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 after the sale of the show to France (*Adventure Line Productions*)', explains Balázs Medveczky, director of Television Services, Duna Media Service.

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: '*Főszállott 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



Some of the hottest programs on the Public service are the format *A Dal*, which achieved its eighth edition in 2019 and is set to select every Hungarian Eurovision representative since 2012, and the return in this 2019 of *Főszállott a páva*, a folk music and folk dance talent show jointly organized by *MTVA*, *Duna Media Service* and the *House of Traditions*

 **Hungary:** local + digital, the formula to evolve

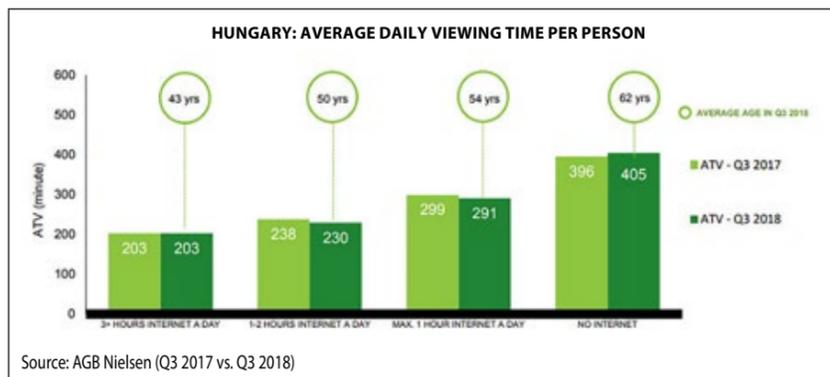
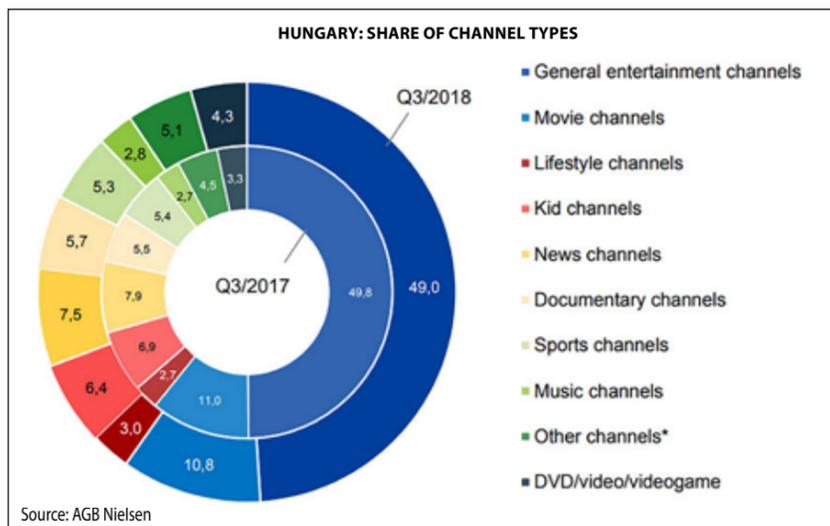
children competing and also seasons with adult contestants’.

From the Pay TV Channels perspective, the impact of the advance of digital players like Netflix made some of them to enter the field with their own products. A good example of this is Viacom International Media Networks (VIMN), which launched last December its OTT service Paramount+ later 2018 for customers of Magyar Telekom in Hungary.

Initially launched in the Nordics, Paramount+ brings together a range of films from Paramount Pictures, along with episodes of popular series from Comedy Central and MTV. In Hungary, the service additionally includes Nickelodeon, Nick Jr. and Spike content, with a wide selection of titles mixing blockbuster hits and hit series.

This way, the deployment sees Hungary becomes the second country in Central Eastern Europe to launch a Paramount branded SVOD service and Paramount+ will be available as a standalone destination, as part of the network operator’s Moziklub VOD platform. The service is available through set-top-boxes, as well as Magyar Telekom’s over-the-top subscription VOD platform and app, TV GO.

Elena Balmont, SVP, interim general manager, VIMN Central and Eastern Europe and Israel: ‘It’s the perfect complement to



our portfolio of channels, offering hundreds of hit movies and TV shows for viewers of all ages and interests. It enriches the range of premium content offered by our distribution partners, while providing flexible access to our wide range of programming content for consumers. An important extension to our linear TV business, this new SVOD service enables us to diversify our footprint and further strengthen Viacom’s market leading position in CEE.’

Moving to digital

One of the main consequences of the proliferation of this digital services has direct impact on the Pay TV business, which, even when it achieves 93% of homes in Hungary, is expected to fall slightly over the next five years, according to a report published by Digital TV Research, which will represent a fall on the revenues as well, from a peak in 2019 at \$446 million, to \$424 million by 2024.

To compensate this, most of the Pay TV companies are moving to offer new products as well like UPC Direct, Horizon Go or the SVOD service Myprime to captivate more clients. But the fragmentation of the Hungarian pay TV sector itself it’s also a challenge, with more than 400 cable operators, three main satellite TV platforms and three IPTV services. While UPC (27.1%) and Magyar Telekom (25.8%) offer TV services across multiple platforms, DigiTV (25.4%) is the third major operator but will challenge the other two if it merges with Invitel (4.8%).

According to data produced by the regulator NMHH, based on information supplied by the country’s leading operators, three quarters of pay-TV subscribers in Hungary now opt for digital services, with a 74.5% as of the end of January 2019, while in February, the number of subscribers to cable television or IPTV increased from 1.830 million to 1.841 million in digital subscriptions.



Viacom launched its VOD service Paramount+ in Hungary with a mix of titles that includes from big blockbusters like Transformers to hit series of the media Group like Paw Patrol

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CME: 'Demand for local content is growing to unprecedented levels'

Central European Media Enterprises (CME) is a media & entertainment company operating businesses in five CEE markets: Bulgaria, Czech Republic, Romania, Slovakia and Slovenia. CME was founded in 1994 with the launch of TV Nova in the Czech Republic.

The Group's operations include 30 TV channels broadcasting to approximately 45 million, and streaming platforms (SVOD, AVOD). And its TV brands are market and audience share leaders in all of its countries of operation with a combined 2018 TV advertising spend of approximately USD 941 million.

'We have achieved strong double-digit growth in profits in 2018 for the fifth consecutive year. We also completed the sale of our operations in Croatia about nine months ago and have recently decided to keep our Slovenian operations', comments **Christoph Mainusch**, Co-CEO of CME and GD of TV Nova.

The Group key pillars are, according to the executive: 'Production of premium and original local content, and being the most relevant and trustworthy source of news. These are not only key in attracting large audiences in TV, but also to our other non-linear platforms. The nowadays-audiovisual industry is not the same as when CME was founded. On of the most dramatic changes is not technol-

ogy, but the strong development on own IPs and local production in CEE'.

'The region is seeing more investment into own-produced content, on a scale outstripping the growth of the TV ad market. This is in line with the global trend for localizing content as the single most effective tool in keeping relevance in an ever more fragmented market, faced with global OTT giants making inroads into midsize and smaller markets too', remarks **Mainusch**.

'Demand for local content is growing to unprecedented levels. Unique local content is finding its place on our local digital platforms, enabling our



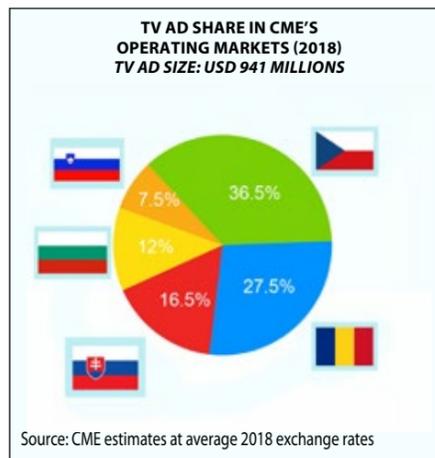
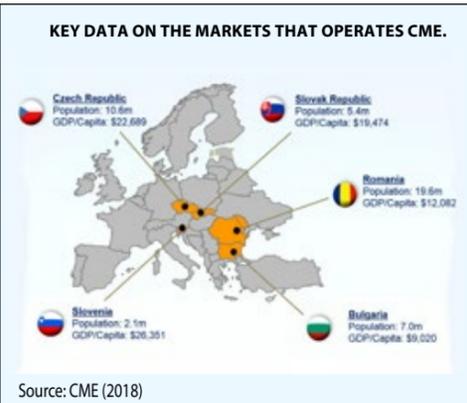
TV content to reach audiences many thought would never watch TV again. As a result, the time spent viewing TV has been rising: digital revolution is making TV stronger in markets where local big budget original digital exclusives are rare'.

'CME programming strategy is completely localized', states **Mainusch**, and he completes: 'We're adapting to market demands and audience tastes in every territory we operate in. All over the CEE region we've seen the audience demand for locally relevant content produced in high quality growing stronger by the year. Because we're trying to stay ahead of the curve and offer more and more of precisely such content, our TV channels are by far the first choice for news and entertainment in every one of our territories'.

'The industry is strong in the CEE region, reflecting a steady economic growth in countries we operate in. CME is undergoing a phase of strong business results and growing profits. Our operations are more focused, making a point to keep costs under control while investing more in local content. Our future outlook is positive', he completes.

Mainusch is also the GD of TV Nova in the Czech Republic: 'Being relevant today means being local on a world-class level. Viewers have recognized our strategy of offering a mix of news, the best local content and biggest international hits.

Christoph Mainusch,
Co-CEO of CME and GD of
TV Nova



While our competitors lean heavily into this or that genre, we're trying to stay broad in our appeal and diversify', he underlines.

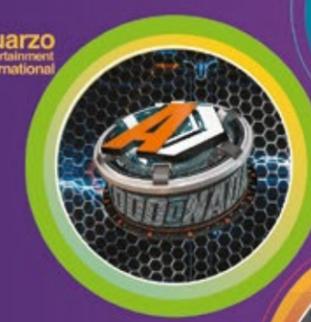
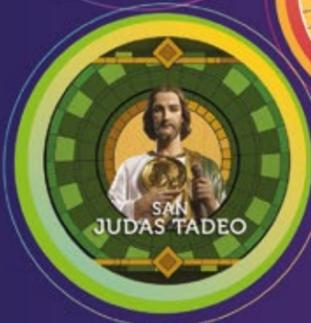
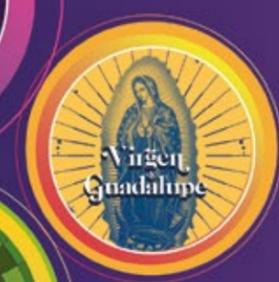
'The offer of local dramas, crime series, soaps and comedies is growing at astounding rates. This year is going to see new episodes of our original crime dramas, *Police Modrava* and *Second Chances*, an adaptation of *Professor T*, as well as our original true crime series, *Traces*, a new original local comedy, and new seasons of adaptations of international reality and entertainment formats, such as *Your Face Sounds Familiar* and *Wife Swap*'.

Mainusch concludes: 'Free TV is by far the most watched medium in the Czech Republic and has the highest reach. We use this fact as the basis for creating a feedback loop between content launched on linear TV and content extended into digital. Our strategy is shaped by the fact that we're, first and foremost, content providers. The platform we use to offer our content on is of secondary importance. Content is king'.

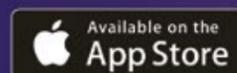


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TV-3: projects "Out-of-the-box"

TV-3 is one of Russia most dynamic broadcaster generating distinctive drama products with focus in the international market. A couple of years ago, it surprised with *Gogol* series, which combined exceptional production techniques and a unique distribution strategy: a release in cinemas followed by the TV premier.

Gogol has been the first Russian TV series to be launched in Cinemas: three films of franchise become one of the extraordinary experiments in the local media market, and had top rates in the box office. On TV, the premier on last March included two new episodes that had never been show in cinemas. The TV series received national TV and films awards. Recently, *Gogol* has landed on Amazon Prime Video for North America and the UK, becoming the first digital window for the production in a foreign language.

TV-3 story is a one of success. Previous to *Gogol*, the series *An Ordinary Woman* become the first Russian project to be in competition in Series Mania (France) and the female lead Anya Mikhailova took the "Best Female Performance" award. And the company is going beyond. Evgeniy Nikishov, Producer, and



TV3 General Producer, explain: 'British distributor Cineflix Rights has been distributing the TV series in the world since then. This year we have another project in Series Mania, which is called *Identification*. Finally, there is an upcoming series, *The Outbreak* (8x'60), which was selected for CanneSeries 2019'.

Valeriy Fedorovich, Producer, and TV3 CEO, added: 'Two years ago we announced that it would develop "Out-of-the-box". Since then, we have managed to push the TV boundaries far away. Our team have created several projects which set up trends for Russian theatrical and digital distribution. These projects have travelled across the world, too. We are grateful that both film industry professionals and end-consumers find that our content is really catching. Placing *Gogol* on one of the leading world online services is another big step for TV3 expansion to the global market'.

The Outbreak is a family drama combined with a disaster production where a man tries to save his family from a disease epidemic. The series is set for premier on TNT Premier OTT on 4Q 2019. 'We are selling the series abroad, and the CanneSeries selection help us to push the project globally', add the executives interviewed by PRENSARIO.

Regarding the Russian market, they say: 'More Russian series are going to the international festivals, and that's a good news for all of us. The country is offering great conditions for con-

Valeriy Fedorovich, CEO, and Evgeniy Nikishov, Producer

tent production, and more global companies are doing business here'.

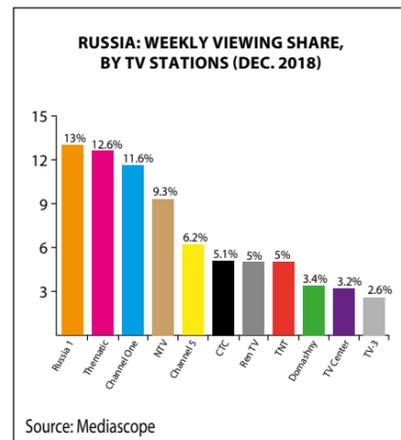
Executives agree that Russia offers great drama storytelling and production is cheaper if compared with Hollywood, and Government is offering interesting cash rebates for international productions. 'The Russian studios are investing strongly in infrastructure and quality is becoming higher and higher. We can see this in the projects of the last five years. We believe the future is bright for the local production and we expect to seal more coproduction deals', they remark.

About this last point, Fedorovich is very clear: 'We want to coproduce with global companies and there are many projects under development. We know it has not been easy to deal with Russia in the past, but now the situation is totally different and the companies are opened to work with the world'.

TV-3 is now working on a global coproduction project that is to be filmed in Germany and Argentina, a 60-minute story about the Nazis found in Argentina. A second project is one about the Russian Revolution, a drama-thriller in which the historical figures like Stalin appear alongside the hidden subculture of Vampires, clandestinely stirring the wheel of the history. 'Co-productions are very important because they help us to bring our stories closer to global audiences', concluded Nikishov and Fedorovich



Gogol is a series "out of the box" with a cinema premier followed by a TV broadcast



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Kanal D: 'TV continues dominating Turkish entertainment industry'

Owned since 2018 by **Demirören Group**, **Kanal D** is a leading Turkish television brand that has become a key player of the market for the last 25 years. The company is not only a strategic player in Turkey, but also internationally through its sales division and the global TV channel **Kanal D Drama** launched two years ago

Kanal D is celebrating the 500th episodes of its long running series *Arka Sokaklar* (*Back Streets*), on its 13th season. Other two fundamental series are the new *Zalim Istanbul*, internationally known as *Ruthless City*, and *Leke*. Combined with **Endemol Shine** studio format *All together Now*, the channel lead the Turkish TV prime time

'The show started a couple of weeks ago and grabbed all attention of viewers. Since there is a certain need of entertainment shows it has been very well accepted by the audience', explains to **PRENSARIO** **Murat Saygi**, CEO, **Kanal D**, who also remarks the romantic comedy produced for the coming summer *Afli Aşk*.

Regarding the Turkish TV market, main content trends and what is the audience looking for, he explains: 'Viewers are still into family series and melodramas. Televisions have been dominating entertainment industry locally. And seems like it will

be for a long while. Digital platforms like **Netflix**, **BluTV**, **Puhu** are rushing to create more local originals to build up their content library. It has to be underlined that TV viewership in Turkey is above 4 hours per day'.

Turkey is Europe's youngest and well-populated country is ready for more content from TV broadcaster and online platforms. **Saygi** comments: 'This educated young viewers attracts also international producers to look into Turkish market. Another point for internationals producers is the success of worldwide sales of Turkish dramas'.

Continuing with the digital world, **PRENSARIO** wanted to know how is **Kanal D** complementing its traditional business with the online platforms. The CEO says: 'TV stands as main content producer in our industry. We will keep looking to broadcast/produce creative, entertaining and more character driven series as well as new studio shows and formats. Because of the shrinking TV ad revenue the company is looking to expand more on digital and international revenues to add new revenue sources'.

International expansion? 'Turkish TV series have earned considerable success particularly over the last decade and have become one of the most preferred television series around the globe, including in MENA, Latin American and European countries'.

But **Kanal D** has gone further, by expanding its business for worldwide with the first Turkish drama global channel **Kanal D Drama** that started broadcasting on American continent in Spanish language, operated along with **Thema** (France), in charge of programming, marketing and distribution.

Saygi concludes: 'Many

Murat Saygi, CEO,
Kanal D



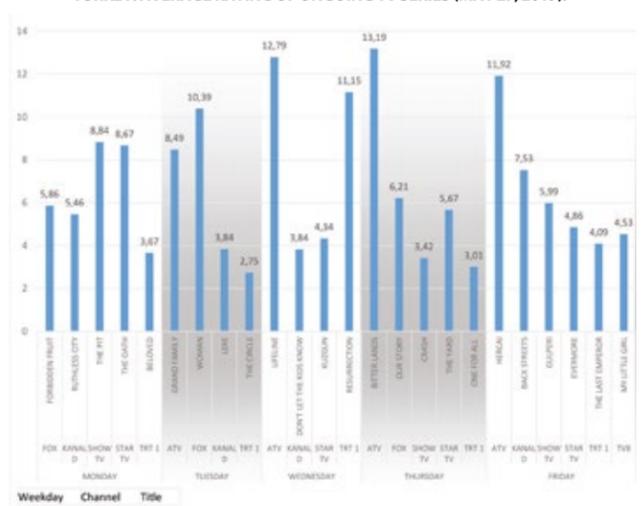
Endemol Shine's *All together Now* is a leading prime time show on Kanal D



Afli Aşk, romantic comedy produced for the coming summer

other territories and languages are in plans. Also library will be versioned in different languages and released on online/digital platforms globally. With **Eccho Rights** and **Stellar Yapım** we developed together *Wounded Birds*, which is a daily-stripped series. Our series have been very popular in our local market and we've also been very successful in selling them globally'.

TURKEY: AVERAGE RATING OF ONGOING TV SERIES (MAY 27, 2019).



Source: Kantar Media

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Natpe Budapest International opens the game

The Hungarian event faces important challenges ahead, more related to the region than the market itself: market fragmentations, high levels of piracy and regions that are starting to recover after almost a decade of crisis are some of them.

