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CENTRAL & EASTERN EUROPE ANNUAL SPECIAL ISSUE 2017
NEW EUROPE MARKET - NATPE BUDAPEST - KIEV MEDIA WEEK

by Nicolás Smirnoff

CEE... the so awaited recovery?

At MIPTV, last April, we've talked with various Central & Eastern European broadcasters who agreed to say that for the first time since 2008, when global crisis took place, they are seeing important numbers up on media business and free TV channel incomes.



Budapest, Hungary



Kiev, Ukraine

They talked about from 10 to 12% up in Russia, 15 to 20% in Ukraine, 12% up in Poland, etc., and especially 11% up in Greece, one of the most damaged CEE markets within the last years. Of course, they are

not everyone. According to Hungarian broadcasters, their market is from 1 to 3% up this year, quite flat, and many CIS territories —Armenia, etc.— are more complicated than taking off.

Even, some consulting companies that usually check the CEE region, don't see a concrete recovery from hard times. But if we follow broadcasters words —and their attitudes define the market— we can say that the global CEE market is about 8-10% up from last year. And this growth hasn't happened since the global crisis.



Dubrovnik, Croatia

With this edition we cover three CEE events: Natpe Europe in Budapest, New Europe Market (N.E.M.) in Croatia, and Kiev Media Week in Ukraine. Through the issue, we develop many broadcaster interviews and locally produced reports, for you to build your own opinion and to take market keys of this new enhancing situation. We expect you find them useful.

Print & Online

Apart from this PRENSARIO print issue, you can follow these CEE shows 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

New Europe Market

Schedule

EVENT	DATE & TIME	PLACE
Surviving it all: things that ftas can teach you	June 13, 10.30am-11.15am	NEM Panel Room
Digital panel: let me choose for you	June 14, 3.15pm-4pm	NEM Panel Room
You can't stop me: the power of tv channels	June 15, 11am-11.45am	NEM Panel Room

NATPE Budapest

Schedule

EVENT	DATE & TIME	PLACE
Cee market overview: regional breakout hits, trends and data	June 19, 5pm-6pm	Intercontinental Hotel
Success in co-productions	June 20, 8.30am-10am	Intercontinental Hotel
A new perspective on the emerging asia region	June 21, 8.30am-10am	Intercontinental Hotel

Kiev Media Week

Schedule

EVENT	DATE & TIME	PLACE
Format show	June 18, 11.30am-6pm	Ballroom Conference Hall
Kyiv coproduction meetings	June 19, 10am-5pm	PARIS conference Hotel
Paytv in ukraine	June 20, 9.30am-7pm	London Conference Hall



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CEE/CIS: businesses up and reinforced

One of the biggest news of the last MIPTV edition was that Central & Eastern Europe is lastly recovered, reaching the pre-crisis 2009 figures, after many years of hard times.

After the global crisis that affected many strategic markets, but mainly CEE and CIS, the advertising pies of every market in this region went down, in some cases up to 50%. PRENSARIO interviewed some buyers from these territories, who confirmed that Russia is 12% up compared to 2016, Ukraine 15/20%+, Greece 11%+, Hungary 3%+. Moreover, they confirmed that the channels are buying more and producing again.

According to **AKAR** (Russia), the volume of TV advertising market grew by 10% in Q1 2017, compared to the same period of last year, and reached almost USD 700 millions (VAT excluded). The segment exceeded the level of the pre-crisis 2014, when revenue of Russian TV channels was USD 690 millions. Thematic channels (or cable-satellite) grew the most within the TV segment in Q1: +40% compared with 2016. Ad revenue of terrestrial broadcasters increased by 9%; dynamism on federal channels were slower.

Nielsen Admosphere (Czech Republic) confirmed on April that the local ad market grew 11.1% to reach USD 700 million on Q1 2017, from which TV totalized USD 420 millions (+15.7%). The **Hungarian Advertising Association** presented on May the official numbers for ad investments on TV in 2016: there was a growth of 8.59% to USD 203 millions, tripling the figure of two years ago when the market just grew 3%. Still, the ratio between the GDP and the ad spend per capita remained below the pre-crisis 2008 level.

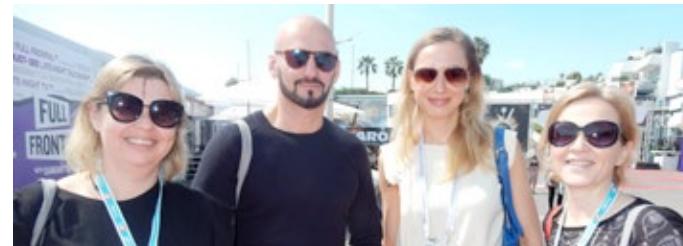
Zenith has released during the Q1 its forecast on global ad spend for 2017 & 2018 and, according to its data, CEE and Central Asia bloc will be the fastest growing in the world, up to 8.9% this year. ‘Turkey and Russia recovered quickly after the 2009 downturn and continued their healthy pace, largely (through not entirely) unaffected by the problems of the Eurozone for the next four years. Their neighbors, like Azerbaijan or Kazakhstan have behaved very similarly’, stands the report.

The conflict in Ukraine severely disrupted the domestic ad market, while Russia suffered from sanctions imposed by the US and the EU, the sanctions it imposed in response, and a withdrawal of international investment. These shocks were exacerbated by a sharp drop in the price of oil, which accounted for 70% of Russia exports in 2014, and devaluation of the both countries currencies.

In 2015, ad spend shrank 44% in Ukraine, 28% in Belarus and 9% in Russia, whose ad market proved more resilient than it was feared,



Buyers from Slovakia at Czech TV cocktail: Ivana Kollarova, international manager, RTV; Erika Tothova, head of acquisitions, TV JOJ; Lubomir Nemec, director, Content Investment (Czech Republic); and Peter Adamik, contracts manager, TV JOJ



Croatia: Zrinka Jancob, acquisitions manager, George Makris, programming director, both from Nova, with Daria Kozlova, manager media, CEE at Disney, and Nina Mikola, head of acquisitions, Nova



Jaanus Noormets, acquisition executive, Kanal 2 Estonia; Junita Budvytiene, head of acquisitions, and Rolandas Maskoliunas, acquisition manager, both from LRT (Lithuania), and Ilze Korjusa, head of digital acquisition at Lattelecom (Latvia)

and having avoided collapse in 2015 staged a recovery in 2016, when it rebounded by 9%. Belarus also grew by 9% and Ukraine by 4%. Russia will maintain 9-10% annual growth to 2019 while Belarus and Ukraine grow at double-digit annual rates.

Far from a negative impact, the political crisis between two of the biggest economies, Russia and Ukraine (when the first one invaded Crimea in 2014), generated a stronger development of Ukrainian audiovisual sector. Why? Russian shows were prohibited in Ukraine, and local drama grew steadily. Now, both countries are key markets for drama TV production.

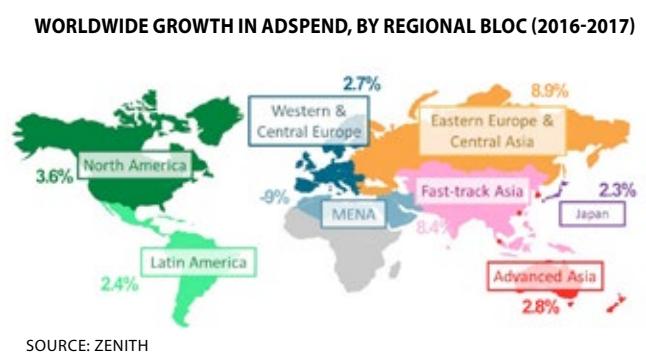
But there is more: last March 23 Ukrainian parliament finally adopted the long-awaited law “On the State Support of the Cinematography in Ukraine”. The new legislation allows foreign producers to get a payback up to 16.6% production costs spent on the territory due to new cash rebate system. Moreover, it is planned that foreign producers will be able to receive additional 10% payback from the labour-production costs in Kyiv and Sevastopol and 4.5% payback – on the rest territory of Ukraine.

On the local level, state support for a movie could be granted to all legal bodies regardless of ownership type – state, private, corporate, etc. Features and animation films could get up to 80% of the budget from state support; TV, up to 50% of the budget. Documentaries, educational and children programs could be 100% funded by the state.

Television

Digital TV Research said on a report that there will be a ‘knock-on effect for the TV sector’ as the number of TV households will fall in 18 countries between 2016 and 2022 with the region’s total declining by almost 2 million. ‘Pay TV will struggle, losing 1 million subscribers over the same period’, explains **Simon Murray**, principal analyst.

He continues: ‘Eastern Europe is slowly ridding itself of the legacy of



analog cable TV. Belated DTT launches in some countries have resulted in some analog cable TV laggards converting to FTA DTT rather than the (more expensive) digital pay TV platforms. The number of digital pay TV subscribers will increase from 25 million (20.2% of TV households) in 2010 to 58 million (45.8%) in 2016 and onto 77 million (61.0%) by 2022.

The report expresses that 2017 will be the ‘peak year’ for pay TV in Eastern Europe, and it explains further that analog cable represented 28% of the 81 million pay TV subscribers at end-2016, so some of these 23 million subscribers will choose to convert to FTA DTT rather than to a digital pay platform. Russia will account for nearly half of the region’s pay TV subscribers in 2022. However, the number of pay TV subs will fall in 10 countries between 2016 and 2022.

Pay TV revenues in Eastern Europe will peak at USD 6.11 billion in 2017 before settling at the USD 6 billion mark. Analog cable will contribute \$1 billion to the 2017 total, falling to USD 184 million in 2022.

Russia’s low pay TV fees for analog cable subscribers were continued by most satellite TV platforms. This means that Poland generates higher pay TV revenues than Russia, despite having far fewer subscribers.

Pay TV revenues will fall in half of the 22 countries between 2016 and 2022. Revenues for market leader Poland will be lower in 2022 than they were in 2010.

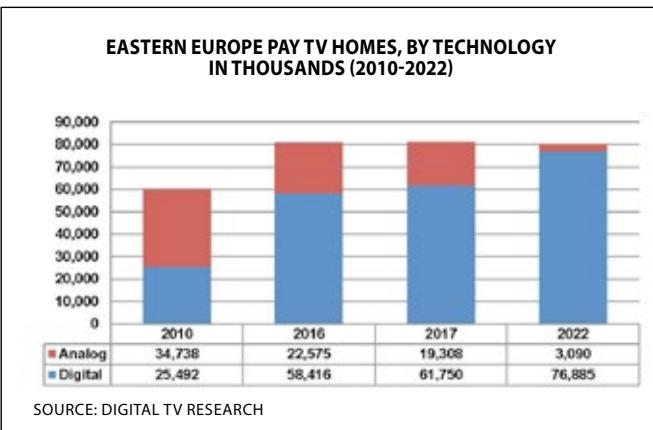
Digital platforms are growing too, especially since **Netflix** disembarked in the region in 2015. For instance, the SVOD has confirmed the very first Turkish drama production. Now, there are opportunities everywhere and



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



Buyers from Poland at MIPDramas: Irmiona Dabrowska, programme acquisition specialist, NC+; Olga Wieczorek, programming film channel; and Katarzyna Brezinka, senior specialist programming, both from ITI Neovision



for everybody, while more and more platforms are being launched in the region.

Evolution

The crisis on the international front make the companies to concentrate their efforts on the domestic market and in every key territory of CEE and CIS, the local production grew in hours and quality. Within the last 10 years, the audiovisual industries of Czech Republic, Hungary, Poland, Russia and Ukraine, among others, evolved. There was also a strongest global activity from those producers, who started to distribute their shows globally.

A good example of this recovery is the transformation from buyers to sellers of some players at the CEE countries. This has been happening in Russia and Ukraine: **Signal Media** and **Kuartal 95**, respectively; the Czech Republic: **Ceska televize** has consolidated its international operation; but it has also happened on smaller ones, such as Croatia, where **RTL** is selling their drama series within the Balkans; Hungary, where **MTVA** is strengthening its distribution arm; Armenia, where **Shant TV** launched its international division one year ago; and Albania: **Vizion Plus** catalogue is growing steadily.

In the nowadays market, there are four clear trends: first, a biggest number and quality of big prime time dramas; second, the short video business is growing everywhere; third, the growth of virtual reality & augmented reality technologies; and fourth, the sport gaming platforms (eSports).

As said, these new trends are reflected in the CEE, too, and the positive economy situation in most of the nations has helped this recovery. Now, it is time to focus on the business itself; there are also big news among the trade shows.



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



Markiza, Slovakia: drama for export

The **Markiza Group** has been a market leader in Slovakia for more than 20 years thanks to its strong brand as a family channel built on a balanced programming mix.

Despite the DTT exit, it has managed to increase its audience share in the commercial target group 12-54 to 28.2 % (all day) and to 29.3 % (prime time) in March. The channels have been available exclusively on cable, satellite, and IPTV platforms since the beginning of 2017. Markiza was the market leader in all day within weekly average audience share in the sales target group 12-54 from the 2nd week of 2017, and in prime time from the 11th week of 2017.

The program **Markiza** channels offer brings a mixture of genres including news and public affairs programs, reality shows, fiction series, and entertainment shows, complemented by movies and foreign series as well as sport events.

Tatiana Tóthová, Head of PR/ Spokeswoman: ‘Recently, the return of popular programs like the reality show *The Farm*, entertainment show *Tvoja tvár znie povedome* (*Your Face Sounds Familiar*) and comedy series *Horná Dolná* (*In the Middle of Nowhere*) on our main channel **Markiza**, combined with excellent performance of our smaller stations, **Doma** and **Dajto**, has improved our performance significantly in



March making us again clear market leader in all day and prime time’.

‘This spring we have continued with new seasons of successful programs, adding the quiz show *Who Knew?* and entertainment shows like *Ultimate Chartshow*, and a make-over show *10 Years Younger*’, she adds.

The group secondary channels **Doma** and **Dajto** target women and men, respectively, offer mostly movies and series from abroad. On the first one, Turkish series are very popular among viewers and the chan-

nel has also aired a special event – live from the Oscars ceremony. On the second one, which is profiled as an action, adrenaline, and adventure channel, it was premiered the new series *Last Ship* and *The Shannara Chronicles*. It also brings sports programs, like the Slovak league football matches (*Fortuna League*), boxing events including Klitchko vs Joshua, Ice Hockey matches of the Slovak national team and soon UEFA European Under 21 will be broadcast as well.

Tóthová: ‘Our audience is looking for local fiction series with local actors and themes, light entertainment, and reality shows. From foreign products, it is mainly blockbuster action and adventure movies or international crime and comedy series – either from the US or Europe which add some color and variety to the programming mix’.

‘TV remains our core business, but the importance of online is growing with the younger generation and its technological preferences, therefore making us focus more on providing our audience with additional exclusive content online. We use television content to keep track of the online habits and we also produce programs made specifically for our online audience. This has been complemented by mobile apps’, comments **Tóthová**.

‘With growing popularity of VOD consumption, we believe local content is key for our market as foreign titles are accessible through existing platforms or piracy. Our audience can access our

Tatiana Tóthová, Head of PR/ Spokeswoman, Markiza



Comedy series *Horná Dolná* is not only a key audience driver in Slovakia, but also one of the most sold title abroad: the original series was broadcast in Poland, and Hungary produced a local version

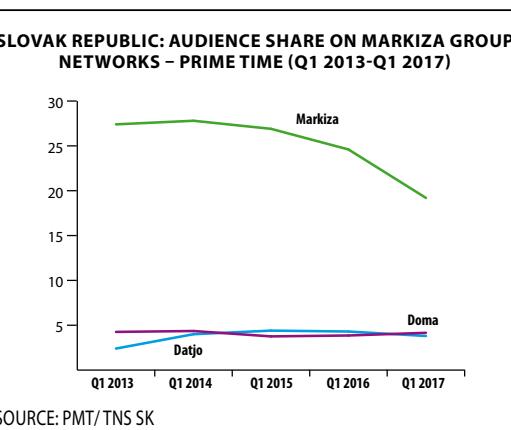
local content via a variety of platforms, from an AVOD catch up service to our SVOD offering. To strengthen the overall performance of the group, we use the synergy of TV, online, teletext and, soon to come, HbbTV, combined with the growing importance of social networks’.

Tóthová: ‘The success of our local productions is proven also by sales abroad, our long-running romantic series *Burlive Vino* (*Taste of Love*) was sold to Estonia and Hungary, and is being adapted in Slovenia with its localized version *Usudno Vino*. Our series *Horna Dolna* was adapted into the Hungarian version *A mi kis faluk*, produced for **RTL Klub** and the original of the series was sold also in Poland as finished episodes’.

‘Recently, we have also coproduced a comedy feature film, *Cuky Luky*, which was developed from a television sketch show aired on **Markiza**. The movie was theatrically released this April and it has attracted more than 110,000 cinema viewers becoming a huge success in Slovakia’, concludes the executive.



The most recent entertainment show on Markiza: *Ultimate Chartshow*



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Novy: seriality, the new genre shows its strength in Ukraine

Novy Channel is among the six largest Ukrainian TV channels. It takes the second place in the audience 14-49 and ranks fifth or sixth (depending on the season) on the audience target 18-54. One of the three Ukrainian channels focused on the youth audience, it has leading position in terms of the audience share among local youth channels.

The proportion of programs on air is approximately fifty-fifty. 50% is channel's original products, and the other part is the acquired content that includes mostly foreign movies, series and cartoons', describes to Prensario **Sergey Evdokimov**, general producer.

Original productions are also divided in the same proportion. The first half comprises adapted shows based on the world's popular formats, such as *Next Top Model*, *Identity*, *Ladette to Lady*, *Berlin – Tag&Nacht*. The second part is original shows developed and produced by the channel: *The Auditor* (*Revizor*), *Love for Survival* (*Kohannja na vizhivannja*), *Cheap and Cheerful* (*Deshevo i serdyto*), *Swindlers on the Web* (*Aferisty v setyah*), *The Ladettes: New Life* (*Patsanky. Nove zhystia*), etc. 'The combination of our own projects with acquired ones gives balanced ratings and allows satisfying the needs of the local viewers', he remarks.



Sergey Evdokimov,
general producer, Novy

'*Ladette to Lady* was Novy's highest rated show in 2016; it has run for two seasons, and the third one is being shot. The fourth season of the *Ukrainian Top Model* is also in production and will be aired this autumn. *Kyiv Day and Night* is among the successful projects as well. Our original programs are also regularly listed among the top-rated shows: *The Auditor*, dedicated to checking the service in restaurants, hotels, supermarkets; *Love for Survival*, about the relationships between a man and a woman that showed a stable share exceeding the average share of the channel by one and a half times. Also worth mentioning successful original entertaining programs such as comedy project *Varyaty Show*'.

Evdokimov continues: 'Since we work for the younger audience, it is important for us to satisfy the needs of viewers aged 14-35. This is what makes us different from the other channels. They are focused on adult audience that has different requirements. As we understand our audience, it is interested in formats related to travel, adventures, discovering new opportunities, new countries, feelings, tastes, directions, etc.'

Furthermore, the genre of *seriality*, which is quite new for us and unique for the Ukrainian TV market, has proved its potential. For example, **Novy Channel** is the only one that has this kind of projects on its schedule. *Kyiv Day and Night* has run successfully for three seasons. This year, we are launching another *seriality* featuring the finalists of the project *Ladette to Lady*'.

About digital media, it is a leading company in terms of the number of views of its content on the Internet. The executive comments: 'First, this is due to the channel's audience. **Novy Channel** is focused on the younger audience that has skills of using digital media. Our content is presented on all the available Internet platforms. *Kyiv Day and Night* is an example of the TV project that also finds its audience on **YouTube**, **Instagram** and social networks by creating additional content for each of these platforms'. **Novy Channel** actively develops and distributes its original formats. **Evdoki-**



Ladette to Lady was Novy's highest rated show in 2016

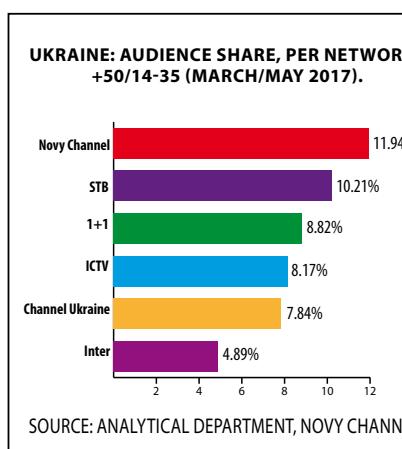


The Auditor, dedicated to checking the service in restaurants, hotels, supermarkets, is an original show developed and produced in house



Seriality: Kyiv Day and Night has run successfully for three seasons

mov: 'We see our production strategy in development of original formats aimed at the local market and local viewer. In a perfect world, we'd prefer to abandon adaptation of international formats. At the same time, we actively trade our formats on the international market. And not only formats, but also ready-made programs. For example, the show *Swindlers on the Web* (*Aferisty v setyah*) was sold to the Baltic States, Russia, and Eastern Europe'.



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TVN, Poland: how to reach the most demanding audience

Part of **Scripps Network Interactive** (USA), **TVN** has always been the leader in introducing new shows and setting the trends on the Polish market. The strength in locally produced shows makes it the market leader in the commercial group in the high season (spring and fall), when most premieres are scheduled.