A decade of challenging economy has had a direct impact on the different territories, where poor job prospects forcing many to seek work abroad migration, and having a direct impact on the TV industry. For this reason, the market has opened the doors to new regions that seek to do business with CEE, and rebranded the show as **NATPE Budapest International**. 'This reflects the expanded nature of the market. While the focus remains on Central and Eastern Europe, we are broadening our outreach to encompass the EMEA and MENA regions, with buyers from Jordan, Lebanon and Kazakhstan, or in this 2019, with the return of the Latin panel, organized by **Prensario** and focused on the evolution of the region from broadcasters to Studios', says Bommel.

According to **Simon Murray**, Principal Analyst at Digital TV Research, 'this migra-

tion married with low birth rates mean that the number of TV households will fall in 18 countries between 2018 and 2024 – with the region's TV households dropping by 2.5 million'.

The number of pay TV subscribers in Eastern Europe will decline from 82.33 million at end-2018 to 78.64 million in 2024', says the report. But CEE is slowly ridding itself of the legacy of analog cable TV. 'There were still 17.67 million analog cable subscribers by end-2018. This total will fall to 568,000 by 2024. The number of digital pay TV subscribers will increase by 13 million between 2018 and 2024 – or up by 21%.

Russia will account for half of the region's pay TV subscribers in 2024. However, Russia will lose 2.88 million pay TV subscribers between 2018 and 2024. The number of pay TV subs will fall in 10 countries between 2018 and 2024'.

But both in those territories that PayTV subscribers will grow, and in those where it will drop, OTT services will have a key role. Either to attract new consumers or to achieve those who left the



NATPE Budapest International is opening the boundaries to new territories and will host a new luncheon with China on the 25th: JP Bommel, CEO, NATPE, and Sun Haidong, division director of the State Council Information Office of China, with the Chinese delegation from CCTV

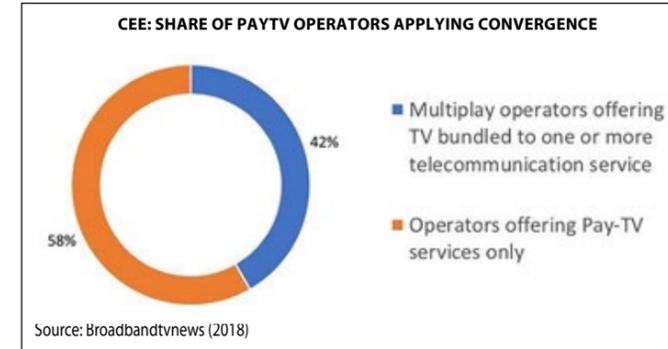
lineal TV, most of the services are creating their own products or forcing alliances with others like **Netflix**, **Amazon**, or **Apple TV+**.

And this could be turned into new opportunities as well for foreign producers. More screens means more need for new content but also audiences more appealing to new type of shows.

While broadcasters are more and more involved on buying formats and scripts to adapt with local tastes –mainly procedural dramas and thrillers–, and to compete with the big OTT platforms, other SVOD services are betting on alliances with distributors to work together and educate the audience about the real value of content.

According to several buyers consulted by Prensario, even when production values are going up, and costs down after several years of crisis, there's still more to evolve. And adapting stories with proven success gives the chance to companies to down risks giving audience a content where they can feel reflected. From the entertainment side, reality shows are growing as part of the unique concept: 'audience's everyday customs and tastes represented on the screen', and talent shows with several seasons broadcasted. 'Launching new IPs is very difficult in CEE,' remarks **Andrew Sime**, **Banijay Rights**.

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



NATPE Budapest International focused for second time in the MENA region: Nick Grande, managing director at ChannelSculptor, Fares Sayegh, CEO at Roya TV (Jordan), and Sanjay Raina, SVP and general manager, MENA and Pakistan at FNG

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 in 2017. And lastly, audience is asking for higher quality content.

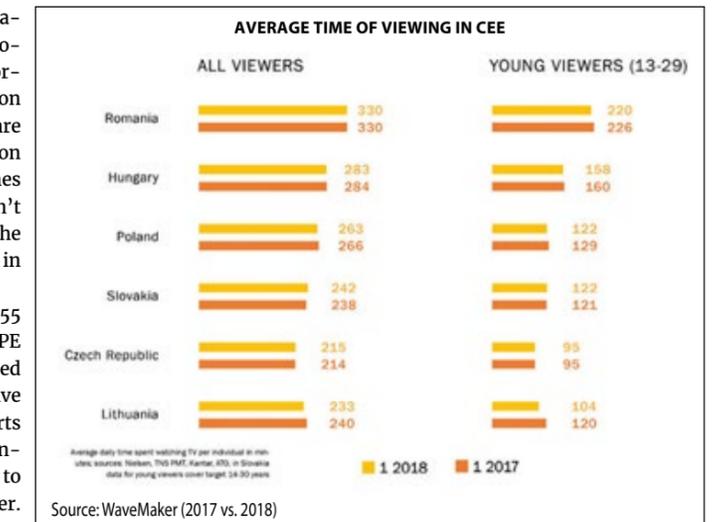
In terms of genres, crime and procedural are the most wanted, while factual and formats based on real life also have a good impact. 'All the entertainment shows mixes reality with talent or games, but there's nothing connects more with audience than realities themselves', said one buyer to Prensario.

What about **NATPE Budapest International**? According to **JP Bommel**, CEO, other big successes during last editions were the 'NATPE Connect' platform, with 800 meetings generated and a 52% of engagement between buyers and sellers in 2018, and the sessions including the major trends in MENA and Latin America. 'Industry talks a lot about globalization, but there is still much we don't know about many territories, or we think we know but in a wrong way, and that is where the insights and sessions enter,' says Bommel.

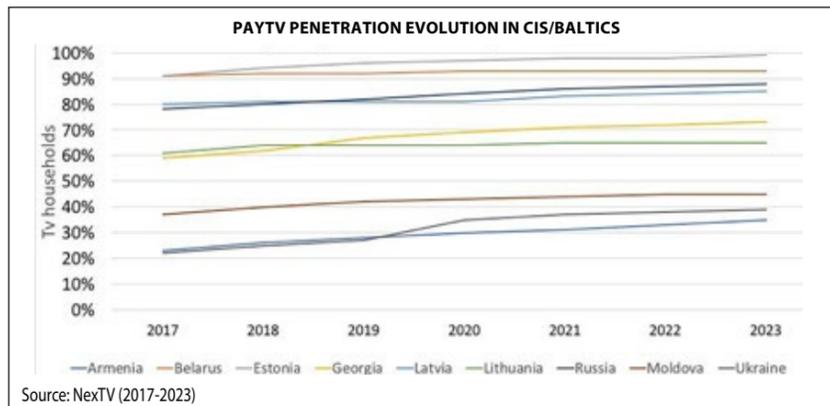
Regarding the US Screenings, they have become important for most of both big and small broadcasters from countries like

Kosovo, Albania or Macedonia, which foreign acquisition strategies are still based on US programmes and that can't assist to the Screenings in May.

'For over 55 years NATPE has created events that have enabled all parts of the content industry to come together. While the industry itself is changing, the core of our work is not. Meeting our clients face-to-face, learning about their challenges and opportunities, and talking to them about content continues to be an important part of our industry', adds Bommel, and remarks: 'We are still operating in a world where relationships are vital and a focused and boutique event such as NATPE Budapest International gives everyone extra time to spend together and understand each other's needs better'.



Hamdi Rashiti, program director from Alsat TV (Macedonia), with Mirela Pammer Glavan, acquisitions coordinator, Media Acquisitions (Coratia), Tatjana Saudet, general manager, Saudet Media (France), and Andreja Sertic, general Manager, Media Acquisitions



Pitch and Play Live comes to its fourth edition: Marietta Temesvari, regional programming director at Sony, Kateryna Vyshnevskva, head of development at Film.UA (Ukraine), Jurgis Jefremova, TV3 Lithuania, Manuela Caputi, head of international distribution, Mediaset (Italy), with Georgi Chakarov and Stanislav Kimchev, both from CEETV (borders)



HRT Croatia at CBS (USA): Martina Rajsek, acquisitions, and Ranka Horvat, head of foreign programme acquisitions, both from HRT (center) with Michelle Payne and Julie Aletti de Geli, from CBS Studios

will also include conversations about **International Co-Production**, a new session about **MENA with Tony Saab**, VP, **Products & Content**, **Intigral**; **Sanjay Raina**, General Manager, **MENA/Fox International Channels**, and **Nick Grande**, Managing Director, **Channel Sculptor/MENA.tv**; and one centered on formats, with **Andrew Sime**, VP of **Formats**, **Banijay Rights**, and **Sumi Connock**, Creative Director, **Formats**, **BBC Studios**. And last but not least, a new edition of **Pitch & Play LIVE!**, presented by **CEETV**.



MGU: 'Audience is getting ever more choicy and demanding'



Viktoriya Korogod, director of TV-Channel Ukraine



Olena Shabashkevich, Digital Projects Director, MGU

Media Group Ukraine (MGU) is one of the largest diversified media holding in the country, managing TV, new media, publishing, production, distribution and sales businesses. Established in 2010, it operates several networks: the FTA channel **Ukraine**; the young audience channel **NLO TV**; the thematic channels **Indigo TV**, **Football 1** and **Football 2**, and also available in HD; regional TV channels **Donbass**, **TV channel 34**, **Sigma**. Also, the satellite TV operator **Xtra TV**; prodcos **Tele Pro** and **Dopomozhemo TV**; the full-service media agency **Media Partnership Buying**; multi-media project **Vogue UA**; newspaper **Segodnya** and site **segodnya.ua**.

The Group produces about 3,000 hours annually (TV movies, short series, TV serials, telenovelas and melodramas), news, social and political talk-shows, documentary and entertainment; live broadcasting of important events, football matches and football programs, premier movies and blockbusters.

Viktoriya Korogod, director of **Ukraine**: 'For the last three years **Ukraine** has been the most popular channel in the country for both, commercially relevant and general au-

diences. The past season proved our leading position with a viewing share of 11.5% and 1.5% rating (cities 50,000+, 18-54); viewing share 14.9% and rating 2.52% (general audience 4+). Last season we premiered grand entertaining project *Amazing People (The Brain)*, based on the German format. Aired on Saturdays prime time, it gained huge interest among commercial (11.3% share and 5.5% rating) and general audiences (16% in share and 5.5% for commercial). This is 16 million viewers watched the show'.

In Spring 2019, **Ukraine** aired the *Mission:Beauty S2*, based on and in-house format. 'Last season viewers enjoyed over 20 premiere runs of new TV series.

Thus, 95-episode melodramatic series *Secrets* was a success on early primetime, based on Croatian format *The Secrets*, purchased from Fremantle (UK). 16-episode melodrama *Secret Love* first aired in winter and has been among the most popular Ukrainian TV series with 5.92% rating, 20% share for commercial audiences', she adds.

Three top shows are scripted reality series *True Mystery*, detective series *Agents of Justice* and documentary detective series *A Story of One Crime*. 'The media environment was greatly affected by presidential elections: we had a number of successful informational and analytical special projects meant for the event', says **Korogod**, who completes: 'For the upcoming season we plan a primetime entertaining project for weekends, new series and new seasons as well as grand music shows devoted to the New Year and Independence Day'.

Series and dramas make a basis of the channel's agenda: 'We produce 1,000 hours of premiere series a year. However, we are keen on entertaining, too. As a rule, we prepare a few grand concerts a year and make primetime and daytime entertaining shows. International cooperation is among our key priorities. Last month **Ukraine** launched co-production with **Helio Media** (Latvia): an eight-episode detective melodrama



German-based format *Amazing People* was a grand entertaining project of last season and gained huge interest reaching 16 million viewers

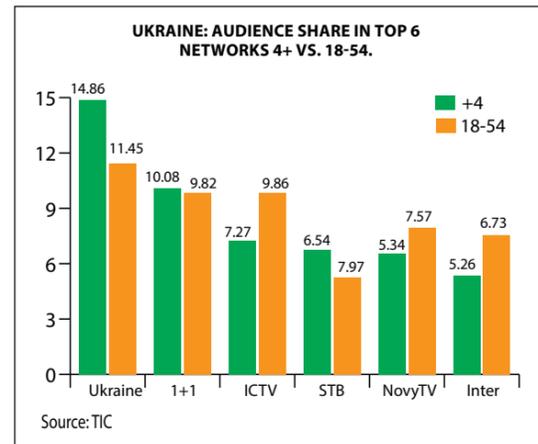
Marcus that we will premier in Autumn, about an ordinary schoolteacher whose son was kidnapped from the kindergarten', concludes.

Olena Shabashkevich, Digital Projects Director, **MGU**: 'Content and big data are the main trends of Ukraine's media market. Content is sought after by all and everyone, while continuous work on big data ensures the proper content delivery to the target audience. A relevant research is a key tool to succeed in the digital.

The proper content involves a good deal more than just a dramatic story. It is closely connected to the production technology adaptation for each vehicle. The audience is getting ever more choicy and demanding of the content itself and no less selective about ways and means to consume it. Video would account for 80% of content consumption in 2020'.

Video consumption is the main trend of content consumption in the digital sphere. 'The mobile traffic is booming with the 20 to 80 ratio for many publishers. Brand loyalty as such is not instrumental in the content producer (consumer relationships). Speedy and convenient delivery of content as well as its quality are key issues. Content producers are permanently "hitting the turbulence"', says the executive.

'The competitive environment is characterized by momentous response to changes. All producers are competing for their consumers and the battle is the focus of their attention. Advertising formats have also shifted. Regular media advertising, banners seem so ineffective that they are not in frequent use now. Quite a few formats are often used to monetize mobile video', finalizes **Shabashkevich**.



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Nova TV: 'An extra step must be made to do something different'



Dražen Mavrić, President of the management board

With eleven channels with a national concession (HTV1-4, Nova TV, Doma TV, RTL, RTL 2, RTL Kockica, SportskaTelevizija and Croatian Music Channel) and about twenty channels with local or regional concessions, Croatia is one of the most competitive market within the CEE region. But for nine years in a row, Nova TV has managed to lead the ratings, according to **Dražen Mavrić**, President of the management board.

'According to the ratings for the first quarter of 2019, the channels of the Nova TV Group were watched by 62% more viewers in prime time than those of the closest competitor. The programme of Nova TV was watched by an average of approximately 520,000 viewers in prime time, while achieved a 33% audience share, gaining 75% more audience than its closest competitor', highlights **Mavrić**.

One of the key reasons relies on the constant evolution according the new trends, and having locally produced shows as the basis. 'Our goal has always been not only to make such content popular, but also to encourage the development of the lo-

cal product which is now ranked among the most popular foreign products in terms of quality and content, as a result of following and implementation of global trends', adds the executive, and remarks that, looking back at the very beginning of Nova TV, the growth and development of local production is remarkable, and today, it annually produces at least one drama TV show with 160 to 180 episodes which is broadcast in prime-time.

And this success is replied also outside Croatia, with some examples like *Larinlzbzor (Lara's Choice)*, sold in 40 countries; *Kud-puklo da puklo (No Matter What)*, drama TV show with elements of comedy sold in 32 countries, or *Zora dubrovačka (Golden Hearts)*, sold in 26 countries around the world.

According to the executive, in the first quarter of 2019, TV viewers spent an average of 2 hours and 22 minutes watching the Nova TV all-day programme, and 1 hour and 24 minutes watching the prime time programme. 'Even though young viewers and millennials spend much less time in front of TV, television remains one of the most popular means of entertainment and information', he says.

But linear TV is not the only focus of the company: 'Currently the digital media are beginning to take their slice of the TV cake, which is something we have embraced in line with the digital transformation in which we are also leaders in the media market. Apart from the Internet portals, Nova TV surpasses its competition on social networks. We have strong digital brands and we use all our digital assets to get even closer



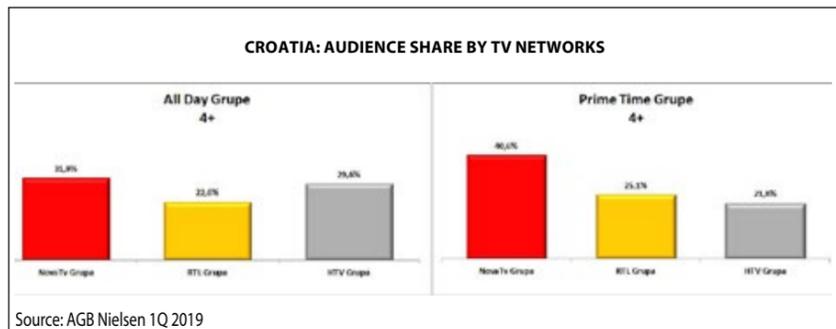
Larinlzbzor (Lara's Choice), original series sold in 40 countries

to our audience who prefer some other technical solutions for content consumption. We do this by adapting the content to a particular channel on which it will be placed – real-time news on the web, an animated GIFs on giphy, stories on Instagram, etc., all of them including the same basic content and idea'.

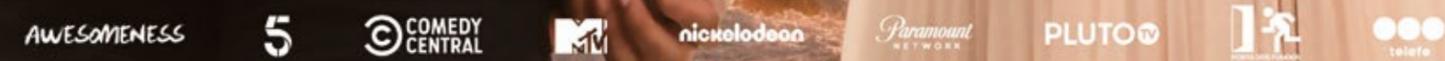
'I believe that major technological changes relating to the production and distribution of video content, as well as to the various communication tools and channels, constitute an opportunity for TV to further enhance its domination. This is where Nova TV again stands in the forefront, by creating the most attractive and highest-quality content distributed through various channels and constantly investing in the latest technology of content broadcast', emphasizes **Dražen Mavrić**.

Regarding the programming strategy, he explains that the company not only invest in original production, but also in foreign-license shows such as *Supertalent (Got Talent)*, reaching a viewership of a million, and the music-entertainment show *Tvoje lice zvuči poznato (Your Face Sounds Familiar)*, which achieved enviable results during its five seasons. The ultimate sensation of this spring has been *Plessazvijezdama (Dancing with the Stars)* as the most popular entertainment programme across all TV stations, with an average of over 670,000 viewers and 43.6% audience share.

And completes the executive: 'The media industry is dynamic, constantly changing and urging us to always keep the highest standards and push the limits in order to maintain our position. To achieve any kind of growth, an extra step must be made to do something more and different. Constant work on innovative products, technology development, original production, investing in our own team – are challenges we are facing successfully and I believe that we will continue in this direction'.



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PopTV: 'local values have proven to be a recipe for success'



Branko Čakarmiš, programming director

Pop TV is the flagship television channel of the commercial multimedia company PRO Plus (Slovenia), leading the local market with a stable 40% all-day audience share.

'We have been the first to undergo the digitalization of news. Our daily web portal 24ur.com remains the most visited portal in Slovenia and is the winner of the title "Best regional portal". A step forward is taking an advantage of the golden age of domestic production, which is a key factor in gaining the lead from other programs distributed on a global scale', explains its programming director **Branko Čakarmiš**.

'We are adjusting to the ongoing changes of our viewer's habits enabling our content to be accessible everywhere at any time. Our SVOD platform, VOYO, with the growing number of subscribers is doing excellent', he adds.

Some of the key titles within this strategy are original TV series *River of Love*, which has an average audience share of 32%. 'Original

content, authentic story, full of emotions and written based on Slovenian values, have proven to be a recipe for success', remarks Čakarmiš.