Poland is among the countries with the highest TV consumption in Europe, with average daily viewing time of 04:21 (in 2016). Interestingly, this figure is not declining even as the popularity of Internet and VOD grows. Naturally, younger audience is the most eager to embrace new media, so erosion of linear TV is visible in the 16-24 demo.

When it comes to viewer tastes, Poland is probably no different from other TV markets. Locally produced shows are most likely to win viewers, be it drama or entertainment. **TVN** is the leader in bringing the new formats and trends to the Polish market. If you look at the list of new launches, TVN's new shows are Top 6.

Edward Miszczak, Programming Director, explains: 'The downside is that we probably have the most demanding audience, so our ratings drop quickly once the premieres are over. That was one



Player.pl pursues a strategy referred to as the windowing policy, under which we provide content via the fee-based SVoD service before its television premiere. After some time, these shows can be watched free of charge via the AVoD service. Thanks to this business model, **player.pl** users were able to watch five episodes of the series *Singielka*, those

Edward Miszczak, Programming Director, TVN

of the reasons why we decided to adjust our programming spending to level off our market shares throughout the year'.

Across the entire market international formats dominate in entertainment. *Masterchef*, *Masterchef Junior*, *Got Talent* and *Next Top Model*. *Kitchen Nightmares* or *Asia Express* are among the most popular. **TVP** has a successful local adaptation of *Farmer Wants A Wife*, while **Polsat** enjoyed great success with first seasons of *Your Face Sounds Familiar*.

Recently broadcasters reached for well-known formats from the past. *Who Wants To Be A Millionaire* (a third incarnation, previously ran in 1999-2005 and 2008-2010) has become a great hit for us in its first weeks, this time as half-hour daily episodes. *Pop Idol* on **Polsat** is also doing reasonably well this season. Scripted reality shows are the daily bread for broadcasters, with relatively small production cost and high popularity among viewers these shows dominate daily weekday slots.

Miszczak: 'Local drama remains very popular, though highest-rated shows are mostly long-running hits on **TVP** that have been on air since early 2000's or even late 1990's. It seems really hard to establish a successful drama on the market, especially as viewers migrate to VOD platforms. In 2015 and 2016 we ran a daily telenovela *Singielka* (adaptation of Argentinian *Ciega a citas*), which was hugely popular on

player.pl (VOD platform), but less than average in **TVN**'s prime time.

On the other hand our recent hit *Druga szansa* (*Second Chance*) enjoys good results both on television and online'.



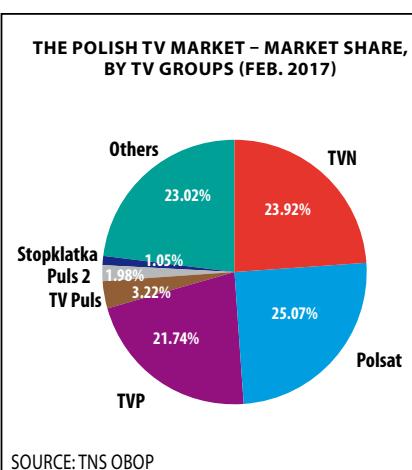
Belle Epoque, a crime drama set in early 20th century Krakow, is TVN first venture into period drama and enjoyed great success in its first episodes



Local versions of global formats, like *Kitchen Nightmares*, lead TVN prime time slots

were actually produced especially for our platform. **Player.pl** also gives access to extra content related to our most popular shows, such as *Kuba Wojewódzki. Talk Show. To be continued* and *Hollywood wives. More*, which are not aired on linear TV.

Miszczak concludes: 'More and more shows are created in Poland for US and international distribution. This year we will produce 13 episodes of *House Hunters International*. We are also gearing up for an international expansion of our thematic channels – **TVN Style** and **TVN Turbo**, especially to neighboring countries. On the digital side, **player.pl** will also develop to include international formats from HGTV'.



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Hungary: recovering strength

BY FABRICIO FERRARA

Hungary, one of the most important markets of CEE, now recovering its strength: the advertising market is returning to the pre crisis 2008 levels. Broadcasters are betting again on strong original production and launching new channels.

The Hungarian TV ad market has been suffering from the global economic slump for many years. Market players were facing a declining advertising pie for the last five years. The market started progress in 2014 with 10% growth vs. 2013. The increase was smaller in 2015 (+3% vs. 2014) but in 2016 the pie grew by 9%. In 2016 the TV ad market size is still much smaller (-22%) than it was in 2008.

For instance, last March the **Hungarian Advertising Association** reported that the total ad billings in the country amounted in 2016 to €520 million, a 12.11% increase over the previous year. This figure did not include TV advertising, which was informed finally in May: the official number was €180 million, representing a growth of 8.59%, tripling the figure of two years earlier when the market just grew 3%. Still, the ratio between the GDP and ad spending per capita remained below the pre-crisis 2008 level.

The Association clarified, that although the growth rate is encouraging, it was impacted by an 80% increase in government ad spending and major sporting events such as the Euro and Olympic Games. At the same time, the advertising industry

continues to be troubled by the ad tax.

The Hungarian parliament will increase its advertising tax from the current 5.3% to 7.5%, rather than the 9% that had been previously planned. **Lajos Kósa**, the leader of the ruling Fidesz party's parliamentary group, said recently at a press conference that the government plans to maintain the 7.5% level until it meets the EU's requirement to reimburse the ad revenue collected in a previous scheme that had been disapproved by the EU. Hungary had introduced a controversial progressive ad tax, with the highest rate being 50%, in June 2014.

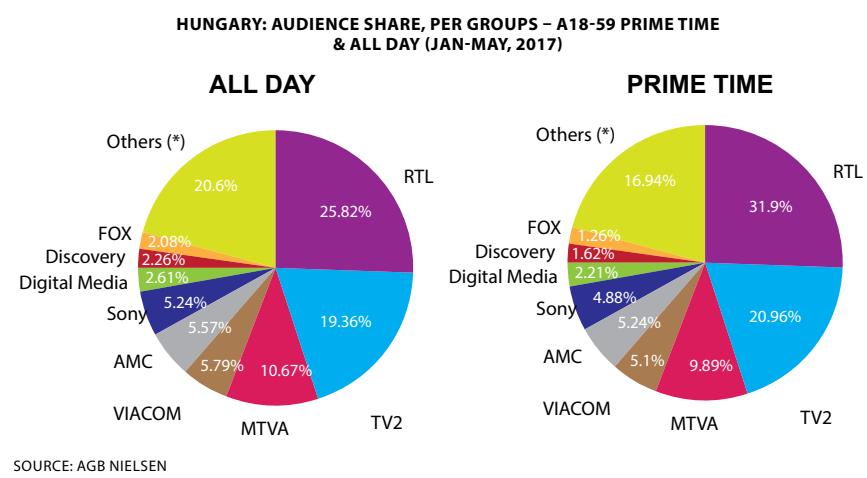
On the digital front, **PWC** reported that the Hungarian digital ad market grew by 13.3% in Q1 2017, based on data provided by **IAB**'s 24 members. Display was up 10.2% compared to Q1 2016; mobile grew by 47.6% and email dropped by 7.6%. Services companies increased their digital ad spend the most (+106%) to become the leading sector in this segment with a 12% share of the total.

On the TV side, the **RTL Group** continues to be the leading conglomerate: it operates the FTA channel **RTK Klub** plus seven cable networks, and it plans to launch on July 3 a new one, **RTL Gold**, following the transformation

of **Film+2**. The channel will offer Hungarian-produced content, such as Anikó Nádai's new talk show *Anikó Show*, and will also carry popular **RTL** quizzes, among them *Minute to Win it*, *Hollywood Game Night*, *The Chef, Who Wants to be a Millionaire?*, etc.

The cable portfolio of **RTL Hungary** has a very stable leading position. **Film+** and **Cool** are market leaders in their categories, while several other channels have been growing recently, including **RTLII**, **RTL+** and **Sorozat+**. The company has decided to take **Film+2** to a new level: the channel output will be renewed and will have a new program structure and a new concept and last, but not least, a new name.

The second largest group, **TV2**, has implemented in 2016 its largest portfolio extension and program investment of the past 15 years by repositioning and launching several new channels. In addition to the FTA network **TV2**, the cable portfolio offers different genres: **SuperTV2** is the Group's premium, general interest entertainment channel; movie channel **Mozi+**; the premium entertainment channel **PRIME**, where popular series and blockbuster movies are aired; **Chili TV**, for gastronomy lovers; sport channel **Spíler TV** with Premier



RTL Hungary: *Budapest Day and Night* is a very successful constructed reality show that attracts younger viewers to RTL Klub, while *X Factor* is entering in its 7th



RTL Hungary: *Budapest Day and Night* is a very successful constructed reality show that attracts younger viewers to RTL Klub, while *X Factor* is entering in its 7th



Tibor Forizs, director of content acquisitions, RTL Hungary

Ökrös Gergely, program & creative director, TV2 Group

John Rossiter, GM, Sony Pictures Television Networks Central Europe

League and Moto GP; **Kiwi TV**, entertainment to the kids; **Iaura TV** for the telenovela fans; the music channel **Zenebutik**; **Humor+** with comedies; and the lifestyle channel, **FEM3**.

While the third group of channels is pubcaster MTVA, other private companies have grown compared to 2016: **VIACOM** is now the fourth, operating seven networks with **Comedy Central** being very active, followed by **AMC**, managing nine TV channels and **Sony** with three. Finally, there are many rumors about **Digital Media** ownership, which will probably change soon.

Broadcasters

RTL Klub, the market leader broadcaster, celebrates this year its 20th anniversary in the media landscape. And the celebration comes with rich news: the launch of a new cable channel, **RTL Gold**, following a market trend; reinforced focus on local production, both scripted and non-scripted; and last but not least a brand new digital strategy. 'For our group, 'TV' is not the abbreviation of 'Television', it means 'Total Video".

Tibor Forizs, Director of Content Acquisitions, continues: 'We have one free TV and 7 cable channels, the new channel is a rebranding of a previous one. We evaluate everything as a group, not free TV or cable alone. The important goal is to act smart and be proactive about market trends. Old free TV tactics are still important but must go hand in hand with our cable and digital strategy'.

About **RTL Gold**: 'We are re-launching **Film+2** which previously aired movies 24



TV2: *Big Star Little Star* premiere episode market share was 18.5% (18-59) resulting in the absolute slot winner; *Nagy Duett* returned on its fifth season on Sundays and had equally outstanding results: it was the most watched event show in 2016 and in 2017 so far it is the most watched program of the channel



'We are developing a brand new VOD platform for catch up viewing and VOD streaming of both long and short form content. Through a personalized user experience our audience will be able to explore and enjoy most of our owned produced shows, premium acquired programming plus exclusive content, behind the scenes featurettes, additional footages, video clips, interviews, etc. We wish to promote a 360 degrees consumption of our content'.

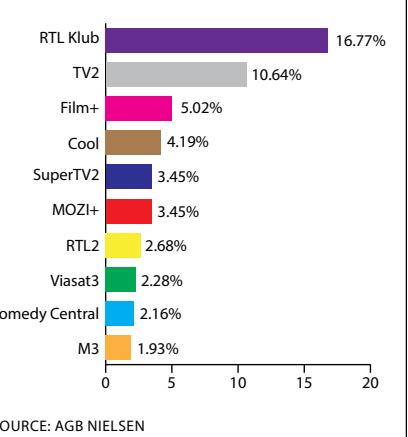
Ökrös Gergely, program and creative director of **TV2 Group**, points out that the company increased its market share by 34% in one year (18-59, AD). The cable portfolio aiming at the 18-59 age group tripled its primetime market share since May 2016. The gap between **RTL Group** and **TV2 Group** prime time market share from 15.99% decreased to 8.02% in one year (2016 May vs. 2017 May) and from 12.39% to 4.05% regarding all day. 'In one year we increased our portfolio from 4 to 11 channels', he remarks.

'Our goal is to build the #1 TV portfolio in Hungary. Portfolio-minded program strategy is the key to success. Strengthening and improving the market share of the new cable channels and the prime time slots of **TV2** are in the main focus. The portfolio development created a big boom in program production, the number of local production has tripled'.

Highlights of this season include *Big Star Little Star* (ITV) that debuted in a daily slot. The premier episode's market share was 18.5% (18-59) and an absolute slot winner. 'Our chart-topping event show *Nagy Duett* (fifth season) on Sundays also has outstanding results. In 2016 *Nagy Duett* was the most watched event show on the Hungarian market, in 2017 so far the most watched program of our network'.

'Brand stretching is getting more important because viewers are hard to reach through a

HUNGARY: AUDIENCE SHARE, PER NETWORKS – A18-59 PRIME TIME (JAN-MAY, 2017)



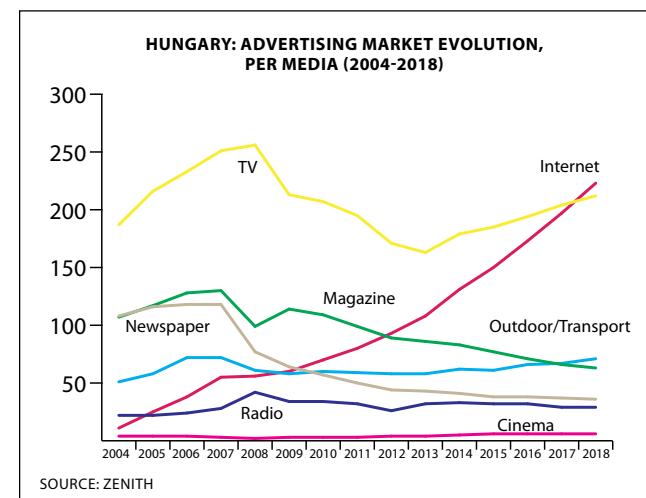
single platform. Viewers need extra, platform-designed content. TV2 recognized in time the importance of integrated communications, so it has appeared on the most popular social media sites', remarks **Gergely**.

'Besides social media sites, our own developed mobile application **TV2 Live** is also a very important platform to reach the viewers: it is a second screen option to our event shows where extra content may be found. The app was downloaded by 1.2 million smartphones/tablets. Our **Facebook** pages' followers are very active, recently a video post from our event show *A Nagy Duett* reached 2 million viewers and more than 30,000 interactions'.

'A survey found that TV2 **Instagram** (71,000 followers) is the most popular among Hungarian media outlets. On **Twitter** we have 359,000 followers, with this number the second biggest in Hungary, only **Barbara Palvin** is ahead of us. On **YouTube** we are also the #1 in the media sector. Each of our eleven channels have their own website, in 2017 **TV2 Group** has had so far more than 720 thousand unique visitors per month and more than 9 million page impressions per month'.

He concludes: 'Local productions have a key role in reaching the above-mentioned goals and building the number one television portfolio in Hungary. In the coming autumn season **TV2 Group** will introduce popular international formats. Acknowledging the success of adventure reality game shows on the international markets TV2 will broadcast *Asia Express* (**4MAT4**) the reality game show following Hungarian celebrity couples through Vietnam, Laos, Cambodia, Thailand'.

'The big sports entertainment event show *Ninja Warrior* (**Dentsu Aegis**) is a good alternative to music competition shows in the weekends. Cooking still has a great audience, so we bought *Game of Chefs* (**ITV**); *Your face*



Sony: *Exes in Eden* on Viasat3 has been one of the shows with the biggest buzz this spring, focusing on youthful, urban target group, followed by Viasat6 popular car show *TotalCar*

sounds familiar (**Endemol**) will return with its fifth season and *Your face sounds familiar Kids and Co* (**Endemol**) with its second season to **Super TV2**. Fiction series have a trend now: we acquired and adapted the popular comedy-drama series *Step Dave*, while the scripted reality series *X-Diaries* (both from **all3media**) will be shot at Lake Balaton'.

'We have a wide range of genres at our channel portfolio so we are looking for movies, series, formats for kids, gastronomy, original daily entertainment, reality show, game shows, and weekly high-concept entertainment shows', finishes **Gergely**.

In October 2015, **Sony Pictures Entertainment** (SPE) secured Hungarian **Viasat** assets that were in the hands of Nordic conglomerate **Modern Times Group** (MTG).

Now, SPE holds the sixth position in the market, after **RTL**, **TV2**, **MTVA**, **VIACOM** and **AMC Networks**.

John Rossiter, GM, **SPE Central Europe**: 'The Hungarian market is changing rapidly, with the entrance of many new VOD services. There is more pressure on the channels in the market to stay competitive and differentiate themselves'.

VIASAT3 is known for creating locally relevant productions that push the envelope; this year we are taking original productions to a new level, and doubling our number of original shows. This helps us keep the Sony portfolio more youthful than the market average, attracting more of the important AB status consumers'.

'We are producing local shows both in Hungary and in Poland. For instance, *Ultraviolet* is our fall highlight on **AXN Poland**, a high production value series with a top-notch local cast. **Viasat3** is focused on the reality genre: one of the shows with the biggest buzz this spring was *Exes in Eden*, which was very popular with the channel's youthful, urban target group. **Viasat6**, our male-positioned channel,

features one of the most popular car shows in the country, *TotalCar*'.

'We are also leveraging opportunities as being part of **Sony** by bringing exclusive premieres to the markets like *Snatch* featuring **Rupert Grint** and will soon premiere our fresh and high production value **AXN** original series, *Absentia* starring fantastic **Stana Katic**', he explains.

'Since 2013, TV production investment shows dynamic growth. There is more competition between the linear services of channel portfolios and the Hungarian market exhibits a rapidly increasing fragmentation. At the moment there are close to 120 channels available in the Hungarian market, where the top challenge is to differentiate your offering and to stand out from the crowd'.

'We are part of one of the biggest content developers and production companies in the world, which helps us guarantee high quality, original content. Locally produced shows create huge value, as viewers identify the channel with these shows, which is a clear USP for the distribution and advertising partners as well'.

'With the **AXN Now** service we were among the first to offer a turn-key branded SVOD solution to our partners in the CE markets, and we are very happy about the number of households we reach with our service in the region. With original productions, huge emphasis is put on integrated linear and digital campaign elements. We offer second screen activities to viewers, live streaming and dedicated ad break social-media stunts. In addition to these we provide instant catch-up services and additional video clips as well as digital-only content', **Rossiter** adds.

'We continue to invest in our channels, original productions and digital platforms. The number of our HD channels is set to increase. We recently launched **AXN** in HD, and **Viasat3** and **Viasat6** will launch in HD later this year. We need differentiation and unique content, therefore we are developing locally produced shows for the Hungarian market for our **Viasat** channels, and we will be delivering exclusive original scripted series for Hungarian viewers', he concludes.



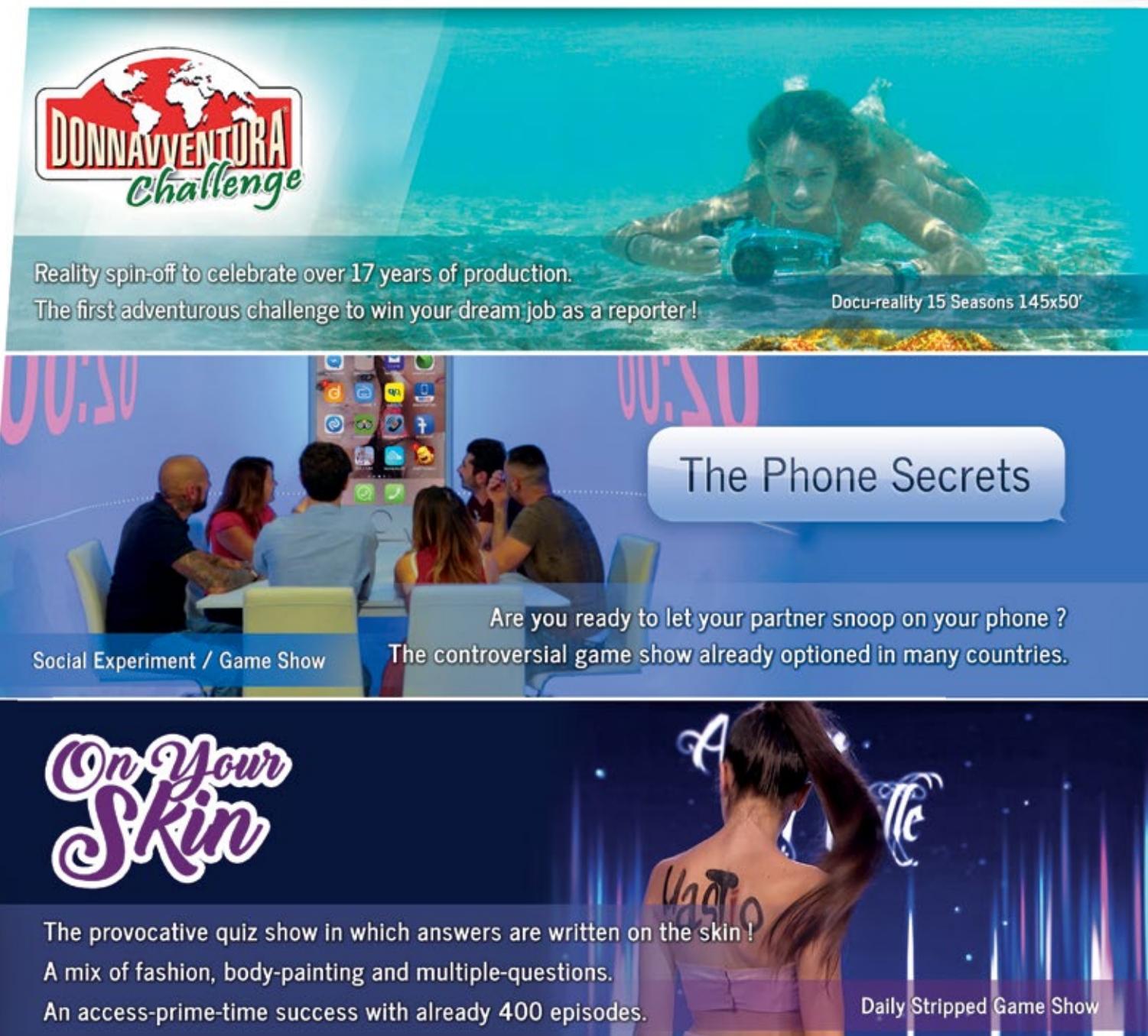
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YOUR AUDIENCE...