Week days are enriched as well with the cooking show *MasterChef Slovenia*, which is on average reaching a 39% audience share, while weekends this spring have been reserved for a successful threesome of reality show *Farmer wants a wife* with a 46% audience share, *Home makeover* with a 45% audience share and a Sunday and the shiny dance floor show, *Strictly Come Dancing*, reaching a 47% audience share. 'The combination of three genres have proven to be a perfect weekend match', says the executive, and highlights that, 'once again, we have been convinced that some series truly are timeless. The cult series *Friend* on our channel BRIO has brought excellent results. While sport keeps its domicile on our Channel Kanal A with *Champions League* and *Moto GP*, which has been broadcasted since 2007, reaching excellent ratings'.

Regarding the local market, the executive highlights that development of television and digital platforms 'goes hand in hand'. 'We cannot speak of one without the other. This is the reason why the viewership of linear television is only in slight decrease in Slovenia, meanwhile we see the growth of SVOD and other platforms of video on demand. However, official measurements regarding these platforms are not yet available', he says and



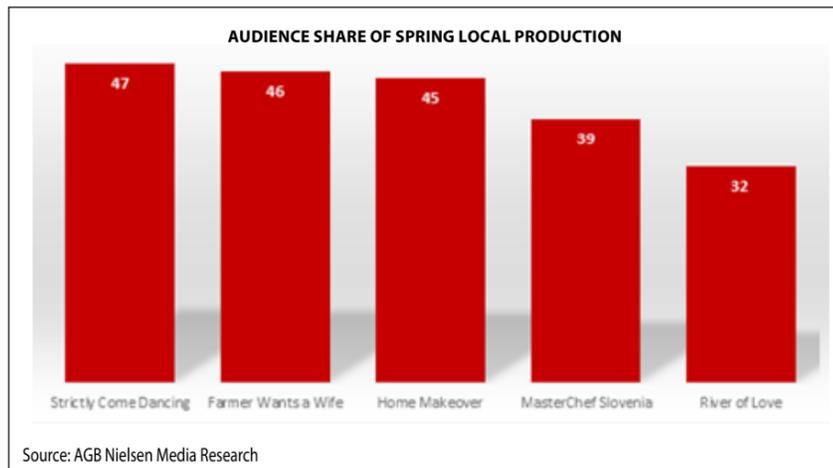
Strictly Come Dancing was the top show in Spring, with a share of 47%

highlights the re-launch of VOYO with new iOS, Android, Android TV applications and a completely new website architecture.

'We have changed the whole platform in order to simplify the user experience and provide a safe and stable service for existing and future subscribers. New advanced user friendly functionalities are coupled with an enriched library and the content which is available in the span of seven days after being aired on television. This is definitely the future and the path we will be following further'.

'SVOD definitely remains our focus', emphasizes, and highlights that, due to changed lifestyles, 'viewers wish to individually choose when and where they will be watching their favorite shows'. 'Alongside with the development of new features on these platforms, we will strongly be focusing on the importance of content. Our future strategy for content will reflect distribution via different platforms. The stress will be on domestic full-length series of different genres, with still unoccupied territory being crime series. Kanal A will continue in broadcasting the most prominent sports events. While exclusive VOYO originals will be on a broader scale offering an opportunity for young producers and directors also by connecting with production houses beyond Slovenian borders'.

And for this, production is another key fact according to Čakarmiš: 'A golden age of domestic production means a golden age for good producers that televisions are searching for. We definitely see the development in continuing with the production of our original content, new formats and featured programs. Investing in the education of specialized profiles, such as copywriters, promo producers and others, is as well a part of a strategy that will contribute to keeping our advantage in Slovenia and abroad', he completes.



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Markiza: 'Local is our main driver'

Markiza Group is the leading media and entertainment group in Slovakia operating 3 TV channels: Markiza, Doma and Dajto, with summed up PT market share of 30,3 % and AD market share of 29,2 % for the first quarter of 2019 surpassing the next commercial competition group, JOJ, by almost 20 % in PT and 40 % in AD.

'In 2019, the main channel Markiza continues to grow its performance and bring a good mix of both well-established successful local productions as well as new shows attracting wide range of audiences confirming its leadership position on the market', describes Silvia Majeská, program director.

According to the executive, the Slovak market has been affected by decreasing terrestrial viewing, which pushed the company to leave free terrestrial platform in 2017, but quickly regained its market position thanks



to 'good content and performance'. 'We have an SVOD platform Voyo, where you can watch selected highlight programs in advance. And we have opened an AVOD catch up service Markiza Plus, where viewers can see via mobile or online all our shows within 7 days. This is to serve the changing viewing habits of customers', says Majeská and remarks that, 'all in all, TV consumption is stable in Slovakia and online and mobile use of our programs is increasing'.

'Slovak audience is looking for good local content. They seek out shows and series they can relate to, and that entertain them with familiar settings and relatable characters', she says and highlights that, compared to 10-15 years ago, the company is investing much more into local content and less in foreign acquisitions. 'This strategy is essential for us as a market leader and it will be even more relevant in the future. We produce good quality content and deliver it to our audiences over linear TV or digital and OTT platforms, so that viewers can access it any way they desire'.

Some good example during last spring season, were the local sitcom *Susedia* (Neighbours), which made its phenomenal return to the screens in 2018 after more than 10 years break, and *HornáDolná* (In the Middle of Nowhere), comedy also adapted in



Silvia Majeská, Program director

Hungary with great success. 'Furthermore, our daily access soap *Oteckovia* (Dear Daddies), successfully adapted from the Argentinean format (Telefe), achieving 38 % market share in first quarter of 2019, and other shows such as locally developed entertainment show *2 na 1* (2vs.1), which in its first season this spring became one of the best performers of the season. Last but not least, other shows such as prime time quiz show *Dobrevedie!* (Who Knew), worldwide hit *The Voice ČeskoSlovensko* (The Voice of Czechia and Slovakia), and Russian comedy adaptation *Kuchyňa* (Kitchen)', she adds.

'In general, local content is driver of our success, and although original ideas account only for one third of the shows in our spring grid, apart from *Dear Daddies*, they are our main audience drivers'.

And for Markiza, as much as for other key players in the region, local production means also a need to be more open to co-productions: 'We already co-produce *The Voice* and a few other shows with our Czech sister channel TV Nova. We also co-operate closely with other broadcasters from the CME group exchanging across the group ideas, scripts and creative producers. And we are open to coproductions if they make sense from content and business point of view', completes the executive.

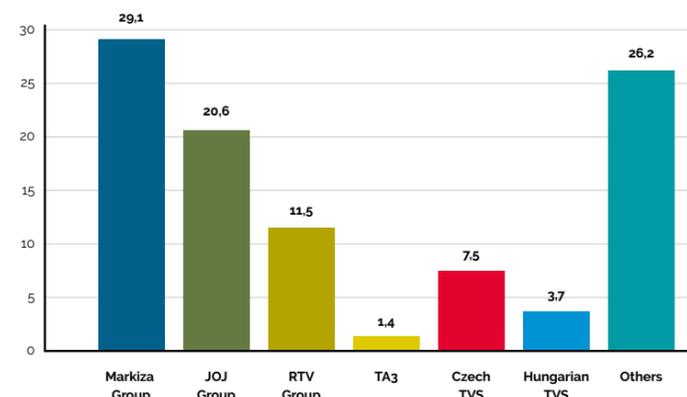


The Voice of Czechia and Slovakia, format coproduced with TV Nova (Czech Republic)



Oteckovia, Slovak adaptation of the Argentinean series Sres. Papis (Telefe)

YTD (MARCH 31, 2019) TV GROUPS - ALL DAY MARKET SHARES TG 12-54



Source: PMT / Kantar Media





BluTV + Inter Meyda: Behzat Ç. returns

BluTV is Turkey's leading SVOD service and world's #1 OTT platform for Turkish content. It has been founded in 2015 in Istanbul and started its operations in early 2016 in the Turkish market. It contains +9,000 hours of content including series, movies, documentaries, kids contents and non-scripted shows, series & movies, foreign movies & series and live TV from US Majors (MGM, Warner, Paramount and HBO) and independent providers such as BBC, Fremantle, Studiocanal, Dori Media and Beta.

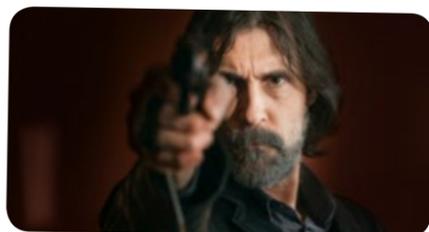
In early 2017, it launched BluTV's Turkish service with Turkish series and movies and BluTV's Arabic service with Turkish series dubbed in Arabic are available around the globe. The OTT has the largest library of Turkish series in Turkish and Arabic, having reached out to 4 million customers around the world.



Turkish OTT market is driven mainly by AVOD services based on catch-up of TV series, IPTV services driven by telecom companies and local and global SVOD businesses. Until now, BluTV has produced 11 original shows that addressed local taste and attracted majority of our current subscribers.

A top recent news has been the launch of new episodes of cult series *Behzat Ç.* later this year along with leading producer and international distribution Inter Medya. The show initially aired in Star TV six years ago and the first three seasons became a huge success. Inter Medya produces the series and distributes it worldwide.

'We have come to the conclusion that our streaming platform can reach new heights. BluTV tells great and rich stories that reflect our rich culture and encourage conversation. With its edgy character, we



Behzat Ç. is being coproduced by BluTV and Inter Medya and will be launched later this year

highly believe that *Behzat Ç.*'s spirit is perfectly appealing for our content strategies and its target audience', comments Deniz Sasmaz, Head of Content Acquisitions & Productions of the OTT.



Deniz Sasmaz, Head of Content Acquisitions & Productions of the OTT

Can Okan, CEO and Founder of Inter Medya, adds: 'This series is incessantly reflecting some of the most pressing issues of our time revolving around his unique personality that

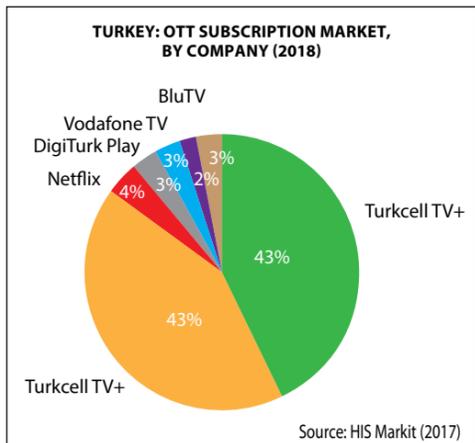
was shaped by his haunting past. As the character says "I've never been a good man, nevertheless I've never been anybody's man". His ideals and actions are what separates *Behzat Ç.*'s story from all other stories'.

Sasmaz continues: 'Although streaming business looks attractive from an outside perspective, it has a very challenging business model. And we believe that the streaming market is quite crowded in many territories and there is a need for some consolidation. While Disney+ and Netflix are serious competitors for us, platform businesses such as Apple TV+ and Amazon Prime Video can be interesting distribution partners in some territories'.

'Our strategy is to offer quality content to our subscribers and become a one-stop shop for entertainment. We have an extensive offering including premium exclusive series (*Handmaid's Tale*, *Young Pope*, *Patrick Melrose*), good library content and more than 600 hours of US blockbusters and independent movies and the best of Turkish dramas (movies and series). We also bring the best dramas from around the world, as we want subscribers to discover good content. We don't have any language barrier and are proud to present a diversified offering in our platform. Just to name a few, *Gomorra* from Italy, *El Marginal* from Latin America, *The Pier* from Spain, *Babylon Berlin* and *Deutschland 83/86* from Germany are our top non-English shows'.



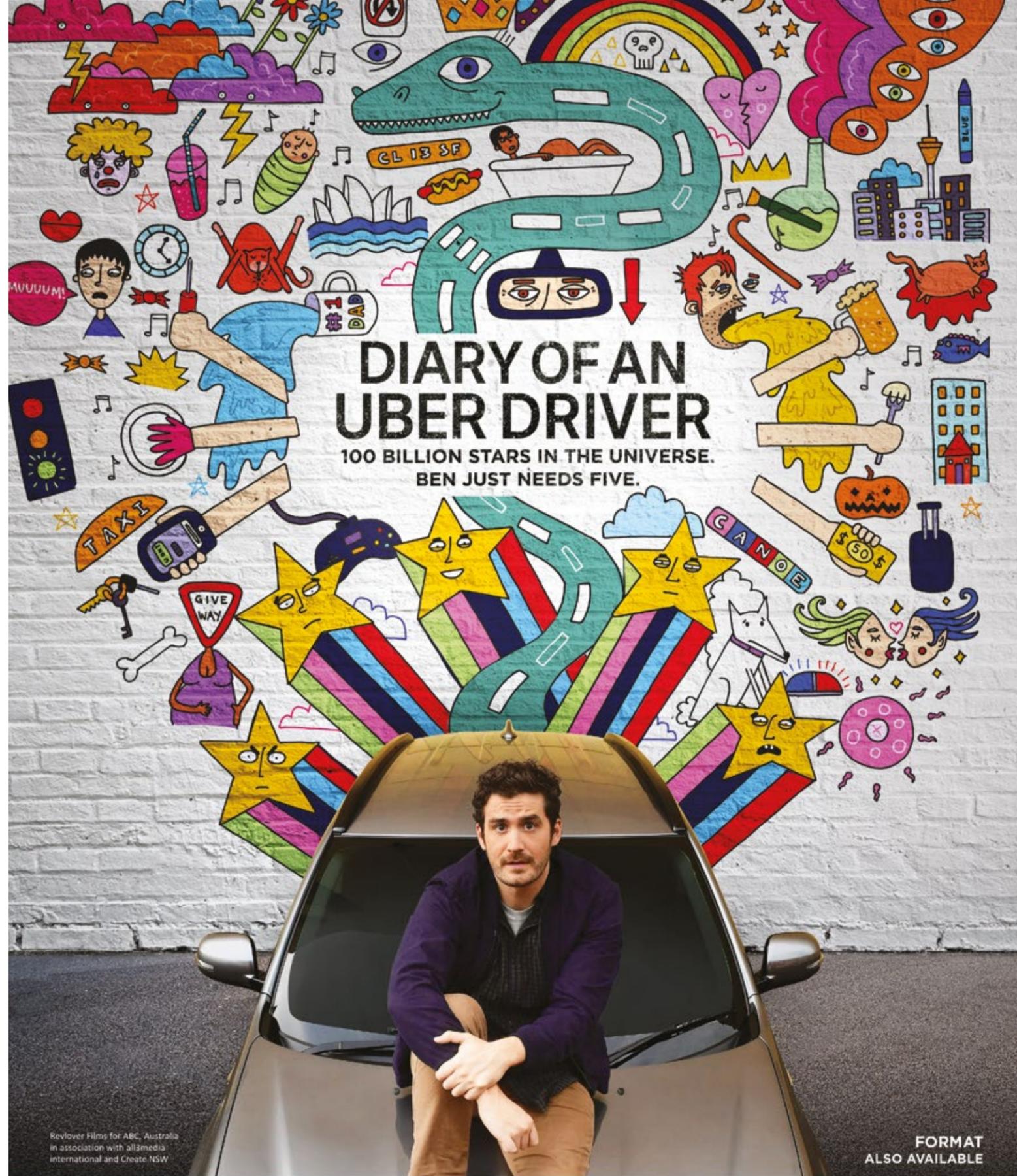
Can Okan, CEO and Founder of Inter Medya



Sasmaz continues: 'We are looking for stories that are mainly local, and that have meaningful and interesting themes in them. We also value the feedback from the audience in several different ways, data analysis is the key parameter but social media has become a really important way for us to understand what the audience is saying and thinking about our shows'.

'We also prioritize diversification in terms of genre. Turkish linear TV offers good quality shows but mainly focuses on family dramas and romance. Our series are shorter by length and number of episodes compare to the linear TV in Turkey. We value quality over quantity and work more deeply for this project'.

'As for *Behzat Ç.*, the series was initially more suitable for digital audience but at that time there were no digital platforms in place. It made sense for us to become the new home of this phenomenal show and work on a sensational comeback as the leading OTT platform in Turkey', finalizes Sasmaz.



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The OTT 'Titans War' takes shape

With the merges of Disney/FOX, AT&T/Time Warner and Comcast-NBCUniversal/Sky, the market has started to altered its landscape giving a new dynamism to the whole ecosystem.

Even when we are talking about something that started about a decade ago, to each fusion, a larger one follows with the goal of not losing footprint. So far it seems that these three big heads, **Disney**, **WarnerMedia** and **NBCUniversal** will dominate the global market, although the changes and recent confirmations (added to some rumors) suggest that they are not alone in this market. Both on the major and independent sides, more announcements are expected in the coming months. The OTT market global adds every moment more players and content offer. It has grown by 25% in the last years and it is projected to continue like this for the next 4-5 years: it is expected that 40 million new subscribers will be added. 'The good thing is that it will not stop growing', agreed the spe-

cialists consulted for this report. The widening of broadband, the arrival of 5G and the growth in connected devices and SmartTVs will only make this expansion not stop, although not all can survive in a crowded market. 'It will be 2 or 3, but there will be a market for others: some USD 350 million are waiting for them, and many want to have a place there', a senior industry executive expects.

Comcast

At 2009, **Comcast** surprised the industry with the intention of buying most of

A NEW GLOBAL ORDER ARISES

Who? Content producers, telecommunication and tech companies
What? Original and exclusive contents
When? 2019 and 2020
Where? Global coverage
How? Direct to Consumer

the shares of **NBCUniversal** from **General Electric**. It was the first major acquisition and merger of means on a planetary scale. The historical context was another: **Comcast** was the leading cable provider in the USA at that time, and managed channels such as **E! Golf Channel** and **Versus**, which later became part of **NBCUniversal**'s signal portfolio.

This acquisition was finally confirmed two years later and meant a series of internal changes within the conglomerate that were taking shape in recent years with, for example, the definitive absorption of **Telemundo** by **NBCUniversal**. The operation of the second Hispanic network in the USA and all its international distribution business (**Telemundo Internacional**) remained in the hands of the corporate structure.

Sky's case is interesting: in September 2018, **Comcast/NBCUniversal** exceeded **21st Century Fox**'s offer for a stake in the British operator's control for USD 38.8 billion. In this way, **Fox** ceded its 39% stake in this company to **Comcast** for USD 15 billion, which will allow it full control, and was left out of **The Walt Disney Company**'s orbit.

The telco won the battle and kept the European giant that has 23 million customers throughout that continent. And it has already reorganized the company from **Osterley**, London, where it merged its operations with **NBCUniversal** into two business units: linear channels and content sales, confirmed **Sky** CEO **Jeremy Darroch**. He is doing the same in Germany, where he also



has a large operation.

Since last LA Screenings, **NBCUniversal Global Distribution** offers **Sky Vision**'s programming. Four series were shown: *Temple* (UK), *Devils* with Patrick Dempsey, from Italy, *Fryed*, coproduction between Australia and UK and *Catherine the Great*, coproduced by **Sky** and **HBO** with **Helen Mirren**. **NBCUniversal** has added +6,500 hours from **Sky Vision**.

Disney

The Walt Disney Company is a corporation that does not stop. It already operates **ESPN+** in the USA for more than 1 million customers, and plans to launch it as a global sports OTT this year along with its expected **Disney+** that will have content from **Disney**, **Marvel**, **LucasFilms**, **Pixar** and **ABC**, but also from **FOX** and its brands, after the acquisition of **21st Century FOX** for USD 71.3 billion.

To understand the magnitude, the contents are a good parameter: **Disney** obtained film and TV studios (20th Century Fox, Fox 2000, Fox Searchlight), as well

as large franchises such as *X-Men*, *Avatar* and *Deadpool*, or *The Simpsons*, *This Is Us* and *Modern Family*. Internationally, the purchase allows you to manage 350 channels in 170 countries, including **Star India**; **FX** and **NationalGeographicPartners**.

Bob Iger, CEO of **The Walt Disney Company** confirmed that **Disney+**'s structure will be five blocks of main content within the service that revolve around **Disney** (TV and movies), **Marvel**, **StarWars**, **Pixar** and **NationalGeographic**. The app will offer five different user experiences, with a personalized aspect and particular characteristics, for each of these five content universes. Recently, it was confirmed that **Hulu** will be also part of **Disney**' family. The OTT with the stronger growth in the US (+25 million subs) is planed to be the home of the Premium content from the Studio, especially from **Fox Premium**.

Craig Hunegs, president of **Disney Television Studios** underlined on **Disney**'s Screenings last month: 'A new gravity has been created in Hollywood after the merger with **Fox**. We are not a telecommunication,

cable or technology company. We are the largest and most dynamic studio in the world, with the most powerful programmatic offer'.

WarnerMedia

The competition was immediate and for the same time the US telcos giant **AT&T**, which had already acquired pay TV operator **DirecTV** with operations throughout the Americas, confirmed the offer of USD 85,000 million for **TimeWarner**, renamed as **WarnerMedia**.

In this case, it is a telecommunications giant that leads the subscription market with **DirecTV** and, which needed powerful brands to compete in the new ecosystem: the **Warner Bros.**, **HBO** and **Turner Broadcasting System**, among the most important and with a global presence.

In the US, **AT&T** has 16 million Internet connections and 47 million video connections through **DirecTV**, **DirecTVNow** (1.8 million, 2Q 2018) and *U-Verse*; 163.2 million **AT&T** wireless subscribers adding up to Mexico, and 400 million people in both markets that access the 4G LTE network. **DirecTV Latin America** has 21.6 million pay TV subscribers (3Q, 2018).

By the end of 2018, **AT&T** president and CEO **Randall Stephenson** remarked that it will put into operation a 'new arsenal' of media properties and indicated that by the end of 2019 a three-tier streaming service will be launched to compete with **Netflix**. One of those new products will be a plan just for movies; another will have original programming and big box office films, while the third option, and the highest cost, will combine content from the first two plus the **WarnerMedia** library and licenses from other companies. According to **AT&T**, these three options will 'complement' the current **WarnerMedia** business: 'They will benefit our current distribution, expand the audience, increase engagement around the content, and provide data and analysis that will inform on the operation of those products, improving monetization', he assured.

John Stankey, CEO of **WarnerMedia**, said the new streaming will use **HBO** content, **Turner** and **Warner Bros.** to expand the demographic base: 'We want more content and generate more relationship through digital content'. He also announced that this content will be limited in other platforms: 'We are analyzing our next steps in the next two years, where we will suffer several structural changes will happen', he concluded.

	Apple	Disney	WARNER MEDIA	NBCUniversal
CONTENT				
Original Content	●	●	●	●
Licensed Content		●	●	●
Live Content				●
PRICE				
Free of Charge	N/A			●
Paid	N/A	●	●	●
ADVERTISING				
Small Ads			●	●
No Ads	●	●	●	●
POTENTIAL REACH				
Audience Objective	● iOS devices owners	● Kids & Family	● TV and Movies enthusiasts	● Comcast & Sky Pay TV subs
Paid Subscribers	● 50 millions for 2025, according to Morgan Stanley	● 30 millions for 2024, according to Wells Fargo	● Close to 8 millions in 5 years, assuming an adoption base similar to HBO Now	● Close to 4 millions in 5 years, assuming an adoption base similar to CBC All Access

• Those who operate several distribution "windows"
• Those that are able to produce originals
• Those with financial backs to "endure the race"
• Those who can keep prices as low as possible
• Those that have exclusive premiers



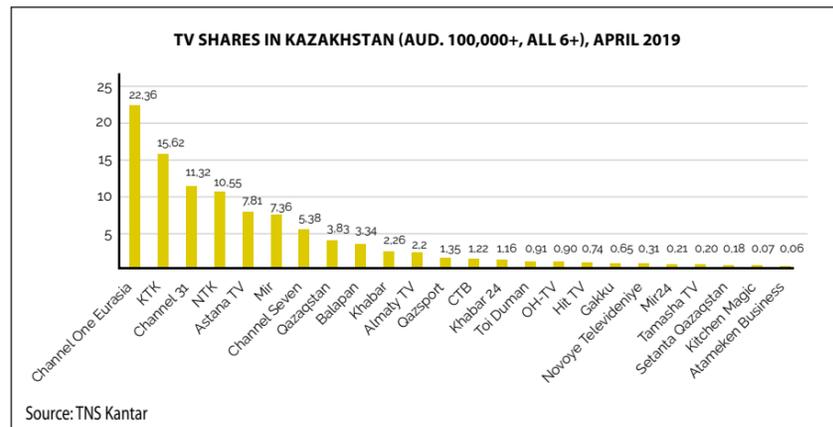
CIS: TV is stronger than ever



Television markets in Central Asia countries such as Kazakhstan, Kyrgyzstan, and Uzbekistan are very different, especially in terms of volume, number of broadcasters, TV-content production facilities and trends of development. For instance, TV markets in Kyrgyzstan and Uzbekistan, are just starting to evolve and integrate into the global TV tendencies. On the other hand, Kazakh TV industry is rather powerful as for the region and already meets all the requirements of the modern TV world and represents all the main trends of the global TV market. In this article we take a short glance at similarities and differences of the three CIS territories from the point of view of the local television markets.

First of all, it's necessary to mention that the population of all three countries has been constantly growing at least for the last 10 years. Uzbekistan is the biggest territory in terms of population and the number of TV households. In the beginning of 2019 population of the country is estimated to be more than 33.2 million. At the same time the population of Kazakhstan is 18.6 million, Kyrgyzstan – 6.3 million.

In all three countries state-owned television plays big role in TV business. Kazakhstan has the largest number of local TV channels – more than 100 with 41 satellite FTA channels and 30 DTT channels (DTT transition is



not complete yet). More than 300 foreign TV channels were available in the country until mid 2018. However, 88 of them were blocked because they didn't open local representative office as a new law prescribed.

There are around 60 broadcasters in Uzbekistan and more than 50 in Kyrgyzstan. Interesting fact: currently there are 64 channels in 4 Kyrgyz DTT multiplexes, many of them are foreign. 2 out of 15 channels in the free of charge social multiplex are Russian. Strong presence of Russian broadcasters is a common feature for all three countries. Russian channels (or local versions of Russian channels, for example

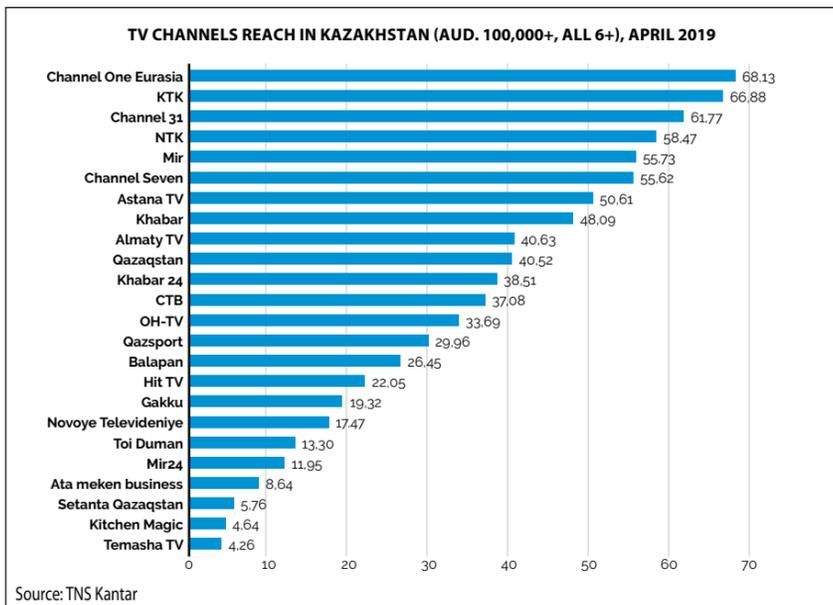
'Channel One Eurasia' in Kazakhstan, or 'TNT Kyrgyzstan') are always among the most popular ones.

The ad market volume in Kazakhstan reached USD 76 million in 2018, in Uzbekistan – 30-35 million, in Kyrgyzstan – 8 million. The most popular TV platform in the three countries is digital terrestrial TV. The second most spread is satellite. Cable is popular only in the capitals and some of the biggest cities, however its share in all of the countries does not exceed 10%. Analogue switch off process is already completed in Kyrgyzstan and Uzbekistan.

Feature movies production is rather well developed in Kazakhstan mostly due to the capacity of Kazakhfilm company owned by the government. In terms of TV content production, this country is also evolving rapidly, especially in scripted content production (more than 40 series produced in 2018). Uzbekistan and Kyrgyzstan barely produce comedies and dramas, concentrating only at non-scripted shows production.

By now Kazakhstan is the only territory in the region where peplemeter audience measurements are being held (Kantar TNS is responsible for the procedure). Though this year the situation will change. Nielsen Admosphere – INTEGRAS won a tender for TV measurements in Kyrgyzstan. First results are expected in November 2019. In 2017 Kantar TNS won similar tender in Uzbekistan, the first results are also expected this autumn.

The article is prepared by Ukrainian media consultancy MRM. If any requests on the CIS region content industry – please contact info@mrm.ua.



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Genre Drama TRT 40 eps (approx.) x 45 minutes



A look into the OTT landscape in CEE

The SVOD market is set for significant growth in Eastern Europe, both thanks to the expansion of major services like Netflix, and local services associated to PayTV services.

According to Digital TV Research, the Eastern Europe OTT market will have 26.19 million SVOD subscriptions by 2024 all through the 22 countries of the region, up from the 10.02 million recorded at the end of 2018. Russia is projected to supply 8.77 million to the 2024 total, with Poland bringing in another 6.32 million. Together, they will account 58% of the region's total, however, it will take until 2023 for Russia to generate greater SVOD revenues than Poland as its subscribers pay lower fees, the report says.

But according to the report, almost 45% of the subscribers by 2024 will be from Netflix (30%), Disney+ (11%) and Apple+ (4%), leaving the game open to other services, especially in countries like Russia, where the local regulator introduced a 20% foreign ownership equity limit on OTT platforms, giving a bust to services like ivi, which recently announced the investment of 1 billion rubles (about Euros 13 million) on original content.

Digital TV Research's report also noted that Poland will remain Netflix's top country, with nearly two million subs, a quarter of its regional total, by 2024. Poland, Romania and Russia are set to account for half its subscriber base by 2024, while Turkey is expected to add other 1.5 million subscribers. But growth in the number of users of linear OTT video services will be even more-significantly polarized, with Russia and Turkey accounting for 79% of the increase in users between them.

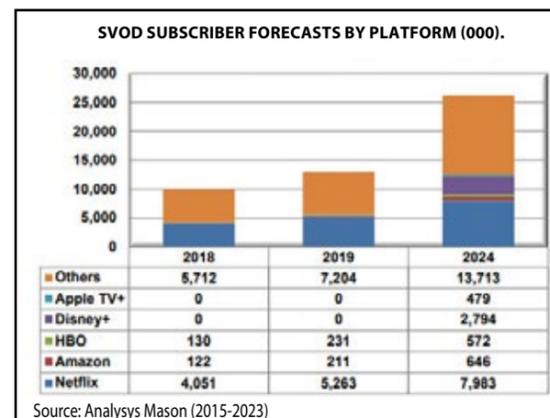
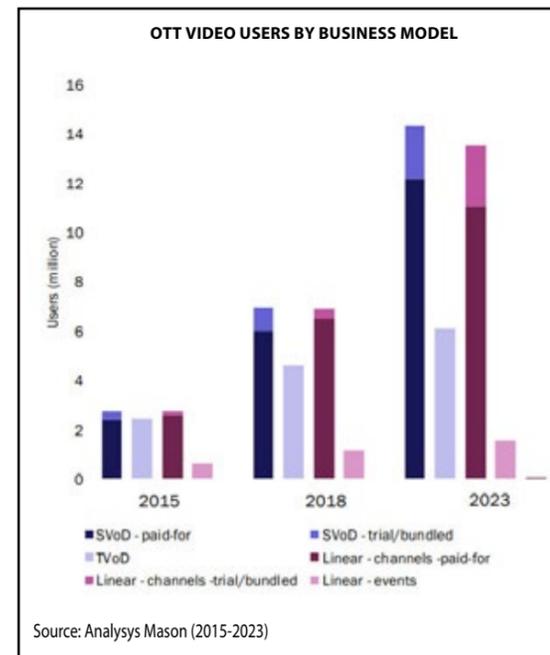
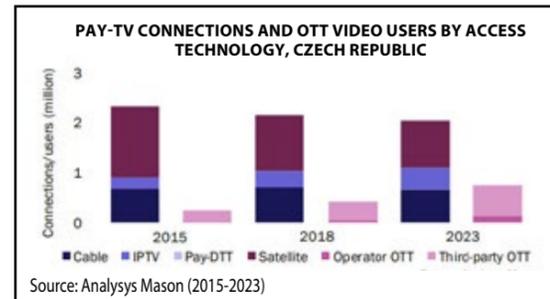
In other countries like Bulgaria, for example, Netflix subscribers were estimated on 108,000 by end-2018, rising to 229,000 by 2024, with a online TV and video revenues that forecast to climb from USD 19 million in 2018 to USD 72 million by 2024.

Unlike other territories, where the growth in take-up of linear OTT video services depend just on the strategies of each company, in CEE it will primarily be driven by PayTV providers diversifying the way that they deliver content away from traditional access technologies, rather than by third-party providers, but third-party providers do also offer such services, often with some sort of association with operators, as is the case with HBO or TVN in Poland or Bulsatcom, which launched in Bulgaria a limited-reach IPTV service, Fusion TV, in March 2015, followed by the OTT platform, Voyo.

Other good example Czech Republic, which bets on PayTV as core to develop multi-screen strategies. Skylink's parent company, M7, is moving towards a hybrid OTT/ DTH delivery across its European footprint, while both O2 and T-Mobile are promoting OTT video services alongside their IPTV services, but we anticipate only a limited impact on the market.

And new players from neighbor territories like France are betting strong in the game as well, with Canal+ acquiring Luxembourg-based M7 on an operation of about Euros 1 billion. This gives the French Group operation independent pay-TV platforms across the Benelux and Central Europe, including Belgium (TV Vlaanderen and TéléSat), the Netherlands (CanalDigitaal and Online.nl), Austria (HD Austria), Skylink in the Czech Republic and Slovakia, Hungary and Romania, and M7 Germany in Germany. Between them the operations have 3 million subscribers to hybrid satellite / OTT Pay TV packages with 800,000 subscribing to an basic access package. At the end of the transaction, the Canal+ Group will hold almost 20 million subscribers worldwide, including 12 million in Europe.

For this reason, won't be strange to see the growth of AVOD services or OTT services that are bundled with operator services increase over the next five years. But the expansion of the free OTT services in the region have to face some challenges: by one side, the CEE population that is declining, with young people -core focus of this services- migrating to other territories. And by the other, the big amount of illegal services, which reduces the market opportunities for small legal services.



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VENGEANCE, LOVE AND TEARS...



Kanal D: in great shape in CEE



Ekin Koyuncu, sales executive, CEE, Kanal D International

'Kanal D International's penetration in CEE has been and still is in great shape, we are constantly working on expanding our reach and maintaining our long-standing relationships with leading TV stations, Pay TV platforms and telcos'.

Ekin Koyuncu, sales executive for CEE, describes the company moment in a key region for the Turkish drama series. 'Our series have been on air for more than 10 years here. Buyers have a high level of awareness and excitement towards Turkish dramas; production quality is always something that we are proud of and when it is combined with our unique but relatable storytelling, the buying decision comes very rapid'.

She adds: 'We are working closely almost all CEE territories and lately we managed to increase our penetration also in Poland and Czech Republic, with our all-times classical titles'.

Kanal D has launched its channel **Kanal D Drama** in co-operation with **Thema** for Latin America. **Koyuncu**: 'It was and is the first Turkish drama channel established ever. It reaches to Pay TV subscribers in Bolivia, Chile, Ecuador, Panama, Peru and Uruguay. With it, Turkish drama phenomena has gained a new momentum'.

'Our main goal is to widen the regions for the network. Therefore, we plan to have **Kanal D Drama** in Europe, Africa and Asia in a short term, especially in Europe where we plan to launch in a very short period', she completes.

In terms of contents, Kanal D is pushing *Ruthless City*, which had proudly announced at MIPTV and started very strongly among CEE territories. **Koyuncu** concludes: 'Our recent titles *Price of Passion* and *Wounded Love* are also getting tremendous amount of interest in the region. In addition to these romantic titles; *Double Trouble* and our family drama *Twins* will also be presented in NATPE Budapest this year'.



Ruthless City, big launch for CEE

Innovate with Mondo TV

Mondo TV is a leading Italian company operating across a number of sectors in the entertainment business. On the content side, it is one of the largest Europe animation producers for TV and cinema, with a library of more than 2,000 episodes of television series along with more than 75 animated movies.



Alessandro Venturi, international sales manager

In Budapest the company is promoting its brand new catalogue, headed by the Latin original property *Heidi* (60x'45 or 120x'24 each) in two seasons: *Heidi, Bienvenida a Casa* and *Heidi, Bienvenida al Show*. Both have been co-produced by **Maria Bonaria Fois'** **Mondo TV Iberoamerica**, and the legendary Argentinian writer and producer **Marcela Citterio** (*Patito Feo, Chica Vampiro*).

Other new project is *MeteoHeroes* (52x'7) produced with **MOPI Centro Epson Meteo**: Fulmen, Nix, Nubes, Thermo and Ventum are six normal children who discover on day to have super powers, those evoking the atmospheric phenomena and intervene in nature through them. And the international co-production *Invention Story* (104x'11), a 3D CGI Full HD animated series produced with **York Animation** (China) and targeted to kids 5-9 years old.

Another big property from the company is *Sissi The Young Princes* (52x'26), co-produced with **Il Sole di Carta**: it tells the story of a charming princess of Austria, an historical figure that most struck the public imagination. She lives happily in the Possi Castle in Bavaria, she loves her family and the animals. The story is a mix of adventure, love and intrigue, but also mystery and magic.



MeteoHeroes, brand new animated series

IndiaCast: drama, thriller & romance

IndiaCast is India's first multi-platform 'Content Asset Monetization' entity, jointly owned by **Viacom18** & **TV18**. Its flagship Hindi general entertainment brand **Colors** has been amongst the top channels in India and has redefined the viewing trends in the entertainment space in India thus making it the prime-time leader.