...OUR STORIES





Pete Smith, Managing Director, Antenna Group

Antenna Group is a leading entertainment and media organization with offices in Europe, Australia and the US. It owns and operates leading brands in 14 territories across TV, radio, tech, digital, publishing and telecoms. It produces, distributes and broadcasts ratings-winning content, and in the last year it has diversified its business into digital, as well as expanding its international footprint with winning-dramas.

In addition to owning and operating commercial channel **Ant1** in Greece and Cyprus, it also has an extensive bouquet of leading FTA and Pay TV networks including **PRVA**, **PRVA Plus**, **PRVA Max**, **PRVA World** and **B92** in Serbia & Montenegro; **Planet TV** in Slovenia; and **Kiss TV** in Romania.



Rising Star recorded the highest ever audience-voting participation and the most mobile-phone app downloads for a new show in Greece; *Ena* is a high end drama from Planet TV Slovenia, which draw in large audiences.

Antenna Group: original, digital and beyond

Pete Smith, managing director: 'In Greece we recently launched *Ant1 Next*, our first SVOD platform. We decided to launch it after a hugely successful trial of the service last year as an AVOD entity. The trial helped us establish a substantial user base and gave us a better understanding of the strong appetite there was for our content. The service is performing very well and we will continue to invest in new, original content exclusively for the platform. We also have VOD catch-up services for our major channels such as **PLAY** in Serbia and **Ant1** in Greece'.

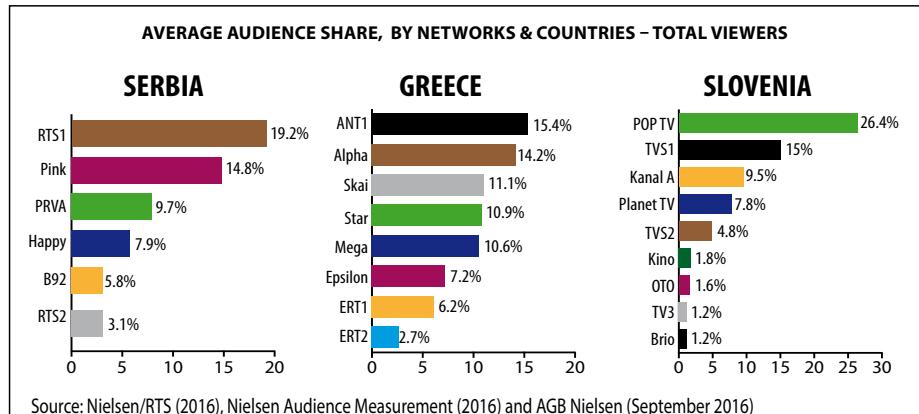
'We also have a very successful partnership with **Vice Media** across a number of territories in emerging Europe. The JV formed in 2014 has seen us launch **Vice.com** in Greece, Serbia and Romania as well as produce original new content in those markets for local broadcasters and for international distribution. The shows we have produced with them have consistently ranked in the top 10 TV shows in our markets and have won a number of local awards', he adds.

'We have had a number of ratings hits on our channels in many territories. In Greece, for example, we saw unprecedented success with our version of the interactive entertainment show *Rising Star*, which recorded the highest ever audience-voting participation and the most mobile-phone app downloads for a new show in Greece'.

Rising Star recorded more than 1.4 million viewers in Greece compared to just 860,000 who tuned into *The Voice*, and an audience share of 34.9%. The local Greek versions of *So You Think You Can Dance* and *Your Face Sounds Familiar* have also performed well, while the daily magazine and news show *Kalimera Ellada* continues to dominate its timeslot with more than a 32% share, as does the channel's lifestyle program *To Proiono* with over 25%.

In Slovenia it has had great success with the local drama *Ena žlahtna štorija* on **Planet TV** the fifth series has a total reach of 24% and sixth is scheduled to air later this year. On **PRVA** (Serbia) the original sitcoms and late-night shows, such as *Andrija & Andjelka* and *Late Night with Ivan Ivanovic*, get an audience share of 20% and 16%, respectively. The local version of hit entertainment reality competition *The Brain* has drawn equally impressive audiences and a 30% share.

'There are local variations of course but in general the main programming trends across



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Antenna Group: original, digital and beyond



the markets we operate in, principally Southern and Eastern Europe, are for local, original scripted content and local versions of the big, international entertainment/reality shows. Viewers want to be able to watch content that reflects and represents the society in which they live. The popular acquired content tends to be European or from the US, in particular sitcoms and dramas'.

Smith: 'Audiences want to see homemade original dramas and local adaptations of international formats and franchises. While there is still an appetite for US content, the highest ratings are for local programs: dramas like *Brousko* on **Ant1** or *Ena* on **Planet TV** draw in large audiences'.

'Together with **Vice Media**, we have produced weekly shows for broadcast on **PRVA** and **Ant1**, as well as special documentaries, web TV series and have localised existing content for **vice.com**. The linear broadcasts have rated incredibly well in all markets and we have won a number of awards for the original local content'.

'Digital is having a big impact on the TV industry, 'but it continues to complement rather than cannibalize established, linear broadcasters and media companies', **Smith** reflects. And he completes: 'Subscriber and linear TV viewing is stable because we operate in younger markets so there is a lot more opportunity for companies like us to continue to grow and expand'.

However, he sees that viewing habits 'will shift in the long-term as broadband penetration increases, bandwidth increases, the quality improves and it becomes more affordable to more people. Everyone operating within the industry has to adapt to these changes'.

Smith explains: 'We will continue to diversify our digital offering. We have already partnered with digital brands such as **Thrive Global** to launch local versions in new terri-



The original sitcom *Andrija & Andjelka* get an audience share of 20% on PRVA Serbia

International success

Greek long running drama series *Brousko* (800 episodes) was a huge success because it combines compelling storytelling and an original, creative concept. 'It provides the right mix of drama, romance and originality while also appealing to the networks' target audiences', explains the executive.

Smith: 'The finished program has been sold to more than 40 territories worldwide, and in Latin America it was distributed in 10 countries (**VIP 2000**). The scripted format has also been licensed in Mexico and Lebanon. It continues to be one of our bestselling dramas and we are looking to increase our portfolio of scripted content'.

The company has recently appointed a new creative head at Antenna TV, **Georg Pofantis**, who is tasked with increasing the original scripted content as well as securing ambitious international co-productions with global appeal for both linear and non-linear broadcast. 'We already have a number of exciting, high-end projects currently in development and hope to be able to announce them soon', he says.

In addition to its scripted content, **Antenna Group** recently announced its latest non-scripted shock doc series *Naked Balkans* exploring a range of little known customs, practices and traditions from across the diverse Balkan states. 'We expect the content and production values of this series to appeal to a broad



Long running drama series *Brousko* was sold in 40 territories globally, including 10 territories in Latin America

range of international broadcasters', he says.

'We want our content, whether it is acquired, commissioned, produced in-house, to appeal to audiences beyond the local market. Drama is expensive to produce and often has more than one commissioning broadcaster, so it instantly becomes less local and more global in nature. With the emergence and proliferation of new platforms, there are now even more opportunities for distributors like us to find the right home for their content in a diverse range of markets and territories'.

'Audiences around the world are more open to foreign-language programming now: there have been significant successes with French-language and Israeli content and of course the *Scandi Noir* phenomenon. There is certainly more of an appetite for drama from outside English-speaking markets', concludes **Smith**.

tories. *Ant1 Next* is already performing very strongly and attracting new subscribers thanks to its mix of first-look programming windows as well as catch-up and box-set content. We also have our catch-up services operating in key markets'.

In terms of distribution, the proliferation of new digital platforms means that there is more opportunity to find the right home for content, whether as a first, second or third window. 'We are also talking to a number of new com-

panies about possible JVs and expansion into new markets', he remarks.

Antenna Group also has its newly formed **Amplifier** division, which has already achieved huge success with the **Vice Media** JV. 'We are expanding this partnership into a range of new territories across the CEE region and we will soon be launching our local version of *Arianna Huffington's Thrive Global* in Greece, a deal we announced at the end of last year', finalizes **Smith**.

FROM THE MAKERS OF SKINS



Drama that captivates

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bTV: 'Audience is more focused on the story and production value'



Florian Skala, CEO, bTV Media Group

The **bTV Media Group** is a market leader in Bulgaria. In the Spring season of 2017 the group maintained its stable leadership, reaching an impressive 44.2% audience share in main

sales target 18-49 based on the only audited measurement system in the country, which is 10% higher compared to same period (20 February to 31 May) of 2016, and nearly 22% points more than its main competitor.

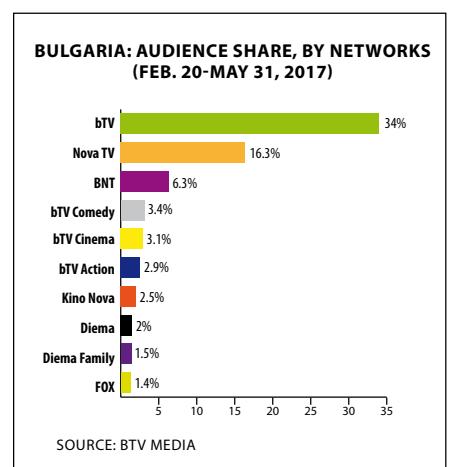
The driver of the group success is the flagship channel **bTV**, while the additional five thematic channels in the group also contributed to the great audience performance of the group. **Florian Skala**, CEO: 'All of the key prime time programs of **bTV** are leaders in their slots. The focus of our main channel is on locally produced big international brands, but we air a mixture of both locally produced programs and acquired content'.

For acquired content, the network broadcasts blockbuster movies on the weekends and the top Turkish title, Broken Pieces, in prime time on weekdays, which delivered 39.6% audience share.

Skala: 'Our audience is becoming even more demanding of quality content, and is fo-



1



'We offer **VOYO** as a subscription VOD service to all users wishing to watch our current library of local productions. We also have an advertising supported VOD platform, **btvplus.bg**, where viewers can catch-up for 7 days with the latest episode of the programs they are following. We've launched a news app with push notifications alerting users of any special event that might affect their lives. And last but not least, our digital channels allow a greater diversification of content projects with additional and deeper looks into specific topics'.

cused on the story and production value. This explains the great success of our key prime time projects. In 4th season of *The Voice*, 3rd season of *MasterChef*, 2nd season of *Home Makeover*, we remastered the storytelling and exceeded expectations in the quality of production'.

'The audience is also looking for locally produced programs based on people's personal stories and everyday life and culture in Bulgaria. That explains the successful results of *Home Makeover* as well as a new show we launched this year: *Wife Swap*. The preference for locally produced TV series has also been demonstrated by the success of the longest running Bulgarian TV series *Citizens in Excess*.

And as it was mentioned, high quality Turkish programming is also popular in Bulgaria. In an environment where people have become more critical of properly sourced news stories, viewers have turned to **bTV**, both on TV and online, as a credible source of breaking news and current events. Since it has been identified as the most trusted source of information in numerous independent surveys, **bTV** news and current affairs shows continue to be the backbone of **bTV**'s programming.

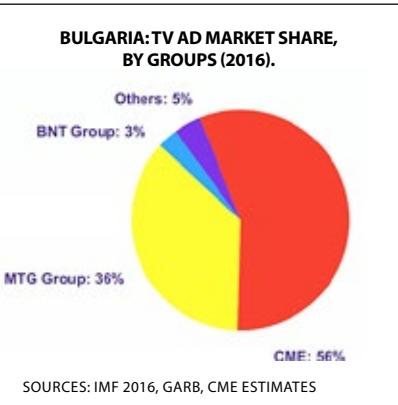
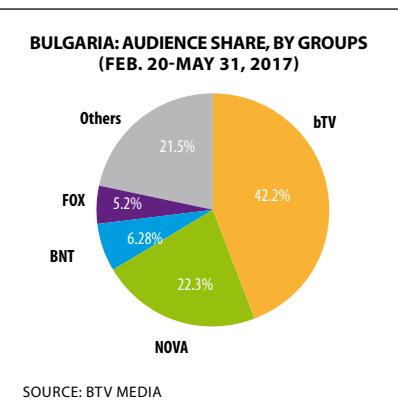
Skala: 'TV remains the leading and most important channel of distribution for news and entertainment.

And we think digital platforms will continue to support television in that leading role. But the digital transformation will affect how people consume both the news and their favourite shows. The shift from a linear towards a non-linear experience will affect the audience and we are positioned to provide rich and entertaining opportunities on every platform or device'.



The Voice of Bulgaria and MasterChef are two of the top rated shows on bTV during the first half of 2017

'As a leader in Bulgaria, we are always looking into the latest trends and new opportunities. We remain focused on the production of the best local content distributed through our own platforms, which has contributed to our position as the strongest media brand on the market', concludes **Skala**.



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COMEDY CHANNEL

Spike

VH1

5

BET

TV LAND

CMT

Logo

3

Penske CHANNEL



MGU: launches four global TV networks



Oleksii Kurakin,
business development director



Media Group Ukraine has announced the release of a package of four international channels for television viewers all over the world. Up to that moment, there have only been single projects of some Ukrainian TV right holders for the Ukrainians who live abroad. The focus of these channels is TV series, films and movies, entertainment and informative shows, great humor for all the age groups.

Ukraine 1 and **Ukraine 2** offer a total of 800 hours of content a year, and are distinguished by thematic differentiation: they combine a broad spectrum of audience interests. The first one offers the series *The Singer*, *The Jewelers Clan* and the scripted realities *Real Mysticism*, while the second one presents mainly TV programmes and shows like *Ukraine Is on the Air*, *Star Track* and *Folk Star*. **NLO TV 1** and **NLO TV 2** have more than 400 hours of content per year, including the best jokes and entertainment programmes (*How the Style Was Hardened*, *Supercops*, *Syshyshshow*), and for shows (*Sissies*, *Dolts*, *Euro Checkin*), respectively.

The package meets the interests of the whole family: from 14 years old to 50+. This is a full-fledged stand-alone entertainment TV product. These TV channels contain the best Ukrainian content created in recent years, as well as the premieres of the Ukrainian novelties. The broadcasts are in Ukrainian and Russian, round the clock, in HD format.

Oleksii Kurakin, business development director, says: 'The package of the international TV channels from Media Group Ukraine is an answer to the interest on the part of foreign broadcasters towards the Ukrainian content. We were repeatedly asked to start broadcasting the channels of our group in different countries. And as a result, we have worked out a system solution, i.e. a package of TV channels for the whole family'.



Netflix first Turkish original series



Netflix continues its investment in international content with the announcement of its first original series from Turkey. Weaving a hero-driven action story with Ottoman and Turkish legend, and history, the **O3 Medya**'s 10-episode series will be written and produced in Turkey and it is expected to launch to the SVOD global members around 2018. The drama focused on a young man who discovers that he has special powers. When dark forces that threaten to destroy Istanbul emerge, he must team up with a group of misfit friends to harness these powers to defend the city and all mankind.



CT bets on regional co-productions



Petr Dvorak,
general manager, CT

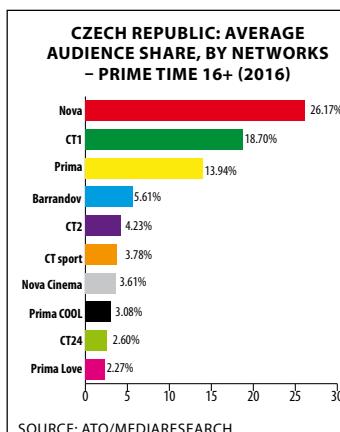


Czech pubcaster **Ceska televize** has prepared 32 new film projects, mostly period dramas but also thrillers and comedies, informed CEETV.net portal. The company has enjoyed high ratings with projects on historical topics and real events. 'Most of these programs deliver higher than average viewership for the station, which proves the interest of the audience', remarks **Petr Dvorak**, general manager.

Among the 32 projects approved last year by the board of the TV, the historic genre occupies a significant place. One of those titles was *Defenestrace by Zdenek Jirasek*, which is focused on the case of killed royal governors in 1618, by throwing them out of the window of Prague Castle. CT is also working on a two-part movie about *Maria Theresa*. Both projects are co-productions, the first one with **Arte** and **ORF** (Austria) and the second one with **ORF**, **MTVA** (Hungary) and **RTVS** (Serbia).

CT will present movies dedicated to the founding of Czechoslovakia in 1918 and the case of Czech pilots after the WWII. There will be a movie project set in present days, focusing on the Methanol case in 2012.

It has also prepared some detective movies and comedy series, i.e. *Dabing Street*, two final installments of the *Holy Trinity* detective series and also a new series called *Lynch* that is prepared by a group of young writers. A new triptych detective with Captain Vasatko (Viktor Preiss) and the painter Horace (David Matásek) closes the cycle of novels by Hany Proskovás.



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What's going on in CEE?

Digital TV, SVOD, 4G networks, original shows, new channels and programming quotas. There is a lot happening in Central and Easter Europe. Here, there is a summarize of the latest news, from different sources.

Turkey: Korea's CJ E&M opens business arm



CJ E&M, one of Korea's leading broadcasters has announced the establishment of a Turkish business unit to make inroads in to the local movie market. 'We will set up a local unit for content making, invest, distribution and marketing in Turkey and begin making South Korea-Turkish coproduced films', the company said, without mentioning when this will happen. In June, we'll begin filming Hot, Sweet & Sour, the Turkish version of A Wedding Invitation, and are working on the screenplay for the Turkish version of Miss Granny with the goal of beginning its shooting with the year', they added.

Belarus: Beltelecom adds channels to ZALA



From May 25, the composition of ZALA IPTV package has been changed, Beltelecom informed. Within the additional package Poznavatelny (Cognitive) the broadcast of TV channel Travel Channel will star. It is an entertainment and information networks about travelling and adventures as lifestyle. Its program consists of documentaries about different parts of the world. Fine Living Networks will be broadcast instead of test TV channel Kinoserija with the thematic package Na divane (On the Couch). The regional channel Varyag will be broadcast within ZALA IPTV basic package. This is a family channel, which includes daily information program Videofact, weekly information program region on the events happening in Brest Region; music program Vinovniki torzhestva!, daily advertising and information program Telemeket, among other own produced shows.

TVN24 leads top 25 Polish thematic channels



May 2017 television ratings in Poland show Scripps Networks Interactive's TVN media group leading the way. The top network among Poland's thematic stations was 24-hour news channel TVN24, with an average market share of 4.7% in the general audience group (4+), reflecting a year-over-year increase of 20.4 percent, according to Nielsen Audience Measurement data. HGTV saw the biggest overall viewership increase among Poland's top 25 lifestyle channels, with a year-over-year gain in market share of 277% versus TVN Meteo Active, the network it replaced. In Poland's key P16-49 demo, TVN24 was also the leader in May, with an increased YoY market share of 8.7%. TVN's TTV entertainment channel nabbed the #2 spot with a 2.12% market share, up 6%. HGTV also recorded the highest increase in the top 25, with a year-over-year increase in share of 436% versus TVN Meteo Active.

Russia: Mail.ru on six own shows for 2017



The GM of Mail.Ru Group Boris Dobrodeev stated the holding plans on producing content for its services. Tele Sputnik reported that at least six own shows of the company should come out this year. The executive did not disclose any details of the project, but made emphasis on the growing popularity of user-generated content, which had been attracting interest from the professional industry as well. 'We believe in the evolution of UGC. One of the latest sport competition generated 12 million views, which is comparable to the TV audience', he remarked.

Romania: 7.3 million subs of Pay TV in 2016



Romania holds 7.3 millions of pay TV subscribers, up 3% over the previous year, according to the data reported by suppliers to ANCOM. From these, over 4.7 million are cable, 2.4 million are satellite (DTH) and 95,000 are IPTV subscribers. The number of clients receiving digital cable retransmission services increased by more than 10% by the end of 2016 compared to 2015. With the increase in the number of subscribers, the household penetration exceeded 97%.