The company has always adapted to the market demands and expectations, keeping up the standards and delivering high quality content to the audiences. With over 35,000 hours of content, available and adapted in over 135 countries in more than 35 languages, **IndiaCast** has been growing its syndication business at a very fast pace and it is one of the strongest growth stories that it has.

For CEE, it highlights a strong drama slate headed by *Beyond Boundaries* (186x'30), which shows an impossible love story of two strangers brought together by destiny: it is the story of how a couple found love. At *Unfaithful* (260x'30) two best friends, one broken marriage, and a dangerously addictive affair. Follow the dramatic twists and turns in the lives of Mauli, her husband Kunal, and her best friend Nandini.

To Die for Love (520x'30) is a romantic thriller about a woman that had the perfect life, the perfect man but little did she know that she was walking into the perfect trap. What happens when the man you love turns out to be a genius manipulator? *The New Age Man* (253x'30) is the story of 'Roop', born after three girls in a patriarchal family. Despite being raised by a strict male chauvinist father, Roop grows up having a flair and inclination towards the stereotypical feminine skills disappointing his father.

Last but not least, *The Odd Couple* (260x'30) that shows a quintessential local gangster, who aspires to be a tough cop. Raghu and Dhanak are worlds apart, but little do they know that destiny has other plans.



The New Age Man



Beyond Boundaries

YOUR AUDIENCE OUR STORIES



Viacom: premium stories



Elena Antonini, director, sales and coproductions, Europe and Africa

After the launch of **Viacom International Studios** one year ago, the company has managed to reinvent itself, evolving as one of the biggest Studios in Latin America.

Since 2018, the studio has produced more than 900 hours of content, adapted more than 20 formats and sell 4500 hours of programming, and now 'continues to align themselves with solid alliances that complement them and support their ambition

to be the best story creators in the industry', according to **Pierluigi Gazzolo**, President, Viacom International Media Networks Americas.

Among the top shows in progress are *El asesino del olvido*, drama thriller and adaptation of the a Turkish series originally produced by **Ay Yapim**, and *Victoria Small*, dramedy developed with **The Mediapro Studios** that follows the story of four women that share the desire of being mothers and will find themselves connected through the raising of the little Victoria.

O Pacto is dark comedy series developed and created by **Porta Dos Fundos**, the largest YouTube comedy channel in Brazil, and *La casa de las sombras* is a horror series created by Jeffrey Reddick (*Final Destination*).

Planeta Marcia is the new teen series for **Nickelodeon**, that narrates Marcia's dream of entering Pioneers, the first space academy, but before becoming an astronaut, she will have to reveal a secret that will change humanity, and *El celular fantástico* is a comedy that follows two friends that keep connected via a cell phone after the death of one of them.

Lastly are the coproductions with Spain *Atrapa a un Ladrón*, series based on Hitchcock classic, *To Catch a Thief*, and *Mala Gente*, from the producers of *La Casa de Papel* (*Money Heist*), **Atresmedia Studios**, about four friends of different nationalities, yoga buddies, who, after accidentally killing a stalker, decide to start a criminal career.



Sahiyet (Ay Yapim, Turkey) will be adapted under the name of *El Asesino del Olvido*

HBO Latin America: 'glocal' content

HBO Latin America has become synonym of premium and original content in the region since the first local production developed in Argentina, *Epitafios*, 15 years ago. Now, the company owns a catalogue of +25 drama series of different genres that **Xavier Aristimuño** as VP, Licensing, is presenting for global players, both linear and digital.



Xavier Aristimuño, VP Licensing, HBO Latin America

'At the beginning of 2000 there was no independent Latin American content outside telenovelas. We wanted to go another way, that is why the first production agreements were directly with the talent, filmmakers and directors', had pointed out **Roberto Ríos**, VP, Original Production, and today, to the return of iconic series such as *Psi* or *O Hiptnotizador*, the company launches new titles such as *Todxs*, a series of eight chapters held in Brazil that will talk about inclusion, sexual diversity, LGBTQIA themes, racism and harassment; this, through the story of Rafa, a young man of 18 years, pansexual and non-binary gender, who decides to leave his life and his family to move to the city of Sao Paulo.

Also from Brazil is *Pico de neblina*. The 10-episode series, scheduled for release in August, takes place in a fictitious Sao Paulo where marijuana was legalized, while in Argentina it stands *Entre hombres*, miniseries based coproduced with **PolKa** (*Epitafios*) and based on the homonymous novel from Germán Maggiori, and the second season of *El Jardín de Bronce*.

But HBO Latin America is expanding even more: the company is working on its first original series in Colombia: *Mil colmillos*, which begins when an elite commando is deployed in the jungle to kill the mysterious leader of a sect that keeps a secret of more than 500 years.



Mil Colmillos, the first original drama produced in Colombia by HBO Latin America

Universal Cinergia: new 'premium studios'

Universal Cinergia doesn't stop: the company opened three dubbing studios in Mexico City, aimed at Premium content. These are added to the 17 that the company already has in Cuernavaca, in the outskirts of the same city, so there will be 20 in total.

It has TPN certification - maximum in the field - and the operation will be in charge of Cristina Littin, of vast experience in services for audiovisual companies.

Littin is from Chile, but she lived since she was 7 years old in Mexico. She says: 'I know the international film and TV market very well, and in particular the Mexican market, I am familiar with Turkish and Latin American content. In Chile, with my own company, we dubbed dozens of film films on a regular basis. Now in Mexico City general and artistic director, with full interaction from now with the dome of Universal Cinergia'.

Which are the Premium series? 'For example *The crown*, original production of **Netflix**, or the material of **Hulu** that we

take care of, or the telenovelas of **MGE** (**Esperanza Garay**, Chile) that are of high range in production deployment. The three studios open since July 1 and there the services begin.'

With the 20 production centers in Mexico City, Universal Cinergia enriches its network that also has locations in France, Brazil, Miami and Spain. **Liliam Hernández**, CEO: 'We seek to expand to where our clients ask

us, analyzing in particular the production neuralgic centers. We saw an extra need in Mexico that is becoming a pole of achievements such as Spain, for example. We want to be close and very at hand, there is a strong movement of projects from now on'.



Universal Cinergia at LA Screenings: Elisa Aquino, Gema López and Liliam Hernández with Cristina Littin



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Latin America: Vanguard in multiplatform Studios

From TV channels that generated content for their own screens to Studios for own screen third parties, Latin America has begun its reconfiguration creating new business models for each partner.

For almost 60 years, Latin America has gained recognition as one of the largest generators and exporters of dramatic content worldwide, with markets such as Mexico, Brazil, Cuba, Venezuela and Argentina as spearhead.

But nowadays, with a bigger global competition, the region adapted its drama productions to the local and international markets needs, becoming 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.

The new scenario

With the search to attend to the new consumption trends generated by digital platforms, many local television stations left a gap in their grids that was originally dedicated to their more traditional view-

ers, with the soap opera as the main genre, and that was quickly filled by titles from other countries such as Turkey, Korea and India, 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.

But Latin Drama does not only compete with foreign titles, 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.

And this situation has exposed a common issue in the region: while many of the big Latin distributors are areas within the local channels structures, focused on

selling what they broadcast on their own screens, global audiences are diversifying. It is fundamental to find a balance between generating a product that helps maintain advertising revenues, and at the same time another that supports what the global industry demands.

For this reason, transforming into “content factories” and start to develop stories for third parties has become key. Good examples are Viacom Studios, Televisa Studios (Mexico), Globo Studios (Brazil) or Ecuavisa Studios (Ecuador), among many, divisions focused on responding to the relocation of content, in some cases, betting on new formats and genres like Turner, which develops films for theatrical, or Caracol (Colombia), producing original web series.

But these “factories” respond to two specific “crises”: First, to a “content crisis”, where an audience domesticated by the SVOD services is gaining more and more relevance, with an explosion of genres and episodes that opens the door to stories more associated with the Pay TV model (13 episodes with multiple seasons) that the usual Free TV program, and is putting aside more traditional genres, like Telenovelas (120 eps) or even, the Super Series (60-80 eps.).

And secondly, a “distribution crisis”, led by big majors launching their own OTT



VIS bet strong on international coproductions: *Atrapar un Ladrón*, based on Hitchcock's classic and produced with The Mediapro Studio (Spain) and Paramount Channel

services, and the need of more original content. The solution? some distributors are starting to convert themselves into new business generators, such as Roxana and Rosalind Rotundo's VIP2000, which went from being a distributor to a content generator and strategic production player, working on 10 original developments; Tondero (Peru), which is offering and promoting production services with America TV in Peru for international players, or Comarex (Mexico), that launched a new division focused on the development of original content and coproduction.

According to Marcelo Tamburri, VP Fiction Development at Turner, in the new scenario, ‘the acquisition of film rights more complex for their broadcast on linear TV’. And, even when Disney/Fox recently announced that the company will ‘sell to everyone that wants to buy their content’, the truth is that Disney+ will remain as first window, and OTT and Premium Pay TV channels will be out of the equation.

‘We have changed the focus: from movies and series, to more entertainment formats and in-house production. If the majors stop selling us their strongest product



Shippeados is a comedy series for digital audiences, developed by Globo for Globoplay

LATIN ADVANTAGES FOR GLOBAL MARKET

- A significant storytelling tradition
- A well-known trademark built in the market within the last 60 years
- A great balance between price and quality
- Coproduction, codevelopment, cocreation
- Any business model
- A well organized production and business models
- A great capacity of evolving to new subgenres

when launching their OTTs, we must build our own original content’, adds Pedro Lascurain, director acquisitions, TV Azteca (Mexico) in consequence.

Strong investment

Dedicating big resources to produce high-end dramas within Latin America, seems to be part of the solution to both issues. Viacom International Studios, Disney/Fox, Turner and HBO are the top ones.

Through its new division, Viacom created in one year +900 hours of original content, licensed +4500 hours completed in 60 countries, +20 formats adapted in the world and there are +35 projects under development. ‘We lead the ‘Studios’ model, changing the business schemes by project. There are already 7 production offices in America and Viacom is replicating the model in the UK and in Madrid for Europe’, says Darío Turovelzky, SVP global content, and adds Pierluigi Gazzolo, president Viacom Americas: ‘It’s time to bet on the content, focusing on co-productions and co-development, targeting all types of outlets, whether or not our screens are’.

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

hits such as *Violetta* and *Soy Luna* for Disney Channel, plus *011CE* for Disney XD, but also creation and co-production of dramas in different regional markets. And now, with the addition of FOX, it has managed to include from historical titles (*Sitiados*, Chile) to real life stories (*Santa Evita*, Argentina) and thrillers (*Santa María*, Chile) and a big slate of local originals.

While Turner has made strong efforts 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 time dramas simultaneously; secondly, it keeps producing originals exclusively for its platforms and channels, 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.

Last but not least, HBO Latin America has been producing dramas 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), *El Jardín de Bronce* (Argentina).

THE EVOLUTION OF THE TRADITIONAL NARRATIVES

50s' - RadioNovela - Melodramatic story narrated and dialogued by radio, which was issued in successive chapters

60s' - Telenovela - With between 120-180 episodes. Telenovelas used to dominate the local prime time, and achieve great success in the international market through stories with global topics like love and passion.

2010 - Narco Series - Focused on local issues like drug dealers and similar structure than Super Series, the Narco Series gained recognition with titles like *Pablo Escobar* (Caracol) or *El Señor de los Cielos* (Telemundo) thanks to real topics, shown from a new perspective.

2013 - Super Serie - Composed by between 60-80 episodes, the Super Series added action and more dynamics situation to the narrative arc

2015 - Biopics - Real stories about famous characters with an extraordinary lives are on top. Disney started the wave with *Hasta Que te Conoci*, and then other followed with stories like *Sandro* (Telefilm/The Magic Eye) or *Sabina* (Endemol Shine Boomdog)

Nowadays - The “new” drama - Less episodes (13-26 episodes) with several seasons, with more supernatural themes, drama, action and global appeal

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Latin America: Vanguard in multiplatform Studios

More alliances

Alliances between FTA channels with Pay TV and digital players have become a key part of this new ecosystem, with co-production models between windows that do not have rights. Not only to increase the production values of a content or entering new markets.

While **The Mediapro Studios** signed deal with companies like **HBO, Amazon, Turner, Vice, Hulu, TF1, Televisa, Univisión, Movistar, YLE, Viacom, A3Media, Mediaset España** or **Globo Internacional, Sony** is co-developing projects with **Azteca's Dopamine** (Mexico), **RCN** (Colombia) and **Globo** (Brazil), and **Mega** (Chile) has recently announced *20 minutos*, the Latin version of **Ay Yapim's** drama (Turkey), which will coproduced in Colombia with **FoxTelecolombia**. **Patricio Hernández**, CEO: 'It is our third project where the priority is not the Free TV in Chile, but the international exploitation. Before they were *12 segundos* (12 seconds), co-production with **Viacom** and **Imagen TV** (Mexico), and the reality show *Resistiré*, which is a hit with **MTV**. In the future, we see ourselves as a multi-screen studio'.

Another good examples are **Televisa**, which has chosen to reinvent itself through **Televisa Studios**, led **Patricio Wills**, with shorter series for its own channels, from 20 episodes to 60/80. But it also adds co-productions, with alliances such as those reached with **Mediapro** for the realization of 3 series, two of which are for the Mexican channel itself but one for third parties.



Mega (Chile) will adapt Ay Yapim's *20 Minutes* in Chile opening the game to new international business opportunities



Narcos México (Gaumont) is one of the top Netflix Originals in the region



Monzon is the latest biopic series produced by Disney in Latin America



Mixing suspense and thriller, *El Jardin de Bronce* is an HBO Latin America original series, produced in association with Polka

And **Globo**, which announced a coproduction deal with **Telemundo** and **Amazon** later this year. 'The transformation that we have undergone in recent years has qualified us a lot to produce beyond our channel in Brazil and has positioned us as a powerful Studio, ready to develop contents of the most different formats and capable of traveling across several platforms', explains **Monica Albuquerque**, Director Artistic Development.

According to **Carlos Bardasano**, President, **W Studios** (US Hispanic), 'the biggest changes are not on the screen, they are behind the camera'. 'Co-productions, co-development, twists of business models. The countries fall short in the analysis of the markets, now with the new platforms the territory is global'.

To accompany this trend in Latin America, new markets are emerging as well, such as **Conecta Fiction** (Spain) or **Series Mania** (France), and traditional like **NATPE** or the **MIPs** are adding new sections focused on co-productions, like the coproduction summit at **MIP Cancun** or the Latin panel, organized by **PRENSARIO** and focused on the new opportunities for international players.

Evolution of storytelling

Another respond to the strong local and international competition in the drama field, can be identified in new subgenres coming from and to Latin America: In Brazil appeared by 2010 the epic/biblical productions from **Record TV**, with huge successes such as *La Reina Esther*, *José de*



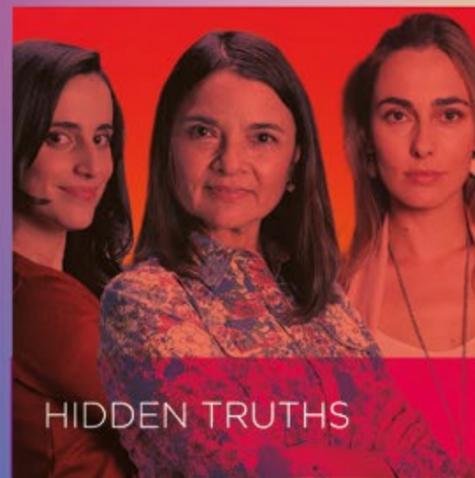
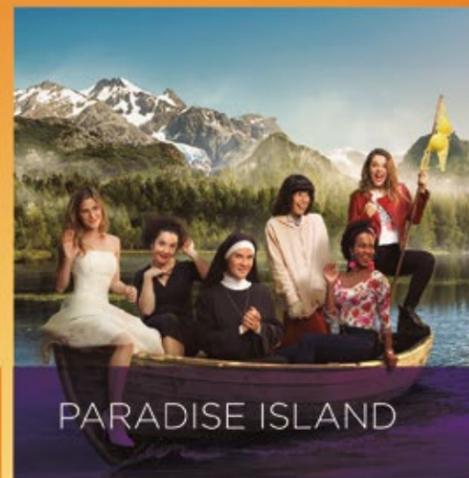
Biblical/epic series like *Jesus* (Record TV) have raised the rod in the Latin production values, with global success

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, but also with strong presence in some markets in Europe and Asia. While thrillers y and suspense have gained territory vs. comedies and dramas, and biopics and character driven series are getting stronger. But above all, stories are getting "glocal".

In addition, there is growth in the series based on scripted formats, of which they represented 12.5% of the total in Latin America, vs. a global average that barely exceeds 5%, while as far as the subject is concerned, 14% of that new content is based on events and real characters, according to **The Wit**. But despite these changes of formats, the only thing that does not change is that the content will remain the King, in the form that is presented, and it is under this premise that the creator of the content and the owner of the IP gain more and more relevance and they position in the center of the scene. It is for this reason that Studios, producers and distributors begin to give more value to intellectual property, and channels compete not only for producing for themselves but also for third parties. The challenge is to understand this new market. 'We are industry migrants, and the foundation is the prior knowledge of the market we want to enter', explains **Billy Rovzar** of **Lemon Studios** (Chile).

And this increase is nothing other than the reflection of a global trend: the more platforms, the more content is produced. To a more demanding audience, they opt for higher quality products. But to cover both quantitative and qualitative needs, coproduction is stronger than ever, especially in a region with as many economic swings as Latin America. Barriers have fallen, and opportunities are the order of the day, it just need to take the lead.

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MADD, a business generator



Ateş İnce, general manager

Since its launch in MIPCOM 2018, **MADD Entertainment** has not stopped. Led by **Ateş İnce**, general manager, the company is not only a leading Turkish drama series distributor but also an strategic business generator. The executive has recently attended LA Screenings where it has announced two key co-production deals about **Ay Yapım** titles: with **Viacom International Studios** is adapting *Persona* (Ay Yapım) as *El Asesino del Silencio* and with **Mega** (Chile) is adapting *20 Minutes*.

Now, the company focuses its efforts on CEE, another key region for the Turkish drama. 'New thrilling romantic drama is *Kuzgun* has been licensed to **Imedi TV** (Georgia). Contextualized in the '80, two cops nab a drug lord, who offers them an outrageous bribe to get him off. One says no, the other says yes, and soon it's the honest cop who's kicked off the force in a drug scandal'.

My Little Girl (100x'45) is a family drama of an 8-year-old girl and a man who years later find out that he is the father of her. 'The story is on air at **Antena** (Romania) since the beginning of may and will start beginning of June at **Skai TV** (Greece). *Persona* has meet the Albanian audience on **Tring TV** after *Phi*', he adds.

At *Crash* (100x'45) a man has lost his wife and daughter in a terrorist act. He feels guilty for what happened and he's suffering, so he decides to commit suicide. The title has been acquired by **Kanal D Romania** and **RTL Hungary** that is the first channel who will start broadcast it in the region. **Madd** has done a special partnership with **bTV** and has included a Bulgarian celebrity to the story. 'Those kind of partnerships make the content more appealing for the local markets', remarks **İnce**.

'Overall, we are very happy with its penetration at the CEE countries, NATPE Budapest is the key market in the region and looking forward to have more strategic cooperation in the future', concludes the executive.



My Little Girl

The Kitchen Hungary: the taste of local culture



Alexis Cardenas, VP International Sales

The Kitchen Hungary team, helmed by **Gabor Somogyi** and **Balazs Garami**, along with **Alexis Cardenas**, VP International Sales for the company, arrives to NATPE Budapest International with the expectative to keep growing in the region after the first year of the launch of its studios in the region.

'With over 70 countries expected, and over 200 TV channels in Hungary, NATPE Budapest promises to again be extremely productive', says Cardenas, and adds Somogyi: 'Today's networks and distribution companies are all looking to consolidate their language needs, and we're proud to say that The Kitchen has successfully responded to those needs. From our perspective, the Hungarian market

all3media: multigenre

all3media international (UK) arrives once again to NATPE Budapest with a diverse slate, mixing high-end dramas, innovative formats and new non-scripted titles.

Among the top scripted series heading the market is the drama led by female characters *Back To Life*, from **Two Brothers Pictures**, and that tells the story of Miri, who has just emerged from a decade in prison, and will have to face the harsh reality of a people that will not allow her to move forward with ease. While *Dark Money* is a powerful drama that traces the impact on the family of a young actor after he suffered abuses on a movie set and accept a substantial benefit for his silence.

From the non-scripted side, the new offer includes **North One's** *SKI A&E*, a documentary series that follows the dedicated team of emergency rescuers and doctors who help save lives, limbs and vacations in Val Thorens, in the heart of the French Alps.

Whil in formats, one of the main genres from the independent distributor, highlights titles like *Race Across The World* (**Studio Lambert**), in which five couples must start a race from point A to point B, without losing heart. With limited funds and no phones, it is the last expedition of globetrotters. From **Glitterbox** is *Catch Me Out*, which shows ordinary people who face the challenge of their lives to convince an audience that they are professional artists, while *Flirty Dancing* was described by The Telegraph as 'an irresistible, grin-inducing illustration of the joys of dance', and sees two disillusioned daters taught two halves of the same bespoke dance.



Maartje Horchner, EVP Content



Race Across The World format from Studio Lambert



Back To Life, scripted series



has never before been so involved in the international language needs of our clients. Programming is now being dubbed to and from Hungarian, in just about every major language'.

With "Kitchen" studios now in Hungary, Spain, Russia, Germany, Moldova, Italy, France, Turkey, Mexico, Brazil and the US, and an international sales office in Madrid, the company continues to expand to meet the global localization needs of the industry.

The company arrives once again with different demos that according to **Deeny Kaplan**, EVP, 'have proven to be a more effective sales tool'. 'Being able to see their content in the target market languages is a great advantage for all', says the executive and also highlights the expansion of the company into new territories, always taking the main characteristics and cultures of each market.

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The Mediapro Studio: catapulting production capacity



Jaime Roures and Tatxo Benet, co-founders

Within the trend of broadcasters and producers to become 'studios', there is a case that stands out for the large scale: **The Mediapro Studio**, the new brand of the **Mediapro Group** of Spain that launched its new format last April. Today the new study has 58 offices in the world, of which 10 produce content. This year it has 34 series in production, with an investment of 200 million euros.

Jaime Roures and **Tatxo Benet**, founders: 'The new role of 'studios' implies many changes: producing multimedia, catapulting production capacity, operational flexibility to adapt to any project. The Mediapro Studio is a group of companies all with brands, strong, such as 100Balas that deals with non scripted, **GloboMedia** that focuses on fiction, Big Bang that develops both categories. **Imagina** is still in charge of international sales, and **Imagina América** is focused on the American and Latin American domestic markets. **Daniel Burman** has at the same time his production company, and is head of content of **The Mediapro Studio** for US'.

'We carry out productions with **HBO, Viacom, Netflix, Amazon, Fox, Turner, YLE, Sony, Hulu, TF1, Televisa, Univision, Movistar, TVE, A3Media, Mediaset Spain, Globo**. We are with more than 200 projects in development, and the production of 5000 hours with original formats. All this we hope is catapulted from here on, with the format of 'Study'. Much good is to come'.



Juan for President, new comedy series

Artesia Films: 'Risk takers'

Based in Guadalajara, the Mexican production company **Artesia Films**, led by **Gabriel Soriano**, is gaining more and more position within the industry as a quality option, both in the development of series and films.

'We see a trend in the industry by large companies to play it safe, we allow ourselves to take risks to bring different products', explains Gabriel Soriano and notes that he also sees a saturation of genres such as biopics and narco novels. 'We seek to always be one step ahead with content that generates an emotional connection with our audience, especially the large communities of Mexico in the USA', he adds.

Among the news from the company that had a good presence in LA Screenings last May, it stands the launch of the film

Penelope, full of action and that follows a little 11 y.o girl that, after being forced to be separated from her mother once she fell prey due to drug trafficking, must rescue her father from the clutches of those who are behind his fortune.

Mediaset/MGE: passion and justice

Mediaset Distribution (Italy) and **MGE** (Chile) head to NATPE Budapest International with a rich line up of dramas headed by *Kidnapped by Justice* (6x50'), based on a real story and set in 1995, where a 6 year old girl is taken from her family, following a false accusation of abuse against her father. Legal complications will keep the girl away from her family for 10 long years and then justice if finally made. The series broadcasted by Canale 5 in March, recorded more than 4 million viewers in prime time.

The Silence of Water (8x50') is a thriller series set in a quiet community by the sea shocked by the brutal murder of a 16 years girl. Investigation led by the local police inspector and by a homicide cop from another city reveals inner secrets and hidden connections among the people of the village. While *Casa de Muñecos - It's never too late to be happy*, (100x45') is an intense Chilean female series about 4 women and their mother who leaves her husband after 50 years of marriage and starts a new life.

Other highlights that **Manuela Caputi**, Head of Sales, **Mediaset Distribution**, and **Esperanza Garay**, CEO, **MGE** are presenting for the CEE region are *Paradise Island* (132x45'), about a woman whose life is turned down as she seems involved in a fraud, and the unscripted format *Volveria con tu ex?* (Would you take your ex back?), a reality series that sees 12 former couples getting back together in the same house and going through several challenges to test themselves and maybe finding a second life chance.



Manuela Caputi, Head of Sales, Mediaset Distribution
Esperanza Garay, CEO, MGE



Kidnapped by Justice, drama based on real events



Gabriel Soriano

We are also beginning with the preparations for *El Independiente*, a comedy that we will start in November and that follows three recently graduated friends who intend to take one of them to a political candidacy without knowing anything about it, and *Opera Prima*, about a group of young people who want to make their first feature film', Soriano says.

Last but not least, the executive highlights *Los dueños de la Noche*, serie co-written with Rodrigo Ordoñez that mixes reality and fiction, focusing on the era in which the emblematic bars of Mexico were centers of organized crime.



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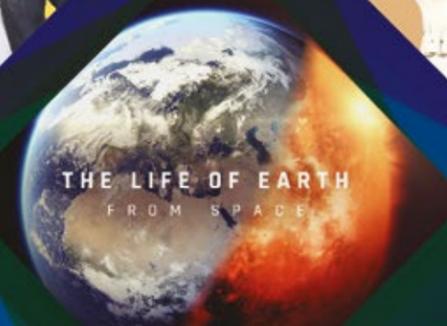


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RCN: Pobres Ricos crosses borders



María Lucía Hernández, director international sales

RCN (Colombia) has proven that Latin stories can travel everywhere with the global success of *Ugly Betty* first, and now once again after the confirmation of the sale of *Pobres Ricos* to the US (CBS), which will be adapted under the name of *Broke*, becoming a milestone for the Colombian company.

María Lucía Hernández, director, international sales: 'We are pleased to announce this new adaptation of a story whose main element is humor, as well as the quality and high production standards that have always characterized RCN's productions throughout the world. *Broke* will be a series that will create wonderful moments for CBS viewers to share with the family'.

'With this alliance, RCN Televisión continues to consolidate its position as one of the main players in the industry, standing out for the quality of its contents and the creativity of its productions, which makes it a powerhouse of the Latin American market. Crossing borders and demonstrating that we are creating local content with a global focus,' concludes the executive.

The original series was produced in 2012 by RCN and *Resonant*, starring Paola Rey and Juan Pablo Raba, which has also been adapted in countries such as Mexico and



Broke, protagonizada por Jaime Camil

Peru. The funny comedy directed by Pepe Sánchez, exposes a social and economic difference between the Rico family and the Siachoque family that will unleash a joking story of love, mixed with solidarity and common union.

Comarex's Blood pact

Comarex (USA) continues to grow not only as one of the leading Latino distributors, but also in the production area, betting heavily on international co-production as a business model.

From the distribution side, it keeps pushing the new titles from *Imagen TV* (Mexico) such as *Colgando en tus Manos*, series which tells the story of a mother who drives a taxi in order to pay for her daughter's expensive treatment. While *La Taxista* is the story about a woman who supports her family through her work, but who will be involved in a love triangle.



Pacto de Sangre, drama

From *Canal 13* (Chile) are *La reina de Franklin*, series that revolves around a prosperous neighborhood entrepreneur, which gives off much happiness and union among those who work with her. However, his business is broken by a real estate threat by his ex-mother-in-law, and

NBCUniversal: out of this world

NBCUniversal highlights in Budapest the new scripted slate headed by *Alien News Desk* (12x30'), an animated topical series set in an extraterrestrial newsroom, where two alien will analyze real human news, politics and entertainment in a irreverent way and with hilarious comments, out of this world. While *The Baker and the Beauty* is an hour-long romantic comedy series that tells the story of the improbable romance between two people from completely different worlds.



Belinda Menendez, President & Chief Revenue Officer, Global Distribution and International, NBCUniversal

Bluff City Law (10x60') follows the brilliant lawyer Sydney Strait used to work at her father Elijah's (Jimmy Smits) celebrated law firm until their tumultuous relationship got in the way, and *The Capture* (8x60') is an acutely timely surveillance thriller set in modern day London.

From *DreamWorks'* slate it stands *Tales of Arcadia: 3Below*, from the seven-time Emmy Award-winning team behind *DreamWorks Trollhunters* comes *3Below* and the remake of the classic *Where's Waldo?* (40x30'), while from *Telemundo* the company recommends *El Final del Paraíso* (90x60'), the seventh season of *El Señor de los Cielos* (70x60'), *Preso No1*, and the return of *La Doña*.

On the unscripted offer, it stands *Best Room Wins* (10x60'), interior design competition series challenge; *Bravo's Play by Play*, which features a panel of actors, comics, tastemakers and athletes dishing on the most buzzworthy moments, news and highlights from everyone's favorite Bravo shows, and *Death at the Mansion: Rebecca Zahau*, series that examines the mysterious death of a 32-year-old woman found hanging naked from the balcony of her wealthy boyfriend's mansion in the peaceful city of Coronado.

Last but not least, the company added last LA Screenings *Sky Vision's material* to its offer, launching 4 new titles: *Temple*, from UK, *Devils* with *Patrick Dempsey*; *Fryed*, coproduced between Australia and UK and *Catherine the Great*, coproduced by Sky and HBO with *Helen Mirren*.



Alien News Desk, new comedy

Pacto de sangre, where the world of four inseparable friends collapses after a bachelor party with unsuspected consequences. After a fateful accident that results in the death of a minor, these friends will be overwhelmed by guilt and fear of losing everything, doing the unthinkable to cover their faults and not drag their families - or women who love - to a world of pain, betrayal and evil. will change the destinies of a group of friends forever.



Marcel Vinay Jr., CEO

Lastly are the series from *Canal Once* (Mexico) *Malinche*, narrated in native languages such as Totonac, Popoluca, Maya and Nahuatl; *Niñas Promedio*, where the sexual practices of three teenage girls are mechanisms to achieve their goals, and *Guardia García*, where the most recognized forensic detective in the country, Alfonso Guardia, has spent thirty years solving the most brutal cases of homicide and catching the worst serial killers.

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INCAA: revitalizing Argentina as production pole for the World

The National Institute of Cinema and Audiovisual Arts (INCAA) of Argentina is putting strong emphasis in placing Argentina in the “Top of Mind” of the global audiovisual industry. It continues supporting the local productions, promoting the national participation at festivals for meetings and networking, as well as creating new funding programs with the same objective as usual: to push the national creations internationally.

Locally, it has successfully launched “Otros medios de exhibición” (“Other Exhibiting Medias”) due to the fact that it has been receiving more participants than expected, creating a new record: 281 projects were presented for the development of TV content and digital platforms in 2019.

Furthermore, another good news for the local industry is that in 1Q of this year, the production of content increased 19% compared to last year’s. According to the *Observatorio de la Industria Audiovisual* (Audiovisual Industry Observatory), which depends of INCAA, revealed that 54 productions were shown in Argentina’s cinema: 24 fiction films (6 less than 2018) and 30 digital documentaries (16 more than 2018). This rise in local production made possible an income of USD 440.000.

The regional industry is trying to expand its public and the opportunities for



Ralph Haiek, president of INCAA, at the Ordinary Federal Congress held in Buenos Aires along with the representatives from the Ministries of Culture of 19 provinces including the City of Buenos Aires

making international co-productions. Moreover, the Union of the Cinema Industry in Argentina (SICA) reported that in the first part of the year 26 films began to be produced; 12 of them are co-productions with other countries as Bolivia, Brazil, Chile, Costa Rica, Spain, Mexico, Switzerland, Togo and Uruguay.

More recently, at the opening of the Ordinary Federal Congress, the collegiate body that co-governs INCAA together with its president and the Advisory Council, held last month in Buenos Aires, the president of the Institute, **Ralph Haiek**, highlighted: ‘We are allocating more than

50% of the budget to Development, as the Cinema Law marks, and we’ve achieved it without leaving aside any of the public policies of the Institute that, on the other hand, have been strengthened, as is the case of the CINE.AR platform, to which we have extended to the whole world and is a very important display screen’.

‘In addition, we continue giving support to National Festivals, we move our cinematographic heritage to a conditioned place where CINAIN will operate and we will carry out an important reform in the Gaumont Cinema. All this is thanks to the fact that we were able to order the accounts transparently’, added **Haiek** at the Borges Room inside the National Library.

After the inauguration, the representatives of the Ministries of Culture from 19 provinces including the City of Buenos Aires, made an evaluation of the *Management Report*, which presented the Balance for the year 2018. In the afternoon, officials analyzed the Federal Development Policy and proceeded to the appointment of the five regional delegates will integrate the Advisory Board.

Internationalization

In February, INCAA arranged an agreement with **Canada Media Fund** (CMF) with the objective of promoting the development of the audiovisual industry between both countries. Besides, the deal aims to spread out Argentinian products in Canada and the other way round. Also, through

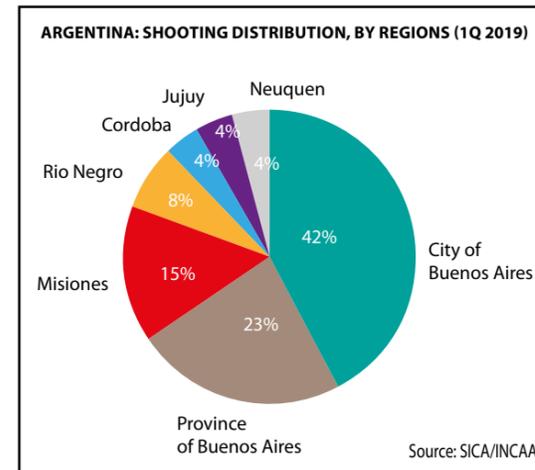
2019 TV AND DIGITAL PLATFORMS CONTEST				
Contest	%	# of Awards	USD	Total of Projects
Federal Contest – Short Series 2019	100%	18	5,400	161
Development - Series Projects 2019	100%	15	22,000	120



At Malaga Film Festival 2019 the INCAA received an recognition for promoting the cinema in Spanish worldwide: Ralph Haiek received the award along with Argentine artists such as Graciela Borges, Oscar Martínez and Héctor Olivera.



Argentina has entered the Euroimages Cultural Support Fund, announced the president of INCAA, Ralph Haiek, during the Cannes Film Festival, surrounded by Viviana Dirolli, INCAA, Benjamin Domenech, executive producer at Rei Cine, Roberto Olla, executive director of Eurimages, Luis Scaletta, producer, and Fernando Juan Lima, VP of INCAA



this deal, they intend to bring Canada’s audiovisual productions to take place in Argentina.

INCAA and CMF are going to establish a program with the purpose of creating television projects and multimedia platforms in order to amalgamate Argentina and Canada cultures. In addition to this,



The series *Secreto bien guardado* was the winner of the TV and Other Medias contest and had an exclusive premier on CINE.AR TV on April 15, and it is also available at CINE.AR PLAY.

Support Fund, and became the first Latin American partner, among 37 countries in Europe plus Canada, of the body that promotes independent film and provides financial support for feature films, animations and documentaries.

Haiek indicated: ‘We are proud of this achievement: the Council of Eurimages



4x4, coproduction with Spain, has been the top Argentine movie in cinemas during the 1Q of 2019, and expresses the good moment of the national production, which grew 19% in the first three months of the year

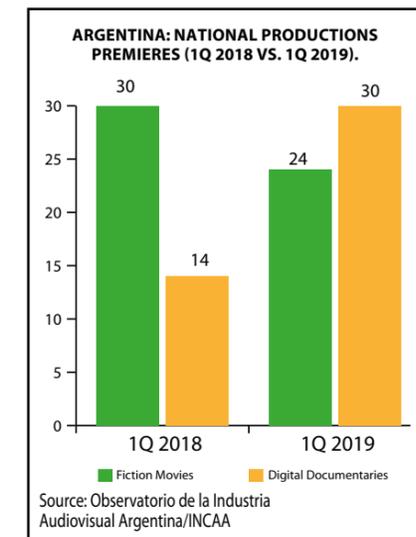


unanimously accepted our cinema, which means a lot because it opens possibilities for co-production and cooperation with all the member countries. It is a great impulse to strengthen our industry and its link and presence throughout the world’.

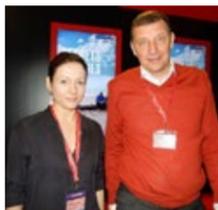
The executive director of Eurimages, **Roberto Olla**, added that he was ‘very excited about the entry of Argentina to Eurimages, because it is a country that has enormous cinematic potential’. With this entry, Argentina has the same attributions as the members with full rights, except for decisions regarding the Fund’s policy.

Created in 1988 with headquarters in Strasbourg, France, *Eurimages* is a fund of €25 million that has developed four financing programs: assistance for co-production, distribution, movie theaters and support for the digitization of funded projects. It is composed of 37 European countries, with Canada and now also Argentina as the only non-European countries that are part of the Fund.

Among other activities, Eurimages has developed the program “Aiming for 50/50 for 2020”, a policy of promotion for gender equality in the productive chain of the audiovisual industry. It is conducted by an Administrative Board composed of a representative of each Member State.



Star Media fights against piracy in Russia



Maria Grechishnikova, VP, Sales and International Projects, and Vlad Ryashin, CEO

Besides of being one of the key players in the Russian and international market, both in production and distribution, **Star Media** has developed now its own unique system for removing links to illegal content.

Back in April 2019, with the help of this system, Star Media was protecting only its own content, being over 6,000 hours of films and series. As of today, a contract has been concluded with PRIOR Group that is also engaged in the

production and distribution of feature films and television series.