BH: BiH preps for future launch of 4G networks



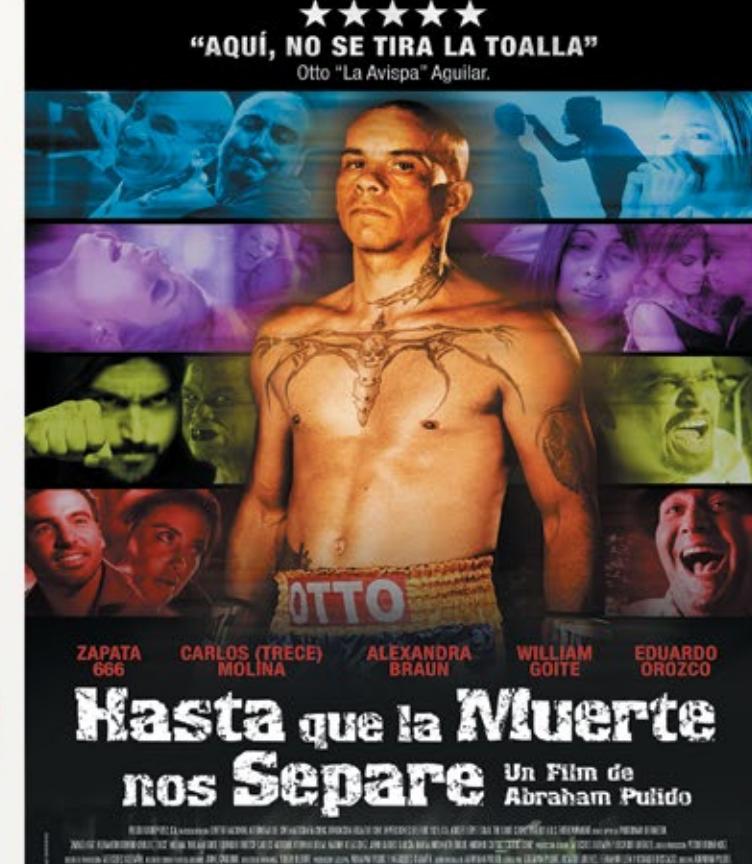
At the proposal of the Ministry of Communications and Transport, the Council of Minister of BiH has adopted the Decision of Sector Policy of electronic telecommunications Bosnia and Herzegovina for the 2017-2021 period and the Action Plan for its implementation, which is a key pre-requisite for the launch of the 4G networks and greater online speed connection in the country.

Hungary: MTVA makes its kids channel ad free



Starting from June 2, MTVA's children net m2 is completely ad free. The broadcaster chief Miklos Vaszily said that they would like to protect children from possible adverse effects, parents from compulsory purchases and ensure that parents can leave their children in complete serenity in front of the screen. He emphasized that the channel is among the leaders in the under 12 demos and added that in the future they will be offering original local content with a focus on education.

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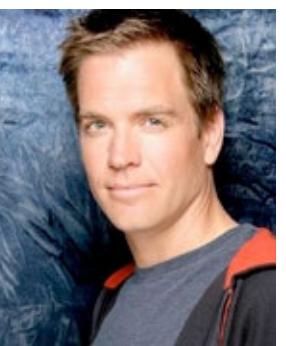
NEM 2017 on its fifth anniversary: larger and stronger

New Europe Market (NEM) celebrates this year its fifth edition with a dynamic academic program. It is held on June 12-15 at Dubrovnik Palace Hotel, Dubrovnik, Croatia. The opening ceremony takes place at sunset and includes a welcome drink by **Pickbox** and a casual Q&A with the famous Hollywood actor **Michael Weatherly** (*NCIS, Bull*) conducted by the Croatian journalist Antonija Mandić.

The media event features many interesting speakers, the most prominent of which are the managing director of **Antenna International, Pete Smith**; president of **AMC Networks International** for Central Europe, **Michael Moriarty**; general manager and VP of CEE, **BBC Worldwide, Salim Mukaddam** and VP of Content and Products at **Viasat World Limited, Karin Heijink**.

Media professionals from across the region and Europe prepares for the four-days event, which includes networking and participating in dynamic panel discussions, presentations, a market and screenings for the upcoming television season. Their evenings are spent at the already legendary parties at the Lazareti Club in the Old Town of Dubrovnik, organized by NEM Diamond Sponsor **Eutelsat**, and on Vala Beach.

NEM 2017 agenda includes a wide range of hot topics directly pertaining to the key topics of the television world. On June 13, the panel discus-



Famous Hollywood actor Michael Weatherly attends NEM 2017 to talk about its lead role at *Bull*



Key speakers at NEM 2017: Michael Moriarty, president of AMC Networks International for Central Europe; Salim Mukaddam general manager and VP of CEE, BBC Worldwide; and Karin Heijink, VP of Content and Products at Viasat World Limited

sion *Surviving It All: Things That FTAs Can Teach You* (10.30am-11.15am) is centered on the survival of FTA channels, which are still able to survive the increasingly large market competition. The speakers are **Pete Smith** (**Antenna Group**, Greece), **Matthias Settele** (**Markiza**, Slovakia), **Petr Dvorak** (**Ceska televize**, Czech Republic), **Ivana Miković** (**RTS**, Serbia) and **Kazimir Bačić** (**HRT**, Croatia).

It is followed by *ESports: The Next Big Thing* (11.45am-12.30pm), centered on the development of eSports as opposed to traditional TV media. Television landscape is changing swiftly and eSports are just one among many new things to emerge. Thanks to technology, this business segment is now moving fast on this road, and earnings are coming fast too.

Regulative Irregularities: Operators Vs Laws (3.45-4.30pm) focuses on the law that prohibits telecommunication companies from owning TV channels. In an everlasting battle for profits, telephone companies recently started offering multichannel television services and now present a threat to traditional providers of TV content.

On June 14, speakers at *Customers First* (11.30am-12.15pm) discusses how companies contend with the rising expectations of their customers. Customer demands are growing and there is a constant pressure to keep up. Since companies started putting the consumer's priorities before anything else, there is a constant need for new and innovative ideas.

Let Me Choose For You (3.15-4pm) is about making business decisions and whether the large amounts of data companies own are actually useful to them. Companies today are facing huge amounts of data, which ultimately leads to more complex decision-mak-



Key speakers at NEM 2017 II: Pete Smith (Antenna Group, Greece), Matthias Settele (Markiza, Slovakia), Petr Dvorak (Ceska televize, Czech Republic), Ivana Miković (RTS, Serbia) and Kazimir Bačić (HRT, Croatia)

ing. Executives seek a perfect way to make a big decision and new technologies have opened up new insights when it comes to this. Lastly, *Things Are Looking Better: Croatia's Production Spring* is dedicated to the new increase in Croatia's production due to more government funding being allocated in this year.

The second day of the NEM begins with a presentation by **Claire Harris**, Commercial Lead for **Nielsen's Watch** business in the Emerging Markets group. The presentation is about video consumption out of home and the understanding of the consummation of media other than TV channels. It is followed by **Akamai** with the topic of how to improve the provision of high-quality video content without an increase in the budget.

Izzet Pinto, the founder and president of **Global Agency** (Turkey) presents his case study about both the successes and the failures he experienced before the company developed into what it is today. On June 14th,

Viacom holds a presentation about licensing digital content, while the final day of NEM is marked by a special presentation held by **Thomas Ahrens** of **Aspera**.

Lastly, on June 15 *You Can't Stop Me: The Power Of TV Channels* (11-11.45pm) with **Karin Heijink** (**Viasat**), **Mike Moriarty** (**AMC Networks**), **Bartosz Witak** (**Viacom**), **Salim Mukaddam** (**BBC Worldwide**), **John Rossiter** (**Sony CEE**) focuses

on whether there is a place for new TV channels in the market, considering that viewers already have such a large number of channels to choose from. In a panel dedicated to TV channels, speakers will immerse themselves in a discussion about the emergence of new TV channels. While watching TV, people can choose between numerous channels of different types and every person can find something for themselves.

The special guest of this year's NEM is the famous Hollywood actor **Michael Weatherly**, best known for playing Tony DiNozzo on the television series *NCIS*. He currently stars in *Bull*, a drama TV series based on the early days of Dr. Phil McGraw's career. All episodes of *Bull* can be seen on **Pickbox** in the Adria region. 'I am thrilled to be participating in NEM this summer. Croatia is a beautiful country and I'm looking forward to sharing my incredible experience on *Bull* in the wonderful city of Dubrovnik', he declares.

This year's NEM features again a good number of participants, who have many opportunities to network and make business deals. Everyone in the TV industry, from national televisions, Pay-TV channels, cable and satellite operators, IPTV companies, the producing elite to marketing agencies and the media.

Apart from networking possibilities, business negotiations and overall great time, NEM is beneficial when it comes to one more important thing: learning. It is a media-oriented conference and this year covers various topics that are mostly connected to the ever-changing trends in television industry.



Caracol: stories of overcoming



Paloma García, sales executive for Europe and Africa

Caracol International (Colombia) highlights for the region a slate of dramas full of action and strong characters. **Paloma García**, sales executive for Europe and Africa, recommends specially *El Bronx* (60x60'), a super series where parallel stories that take place in the Bronx neighborhood, a dangerous sector of

town with a mixture of failure, disappointment and despair of thousands of drug addicts, drug dealers, merchants of dreams, and interspersed with love, faith and strong fraternity links.

The Goddess (60x60') centers on a woman who with her talent and love conquered a world of men with her joy, charm, kindness, craftiness, and optimism. She faced a chauvinistic world filled with jealousy and envy, bringing everyone to her knees. While *Night School* (60x60') is a series full of drama and emotion inspired by the stories of the millions of students in the world who resort to night education as their only way of getting ahead.

Lastly, García highlights the telenovela *Dynasty*. 'In this story, Kaleth Morales is a singer who seeks to revolutionize the musical genre that runs in his blood, and with his passion and talent, he manages to captivate his crowds as well as the heart of July Pupo; but his fate was already written long before he was born. At age 22, a car accident leads to his death, a tragic event that will transport his spirit to "El Limbo", a journey of memories and old rivalries. Miguel Morales, Kaleth's father, begins a successful life



El Bronx, super series

as a composer and singer; the source of inspiration for his musical career comes from a vision where his eldest son plays the guitar on top of a white raft. Thus begins the legendary Morales Dynasty', she describes.



Peter Iacono, president, international TV & digital distribution

Lionsgate: content for each type of customer

A good strategy to keep growing in today's industry is to have a specific product for each link of the production chain. That's why **Lionsgate**, a pioneer in generating live series for OTTs, bought **Starz** in premium cable, and has launched an entertainment division where *Candy Crush*, a shiny floor entertainment show for open TV, is already a star product.

'The key today is to have a good balance, and Lionsgate has it for each type of customer. Original series, blockbusters and good cinema, cable package, Latin material for niches like **blim** in OTT. We have taken a leap in the offer since last year', describes **Peter Iacono**, president, international TV & digital distribution.

Along with *Candy Crush*, Iacono highlights the new drama 10 Days in the Valley (10x60'), starring Kyra Sedgwick (*Something to Talk About*) as an overworked television producer and single mother in the middle of a separation. Her life is turned upside down when her young daughter goes missing in the middle of the night. And *Dirty Dancing*, a three hours special event based on the global pop cultural phenomenon; a reimagining of the iconic stared by Abigail Breslin (*Little Miss Sunshine*).

The White Princess (8x60') is a event series drawn from the novel of the same name by Philippa Gregory, and part of *The Cousins' War* book series; *Kicking & Screaming* an unscripted show where 10 pampered prima donnas pack their bags for the jungles of Fiji, to face the wild with 10 survivalists and compete for a grand prize of USD 500,000, and *Nashville* (112x60') is set against the backdrop of Nashville's famous music scene.

Lastly, the company keeps pushing one of its latest hits: *Power* (48x60'), which tells the story of a visionary crime drama set in two different worlds, the glamorous New York club scene and the brutal drug trade.



Dirty Dancing

Globo: more than dramas

Globo (Brazil) arrives with a strong catalogue that mixes big telenovelas and dramas with a twist. Heading the slate are *Total Dreamer* (130x60'), a modern fairy tale tells the story of a homeless girl who dreams of helping out her family and finds her big chance of turning her life around in a fashion modeling contest; *Time After Time* (100x60'), a forbidden love story doomed to end tragically, and *Wounded Past* (130x60'), about love and tragedy.



Supermax, new series

Other new titles are *Lady Revolution* (45x 60'), centered on the daughter of a revolutionary; *Burning Hearts* (100x60'), and *Rising Sun* (100x60'), about an independent woman, raised in a Japanese family and an immature guy of Italian origins.



Raphael Corrêa Netto,
head of international business

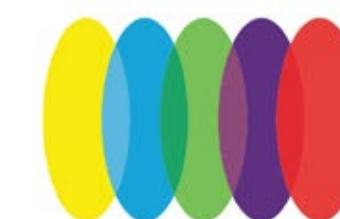
From the slate of series it stands *Supermax* (10x60), one of the main bets of the company for this season, and described as 'more than a reality show, much more than a show'. *Above Justice* (16x60') is about a young man who murdered his fiancé out of jealousy faces the rage of his former mother-in-law, and *Nothing Remains the Same* (10x60') is set in radio's golden age during the 1950's.

In miniseries Globo offers *The Brothers* (10x60'), a family epic about identical twins parted by the love of a mother who always did tell them apart, and complete the catalogue the feature films *Magal and the Ants* (90'), *The Eternal Son* (86'), *Under Pressure* (86') and *Alone Man* (88').

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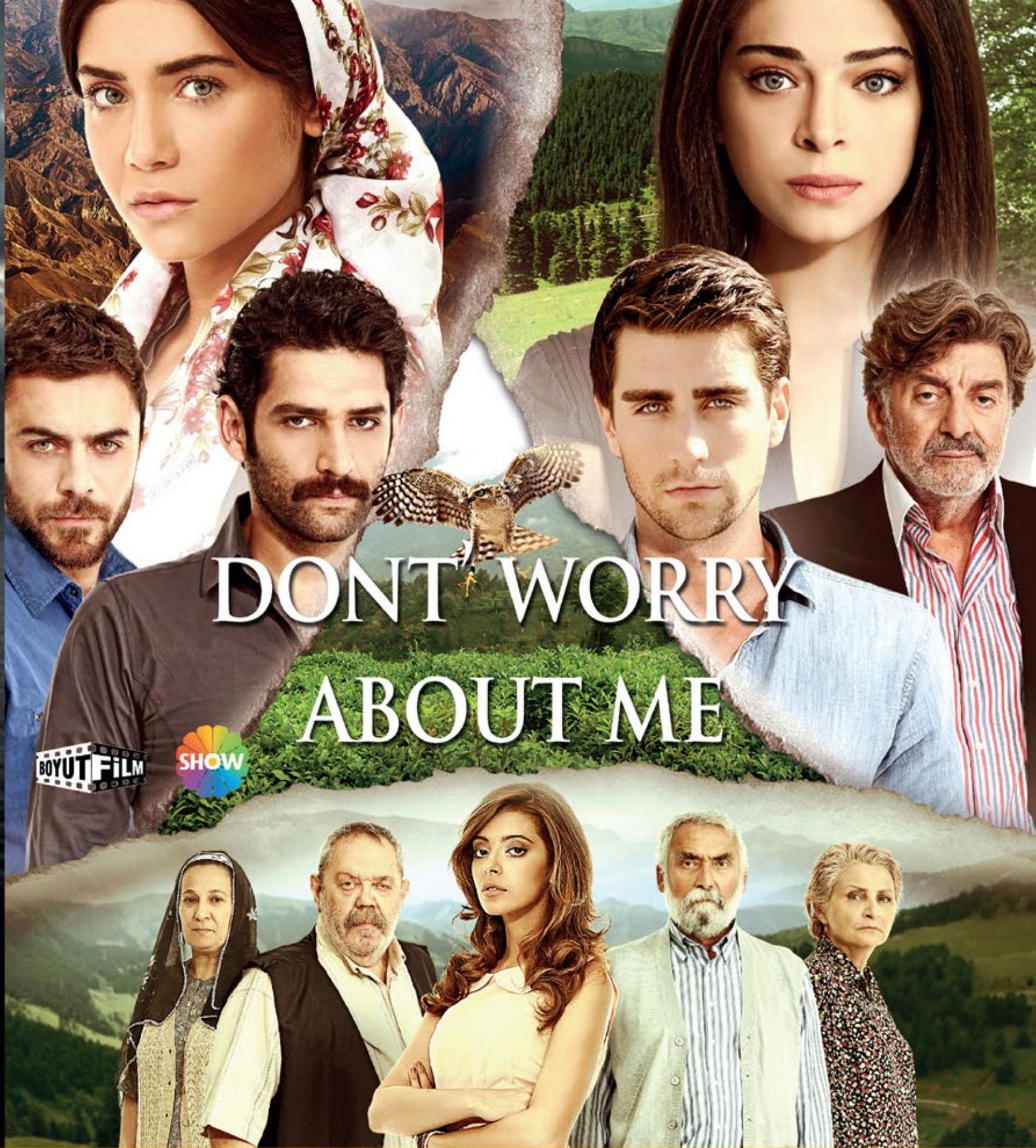
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Kanal D: focus in Europe and co-developments

Kanal D is one of the leading broadcasters of Turkey, but is also among the main exponents of the Turkish series global success, managing to reach almost every corner of Latin America, including the US Hispanic as well as MENA, Central Asia, CEE, CIS and other territories in Asia, with titles like *Fatmagül, Times Goes By* and *Forbidden Love*.

Ezgi Ural, director, business development and content sales, describes: 'During the last 3 month, we close several deals worldwide, especially in Europe after the sale of titles like *Wounded Love* to Poland and Hungary; *Flames of Desire* and *Family Secrets*, both sold to Romania, *Leaf Cast*, acquired in Serbia and Montenegro, and *Fatmagül*, which keeps adding new markets after the sale of the drama in Bulgaria'

'While we keep growing our Latin America penetration, this year we are focused our strategies to reply that success on the Far East as well as we are



Innocent, first BluTV original series



Wounded Love, sold to Poland and Hungary

focusing on Europe more than ever, but also we are interested in co-production and co-development projects for expansion', adds **Ural**.

Other big titles of the company for this season are the first digital original dramas, produced for **Kanal D**'s OTT **BluTV**; *Innocent* and *Possessed*.

Combining crime fiction with drama, *Innocent* is an unordinary story of an ordinary family. *Innocent* is **BluTV**'s and Turkey's very fist original content. Starring Haluk Bilginer (*Winter Sleep, Ezel*), Nur Sürer (*Under the Trees, Sorrow*), Ali Atay (*Leyla and Mecnun*), Okan Yalabık (*Magnificent Century*), Serkan Keskin (*Leyla and Mecnun*), Tülin Özen (*Magnificent Century: Kösem*) and Bartu Küçükçağlayan (*Almost Famous*), the series is directed by award winning director Seren Yüce and produced by **D Productions**.

Possessed is the first horror genre miniseries particularly produced for an OTT platform. The series is centered on strange events going around a young couple in a little village. Produced by **D Productions**, written and directed by Alper Mestçi, one of the best directors of Turkish Horror movies and starring Funda Güray (*Broken Pieces*), Baran Akbulut (*Forbidden Love, Behzat Ç*), Sait Genay, Ferit Kaya (*Time Goes By, Fallen Angel*), Koray Şahinbaş.



Ezgi Ural, director, business development and content sales

Global Agency closes varied deals for Mother



Global Agency (Turkey) have closed multiple major deals in more than 15 countries for *Mother*, the Turkish adaptation of **Nippon TV** (Japan) original drama, produced by **MedYapım & MF Yapım** and broadcasted by **Star TV**, registering 7.6 ratings and 19.8% of market share on its debut.

Starring Cansu Dere, well-known also for her stunning performances as the protagonist of *Sila* and *Ezel*, *Mother* has sold to Croatia, Macedonia, Greece, Georgia, Indonesia, Iraq, Iran, Uruguay, Chile, Serbia, Mexico, Bulgaria, Romania, Argentina, Colombia and Puerto Rico. Albania, Kosovo, Poland, Greece, Africa, Bolivia, Brazil, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Israel, Kazakhstan, MENA, Nicaragua, Panama, Paraguay, Peru, Russia, Ukraine and US Hispanic are the territories that the final stages of the deals are being negotiated.

Mother is the story of a young elementary school teacher who lives in a little town and her student. When she realizes that one of the female students is being mistreated by mother, her maternal instincts kick in and she impulsively decides to bring the girl into her own care. They escape together to Istanbul.



Mother, Turkish series based on Nippon TV's drama

CBS: action and technology



Michelle Payne, VP, Regional Sales, London

CBS Studios International (USA) highlights for this season two big dramas: *Seal Team* (13x60'), stared by David Boreanaz (*Angel, Bones*), and which follows the professional and personal lives of the most elite unit of Navy Seals, and *Valor* (13x60'), where an unit of U.S. Army helicopter pilots called the Shadow Raiders is sent on a top secret mission to Somalia, a mission that goes terribly awry.

In *Wisdom of the Crowd* (13x60') a visionary tech innovator creates a cutting-edge crowdsourcing app to solve his daughter's murder, and revolutionizes crime solving in the process, while *9JKL* (13x30') is a comedy centered on a new divorcé and actor between projects moves home to New York to regroup, living in an apartment sandwiched between his doting, meddlesome parents on one side and his competitive brother, sister-in-law and their new baby on the other.

Lastly are *Instinct* (13x60'), where Alan Cumming stars as a former CIA operative who is lured back to his old life when the NYPD needs his help to stop a serial killer, and *Salvation* (13x60'), which centers on an MIT grad student and a tech superstar who bring a low-level Pentagon official a staggering discovery – that an asteroid is just six months away from colliding with Earth.



Seal Team, drama with David Boreanaz

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BY ARTEM VAKALYUK, HEAD OF ANALYTICAL DEPARTMENT,
UKRAINIAN MEDIA CONSULTANCY MEDIA RESOURCES MANAGEMENT



Inside the Ukrainian content market

Ukrainian content production and distribution industry is currently on rise with more than 200 scripted projects in different stages of production. The boost of feature films production started few years ago with significant increase of the financial state support. According Ukrainian State Film Agency now about 80 different projects are being produced with its aid. The overall state support for production this year is planned to reach USD 20 million comparing with just USD 2 million five years ago.

Worth mentioning that lots of these titles are co-produced with foreign colleagues, mainly with European partners. For instance, during recent Marché du Film-Festival de Cannes, the Ukrainian delegation presented to producers from all over the world eight full-length films looking for foreign partners: *The Bobot*, *Voroshilovgrad*, *Egregor*, *The Stronghold*, *Quester & Max*, *Toloka*, *Tera* and documentary *Panorama*.

The list of currently being produced international co-productions with Ukraine includes several dozen films. Among the most anticipated ones: *The Line* by Peter Bebjak (Slovak Republic, Ukraine) that will premiere at Karlovy Vary International Film Festival 2017; *Easy* by Andrea Magnani (Italy, Ukraine) to be released this September; *Luxembourg* by Myroslav Slaboshpytskyi (Ukraine, Germany, France,

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Norway); *Polina* by Olias Barco (Ukraine, Belgium, France); *When the Trees Fall* by Marysya Nikityuk (Ukraine, Poland, France, Macedonia); *The Painted Bird* by Václav Marhoul (Czech Republic, Ukraine, Poland, Slovak Republic); *Stasis* by Mantas Kvedaravicius (Lithuania, France, Ukraine); *The Twins* by Eva Neymann, (Ukraine, Poland); *Ether* by Krzysztof Zanussi (Ukraine, Poland, Lithuania, Hungary, Italy); *Donbas* by Sergei Loznitsa (Ukraine, Netherlands), etc.

Animation

The local animation industry starts conquering international market. In 2016 new Ukrainian animation *The Dragon Spell* (budgeted at USD 4 million) was released, grossing locally near USD 400,000. Nevertheless, theatrical rights to this film produced by Panama GrandPrix studio were sold to many territories: Japan, China, South Korea, UK, Poland, Turkey, India, Czech Republic, Bulgaria, Hungary, Vietnam, Middle East, ex-Yugoslavia and Baltic states. Negotiations with North and Latin Americas and France are underway.

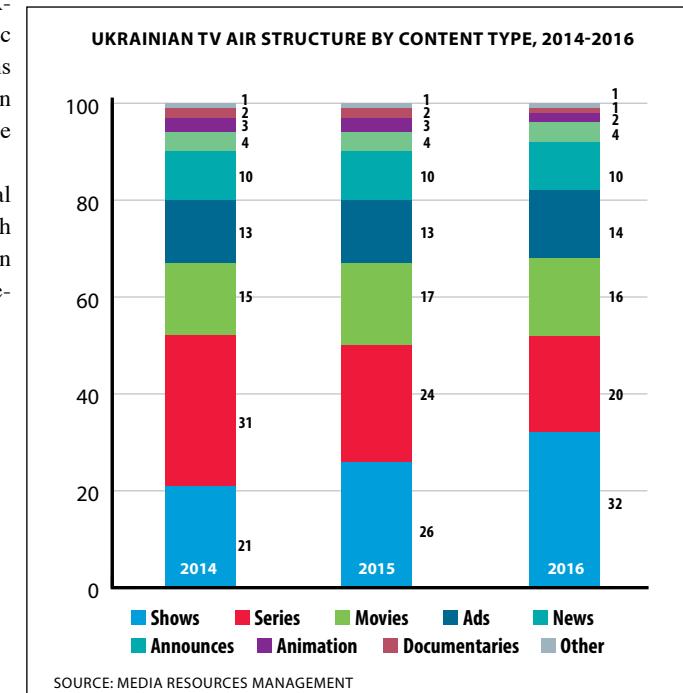
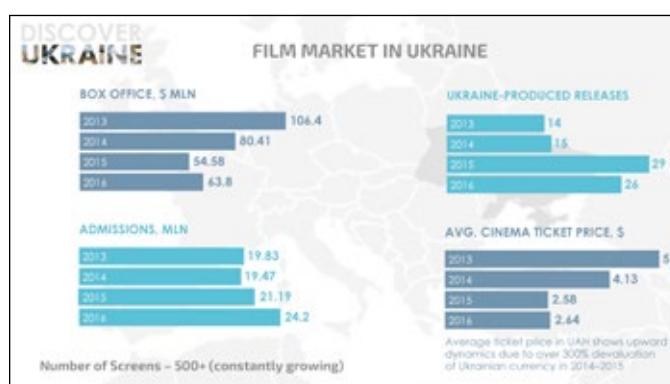
There are several Ukrainian full-length animation projects in production and in pre-

production, and they have already attracted great attention from foreign distributors. For instance, Ukrainian studio Animagrad (part of FILM.UA Group) has several feature animations in its production line-up. *Stolen Princes* local release is planned for March 2018. And despite the projects is not ready yet, it was licensed for cinema release already to more than twenty territories: China, France, Germany Poland, South Korea, Iran, South Africa, Austria, Switzerland, Baltic states, etc.

Another animated feature from Animagrad portfolio, *Mavka. The Forest Song*,



Servant of the People (Studio Kvartal 95) was sold as a format to Fox Studios (USA)



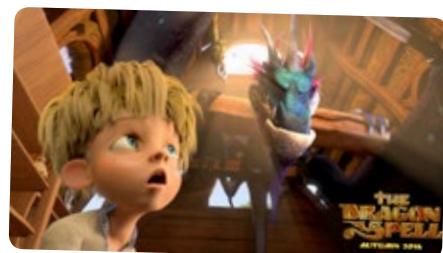
Victoria Yarmoshchuk, CEO, MRM, and executive director of the Ukrainian Film Association

recently became the first ever Ukrainian project selected for participation in such international forums as CARTOON Movie (Bordeaux, France), Animation Production Day (Stuttgart, Germany), CARTOON 360 pitching (Barcelona, Spain). Thus, animation creators from France, Germany, Belgium and The Netherlands and other countries expressed great interest in co-production with Ukrainian cartoon producers.

Local content

On the other hand, Ukrainian TV channels are shifting their focus towards locally produced scripted content (we don't speak here about non-scripted content, cause over 95% of it is being produced locally already for several years), commissioning more and more TV series to indie Ukrainian producers. Moreover, almost all major Ukrainian broadcasters are developing their in-house productions and even start experimenting with feature films for theatrical distribution.

And Ukrainian TV series are also starting conquering international attention. Thus, Ukrainian detective series *The Sniffer* (FILM.UA) was licensed as a format to TF1 (France) and NHK (Japan). And Studio Kvartal 95 comedy series *Servant of the People* was sold as a format to Fox Studios (USA). Moreover, Ukrainian scripted



Ukrainian animation *The Dragon Spell* (Animagrad), released in 2016 and budgeted at USD 4 million, grossed locally close to USD 400,000

series are interesting for such international VOD-giants as Netflix and Amazon Prime (dozens of series produced by FILM.UA, Star Media and Studio Kvartal 95 are already available on these platforms).

'We can't but say that this spring Ukrainian authorities have finally adopted the long-awaited law "On the State Support of the Cinematography in Ukraine". New legislation will allow foreign producers to get a payback up to 16.6% production costs spent on the territory of Ukraine due to new cash rebate system', explains Victoria Yarmoshchuk, CEO, Media Resources Management (organizer of Kiev Media Week), and executive director of the Ukrainian Motion Picture Association.

She concludes: 'Moreover, it is planned that foreign producers will be able to receive additional 10% payback from the labour-production costs in Kyiv and Sevastopol and 4.5% payback on the rest territory of Ukraine. On the local level, state support for a movie could be granted



Ukrainian TV series are also conquering international attention: the Japanese version of *The Sniffer* (FILM.UA) was produced and broadcast on NHK

to all legal bodies regardless of ownership type: state, private, corporate, etc. Features and animation films could get up to 80% of the budget from state support. Television up to 50% of the budget. Documentaries, educational and children programs could be 100% funded by the state. Note, although Ukraine intends to offer the smallest rebate in Europe it is still the great advantage for foreign producers as far as even without any rebates Ukraine is the cheapest European country to produce in'.

Discover Ukraine in Cannes Film Festival 2017



Head of the State Film Agency of Ukraine Philip Illienko and Viktoria Yarmoshchuk, Head of the Ukrainian Film Association, presented on May 22, during the Cannes Film Festival, the advantages of film production in the country, as well as a new system of rebates for foreign producers

More than 50 foreign films (*Transporter 3*, *Bitter Harvest*) have been produced in Ukraine over the past 25 years with local services and locations, and this figure is growing every year. While the cinema industry is well developed, the production prices are low. There are 50 fully equipped pavilions, many rental houses with a full set of modern technology, several service companies.

According to Yarmoshchuk, the Ukrainians are 'especially strong' in postproduction, CG and VFX, being the winners of many world awards and cooperating with Universal, Warner, MTV, Fox, WWE, Sony. There are a small number of theatrical screens in Ukraine, 500 for the moment, but this figure is growing and this is one of the main priorities in the development of the industry for the near future.

She highlights the figure of the Ukrainian box office at USD 63 million, growing by about 16% per year, this also applies to movie ticket prices. The number of films produced is constantly increasing. Illienko expected to at least 15 big this year, filmed with the support of the State Film Agency.

Annually the State budget for cinema support is growing: in 2017 it is approximately USD 19 million and it is actually twice as much as in the previous year. Next year, the amount will be even greater, since additional funds are needed for the cash rebate funds.



Mediaset Distribution: drama + factual



Manuela Caputi, head of sales

Mediaset Distribution (Italy) recommends for CEE a catalogue of unscripted formats and factual, plus new drama series just aired locally through **Canale 5**.

The first title that **Manuela Caputi**, head of sales, recommends is *Donnaventura Challenge*, spin off of the long running proven success brand *Donnaventura* aired by **Canale 5** for 28 seasons. The new series is an adventurous expedition of all-female team, who embarks in an exotic journey across a country with the aim to win a one year full job as a reporter for a prestigious magazine. The women travel and discover new scenery, culture and tradition but in each episode of girl is voted off by the TV viewers', describes **Caputi**.

Other big spin-off is *Master Adventure*, which sees two different teams composed by women and men competing in the ultimate race with elimination. After the first round, the new team is formed up with a man and woman together and the trials are set in different places: in the snow and in the sand with all kind of vehicle, from moto, quad and canoes in extreme water or trekking competitions. A special jury of professionals: a military officer, an athletic trainer a triathlon athlete and a psychologist will vote the finale winner.

'We launch for CEE the factual entertainment show *Guerrilla Gardens* (6x30'), on air on digital channel **La5**; a branded entertainment show in which two pairs compete in challenges around gardening and floral creation for a special person'.



Master Adventure, spin-off

For the scripted side, **Mediaset Distribution** is presenting the second season of drama series *Solo per amore/For Love Alone* (40x40'), aired the first time in 2015 and on air with the 2 season of 10 episodes in May. The series is focused on a strong woman who fights to find out the truth about her husband's disappearance.



Fidela Navarro, international director

Azteca (Mexico), one of the largest Spanish-speaking content producers in the world, has modified its strategy betting more and more on high-quality productions for all the platforms, and the results are already over the table.

Today, the company stands with a catalogue headed by new dramas like by *Two Lakes* (12x60'), a terror series produced by **Azteca & 20th Century Fox** that tells the story of three families inhabiting the same house on different times (1944, 1975 and 2015).

Following a big trend, especially in Latin America, the company push *El César* (26x60'), an idol fall and a man stand up, is the dramatized biographical series following the steps of Mexican legend and worldwide boxer, Julio César Chavez.

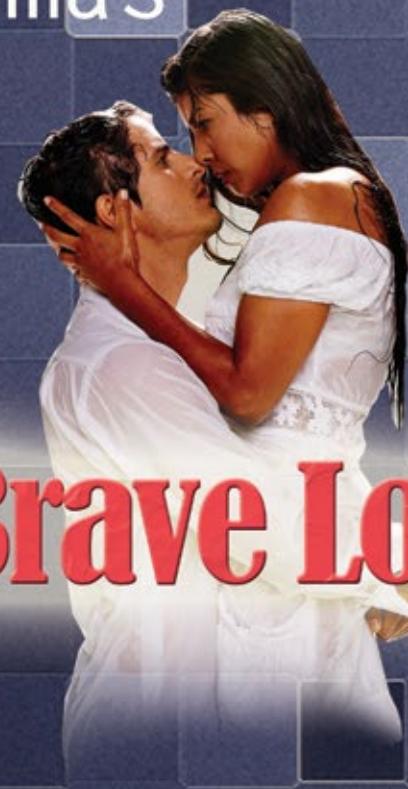
In *Nothing Personal* (80x42'), a woman witnesses the murder of two young journalists and becomes embroiled with a criminal organization, while *Missing Bride* (80x42') is the story of the disappearance of a woman without the trace the day before her wedding.

Lastly, **Azteca** recommends for the CEE markets *Living to Race* (40x46'), the life stories of the legendary racecar drivers Ricardo and Pedro Rodríguez are told parallel to those of Guillermo and Rodrigo, coming together in this drama of perseverance and victory. And *Women Breaking the Silence* (150x42'), a story that portrays multifaceted women (mothers, housewives, students, or workers) who have lived and struggled over the years with everything that happen around them. They will not stay behind and the will not be submissive in silence never again.



El Cesar, biopic

Over 10,000 hours of top latin telenovelas, turkish series and filipino dramas



Brave Love



TRT/MISTCO: high-budget dramas

MISTCO, exclusive sales agent of the Turkish pubcaster **TRT**, highlights the new successful drama *The Last Emperor*, produced by **ES Film** and centered on the life of the Ottoman Emperor, Abdulhamid Han in the 19th century.

At You Name It (100x45'), a man finds himself in an obligatory game for his sister who has 6 months left to live... He will go through a contractual marriage. Other highlight from **TRT/MISTCO**'s catalogue is *Resurrection: Ertugrul*, which, according **Aysegul Tuzun**, VP sales and marketing



The Last Emperor

and marketing, and **Beyza Nur Torun**, sales & mkt manager, is still 'a driven content for the company, simultaneously being aired on some territories worldwide and waking up the interests from all around the world for its third season'. 'It has become

one of the most successful Turkish dramas locally, being in first-ranking position for 3 seasons in a row. Beside current broadcasters, we are about to add new broadcasters from different territories', they add. Set in the 13th century, the story unfolds in a context where the main character is struggling to find a home for his tribe and the woman he is in love with.

In kids' animation, the executives recommend *Ege and Gaga*, a 26x7' story centered on a boy and his best friend, a talking crow. In each episode they find and learn something new and record it to their notebook with pictures and photos. While from the documentary slate they stand *The Outlander: Discover Life* (13x26'), about experiences of a wildlife photographer about nature in the world's different regions and the mysteries of ethnic cultures.



Aysegul Tuzun, VP sales and marketing



Televisa, into Wild Lands



Claudia Sahab, Director of Europe

Televisa International (Mexico) distributes in the international an offer composed by own productions, broadcasted in several channels in Mexico but also in over 50 territories through 26 pay-tv brands, and television networks, cable operators and OTTs services. Heading the slate of new titles for CEE region is the melodrama *Wild Lands* (72x60'), the story of three men who are in love with the same woman, and a woman who is condemned to decide which of them she loves, showing that 'human laws are not in command here... in these wild lands, the heart rules'. At the light melodrama *My Husband's Family* (100x60'), a couple holds the ideal romance: each have their own job, they share the same dreams, and both are ready to go down the aisle, but fate has a surprise prepared for them when they seem compelled to move to a modest apartment in a poor neighborhood. While *My Sweet Curse* (127x60') is set on the village of El Salado, where traditions, beliefs, and old customs are maintained.

Lastly are *In Love with Ramón* (127x60'), about two girls that become orphans when their parents die in a plane crash and that discover that the beneficiary of their parents' inheritance is the poor woman who works as their nanny, and *Sincronia* (12x60') a thriller that opens the way for the audience to see the different perspectives of the people engaged in the same conclusive event with the strength to change the destiny of those involved. Addressing powerful and current topics like kidnapping, human trafficking, influence peddling, or pedophilia, we will get to see what happens in the lives of the victims, murderers, and those who, for whatever reason, participate in situations that aren't easy to get through.

*Wild Lands*, new drama

RMVISTAR: new contents, for CEE

RMVISTAR (USA/France) is a boutique distribution company created by Rose-Marie Vega representing well established Canadian and French production companies, as well as exclusive Latin American contents. Over time, the Company has grown and diversified its catalog of programming and formats.

Vega: 'We are attending NATPE Budapest for the first time, as we are expanding our distribution capabilities through a network of regional Agents. In this market, and in association with T12M, we are promoting a set of new contents including the just released crime documentary from director Charlie Minn *One Pulse*, about the 2016 Orlando massacre and two new politico-news docu-Series *Bunker* and *In the name of the people*. As part of our core mission, we promote of course the Latin America productions beyond its borders with 20 movies, from comedy to action and an intriguing Argentinian crime-Series titled *The cleaning lady*'. We are also very enthusiastic to represent the exciting original series and format *The Fashion Hero*, a unique fashion competition that turns "the rejected into the respected", developed by renown fashion celebrity Caroline Bernier.

We are looking forward to attracting interests from buyers from Central & Eastern Europe to our exclusive boutique contents and are excited to explore opportunities offered by this growing and major CEE region.



Luisa Amanda Padilla and Rose-Marie Vega (borders) with María Elena Paniza, from KM Distribution, and Vanessa Velazquez, Spring Media

*The Cleaning Lady*, series

Mediabiz: 10 years of constant evolution

Since its foundation 10 years ago, **Mediabiz** (Argentina) has been evolving and following closely the major trends in the global industry and changing the course accordingly. **Alex Lagomarsino**, CEO, explains: 'At the beginning, there was a growing interest in formats for the adaptation in local markets, with some examples such as *Desperate Housewives* in Argentina (**PolKa**) or *Grace Anatomy* in Colombia; now we see the need to go to original. For this reason, we evolved from a distributor to a talent representative'. According to Lagomarsino, there is an exaserved trend focused on original



development in many parts of the world, with expanding markets such as Denmark, Norway, Israel, UK and Turkey, all wanting to have their own content. Despite this expansion, for the executive there's still one challenge for those countries in some regions like Latin America: costs. 'Budgets go from USD 500.000 to USD 700.000, making difficult for those contents the entrance in the territory, but there's place for them in Pay TV services and big OTTs'.

'That forces you to make stories more and more complex. The business is looking more to the cinema in terms of processes. Before scripts

were written immediately after the idea came up, now there are more feedbacks and correction in order to have a perfect story', emphasizes Lagomarsino, who identifies OTTs evolution as a key factor. 'The challenge of new platforms and the access to new stories, forces to be much more solid. Risk must be minimized because investments are higher'.



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INCAA, Argentina: a new strategy for audiovisual promotion

After the changes in the national government, the Argentine INCAA (Instituto Nacional de Cine y Artes Audiovisuales) renewed its authorities and appointed Ralph Haiek as President. The new management has put in practice a new system of contests to encourage audiovisual production with two major goals: on the one hand, to develop the industry all across the nation; on the other hand, to foster alliances with media outlets from other countries around the world in order to help international co-productions with Argentina.

In an interview with PRENSARIO, **Haiek** underscores that this represents a ‘paradigm change’ concerning the way the audiovisual industry is supported. The major change, compared to how the previous management handled this issue, is that there is now a three-stage pyramid established for the production and development of projects, allowing combined financing (by the government and private sources) and especially the involvement of the other investors (“counterparts”) and certainty about the public exhibition of the resulting product on screens in other nations.

The INCAA has launched two types of promotion initiatives: first, the support to development, in addition to the support to production, where the State contributes between 20% and 70% of the total; secondly, the existence of one or more other investors (“counterparts”) that will contribute with the additional funds required to fulfill the budget and finally the need to have a formal exhibition agreement for the project at the moment of signing up for the contest.

The new contests put forward for consideration a pyramid arrangement: the major productions, to be aired on prime time, are at its top; in this case the State provides up to 30% of the budget and concedes the producer its part of the intellectual rights in order to



MIPCOM 2016: Argentina's 'Snack and Screening' with Ralph Haiek, President, INCAA, with independent producers from the country that exhibited their content to more than 50 international buyers



The Argentina Audiovisual cocktail at Tresor Tower during NATPE Miami 2017: Marcelo Giusto, general consul of Argentina in Miami, along with Ralph Haiek, President, INCAA and independent producers from Argentina

allow the producer to have a value that can be negotiated with the “counterpart”.

The experimental projects (webseries) are at the base of this pyramid; the State contributes with up to 80% when the content aims at websites and social networks for exhibition. 112 of these awards have been bestowed in 2016. Why we consider this paradigm change to be virtuous? Because we are helping to build up an industry connected to the real market. In addition, we develop tools to support the entire process, all the way to the final screen: Business Rounds, enablement and training concerning the content distribution business, project pitching’, states **Haiek**.

In all the cases, a prestigious independ-

ent jury selects the winners of the contests, based on the amount of qualified Argentine work they will require, and the level of the “counterparts” and the associated screens proposed. The major goal is to promote the production of content with international potential; this implies a clear bet on the international markets, with participation at the MIPs in Cannes, NATPE Miami or the L.A. Screenings, as well as newer venues, such as Series Mania in France and Conecta Fiction in Spain.