The company has been working in the «anti-piracy» direction since 2013. Earlier, before developing its own security system, Star Media used third-party services to protect its premiere productions. However, this did not allow to protect from illegal hosting on the web so-called “archival productions”. After upgrading its anti-piracy system, the company has secured disabling nearly 95% of illegal links to its content.

Under the contracts it proposes, Star Media offers its partners a cleanup of content hosted in social media by «pirates» the cleanup through the **Google DMCA on YouTube**. In addition, the **Association of Television and Cinema Producers** has signed, among other rightholders, a memorandum on the fight against piracy with **Yandex, Mail.ru, and Rambler**. Within its framework, the interaction between the companies presupposes pre-trial removal of the links to illegally hosted content from the list of search results retrieved by the web search engines.

‘Content protection has always been an important issue for us. We had a department in the company that would clean up a small percentage of illegal links, but it was not possible to clean up completely the links to all of the company’s productions. The cost of such cleanup by third party companies would never have paid off. Now, content protection may become another source of revenue’, explains **Maria Gercishnikova**, VP, Sales and International Projects at Star Media.

VB1

Globo: moving together

Globo (Brazil) arrives to NATPE Budapest with the objective to show Globo Studios’s production growth, as well as the significant investment in technology, which makes it possible to produce series such as *Iron Island*, another original Globo production exclusive for Globoplay, which is already in its second season, and will be highlighted on a panel on the 25th June about the new opportunities in Latin America.

‘We count on a great capacity of production and increased the amount of content produced so that we are able to offer original projects to all Globo Group platforms in Brazil – OTT, free-to-air TV and pay TV. Nowadays there are more stories with potential for multiplatform’, describes **Raphael Corrêa Netto**, Globo’s Head of International Business.



Alejandra Moreno, head of marketing; Silvio de Abreu, head of drama and comedy, Carolina Andrade, head of development, and Raphael Correa Netto, in LA Screenings

ORF: the best mix

ORF-Enterprise is the commercial arm of the **Austrian Broadcasting Corporation** (ORF), Austria’s public broadcaster and market leader. The company is active in selling advertising airtime, sponsoring, international content distribution, licensing and merchandising.

For CEE, it highlights a wide variety of documentary of several genres such as *Empire of the Vineyard* (‘52) is a nature documentary where a well-tended vineyard nurtures the quality of a wine over generations. But its micro-world is a battleground, an animal empire fought over in hundreds of tiny dramas every day.

Or *Passion and Power – Queen Victoria’s Secrets* (‘52) looks behind the clichés and court propaganda to reveal who Victoria really was: a strong-willed and passionate woman, an intrepid monarch who fought for Britain’s supremacy.

Also, the documentary series *Beer-tastic!* (4x’52) that follows beer sommelier and author Conrad Seidl on a tasty journey around the globe to discover famous beer styles and experience new flavors. The audience travel along with Seidl to places in Africa, China, Europe, and the US, where some of the most interesting and even obscure beer styles have been invented.

Last but not least, two TV series: *Walking on Sunshine* (10x’45), a new success comedy series is set in the weather department of a TV station where a renowned news anchor finds his new home after experiencing personal highs and lows. It’s all about a mysterious heritage, amorous encounters and the balance of power ... and the classic *Suburbia – Women on the Edge* (30x’48) where five women, whose biggest challenge so far has been surviving their daily hour-long luxury shopping tours burning up their husband’s credit cards, are taken by complete surprise when suddenly one of them is divorced by her husband and thrown out of the house.



Marion Camus-Oberdorfer, Head of Content Sales International



Passion and Power – Queen Victoria’s Secrets

GRB: factual franchises

Melanie Torres, sales consultant at **GRB Studios**, attends NATPE Budapest in order to expand the company’s catalog among CEE players. The distributor is specialized on factual content and it is bringing to the capital city of Hungary a wide and varied programming offer. ‘We are currently closing a deal with Discovery for the renewal of several season of *Untold Stories of the E.R.*, and for the latest season, 13. It is one of the most emblematic production from our line up’.

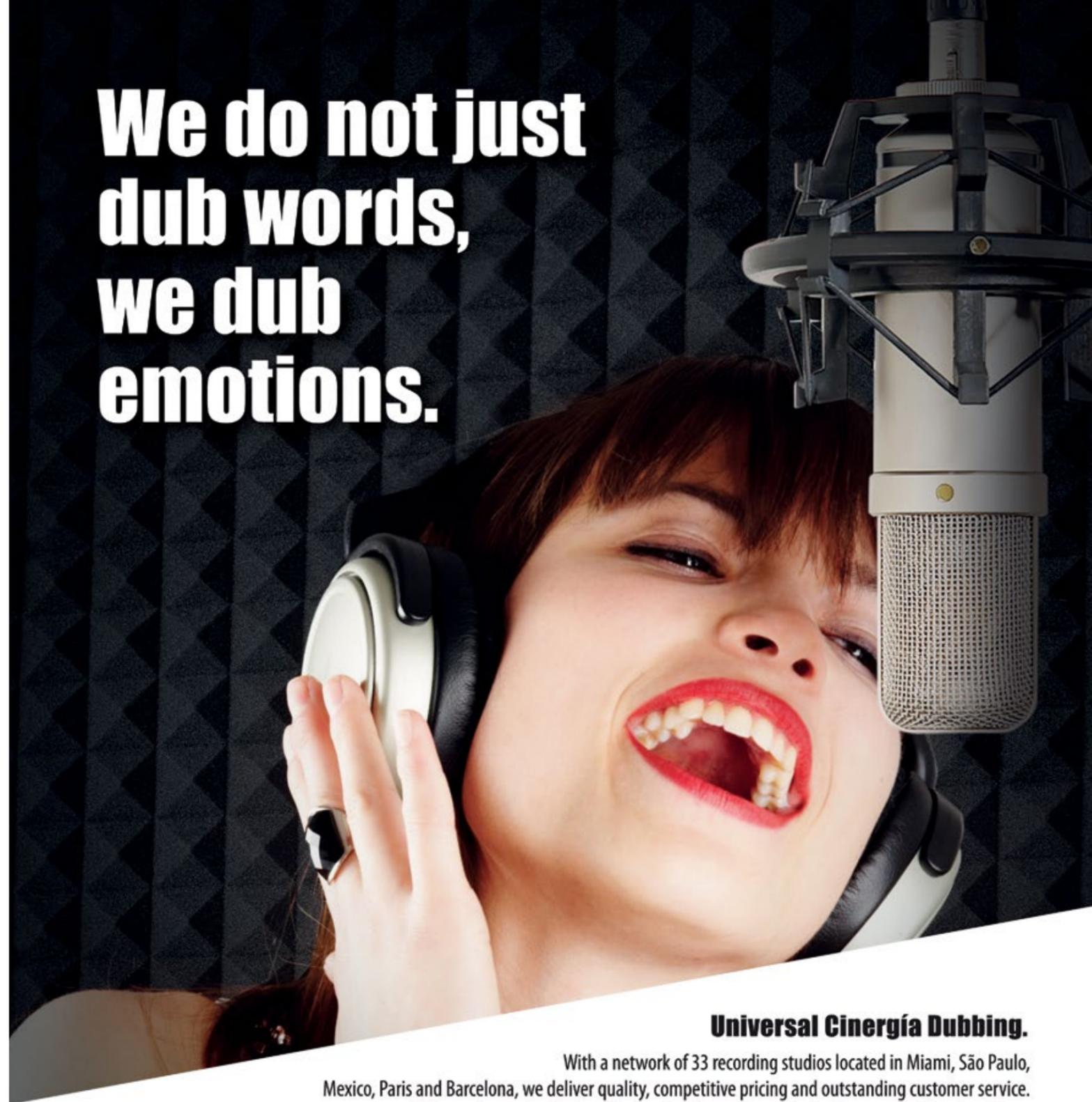
Formats are also a new focus on the company, like *Untold Stories of the E.R.* and *Showdown of the Unbeatable*, a science/engineering competition between the brightest engineers, whose finished tape and format are also available in Latin America. Regarding CEE, Torres concludes: ‘We have done good businesses with agreements closed in Poland, Hungary, Spain and Italy’.



Melanie Torres, sales consultant

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Caracol TV: *The Agency*



Paloma García, international sales executive

Caracol TV (Colombia) has become during last years on a true powerhouse, expanding its influence beyond Colombia through its world-class International Channel and International distribution division, **Caracol Internacional** and thanks to a slate of high-end dramas and super series, but also new original formats like *The Agency*, which arrives to transform the world of modeling, with a competition between men and women

of different sizes, heights, and races, who will strive to become the new top models in the country.

On the scripted side, **Paloma García**, international sales executive, recommends *The Good Bandit* (60x60'), the story of a mafia boss who decides to change his life and get away from the crimes, and sins of the past, to become an honest man. Now, he will have to leave the criminal world, be faithful to his wife, raise his children away from easy money and take his old band of criminals out of crime.

'We begin and get inspired by local stories, which we know very well and generate identity with the audience, but we focus our efforts on developing them with a language that transcends cultural barriers and can travel to all territories', adds **Lisette Osorio**, VP International, and highlights the example of *The Bronx*, sold in 11 countries in Latin America and adapted in Vietnam.

'We work every day to maintain our leadership in audience with the contents on screen, and also to



The Agency, new format

continue being pioneers in innovation in the international market. We are venturing into new business models, positioning our productions on digital platforms and, also, designing content designed to live in the digital environment, such as our web series', she completes.

DICM 2019: renewal

Dubai International Content Market (DICM) announced over 750 buyers, sellers, producers and media professionals for its 2019 edition, scheduled to take place on the 9 and 10 of December at the Jumeriah Beach Hotel, Dubai.

Held at the main destination for deal-making, DICM allows to its international participants to tap into a fast-evolving and growing market and get in touch with key countries like KSA, Kuwait, Bahrain or Egypt. Timing couldn't be better as distributors can showcase and sell their content at a key period, four months ahead of Ramadan, when content consumption doubles in the region.

Some of last year's features will be available again, including "Plug and Work", a cost-effective and fully equipped exhibiting solution providing tools for showcasing your content and meeting with clients; this is a unique concept customizable to each exhibitor. Participants can Access the Matchmaking Platform for pre-arranged meetings with se-

ATV: premium Turkish dramas

ATV Distribution (Turkey) is going through great moment in both, domestic market as the leading TV networks of the Turkish TV market, and internationally as the successful prime time series are gaining recognition in the global scenario.

CEE is a key region for the distributor, as 'it represents an important part of our sales and we value the long-standing relationship with our clients in this region', explains **Muge Akar**, content sales deputy manager.

Hercai and *Lifeline* are the top drama series sold in these territories. Since the first one is a new content recently launched, still the number of countries that have acquired are not many. 'But there is a huge interest and we expect to close many deals after Natpe Budapest', stands **Akar**. *Lifeline* was sold to Kosovo, Bosnia, Serbia, Montenegro, Georgia and many other countries. For Budapest, the company is promoting both series: *Hercai* shows the true romance from Turkish dramas that awaken all the good feelings of the audiences. It achieves this in a strong way with its story that shows being stuck on choosing love or revenge, family or lover, past or present. *Lifeline* will be introduced with its third season in Turkey, focused on to prevent domestic violence against women, building a new life and new hopes with a help of love. When Nefes and Tahir's path crosses, they fall in love and start a new life. Further in the second season, *Lifeline* brings new sub-stories and the storyline becomes wider in a strong way. Regarding the CEE market, **Akar** concludes: 'Turkish dramas are very popular here as the rest of the world. The most importing keyline is to have premium Turkish dramas with high quality productions, powerful storytelling and realistic acting. **ATV's** all catalogue fulfills this demand from CEE and we are glad to have a close and long-established business relationship with the partners'.



Muge Akar, ATV's content sales deputy manager



Hercai

cured leads.

Vlad Borovina, Project Manager for DICM, explains: 'We are inviting companies to be part of the only event anchored in the one and only Media HUB in the Arab world and one of the regions' Production Center: Dubai. With its development, safety, accessibility, not to mention the home of majority of clients from MENA, it's obvious why clients love to be come to Dubai and to DICM'.

'Last year's numbers show the success behind the event with 75% of exhibitors being satisfied to very satisfied with their participation and 71% confirming their return in 2019. In conclusion, DICM is the ideal platform to hold meetings, build relationships and make deals in the MENA region', concludes Borovina.



...
SOMOS CREADORES DE GRANDES HISTORIAS. CONTAMOS CON EL MEJOR EQUIPO CREATIVO, PROYECTOS INÉDITOS DE FERNANDO GAITÁN Y CERCA DE 20 PRODUCCIONES EN DESARROLLO.
...

GENERAMOS CONTENIDO PARA EL MUNDO



Dance & sing with Talpa Global



Laura Rhodarmer, SVP Licensing

Talpa Global (The Netherlands) highlights at NATPE Budapest International a slate headed by *DanceSing* (8x82'), an exhilarating new talent show for all-round superstars. It seeks out for talents who can both sing and dance at the highest level! Which superstar will be able to impress our expert judges and win the ultimate career kick-off with one of the world's most renowned music producers?

In **The Desert** (13x90'), competitors are taken away from the urban jungle and placed in the heart of the world's most unforgiving environment: the desert. After 100 days, 2 remaining finalists will compete in an epic 3-day solitary race through the desert. While *The Loved Ones* (10x50') is a dramedy about 4 families with complete opposite parenting styles. Despite their social and cultural differences, they often face common problems because they all raise teenagers. Social media, peer pressure, drugs, sex... The parents have set the bar very high for themselves and their beloved offspring. Because life must above all be perfect.



DanceSing, talent show



The Loved Ones, dramedy

Lastly, **Laura Rhodarmer**, SVP Licensing recommends *Home Alone* (6x40'), a social experiment where five kids are challenged to live on their own for an entire weekend while their parents are just next door, watching and commenting on their child's every move. The children are confronted with tasks like shopping and team challenges, but one question will emerge: How will these kids behave without their parents?

Azteca: adapt to move forward

TV Azteca (Mexico) arrives to Budapest after the announcement of the new unitary series for **Azteca 7** based on based on urban legends, What people tell has 24 hour episodes that are thought for three seasons.

Patricia Jasín, VP International, explains: 'We are reinforcing our offer with differentiating content. We also add documentaries that we are broadcasting on our pay TV channels about the Virgin of Guadalupe and San Judas Tadeo, and others about Mexican traditions. We also have a documentary in English of 13 episodes'.

On the other hand, the international area offers to the global market the content of Kuarzo Entertainment (Argentina), especially formats like *Si no estudias, te caes*, *A Todo o Nada*, *Una Noche Familiar* and the scripted series *Millenials*, broadcaster on the new FTA Channel in Argentina, **NET TV**. 'Of them we have 20 formats and some six fictions, but we also offer their production services, in addition to original projects,' says Jasín.

About the market nowadays, she highlights: 'The distribution as we knew it disappeared. The sale of finished shows and formats in the global market has been transformed and the supply must be adapt to move forward. Distributors are no longer just sellers, but especially business generators'. For Jasín, it's important to 'add commercial options' that offer a 'more attractive' proposal and allow differentiation.

Regarding OTTs, she completed: 'Far from increasing the "outlets", the market polarized. You should talk to fewer people and companies. It is not the first time that it happens in the market, it has happened in previous stages of the industry. We listen constantly "The market is difficult", but that is what only those who do not adapt think and feel'.



Patricia Jasín, VP International



A Todo o Nada, game show produced by Kuarzo Entertainment

Zee: for all audiences

Zee TV's Global Content Hub is India major creative and broadcasting entertainment programming force and is a one-stop-shop offering award-winning programs in every genre - historical, romantic, family and thriller dramas; reality and formats; adventure and travel; scripted comedy; kids; lifestyle and fitness programs, and much more, all in variety of languages including Hindi and English.

Holding one of the most significant content libraries in the world with 260,000+ hours of premium content including 4,800+ movie titles, the company attends NATPE Budapest to push its business towards the CEE region. Its biggest bet is for the factual documentary *The Life Of Earth From Space* (2x'60) that delivers a cinematic, blue-chip view of the entire life history of our planet, as you have never seen it before.



The Life Of Earth From Space



Vibha Chopra, Business Head, Global Syndication & Film Distribution

The distributor also promotes two family dramas: *Destined Love* (500x'30) an intriguing story about two young girls that discover the existence of their mother and their sister after the death of their father; and *Carmen* (60x'60), an adaption of popular Indian series 'Kareena Kareena'. It show revolves around a beautiful young lady who came from Alexandria to Cairo looking for an opportunity to achieve her dreams of being famous and rich.

Last but not least, the lifestyle reality *Altar'd* (12x'60) with S1 & S2 available. The Wedding day may be approaching fast, but these overweight couples are determined to make one big change, to lose weight before walking down the aisle. Twelve weeks before their nuptials, the future bride and groom are paired with trainers and begin their transformation. But of course, there's a twist that no one will see coming!

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ABS-CBN: classic with twists



Macie Imperial, VP, Integrated Acquisition & International Sales & Distribution

ABS-CBN International Distribution (Philippines) strengthens its global position by attending the key global and regional markets promoting its Filipino series. For CEE, the company highlights a strong drama series catalogue headed by *The General's Daughter*, which shows a military nurse for the AFP dedicated to save lives... but she has a secret: she is a spy, trained by her very own father, Tiago, to exact revenge against his enemy,

Marcial, a general of the army.

At *Los Bastardos* Don Roman will lead a happy life with his small family until tragedy strikes which will lead him to look for true love from four other women. *Betrayal* shows a young boy that knows that everything happens for a reason, so when the woman of his life came into his life and became friends, he knew that their bond was unbreakable. Another good drama option for CEE buyers is the classical series *The Heiress*, which follows a lovers story that end up marrying different partners who bring them from rags to riches all while triggering a complicated situation.

At *A Mother's Guilt* a selfless single mother whose world revolves around her family. While she does everything she can for them, she focuses on her son Paco, who was born with a heart condition. But when Paco suffers a near fatal heart attack, a desperate Sonya agrees to a grim deal where she does the unthinkable and takes a man's life to save her son's. Paco survives, but Sonya has to live with the guilt of her crime.

The international distribution division of the Philippines leading media group has been recognized in the global arena as a reliable foreign content provider and has been a premier source of high quality programming in +50 territories. It has sold over 30,000 hours of content worldwide.



The General's Daughter

RMVistar: moving to new horizons



RoseMarie Vega

RoseMarie Vega keeps pushing RMVistar to new territories and, after a very successful LA Screenings, bets on CCE as an uncharted territory for the company, where are looking forward to develop its presence and relationship with producers, broadcasters and OTT platforms with a unique offer of formats and programs.

There, the company seeks to replicate the achievements of Latin America and US, where it sold the series *La Chica que limpia* (Jaque Content, Argentina) to Warner for a US version and Turner, who will adapt the series for Latin America in Mexico, or action format from Brazil titled *The Motorcycle Girl*.

'With Warner 26 episodes are planned, in two seasons. It is a firm project, where now is the choice of the showrunner. The writers' strike that has broken out in the USA complicates things, but we hope that

Gaumont: family-focused

Along with a slate of big dramas, boosted by Netflix's hit drama *Narcos*, Gaumont (France) arrives to NATPE Budapest International with a kids and animation slate where stand titles like *Belle and Sebastian* (52x11'), a story that follows a courageous and wild young boy from the Alps and his befriend, an exceptionally generous dog, that is shunned because of her enormous size, and nobody can stop them from exploring every single peak of the valley together.