The new paradigm seeks to attract the “counterparts” and screens to the sector in the middle of the pyramid. For those at the base, emerging and growing, other policies are called for; among them “project development” allows us to provide knowledge and training for business dealing to small producers from different parts of Argentina. This includes web development, with YouTube and Vimeo, where we have to invest more’.

The Counterparts

The INCAA has a strong strategy to encourage the counterparts: in 2016, specific screenings were devoted to fiction at several markets, among them Snack & Screen at MIPCOM, where eight producers exhibited their series and developments to an audience of

more than fifty buyers from around the world. Or Fiction Factory at Ventana Sur in Buenos Aires, with fifteen top producers from Latin America analyzing the projects submitted by fifteen producers from the interior of Argentina.

Business rounds were also held to exchange ideas and networking, with the participation of HBO, Netflix, AMC, Disney, History, Fox, Clarovideo, Televisa, Viacom, Turner, Sony, Discovery and DirecTV, among others. Comparing the new policy with the earlier procedure, **Haiek** explains that ‘under the former system, the State supplied 100% of the money and kept all the rights; when it stopped proceeding this way, there was an arising situation but no industry had been founded.

These new plans highlight the positive aspects but, at the same time, they seek screen output for the Argentine talent, work, locations and producers of various magnitude’. This year, the INCAA will be participating at the *Conecta Fiction* exhibition (June 20-23) in Santiago de Compostela, Spain; this venue seeks to establish closer ties between Spain and Latin America; a delegation of 12 producers will be attending, and Argentina has been designated Country of

Honor. There will be pitching sessions, business rounds and a strong academic participation in the panel sessions. **Haiek** comments: ‘We aim at deepening the strategy of bringing together the projects and the screens’.

Later this year INCAA will be hosting MARDOCLAB, devoted to documentaries and scheduled to be held during the 32nd *Mar del Plata Film Festival*, in November. Screens from the entire world, including Canal 22 (Mexico); RAI (Italy), the Danish Film Institute, Señal Colombia, PBS (USA), Sundance Institute, Deutsche Welle (Germany), the Scottish Documentary Institute and Visions du Reel Switzerland, among other, will be taking part.

‘Argentine fiction is recognized and works well around the world; therefore, documentaries and animation constitute the big challenge at this time. We believe there is great potential for these genres, especially in Europe and Asia. Regarding documentaries, there are many productions but they gener-



Patagonia region and the Andes Mountains: another excellent source of locations for international projects



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lion Argentine pesos, about USD 4.700 million. The Institute will contribute, as recovery of salaries and social security expenses, up to 20% of the budget to be submitted, with a cap of ARS 15 million, about USD 625.000. Four grants will be awarded.

There is also a 4K contest, for 13 episodes and a budget reference of ARS 42 million, about 2.62 million USD. In this case, the support runs up to 30% of the budget, capped at ARS 12.6 million, about 787.000 USD. The jury will select four of these projects.

Producers with working background may sign up for a contest dealing with the development of fiction content. The budget reference has been estimated at ARS 945.000 (USD 59.000) and the INCAA will provide up to ARS 472.500 (USD 29.500) per project. The petitioner must provide an associated investor; eight of these projects will be chosen.

There is also a contest related to **Social Media**, which will review fiction shorts no longer than 1 to 2 minutes and produced solely with the resources provided by the platform. A jury will select ten finalists, whose content will be uploaded on the Internet shown at the **Gaumont** movie theatre, which is managed by the INCAA. The title with the largest number of views will be awarded the winning prize.

INCAA has had a very interesting experience with a five-minute short feature produced by **YouTubers** that merited several showings at the **Gaumont** with strong attendance. Titled *Hermandad (Brotherhood)*, this video defined as ‘terror-comedy’ has been produced by **Pablo Agustín**, member of the **Bajo Ningún Término** (BNT) (Under No Condition) duet. **Mica Suárez**, **Daiana Hernández**, **Alejo Igoa** and **Barbara Martínez**

were featured. ‘We want to bet on the social networks as a medium, but we feel that **Snapshot** is the most innovative; it has already announced that it will provide premium short content. There is great potential in this segment of the business’.



The Iguazu falls: many international films, TV series and entertainment formats as 'I am a celebrity, get me out of here' (RTL Klub Hungary) shot in the jungle



Buenos Aires, the capital of Argentina: Tango, football... famous content projects make a stop here for rich full images and sensations

Telefe: dramas and strategic alliances



Guillermo Borensztein, head of international business

The international distribution and business unit of **Telefe** (Argentina) offers a wide gamut of proposals that includes co-productions, sale of programs and formats, scripts and production services for the international market.

Among the contents for the region, the company highlights for the region *Fanny* (100x60'), the new production of

Underground and Telefe where the head of a fans club of a telenovela becomes the star of the series, and *The Cockfighter* (10x60'). Produced by Underground, Turner, Telefe and Cablevision, the series will be aired on **TNT** in Argentina as well as in other Latin American countries, while Telefe will be the broadcasting channel and its exclusive distributor throughout the world in all platforms.

Following a big trend, Telefe also have *Sandro, de América* (13x60'), the first project from **The Magic Eye**, company from **Telefilms** focused on TV series. *Sandro de América* tells about the life of Roberto Sánchez, renowned Argentine singer-songwriter known as Sandro. We'll reveal data never ever told about the artist's life. The story shows how his charisma and musical talent helped him overcome the difficult situations that marked his life since an early age. The program depicts the way Sandro got through poverty and the prejudices he had to face, becoming a sensuous musical icon deeply loved and admired throughout America.

Lastly, for the teen audiences is *Vikki RPM* (60x60'), super-production recorded in **Viacom International Studios** (VIS), produced by **Somos**



Fanny, new comedy

Productions for Nickelodeon, and with a strong multimedia experience that spreads the focal point of the main plot into different platforms allowing the viewers to get more involved with the story.



Silvana D'Angelo, director

Smilehood (Argentina) keeps standing in the international market thanks to a catalogue of fresh and smart products, with plenty multiplatform titles, but now adding a star proposal: *Gilda*, biopic based on the life and story of the popular Argentinean singer, stared by Natalia Oreiro, well known especially in countries like Russia, Israel and several countries of the former Soviet Republic.

According to **Silvana D'Angelo**, director, there're several key factors in the series: First, Gilda was considered as a Saint, with power of healing and to realize miracles, turning her into a very interesting figure; secondly, the popularity of Oreiro in all over America, CEE and in Asia, and lastly, there is the trend of biopics.

'Having a title like this generates many challenges also. It's not about selling the product to the bidder in each country, but a game of chess with the handling of the windows. That way, you can avoid that an agreement that looks good, does not end up slowing down other better ones later. Everyone is asking for the series, but we are not rushing to choose the best network, from TV to OTTs', she emphasizes.

'On the other hand, we are advancing in an area of coproduction projects, to access to new material from the beginning and make them grow; adding imprints that fit the international market. In addition, we are developing paper formats, which have come back to be effective for the search of fresh/original material, both in fiction and entertainment'.

At the same time, the company is focusing on entertainment shows like *Dilema*, developed by **Marcos Gorbán**, sold to **Latina TV** (Peru) and with good interest in markets like Mexico, Brazil and Asia.



Gilda, biopic

Discover with Sonuma

Created in 2009, **Sonuma** is the distribution's arm of **RTBF**, the Belgian Public Television. The company handles a wide range of current programs and footage collection produced by the public broadcasters.

'Last year has been an expansion period where our programs reached new customers as **Nat Geo**, **TVE** (Spain), **TVN Poland** or **CanalPlay**, thanks to our wildlife and current affairs documentaries, as well as our webseries', explains **Sebastián Lami Dozo**, head of sales.



Sensations, edutainment series

'We are planning to extend our presence and activities to North and Eastern Europe with our documentaries, concerts and web series. For CEE, we have exclusive concerts, and we expect to reach Asia with our lifestyle programs places all around the world.'

as *A Brick in the Belly* or *Unusual Houses*. Next step is fiction series', he adds.

Among those musical series are *Sensations* (4x52'), an edutainment series that discovers classical music history through a specific thematic, while from the nature and lifestyle it stands *The real of the little owl* (26'), a new episode of the series *Wild Europe*, which discovers the little owl, a delightful small bird of prey, evolving in its habitat, as well as the fauna which populates its "realm"; *Odzala* (4x26'), the third episode of the successful *Extraordinary Africa II*, after *Mysteries of Congo river* and *Madagascar, the Lemur Island*. And lastly *No access for unauthorized persons* (6x76'), a journey to visit no access for unauthorized persons



Sebastián Lami Dozo, head of sales



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Ben Packwood, Sales Manager,
EMEA North

TV2 has also ordered two 90' festive helpings of Gordon Ramsay's *Christmas Cookalonga* and 20 episodes of *Ultimate Cookery Course*, a series that sees Gordon revealing everything about cooking.

AMC has ordered a package of content totalling 77 hours for Hungary, Czech Republic and Slovakia, renewing a slew of hit series including the third season of **Lion Television's** *Big Dreams, Small Spaces with Monty Don*, *Hotel Hell* from **One Potato Two Potato**, and **Studio Lambert's** *The Great Interior Design Challenge*, alongside seasons seven and eight of all3media America's *Undercover Boss USA* and 20 episodes of Gordon Ramsay's *Ultimate Home Cooking*.

In Poland, **ITI Neovision** has picked up three series and the Christmas special of **North One Television's** *Travel Man: 48 Hours In...* with Richard Ayoade; seasons four and five of *Gardener's World*, the iconic long-running produced by the **BBC**; season three of *Big Dreams, Small Spaces* and season four of *The Great Interior Design Challenge*. **FTV Prima** (Czech Republic) has acquired five seasons of *The F Word*; Croatia's **RTL** encompassing more than 170 hours of content; **HRT** (Croatia) has acquired three seasons of *Big Dreams, Small Spaces*, season five of *Gardeners' World*, season four of *The Great Interior Design Challenge* and season six of **Spun Gold TV's** *Love Your Garden* as well as **Lion Television's** one-hour special *China – Treasures of the Jade Empire* and six-hour series *Full Steam Ahead*.



The F Word, cooking show

DINT: expanding along with the industry

With 33 years in the industry, **DINT Doblajes Internacionales** (Chile) continues with its plans of expansion and investments to other international markets. It has 17 studios and 7 mixing rooms equipped with the latest technology, and has been pioneer in the dubbing of major Turkish hits such as *1001 Nights*, *Fatmagul*, *Forbidden Love*, *Ezel* and *Medcezir*. 'Today we work with the latest Turkish productions like *Brave and Beautiful*, *Wounded Love* and *Kosem*, among others. Our voices travel well across all Latin America, in the world of the telenovela. We put passion into our work', say **Christian and Paola Barzelatto**, president and VP respectively.

Patricia Menz, one of the founders, recalls that the first major success of a dubbed telenovela for the region was in 1986: *Doña Beija*, production of **Rede Manchete** (Brazil) with actress Maite Proenca, which

Dori Media: love and entertainment



Revital Basel, VP Sales,
Dori Media Group

Dori Media Group highlights for CEE a slate of drama and game shows headed by the comedy crime drama *Dumb* (50x35'), about a 30 year old frustrated and stoned actress who is stuck with a body and appearance of a teenager and hates it; the new shiny floor game show *The Best of All*, and the sitcom *Game Over* (6x30'), that peeks into the life of stand-up comedian, just before his wedding.

Other top titles are **Underground's** (Argentina) drama series *El Marginal* (13x45'), about an ex-cop who enters a prison to infiltrate within a mixed band of prisoners and jailers who operates from within the prison, and the game show *Intuition*, where participants don't need to know anything, all they need is strong intuition.

Also from Argentina and to the international market are the telenovela *Por Amarte Asi* (60x60'), where a prestigious rich attorney represents a woman that disconnected her dying husband from the machine that kept him alive, obeying his last wish to end his pain, and the comedy *Esperanza Mia* (180x45'), coproduced with **Polka** (Argentina) and aired successfully on **El Trece**'s prime time

Complicated (10x30') is centered on a 40 something with a wild past and hazardous present, divorced twice and with two exes that will make sure to make every moment of his life as complicated as possible; *Full Moon* (100x30'), a thrilling drama set in the "full moon" parties' scene in Thailand about the young who visit the island known for its parties, while *Power Couple* is a reality show that shows eight couples moving into a village for 6 weeks facing in each week extreme challenges.



The Best of All, shiny floor game show



Christian and Paola Barzelatto
during the last MIPTV



Christian and Paola Barzelatto
during the last MIPTV

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Eurodata TV: A look into the Turkish market

BY RODRIGO CANTISANO

During the last 10 years, Turkey have managed to succeed in becoming a key player within the global content industry thanks to a strong investment in the local talent and production services, but also the creation of a industry moving forward as a block into the international markets.

In terms of production, in 2016-2017 Turkey increased the development of fictions on a 18%, representing today represents the 71% of genres created, while entertainment showed a decrease of 4%. 38 new programs were launched during the same period including finished programs (8%) and adaptations (8%), and original formats (84%).

According to the report, in prime time 67% of the offer corresponds to fiction (of which 85% are series, and within that 85%, a 17 corresponds to re-runs and summaries), 20% to entertainment and the rest to generalist content. One of the most striking data of the study is that the series have increased their duration reaching today 159' (48' when speaking about reruns and summaries), as opposed to the global tendency to shorten formats.

Within this context, crime and epic have become strong pillars for fiction: *Insider* (**Ay Yapım**) was the most watched show with an

increase of 125% through **Show TV**; while *The Last Emperor* (**ES Film/Mistco**) registered an increase of TRT's viewership in a 35%. Following a global trend, Family Dramas have started to place woman in the center of the scene, with good examples such as *Vatanim Sensin* (**O2 Production/Kanal D**), *Kalbimdeki Deniz* (**Pastel Film/Fox**) or *The New Bride* (**Surec Film/Echo Rights**).

Despite of the decrease of the presence of entertainment shows in the prime time, other trend according Eurodata is the evolution of family formats such as *Next One!* (**Endemol Shine/Fox**), *Keep Your Light Shining* (**Global Agency**), *50/50* (**InterMedya**) or *Survivor* (**Endemol Shine Group/Star TV**), developed for the international market.

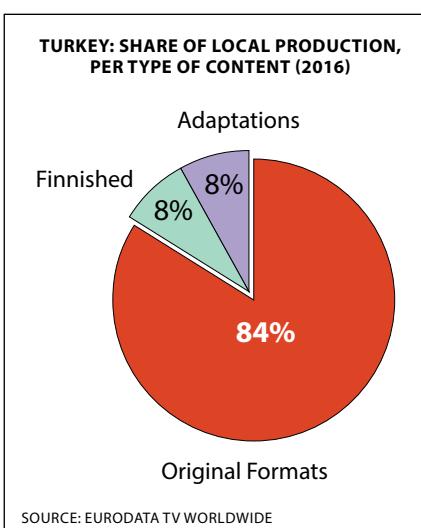
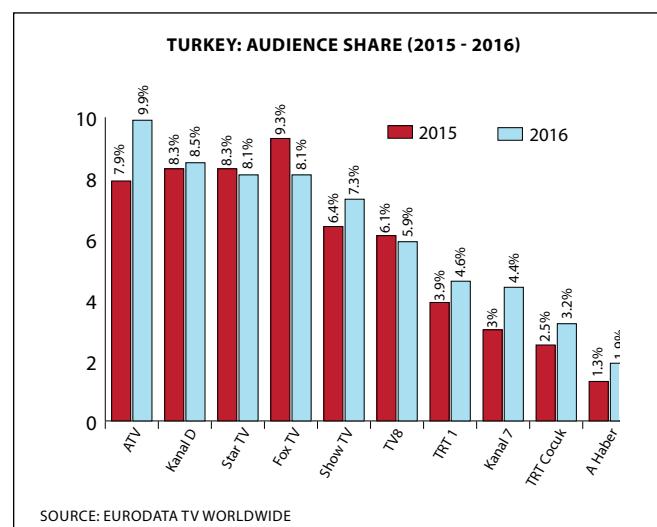
Kids content also registered a good performance in 2016 with highlights like *Keldoglan*, which achieved 230K viewers on average between children 5-11; *Yarisci*, with 198.4K viewers, and *Istanbul Muhafizlari* (172K).

When speaking about consumption, Turkey exceeds the average of TV viewing time in 64 minutes, registering 4h04 in 2016 vs. the 3h00 in the rest of the world in audiences over 5 years, and in 80 minutes among young people from 20 to 34 (3h24 vs. 2h04), according to the report *Turkey: From local content to global recognition*, conducted by Eurodata TV.

Eurodata TV

In the list of the most watched channels, **ATV** completed last year in first place with a market share of 9.9% - 2% more than in 2015-, followed by **Kanal D** (8.5%), **Star TV** (8.1%), **Fox TV** (9.3%), **Show TV** (7.3%), **TV8** (6.1%), **TRT 1** (4.6%), **Kanal 7** (3.6%), **TRT Çocuk** (2.5%), **A Haber** (1.3%).

Black Rose (**Inter Medya**) was sold to 80 countries, while *Sila* (**ATV**) was distributed in 45 worldwide.



SOURCE: EURODATA TV WORLDWIDE

Crossing borders

Even considering the importance of local industry, it is a receptive market for foreign content, both as finished programs like like *Asmar Sahar* (**Kanal 7**, India), *The White Slave* (**Caracol**, Colombia) or *Laços de Sangre* (**SIC**, Portugal) as well as formats. **Global Agency**, for example, acquired the rights of two formats from **Nippon TV** (Japan): *Mother* (*Anne*) and *Woman*, while **Show TV** did the same with the Korean romantic comedy *Full House* (**KBS**), titled locally as *İlişki Durumu: Karişık* and produced by **MF Yapım**.

Going to international, Eurodata's report highlights that Turkish series have positioned among the 15 best performing shows worldwide, with 108 occurrences of 56 different series (11.3% series in the



Black Rose (**Inter Medya**) was sold to 80 countries, while *Sila* (**ATV**) was distributed in 45 worldwide.

top worldwide rankings). Some examples: *Magnificent Century*, among the top 15 programs in 9 territories; *Magnificent Century: Kosem*, in 4 territories; *Broken Pieces (Global Agency)*, among top programs in 12 territories and with an important success in Poland, Romania and Estonia. *Black Rose (Inter Medya)* was sold to 80 countries, and was the most watched show in Georgia and Serbia, while *Cilek Kokusu (Star)* and *Gülerin Savası (Kanal D)*, had a great performance in UAE, Lebanon and Morocco.

In 2016 76 programs were exported to 16 countries, being Middle East the top region with 30 titles and followed by Latin America (20) Eastern Europe (19), Europe and US (3) and Indonesia (1). In Latin America, *Ezel* was sold in each country; *Fatmagul (Kanal D)* to 50 territories, *Sila (ATV)* sold in 45, and *Wounded Love*, the new big bet of **Kanal D**, already to Argentina, Chile and Peru. Also, **Kanal D** signed during last MIPTV edition



From local to international, and vice versa: *The End* (**Echo Rights**) was adapted in US by Sander/Moses Productions, while the Japanese drama *Mother (Nippon TV)* was produced locally under the name of *Anne* (**Global Agency**)



SOURCE: EURODATA TV WORLDWIDE

a codevelopment deal **Mega** (Chile), the first one in the history between both regions.

In adaptations, *The End* has a local version in Spain and *Fatmagul* in India, while USA bought for first time in 2016 3 series: *Secrets (Kayıp)*, *Kacak* and *As Time Goes By (Oyle Gecer Zaman)*.

The Digital Era

In January 2016, Eurodata registered than Turkey had 46.2 million active internet users (58% of population and +10% vs. 2015), 42 million active social media users (53%),

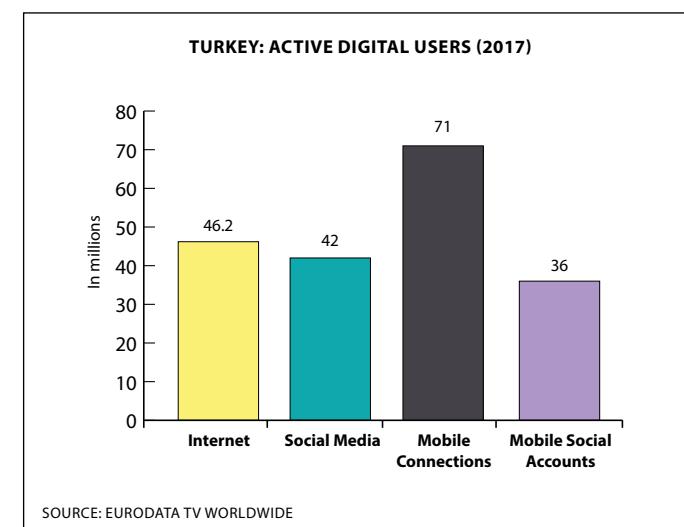


Innocent (**Kanal D-BluTV**) is the first digital original content

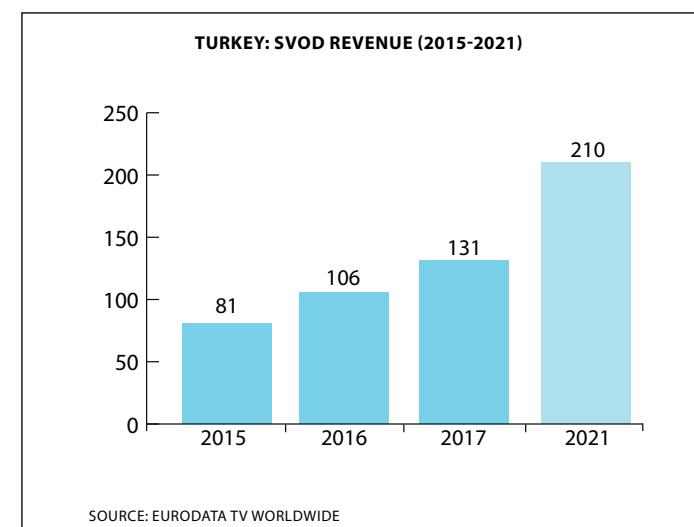
71 million mobile connections (90%) and 36 million active mobile social accounts (45%). Turkish people spend 4h14 per day consuming Internet via PC and 2h35 via mobile; while the average daily use of social media is about 2h53. 97% of the adult population (16-64) has access to mobile devices', highlights the report.