Another hit is Gaumont's 2D-animated comedy series *Bionic Max*, which was recently greenlit by French broadcaster Gulli for a second season. The 52 x 11-minute series is about bionic guinea pig Max and his goldfish best friend Jean-Claude, who are working as delivery boys in Central Park.

In order to keep pushing the animation division, the company announced later this year the expansion of its animation and family division by upping Terry Kalagian to SVP of creative development and hiring Kimberly Dennison as VP of creative development. The prodco also recently brought on former *Spin Master* exec Alex Soto as its first-ever creative director for animation & family, with oversight of Bionic Max a key part of his new role.

Lastly, it stands *Furiki Wheels*, a fast and furry-ous comedy about a hyperactive sloth whose family just doesn't understand his drive to drive. While most sloths spend their days eating, resting and sleeping, Andre Furiki is dedicated to being the fastest, and together with his animal friends at the racing academy, he gets involved in all sorts of scrapes and adventures. The series was originally commissioned by France Télévisions and Disney XD (EMEA).



Bionic Max will have a second season at Gulli in France



Belle and Sebastian

it will soon move forward. On the other hand, the format is already closed with India, optioned in France, Spain, Italy. Nowadays the global market is more open, many barriers fall when the content is good', says Vega.

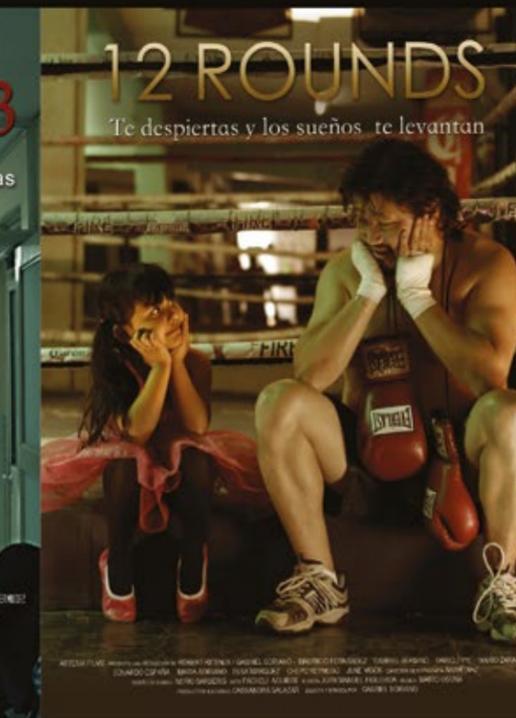
Also, the company added *Odyssey Films* to its slate, American company well known as part of the Netflix offer, with sales rights for the world. And the *Muse Entertainment* films, which appear on the *Hallmark Channel*, are now also available with their scripts, as formats. 'Market to market we are adding contributions to our catalog, and gaining positioning. In LA, we did very well and we kept moving forward', Vega summarizes.



La Chica que Limpia was optioned in France, Spain and Italy and will be adapted in the US by Warner



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NEM 2019: Time to think locally and act globally

With representatives from more than 2000 companies, the **New Europe Market (NEM)** celebrates a new edition from June 10th to 13th, in Dubrovnik, Croatia. Since its first edition in 2013, the event has gained the reputation of a world-class gathering for TV content and all related business branches for the CEE region and beyond.



For years, NEM has, through presentations and case studies, not only familiarized visitors with the novelties from the TV industry, but also inspired them with stories about the beginnings of the greatest companies in the industry. And this year again, has gathered some of the most important companies such as **Sony Pictures Entertainment**, **Eutelsat**, **JW player**,

Viacom, **AMC Networks International**, **Global Agency**, **Bitmovin**, **NBC Universal**, **Viasat World**,

On the academic side, **Stephen Driscoll**, EVP EMEA & European Co-Productions, **all3media international** will describe the main trend of scripted formats, with series like *Step Dave*, *Liar*, *Innocent* and *Diary of an Uber Driver* as example, while ITVS GE sales executives **Greg Johnson** and **Jennifer Ebell** will present a must-see showcase of what's to come for the rest of this year, unveiling three exciting new titles: television adaptation of **Malorie Blackman's** best-selling novel series *Noughts + Crosses*, the thought-provoking true crime drama *A Confession*, and an extraordinary new documentary **Judi Dench's** *Borneo Adventure*.

Special guests of this year's NEM are three Hollywood stars. **Gabrielle Union** and **Jessica Alba** will showcase their new series, from the universe of the Jerry Bruckheimer *Bad Boys* franchise, *L.A.'s Finest* (**Sony Pictures Television**). **Alan Cumming**, the star of the series *Instinct* (**CBS Studios International**), will be another special guest that visitors will have the chance to hear from in the panel room.

NEM boasts eight interesting panel discussions, with the very top of the TV industry taking part. The panel "Time to Think Locally and Act Globally" will raise the question if the region should join forces in order to be competitive through co-production and higher budgets.

At "On Demand Platforms and TV Channels – Mutually Exclusive or a Great Combination" speakers will discuss why Pay TV channels are becoming on-demand platforms and vice versa. The global TV content phenomenon will be the subject of a panel called "Did the Soap Opera Bubble

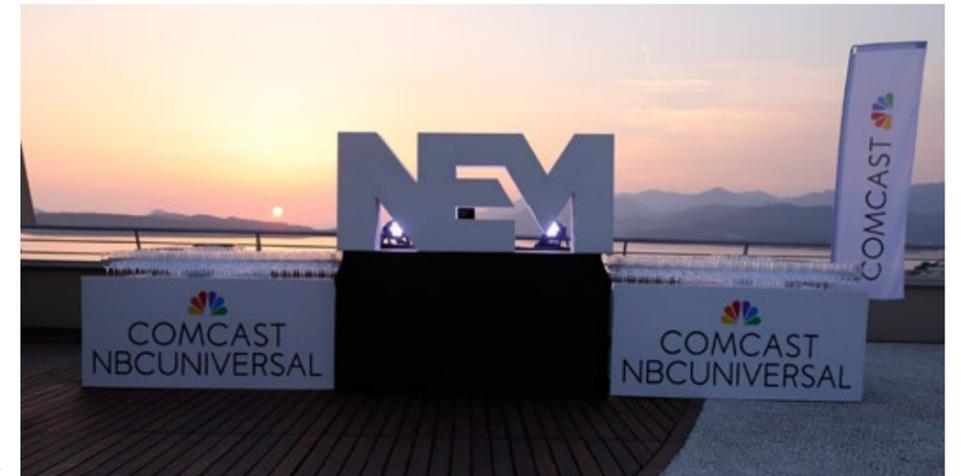
Burst or is it Still Growing?"

Major TV industry players, such as **Bhavesh Vaghela**, CEO of **Paywizzard**, **Salim Mukaddam**, General Manager and VP of Central and Eastern Europe at **BBC Studios**, **Levente Málnay**, Executive VP and MD at **AMC Networks International**, Central & Northern Europe, **Chris Marcich**, CEO of **Croatian Audiovisual Centre** and **Matthias Settele**, General Director at **TV Markiza**, will talk about the most current subjects.

Nebojša Taraba (*Drugi Plan*), described about the event: "Thanks to the screening of series *The Paper* at NEM, Keshet International, one of the leading international distributors, acquired the rights to distribute the series, and soon a deal with Netflix was made. This is the first Croatian series on this streaming service, and is available in 190 countries. Because of such opportunities NEM is a TV event no one from the industry should miss'.

Sanja Božić-Ljubičić, CEO of **Media-vision**, the company behind NEM, will host a special Q&A in the panel room with **Dimitris Michalakis**, Executive Director at **COSMOTE TV** and **Pavel Stanchev**, CEO of **TV2**, who added: "I am proud to have seen NEM grow in all segments for seven years now, and to see our efforts recognized by best of the best in the industry. It is truly wonderful to witness key deals made at NEM'.

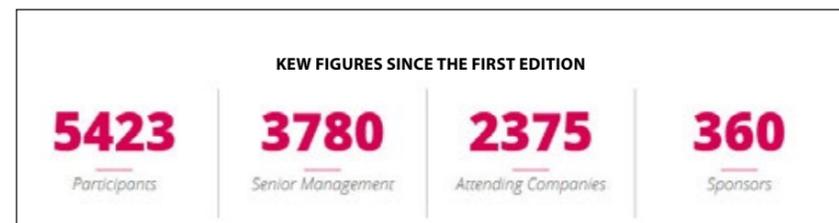
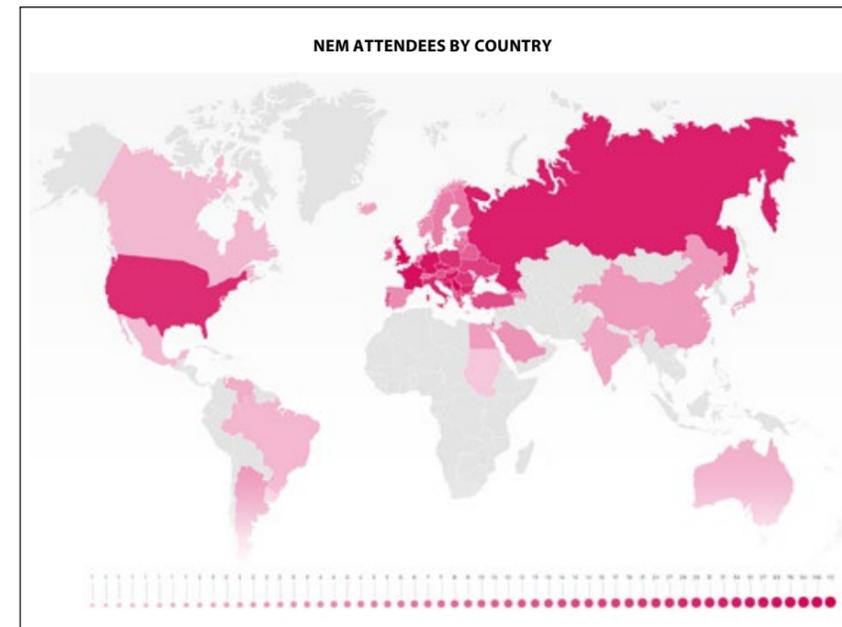
"We have recognized the growth of local production on the TV market. This type of production strengthens the TV industry and is irreplaceable, especially when we are talking about the future. The NEM team has made an effort this year to highlight local production and to give a chance to young and seasoned local producers to show their formats to business people around the



world. If you are dealing with local production, contact us and don't miss the opportunity to present yourself in front of a broad European audience', says **Božić-Ljubičić** and completes: "At NEM's market, participants have the opportunity to arrange meetings and make new business deals, meet people that they usually wouldn't have the opportunity to meet. The market gathers relevant sellers and buyers and connects the industry on a different level. While being highly equipped with the best conditions for conversations and presentations regarding their services, which resulted in more than 30 successfully closed deals'.

Other buyers that will share their expertise are **Bill Wijdeveld**, VP Business Development, **M7 Group**; **Bhavesh Vaghela**, CEO, **Paywizzard**; **Dražen Mavrić**, Head of the Management Board, **Nova TV** (Croatia); **Dragan Jeličić**, Film Channel Editor, **RTV PINK** (Serbia); **Elena Petrova**, Head of Business Development, **A1 Broadcasting** (Austria); **Emma Jones**, VP Commercial Affairs, **Viasat World**; **Gábor Harsányi**, VP, General Manager, **VIMN Central East-**

ern Europe and Israel; **Florian Skala**, CEO, **bTV Media Group** (Bulgaria); **Jan Maxa**, Content Development Director, **Czech Television**; **Katarzyna Drogowska**, Head of Product and the Editorial Team, **player.pl** (Poland); **Katarina Pavlović**, Program Director, **Prva TV** and **O2** (Serbia), y **Branko Čakarmiš**, Programming Director, **PRO PLUS** (Slovenia).





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LA Screenings 2019: The show most go on

These LA Screenings 2019 have been very special for the content industry, with strategic news noticed day by day on real time. The about 1500 worldwide buyers and programmers had arrived last weekend in Los Angeles knowing the big mergers and rumors about product restrictions due to the new global OTTs. The good news for them, ending the week, are that the Hollywood studios are willing to continue distributing their contents to the different platforms.

Last update: **Disney** will hold its branded content —**Disney, Pixar, Marvel, Lucas-Films**— through **Disney+** as first window, and then it will be available for free TV, but not for Premium OTT or Pay TV. **WarnerMedia+** would do something similar for its top brands. For the rest of the product, the picture will be flexible depending on its ups and downs, but the main volume will be offered to every platform. ‘Collaboration is frequently better than competence’, a studio executive said.

Is this scenario steady from now? Of course, everything is ‘so far’. But **WarnerMedia** announced during the week the renewal of many multi-year deals with top broadcasters, and **Disney** —which suspended this year

its traditional Upfronts— finally presented 18 titles to any platform, mainly from **Fox’s** slate.

In the meantime, **CBS, NBCUniversal, MGM, Lionsgate** and **Sony** —which changed its traditional screenings during the week by one big upfront Tuesday evening— kept themselves open to any customer, pushing new multiple-screen alliances and avoiding own OTTs announcements.

So... the new big OTTs era is coming, with also **Apple TV+** launching by the end of the year, **CBS All Access** and **Viacom’s Paramount+** already at the market and expanding to new territories, **NBCUniversal** with **Sky...** but without the distribution crack that was feared. The **Fox** Premium product would be joined below the **Hulu’s** umbrella, with **ABC** and the other ‘not branded’ product of **Disney**.

LA Screenings’ trends? The studios have showed themselves more flexible both in negotiation models and content profiles. Many buyers told **PRENSARIO** that they are not requiring volume deals as firmly as in the past to get the top product, and prices can be discussed according to the context of the customer.

About content, in times of a global market

BY NICOLÁS SMIRNOFF AND FABRICIO FERRARA

and crossed co-productions everywhere, the offering of the studios gets more international. A big news of LA Screenings was the introduction for the first time of **Sky Vision** within the **NBCUniversal** slate, providing series as ‘Temple’ from UK, ‘Devils’ from Italy, ‘Fryed’ from Australia and ‘Catherine The Great’, co-production between **Sky** and **HBO**. The studio has also **Telemundo**, for the Hispanic market.

Genres? This is a moment of ‘revivals’, to get classical TV series or films and to make new stories, both remakes or spins-off, using some of the characters. In the digital age, it is a good way of gaining relevance fast. Most of the studios have tittles on the trend. Also, we’ve continued watching many super natural stories, as they are good to generate fresh twists, ‘noble causes’ and ‘obsession’ for the family: since ‘Modern Family’, not only the prime ties, but also the people chosen.

And particularly this year, we’ve seen some very emotional stories that made some buyers cry during the presentations. This tip is not dysfunctional: it adds appeal for free TV buyers. ‘Today, content with massive exposure and emotional ties with the audience, is what the broadcasters need to compete better’, a free TV buyer said.

A global outcome of the event? It was a good LA Screenings, with better product than previous editions and applying better the different audiences. And the ‘not so restriction’ news, changed the mood of many content executives. The future can be sweeter for more people.



BBC’s (UK) programming heads at NBC Universal: Patrick Holland, Channel Editor, BBC Two, Fiona Campbell, controller BBC Three, Sue Deeks, head of program acquisitions, films and series, Alison Mabe, head of planning and scheduling, BBC Two, and BBC Four, and Dan McGolpin, Controller, Programming & Daytime, BBC One



Canal+/Studiocanal (France) buyers at Disney: Laure de Boissard, director, TV/VOD, Nathalie Folloroux, programming director, Juyonnet Françoise, executive director TV, Canal+, Julia Tenret, sales director, Disney, Laurent Sicouri, acquisitions director, Canal+, Barbara Crawford, VP current series, FX, and Judith Sakarovich, deputy head of acquisitions, Canal+



Rodrigo cantisan: Hungarian broadcasters: Gabor Szollosy, program director Digital Media/Story 4 and 5, with TV2: Katalin Joboru, head of acquisitions, Gabor Fischer, program director, Andrea Zaras, head of content management



Asian buyers at a cocktail in Beverly Hills: Alli Farrell, head of marketing and publicity, Gaumont France, Wallace Wong, senior programming manager, Nancy Lai, controller, Winnie Ngai, CMO-OTT, and Sang Au, senior OTT content manager, all from TVB (Hong Kong); Andy Chang, freelance, Marianne Lee, VP contents, general entertainment, Turner APAC, and James Chang, EVP, Tempo (Taiwan)



CEE broadcasters: Erika Tothova, head of acquisitions, TV Joj (Slovakia), Tibor Forizs, director of content acquisitions, RTL Klub (Hungary), Peter Adamik, junior contracts manager, TV Joj, and Oksana Gavrilina, head of acquisitions, Film Media (Russia)



Spain: Carolyn Stalins, VP EMEA, NBC Universal, with Alex Martínez Roig, content director, and Silvia Lama, acquisitions, both from Movistar+, with Mónica Entio Jorquera, acquisitions, Mediaset; Belinda Menendez, president distribution, NBCUniversal; Ángel López, acquisitions director, Mediaset; and Sonia Salas, head of acquisitions, Movistar+

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MORE ATTENDING BUYERS



TV-3 Russia: TV-3 Russia: Evgeniy Nikishov, general producer, Olesya Saraeva, PR manager, and Valeriy Fedorovich, CEO



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



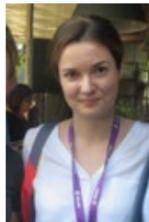
Natalia Ivanova, head of animation at CTC Media (Russia)



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



1+1 Ukraine: Olga Slisaren, head of entertainment programs, and Olga Kishchenko, format manager



Asia Batayeva, senior format at Novy TV (Ukraine)



Hungarian: Tibor Forizs, director of content acquisitions, RTL Klub, and Gábor Szollossy, program director, Digital Media/Story 4 and 5



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



TV2 Hungary: Andrea Zaras, head of content management, and Gabor Fischer, programming director



Gita Peterson, acquisitions manager; and Ieva Grovedaitė, acquisitions executive, both from MTG (Sweden); Elvyra Dunauskaite, VP, acquisitions of TV3 Lithuania; Andy Jan Rudovský, 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



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



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



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



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



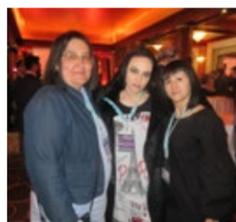
Erika Tothová, head of acquisitions, JOJ Slovakia; Lubos Kriz, head of Telexport/Czech TV; Elza Strapková, acquisition manager, TV Markiza (Slovakia), and Peter Adamik and Eva Dzurovicinova, both acquisition executives from JOJ Slovakia



Pop TV Slovenia: Pavel Vabec, general director, Ana Wlazak (Disney), and Branko Camis, programming director



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



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



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



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



Sony CEE: Adam Horvath, program manager, Gedeon Isepy, senior scheduler, Gabor Fekete, programme and break structure manager, and Lázló Fülöp, acquisitions executive



AMC Networks CEE: Edina Balogh, contract manager, Zita Barath, acquisition manager and Melisa Harto, acquisitions



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