Regarding OTT consume, there are 3.5 SVOD users (+59% vs. 2015) that generated in 2015 USD 106 million in revenues, and are estimated to complete USD 131 million by the end of 2017, and USD 210M by 2021.

Strongest international platforms are **Netflix**, **Dailymotion**, **Filmbox** and **PopCorn Flix**; while from the local market it stands, **Digiturk Play**, **Teledunya**, **Turkcell**, **Turkweb.TV**, **Tivibu**, **TVYo** and **BluTV**, the OTT service from Turkish broadcaster **Kanal D** which in January 2017 launched its first original scripted productions on the international market: the crime drama *Innocent* and horror miniseries *Possessed*.



SOURCE: EURODATA TV WORLDWIDE



SOURCE: EURODATA TV WORLDWIDE

Conecta Fiction: Europe + The Americas



Geraldine Gonard, market director

Organized by Xunta de Galicia, ICEX España Exportación e Inversiones, Fundación SGAE, and produced by Inside Content, the first edition of Conecta Fiction, to be held from June 20 to 23 in Santiago de Compostela, Spain, seeks to connect producers and channels from the Americas to Europe and vice versa.

350 professionals from 20 countries from Europe, USA and Latin America, including OTT platforms, investors, creative, distributors, screenwriters and more than 35 international TV channels will participate on an extensive academic program and several network meetings. From Spain,

there will be representatives of the main TV groups: **RTVE, Atresmedia, Mediaset, Movistar +** and the collaboration of **Televisión de Galicia** and **Grupo La Voz**. The world of co-production of TV fiction series will be discussed in depth and will be analyzed by various international speakers from Spain, US, Colombia, Israel, Argentina, and France among other countries, in 15 panels and roundtables, six workshops and case studies, sessions on financing and tax incentives, branded content, etc. Also, there will be screenings of *La Catedral del Mal* (**Diagonal TV**), *Run Coyote Run* (**FNG Latin América/Clarovideo**) and *Zone Blanche* (**AB International Distribution**).

Within the special program dedicated to Argentina "Country of Honor", developed in collaboration with the INCAA, there will be screened *Estocolmo*, the first local production for Netflix; *Un Gallo para Esculapio* (**Underground/Telefe**) and *La Fragilidad de los Cuerpos* (**Turner/Pol-Ka/Cablevision**).

On Thursday 22 at 10am, eight Argentine producers, including **Kapow, GM Comunicaciones, Mulata Films, The Magic Eye/Grupo Telefilms, Storylab, La Maldita, Anima Films** and **Onceloops** present their projects and offer a vision of audiovisual production in Argentina on a panel moderated by Fabricio Ferrara, from Prensario. **Geraldine Gonard**, market director: 'We are pioneers and we have the objective to make possible the contact between professionals of both territories to generate projects together. Professionals in Europe and America meet several times a year to buy and sell content already produced, but we want to be in a previous stage, at the origin of fiction content and born in co-production, this is our engine'.

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Raya Group: Brave content



Ramazan Yirmibesoglu, managing director

Established in 2012 by Ramazan Yirmibesoglu and Ali Kanturvardar, **Raya Group** is a Turkish company specialized in marketing on series and films to abroad, but now focused on the distribution of high valued dramas.

Among the main titles that the company is pushing in the international market stands *Brave Heart*, centered on the life of a man that lives in a small village in Istanbul which everyone works as a fisherman. During his army duty while they were sailing suddenly they saw a boat with refugees from Syria. Unfortunately their boat was sinking and there was a little boy drowning in the water. *Dont't Worry About me*, series sold to **Canal 13 Chile** begins when a boy and his father and his wealthy friend get caught to the storm. He manages to save his friend, but unfortunately, loses his father who drowned. Because of his loss and also by the fact that he couldn't save his father, he decides to leave the village, and hadn't returned there after finishing his studies and joining the army abroad.



Brave Heart, drama
of another daughter, fruit of an affair he had in Paris which he kept secret for years. Lastly are the movies *Pain of Autumn* set in Istanbul in 1955, and *What About After*.

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Mondo TV: unique properties



Micheline Azoury, Head of Aquisition & TV Sales

'Our current latest line-up is marked with unique properties, differentiating one from the other to serve perfectly all age group and gender among our kids and filling various different time slots worldwide', describes **Micheline Azoury**, head of acquisitions & TV sales, and highlights *Yoohoo and Friends* as a title to consider. 'Composed of 52 episodes x 11', this 3D CGI series values being Eco Friendly by saving endangered animals and environment on Earth', she adds.

Other highlight in the pipeline is the first live action series produced by Mondo TV Iberoamerica, **Heidi Bienvenida A casa**, with a 2nd and 3rd season confirmed. 'It's a new way to tell the world famous story of Heidi in a truly original and twist way reflecting a modern aspect for all the children's fiction, where music and dancing and fashion played among the fun, all together can only bring a great mix, by introducing extravagant characters and thrilling adventures', emphasizes **Azoury**. Other big titles are *Invention Story* (104x11'), with 5 coming seasons, and *Sissi the Young Empress* (52x26'), a girls' property airing currently in more than 80 countries simultaneously like Italy (**Cartoonito**), Middle East (**Joom**), Portugal (**Canal Panda**) and Austria (**ORF**), among others. 'We work with major operators in whole Europe, mainly within



Yoohoo and Friends,

Mondo TV Group (Italy) been lately going through a fast expansion: first as a producer and secondly as a distributor of children's content, leaving on its back more than 50 years of expertise.

Micheline Azoury, Head of Aquisition & TV Sales

the CEE our cooperation is even stronger more and more, from Hungary, Czech Republic, Poland, Romania, Bulgaria and Former Yugoslavia', completes the executive.

FilmUA: more active

FILM.UA Group (Ukraine) completed a first half of 2017 with plenty news: *Inseparable* drama series became the sixth project available for **Amazon Prime** subscribers in the US and Canada after *The Sniffer*, detective series; *Battle for Sevastopol*, war drama, *The Red Queen*, melodrama, and *Back to Basics* and *CineCuisine* digital projects. In May, *Mavka*.

The Forest Song animated feature par-

ticipated in two key international events (*Animation Production Day* business forum & *CARTOON 360* pitching), *Mom Hurries Home* rapidly won over international audience and European markets.

Also, the company prepared a cycle of 16 videos, each carefully recreating an authentic female look on the verge of the 19th and 20th centuries, for *Eurovision*; on May 17-26 participated with a stand on the 70th Cannes International



Inseparable, sold to Amazon

Film Festival, and also keeps pushing the development of AR and VR with **Signal Red**.

ORF: wild and natural



Marion Camus-Oberdorfer, head of sales, ORF Enterprise

ORF-Enterprise, the commercial arm of the **Austrian Broadcasting Corporation**, Austria's public broadcaster and market leader, keeps focusing in advertising airtime, sponsoring, international content distribution, licensing and merchandising as a strategy to stand. For this season, the company highlights an intense programming catalogue of 4K natural & wildlife documentaries and drama series, as well as music concerts.

On the first, it offers *Wild Caribbean – Rhythms of Life* (3x'52), where you can see the Caribbean in spectacular action. From the first frame of a sea turtle to what happens when a volcano bursts from the ocean. While at *The Canary Islands* (2x'52) audience travel through the isolated in the Atlantic Ocean off the North-west coast of Africa. Each island is unique with a diversity of terrain and climate - temperate coastlines, scorching deserts, tropical rainforests and frozen, snowcapped mountains.

Mysteries of the Stone Age (2x'52) is a history & biographies doc about circles and buildings made of gigantic stones seem to have come from another world. New studies reveal clues to the mysteries of the Stone Age, while *Fast Forward* (50x'45) is a drama series about a single mother and investigator. Her professional and private life aren't always separable, this due to her ex-husband, the chief of forensics.

And *Everybody Waltz - 50 Years Viennese Johann Strauss Orchestra* ('90) is a classical



Wild Caribbean – Rhythms of Life, 4K documentary

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TRT Screening Days 2017: successful second edition



Turkish pubcaster **TRT** organized on April 26-28 at Raddison Blu Ressort & Spa in Cesme, Izmir, the second edition of its *TRT Screening Days* with 90 global buyers from Middle East, Asia Pacific, Europe and Latin America. There were conferences about fiction series, animation and documentaries, as well as special panels about the Turkish market from **Virginia Mouseler**, **The Wit**, and **Sahar Baghery**, **Eurodata TV**.

Compared to last year, there were more buyers from Latin America and Asia Pacific, with new acquisitions and programming executives from Colombia, USA, as well as Australia and Pakistan. **TRT** top product is the period drama, like *The Last Emperor*, which premiered on last February on **TRT1** and since then is the #1 fiction on prime time (AB) with an average rating of 7.5-8 rating points. The cost per episode has been USD 300,000. The second season of *The Last Emperor* will premier next October, produced by **ES Film**, and there is a third planned for 2018.

The international distribution is in charge of **MISTCO**, which confirmed that the series is being negotiated in MENA, CEE, CIS and Latin America. ‘We have very good perspectives during the second half of the year’, highlighted **Aysegul Tuzun**, VP, and **Beyza Nun Torun**, marketing and sales executive.

TRT also promotes its TV movies and miniseries. All them are globally distributed by **MISTCO**. It highlighted five miniseries produced between 2013 and 2015. They are high-budget period dramas about real stories between the first and second world war.

Halid Seyfullah Simsek commented: ‘Three years ago **TRT** began to program these productions as a TV genre. The rest of the commercial networks followed us. It was a huge challenge, but with our example, the miniseries returned to the Turkish television market’. The execu-



Nine entertainment format producers presented its shows, including game shows, realities and quiz shows

tive highlighted *The Great Exile Caucasia* (4x'80) and *Ciragan Conspiracy* (14x'90 o 8x'45), both from 2014. The next year it premiered *Sedulbahir 32 Hours* (4x'95) and in 2016, *The Century Old Seal* (15x'60 o '90).

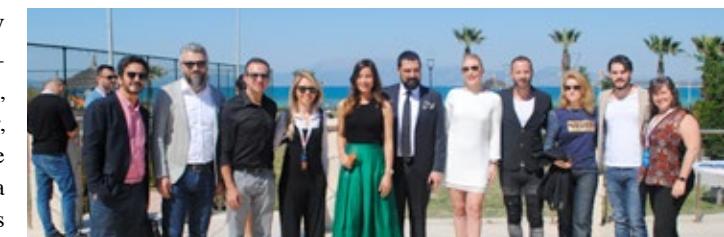
About the TV movies, they also begun 3 years ago and, again the pubcaster, was a pioneer on the genre by dedicating a fixed slot on Sundays prim time. It also supported local producers: experienced producers from Hollywood and from the New York Film Academy have come to Turkey to train them.

Faruk Guven, director, pointed: ‘TV channels can create thematic slots with our the TV movies. For example, about romance, action, sports, etc. and they can be packaged many days of the week. They are a very good option to program along with series’.

Following its competitors, **TRT** has diversified its programming catalogue adding new entertainment formats. During last day of the screenings 9 producers introduced new game shows, dating shows and variety shows that are being broadcasted on **TRT1**. One of the most important one



Senol Goka, director general of **TRT**, along with the organizing team of the second edition of **TRT Screening Days** in Cesme, Izmir



The protagonists of *The Last Emperor* along with Latin American and European buyers

over epic, romantic and patriotic dramas like *Nameless Squad* (**Kanal D**), about idealism and dedication in an elite group fighting terrorists; or *Elite Soldiers* (**FOX**). In this group was included

The Last Emperor (**TRT**) On the global side, the trends are about romance dramas, known as *pink*, and on epic dramas, about historical events, both very well distributed worldwide. In the first case she mentioned series from India, like *Saras & Kumud* (**Star**), the very first one to arrive to Latin America, and of the second one, *The Promised Land* (**Record**, Brazil), which has been sold all over Latin America.

Sahar Baghery, head of global research, **Eurodata**, said Turkish audience (5+) watch 4:04 hours of TV on average, but at the same time is an ‘hyper connected’ society with 42 millions of Social Media users, and 46.2 millions Internet users. ‘Turkey produced on average 38 new shows a year and dramas are the top genre on prime time: *Insider* (Eccho Rights), *The Last Emperor* (**TRT/Mistco**), *Cesur Yurek* (Show TV) and *Magnificent Century: Kosem* (**Star**) are some of the most important ones’, she added.

On the digital side, some big productions are being developed: *Innocent*, **BluTV + Kanal D**, and **Phi**, from Ay Yapim for **Puhu TV** (Eccho Rights) on a '60 format. At the same time, **Netflix** confirmed this month the production of the first Turkish original. ‘The competition is growing steadily in this business segment’, she finished.



Buyers at **TRT Screenings 2017**: Beyza Nur Torun, **MISTCO**; Luis Nemtala Crespo, **ATB** (Bolivia); Massod Sanjer, **Moby Group** (Afghanistan); Ignacio Barrera, **Albavision** (USA); Melis Hamamcioglu y Nurfer Turan, **FOX** (Turkey)



LA Screenings 2017: ups & downs of fitting the multiplatform era

LA Screenings is the 10 days event where Hollywood Studios introduce their new films and TV series to worldwide buyers and programmers. This year, about 1500 acquisition executives attended, from May 16 the earlier ones -Latin America- till May 25, when last European and Asian presentations took place.

This 2017 was a good edition, with active attitude from buyers and varied product to attend the challenges of new media ecosystem. Local content is a big main goal, but also to refresh the screen with product of new origins and to reduce costs, both at non-scripted and scripted, with clever solutions.

About major genre tips, Hollywood studios mainly insisted on their traditional icons -doctors, lawyers, cops- and the twists go through the narration mode, new themes within and especially, the insertion of technology to reinforce old tasks: to save patients, catch killers, etc. Also, the super-natural stories continued having a good role, while the news were military series, which were much more than in the past, some good and some not.

PRENSARIO surveyed more than 100 worldwide buyers, and the TV contents most well commented, were: *The Residents* at **FOX**, as a medical series which makes focus on bad praxis; the format *Candy Crush* at **Lionsgate**, according to the new global trend of shiny floor game shows; *Wisdom of the crowd* at **CBS**, as a crime series where a genius creates an app to find killers faster; *The Brave* at **NBCUniversal**, as one of the best military series, with good drama inside; *Black Lighting*, a new based **DC Comics** series, at **Warner**; *SWAT*, as a strong remake at **Sony**. And we have *Siren* at **Disney's FreeForm**, as an example of

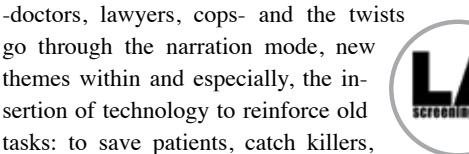
multiplatform series for the new audiences.

The market is clearly divided in three types of buyers: free TV, pay TV and OTT. Most of Hollywood studios have taken as strategy to be a ‘One stop shopping’, with products for each segment. TV series produced for OTTs, premium series, traditional series for basic cable, local content and entertainment formats for free TV. The hardest fight takes place between premium cable and OTTs, which compete for the same best product and original, exclusive content. Free TV players suffer to be at the back in the windows role, and due to usual crisis of their countries that affect their financial performance.

But as we’ve seen the last two MIP markets, everybody has a plan of actions to move forward. So, business traffic is up within the three kinds of buyers. Among the initiatives, a main one is co-production ventures -broadcasters,

Pay TV and **OTTs** are extremely interested- but also to vary providers, looking for fresh products and to improve deal conditions. This way, we see even at bigger players, content from non-traditional origins, independent films and unusual genres.

Broadcasters make efforts to produce original content reducing costs. About entertainment, they promote production hubs in convenient countries. About fiction, shooting in territories with tax incentives. For example, for Lionsgate’s *Candy Crush*, Spanish **La Competencia** has set up a hub in Spain, to feed Europe. For **Endemol Shine**’s *The Wall*, to be aired in **NBC**, a Polish hub was chosen. About fiction tax advantages, USA usually shoots in Canada and Latin America; Spain in Canarias Islands; France in Belgium.



Sophie Clignet, programming manager at **RTBF Belgium**, with **RTS Switzerland**: Mara Sorbera, acquisitions, **Alix Nicole**, acquisition manager of fictions



Muriel Gorr, **Disney**, with Stefanie Segers, acquisition manager, **SBS Belgium**; Mignon Hursman, head of acquisitions, **NPO**, The Netherlands



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



Pavel Vrabec, programming director of **Pop TV**, Slovenia; Ana Walczak and Daria Korsova from **Disney**, George Makris, programming director, **Nova TV**, Croatia

More global trends

The paper formats are steadily back. There is a so strong need for fresh content, that players don’t ask proven products any more. If they are proven, they are fresh. This opens good opportunities to new ideas and providers. Second, about genres, the big game shows are back at the European prime time, as we’ve stressed lines above. *Candy Crush*, *The Wall* and *Talpa's Five Gold Rings* have been mentioned from MIPTV as three shiny floor formats that lead the trend. ‘Playgrounds are clever now’, it was described.

Watching the future, the main challenge for the content industry is to evolve deeper onto new tech times. Some Hollywood studios, to mention big examples, continue doing the same as 10 years ago. Though today they can handle products for OTTs, their evolution is just latent about real multiplatform contents, short content, web series, etc. There is no launch of separated labels, to assure product feed. Just Disney has **FreeForm**, but not much more. Of course, European format titans, big Pay TV titans, tech independent players, have very good experiences about, but for the industry as a whole, almost everything is to be done.

NBCUniversal: more integrated

NBCUniversal International Distribution (USA) has completed the first half of 2017 with some important news. By one hand, **Sky** (UK) has extended its multi-year distribution agreement with NBCUniversal, which covers **Sky Cinema** and NBCUIN suite of channel brands for Sky's customers in the UK, Ireland, Germany and Austria, as well as EST and TVOD agreement for **Sky Store** across those territories.

And secondly, it integrated **Telemundo** and **DreamWorks** under NBCU's umbrella, in order to strengthen and diversify its offer, with a mix of comedies produced by the Studio and telenovelas and Super Series of from Telemundo.

Among the top titles for the region, it stands the new scripted series *A.P. BIO* (13x30'), comedy centered on a philosophy scholar that loses out on his dream job; *Blood Drive* (13x60'), drama inspired by grindhouse cinema; Freeform's *The Bold Type* (10x60'), and *The Brave* (13x60'), a journey into the complex world of America's elite undercover military forces.

Broadcasted in **TF1** (France) and **RTL** (Germany), *Gone* (12x60) is a procedural drama based on the novel, *One Kick*, from bestselling author Chelsea Cain; *Jamestown* (90', 7x60' or 8x60') is an epic story set on 1619, and *Law & Order: True Crime - The Menendez Murders* (8x60') is the new series of the franchise, recounting the infamous case of brothers Lyle and Erik Menendez.

On unscripted formats some of the new titles are *The Case*

La Fan, new series from Telemundo



A.P.BIO, comedy centered on a philosophy scholar



Belinda Menendez, president, NBCUniversal International Distribution & Networks

Against Adnan Syed (4x60'), the realities *Cyrus vs. Cyrus: design and conquer* and *Invite Only Cabo* (8x60'), the electrifying dance competition *World of Dance* (10x60'), host by **Jennifer Lopez**, and the documentary *The Jury Speaks* (4x60'). While in feature films it stands *The Mummy*, stared by Tom Cruise; *Book of Henry*; *The Beguiled*, directed by Sofia Coppola, and *Despicable Me 3*.

Lastly, from **Telemundo**'s original productions, the company recommends the drama *Lady Altagracia* (120x60'), a story of revenge, betrayal and ambition, but also of redemption, justice and love; *The Fan* (125x60'), dramedy that follows the president of a famous actor Fan Club, and the new seasons of the super series *The Queen of the South* and *The Lord of the Skies* (85x60').

La Fan, new series from Telemundo



Star Media, internationally deeper

Star Media is the Russian and Ukraine group that has skipped to major leagues with big-budget TV series spoken in English language. The first step was *Mata Hari*, which was taken in distribution by **Red Arrow** (Germany) and was shown last Mipcom at the Worldwide Premiere event, to open the market. Now there are 4-5 projects more in process.

Vlad Ryashin, CEO: 'Mata Hari' was emitted at **Channel One** in Russia, with huge success, about 30% of audience share at prime time at a peak. A second project we have is a period adventure series *Sofia*, in alliance with **Fremantlemedia Poland**. With **Federation Entertainment** from France and **Letterbox Filmproduktion** Germany, we have *Red October*, 6 episodes epic period drama set at the times of Russian Revolution and the civil war. We are also developing a number of high-concept drama series with a plan to find co-producing partners'.

Docu-dramas: 'It is a good niche for us. We produce series for the Russian market and specials for the international market, with very good demand. Now we're currently in production of *Lenin*, with

unique never shown material about the Soviet leader. It is 12 episode series for the Russian audience or two specials of 60' for the international market, and *The Great Russian Revolution*, with 8 episodes or one special of 90'. At Mipcom next October, we're planning to present a 2 part docudrama about the last days of the last Tsar of the Romanov Dynasty and his family, in exile before their execution'.

'Since we produce with an international approach, business is faster and stronger. We are a worldwide player now, and the next step in evolution would be to enter the United States market, we expect to do it in 2-3 years. Also this year, the Russian market is recovered 10/12 percent, the Ukraine market until 20 percent... we have fresh energy to reinforce all steps of our business'.



Star Media at MipTV 17: Maria Grechishnikova, sales, and Vlad Ryashin, CEO

Banijay expands its digital team

Banijay has appointed Lionel Abbo as global head of digital for Banijay Group and Banijay France, reporting directly to Marco Bassetti, CEO, for the Group and François de Brugada for France.

Bassetti: 'Expanding our global digital business continues to be a key ongoing strategy across the Group. Lionel's extensive knowledge, contacts and business acumen will be an invaluable asset as we maximize opportunities in this vibrant and rapidly evolving sector'.

'The digital sector is an integral and important part of the industry,

whether through co-productions or distribution, and I'm excited to join such an innovative and forward-thinking company to grow their business across this arena', adds Abbo, who joins Banijay Group from Shine France, where he has been deputy managing director Creation Developpement 360° since 2009.



Lionel Abbo, head of digital

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Latin Media Corp: multicultural



Jose Escalante, CEO

Latin Media Corporation, company led by **Jose Escalante** presents a wide multicultural catalog of top series from The Philippines, Turkey, Korea, China India and Latin America.

'In Latin Media we are constantly looking for the best stories that would work worldwide, outstanding plots, beautiful casts and amazing places are

just some of the characteristics of our dramas. Thanks to our 25 plus years of experience in the industry we are able to keep the excellent quality in terms of production and stories', explains Jose Escalante.

For CEE the company presents the trilogy of love which encloses great stories such as *Mothers* (80x45'), *Brave Love* (80x45') and *My 3 Daughters* (79x45') with great ratings in Latin America.

For the Turkish drama lovers, Latin Media brings the acclaimed Turkish series *Little Bride* (99x45') and recently added the drama *Selim & Sahra* (4 seasons), also with excellent rating in Turkey (**Samanyolu**) beating series like *Elif*. 'It's an exciting love story where family, societal and political issues are covered. The series was a categorical success in Turkey where it was one or two of its fringe from Monday to Friday at 7:30 pm for almost three years', describes the executive about the series.

The catalog also includes Filipino Dramas, highlighting *Captive* (42x45') about a little girl kept captive for 18 years until she escaped; *Don't Forget Me* (45x45') a love story with a tragic plot related to early Alzheimer diseases and *A New Opportunity* (42x45').



Selim & Sahra, Turkish series with 4 seasons

'Today, foreign fiction has been gaining space in the different programming grids worldwide. We have the vision and the know-how to provide the different programmers assured successes following the trend in each region', completes Escalante.



Crack Them Up, format

Universal Cinergia: benchmark in the business of translation

2017 represents a year of growth for **Universal Cinergia**, one of the youngest dubbing houses for the Latin American market, but which in just 5 years in the market is already a benchmark in the business of translation and dubbing. Its portfolio of clients is expanding more and more, and with it, the need for more space and hours of work to meet the demand that comes from Europe, Asia and soon also Africa, according to **Liliam Hernandez**, executive with over 34 years of experience and experience in the world of TV.

'We worked in the new facilities in Miami for 8 months. In the new building are part of the administration and part of the logistics of the recording studios we have in other countries: 17 in Mexico, 3 in Brazil and the Paris-Barcelona studio. Here are the operations we do in-house, everything that is English, and part of the French and Portuguese works. The idea is to expand and be able to render more to our clients with different talents' explains **Hernandez**.

During 2016, the company grew especially thanks to the collaboration with Turkish broadcasters, where their clients include **Inter Medya**, **Calinos**, **TRT**, **ATV**, **Echo Rights**, **Fox Turkey** and **Kanal D**, for which they dub to Spanish the series that entered successfully in the Latin American market. 'Turkish dramas are not only about love, but also family and values, elements that have contributed to its penetration in the market', adds.

By the other hand, the company added **Elisa Aquino**, as international sales, with big projects for Africa and India, and with good perspectives in big companies such as **NBC**, **BBC** and **CBS** for the second half of this year.



With the aperture of the new Studios in Miami, the company totalize 30 between Europe and America



Liliam Hernández, CEO, and Gema López, COO, during the inauguration of the new studios



Vladimir Zelenskiy, co-founder and creative producer of Kvartal 95

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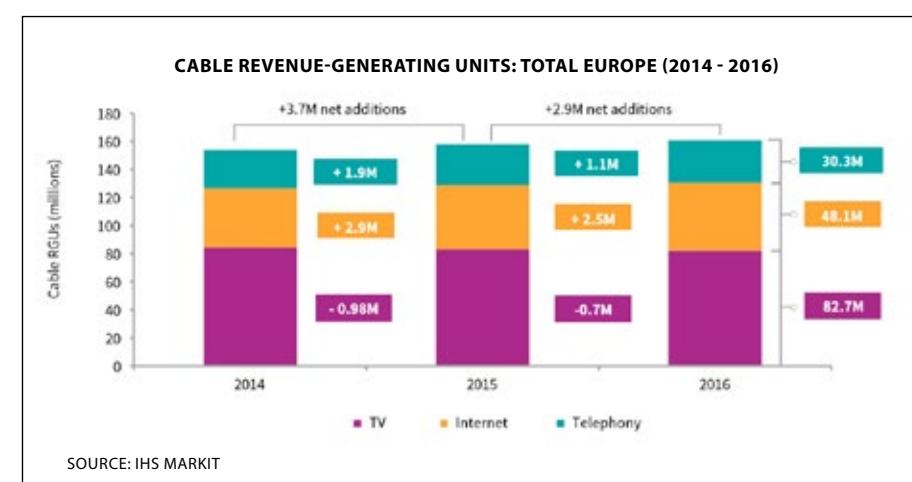
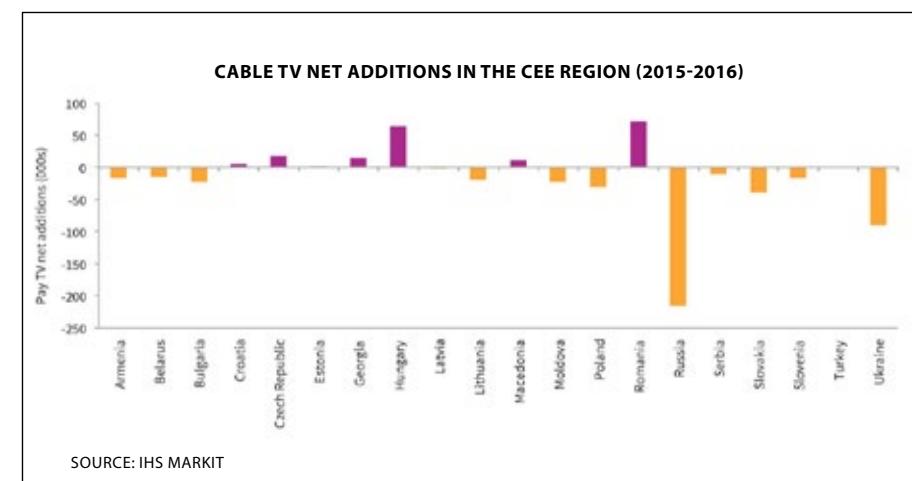
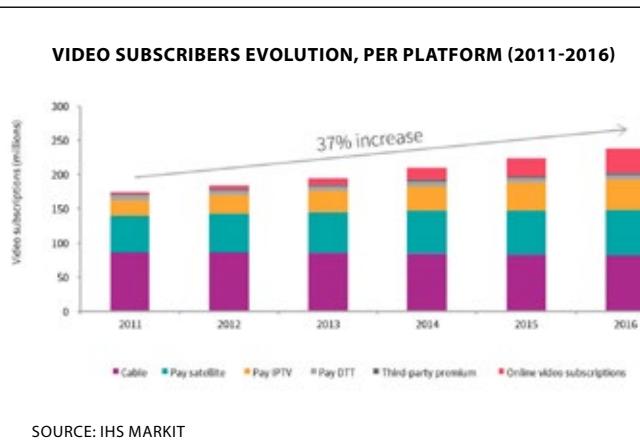
Challenges in a competitive era

Even when traditional cable is losing ground to telco and satellite services in many European markets, the cable industry as a whole is in good health due to the growth of broadband and digital services and a strong investment in the upgrade of their networks, with new interfaces like DOCSIS 3.0.

With a penetration of 50% across all European homes, the top 10 cable operators account today for 62% of the cable TV subscriber base, while the Top 2 comprise 37%, turning into the backbone of an increasingly connected society, according to IHS's report "Cable in Europe: the freshest data".

Both in the CEE and Western Europe, cable TV lost ground in most of the markets during 2016, especially in key ones such as Russia, Ukraine, Germany, Austria, Netherlands or Portugal, but with some others such as Romania, Hungary, Georgia, Czech Republic, and Spain actually added new subscribers. In WE, the loss added up to 3 million of subscribers, while in CEE it has been of almost 1 million. By comparison, the satellite and telco platforms grew by 4 and 14 millions in WE, and 10 and 9 millions in the CEE, respectively.

Nevertheless, the cable operators have successfully pushed TV average revenue per user (ARPU) up 16% in the past 5 years, adding up by now to 95% of the total TV revenues, and cable broadband is gaining in most of CEE markets and all but one WE territory: Ireland.

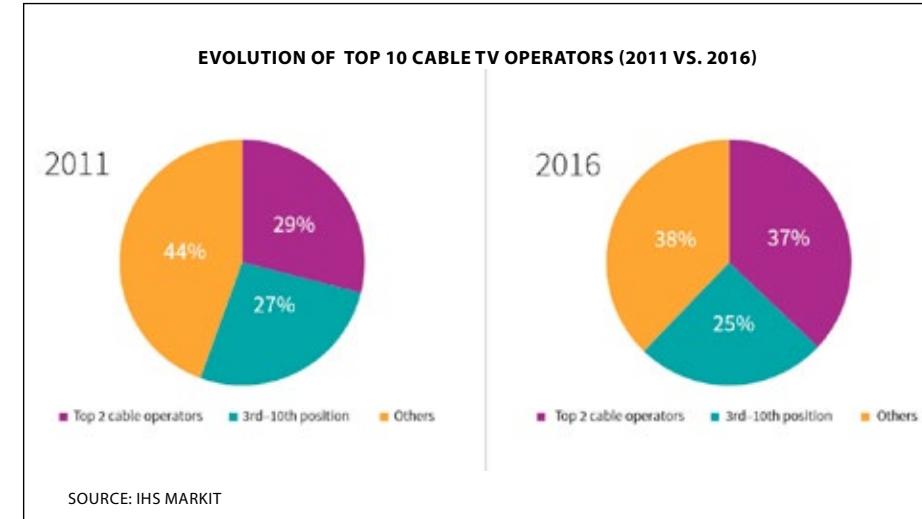


And the cable operators remain successful in converting their subscriber base to super-fast broadband, with 12.2 million connections in WE by 2016, and with a estimated growth up to 15.8 million by 2020. This growth helped cable operators to add over 6 million new revenue-generating units in the last 2 years.

During 2014 and 2015, 3.7 million net connections were added, among them 1.9M to telephony; 2.9M to internet, and a decrease

of 0.98M in TV; considering 2015 and 2016, there where 2.9M net additions (+1.1M in Telephony, +2.5M in Internet and -0.7M in TV).

According to IHS, more than one third of all European pay TV subscribers are served by just 5 groups: **Liberty Global**, with close to 22.5M subscribers; **Sky**, with a customer base of 21.7 million customers in the region; **Vodafone**, with 12.6 million wireline customers; **Orange**, with 9.5 million customers, and **Vivendi**, with almost 9 million subscribers in Europe. Yet, when these companies kept their leadership in the Pay TV industry, recent growth has been lackluster at best, especially for Liberty and Vivendi, which lost near 2M and 1M subscribers respectively between 2014 and 2016.



connected lives, has already overtaken the Pay-Lite proposition.

In 2014, Advanced Pay TV subscribers were just 0.7 million among Europe's big 5, while PTV Lite had 1.6M. But in 2016 APTV performed exceptionally, adding 2.3 new million subscribers (to total of 3M), while PTV Lite ended with 2.8M.

Finally, the denominated 'full-fat' services are expected to deliver far higher ARPUs. **Sky Q** and **Now TV** are two large examples of this, with ARPUs up to USD111 and USD 69.7 a month, respectively. The first one includes **Box Sets Bundle** (USD 49), **Sky Q Multiscreen** (USD 14.5) and **Sky Sports & Cinema** (USD 47.5). The later features **Entertainment Pass** (USD 9), **Cinema Pass** (USD 12.8), **Kids Pass** (USD 3.8) and **Sports Pass** (USD 44.1).

OTTs

One of the main reasons of this drop is related to the proliferation of OTT platforms such as **Netflix** and **Amazon**. If we add digital platforms to scene, we will find that Netflix is in third position in terms of subscribers, following only Liberty Global and Sky, with over 20M subs., while Amazon takes 8° place, beating giants such as **Telefonica** (Spain) or **Deutsche Telekom** (Germany) in terms of subscribers.

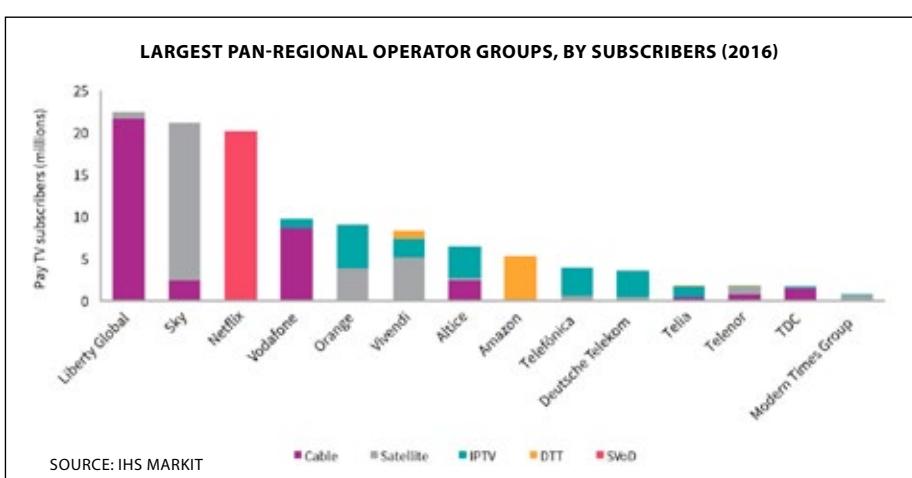
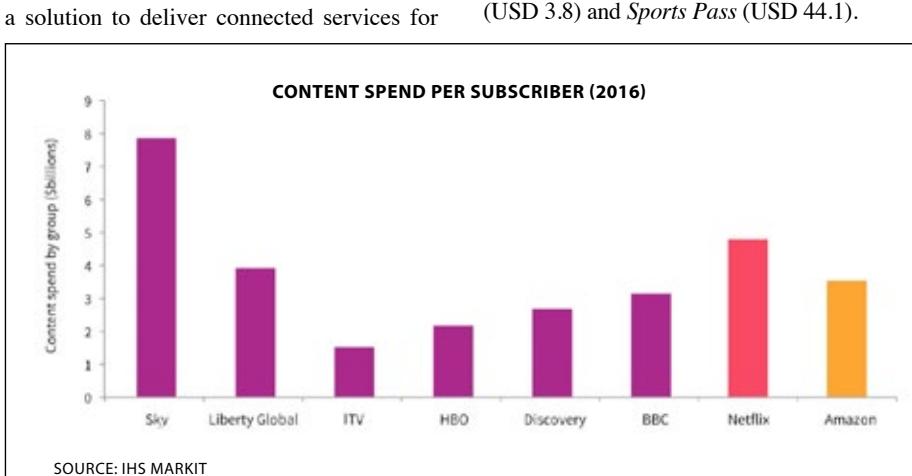
In the UK, for instance, Netflix adds up to 6.3M and Amazon 2.3M vs. the 10.7M held by Sky, while in Germany Amazon is the 4th platform in terms of subscribers (2.8M) after **Vodafone** (7.8M), **Unitymedia** (6.4M) and **Sky** (4.9M). VOD services don't appear in the top-5 listing only in France, Russia and Poland,.

Global audiences want more than ever before to be in control and choose when, how and where watch their preferred shows; and, Europe is not the exception. IHS estimates that, between 2011 and 2016, SVOD usage grew by 37%, increasing revenues by 32% (USD40.2B in 2010 vs. USD53.6B in 2016).

The key?: Strong investments into original content. In 2016, Sky spent USD 8B, with strong focus on sports rights, a genre that, along with live action and news, remains strong at linear TV; Netflix spent USD 4.5B, while Liberty invested USD 4B (source: IHS Markit). In terms of revenues, Amazon stood out with video revenue growth of 140%.

Pay-Lite, a traction strategy

Along with strong investments in original content, Pay-Lite alternatives (OTT solution





Viacheslav Murugov, CEO, CTC Media (Russia)



Natalia Lazareva, producer, Alexandra But, head of international, and Yuri Sapronov, CEO, Russian World Studios



Igor Fedorov, acquisitions Intra Russia



Friday TV Russia: Tatiana Massova, content manager, and Anastasia Korchagina, head of acquisitions



Buyers from Kazakhstan: Nurzhan Muhamedzhanova, general producer, Channel 31, with Aliya Babayeva, director general, and Vela Fidel, deputy general director, Channel 7



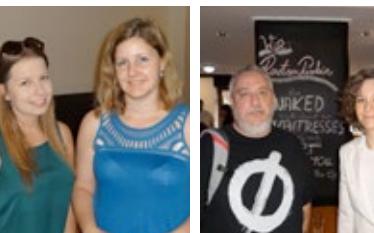
RTL Group in Central & Eastern Europe: Andreas Fischer, SVP of the group for emergent CEE countries, with RTL Hungary: Peter Kolosi, program director, and Tibor Forizs, director of content acquisitions



Hungary: Aniko Medvegy, entertainment department, and Andrea Zaras, head of acquisitions, both from MTA; Jakob Pochlatko, executive acquisitions from Epo Film; and Bianka Balzs, head of children department, DUNA



TV2 Hungary: Okros Gergely, program director, Janos Wisinger, director, Klara Paszternak, senior program acquisitions, and Gabor Fisher, program director for cable channels



Viacom Hungary: Csilla Masli, junior program planner, and Szilvia Kerekes, programming manager



Hungarian buyers: Varga Attila Sixx, Index2, and Eszter Solymosi, acquisitions, SPT Networks Central Europe



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



Telewizja Polska: Ewa Dqbrowska, head of programme acquisitions; Lukasz Kluskieicz, head of film department TVP2; Magdalena Chajewska, head of film department TVP1; and Barbara Siwa, sales manager, KDR Film Studio



Pavel Vrabec, general director of Pop TV, Slovenia; Ana Walczak, Disney; Branko Carmis, programming director, Pop TV; and Daria Korsova, Disney



Nelly Stoyanova, acquisitions manager, Diema Channels (Bulgaria), and Jan Rudovsky, head of acquisition, FTV Prima (Czech Republic)



Greek broadcasters: Theodore Kyriakou, CEO, Antenna Group; Nathalie Woodfield, programming director, Star; Giannis Latsiosi, Otemet; and Karolos Alkalai, general manager, Star



Ranka Horvat, editor drama, both from HRT Croatia (borders) with Tatjana Pavlovic, acquisitions manager, Antenna Group, Greece



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



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



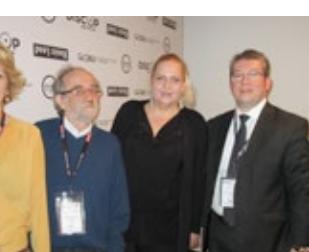
Fox Networks Group, Central & Eastern Europe: Olga Zhurova, head of channels, Ribere Lia, head of programming, Vessela Dimitrova, programming director, Balkans, Yadigar Metin Belbiken, VP of Thematic Channels, Turkey



Ivana Suliková, programming manager, Markiza, with Ivana Kollarova, manager, and Katarina Slováková, head of acquisitions, RTV



Andreja Sertic, CEO, and Mirela Pammer Galvan, acquisitions, both from Media Acquisitions (Croatia), with Hamdi Rashiti, program director, Alsat M (Macedonia)



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20.0 RATINGS
ON PRIME TIME

las ESTRELLAS

ROMANTIC COMEDY



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INTERCONTINENTAL BUDAPEST



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