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.

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 CB 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.

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.
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 pie of every market in this region went down, in some cases up to 50%. 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.

Advertising in Russia is growing faster than the media ad market, which is expected to remain below the pre-crisis level.

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 (unaided USD 420 millions (+41.7%)). The Hungarian Advertising Association presented on May the official figures for ad investments on TV in 2016: there was a growth of 8.9% to USD 203 millions, putting 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 growth, mainly not only 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.

In the nowadays market, there are four clear trends: first, a biggest change in the region is the local ad market grew 11.1% to reach USD 700 million on Q1 2017, from which TV (unaided USD 420 millions (+41.7%)). The Hungarian Advertising Association presented on May the official figures for ad investments on TV in 2016: there was a growth of 8.9% to USD 203 millions, putting 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.

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The conflict in Ukraine severely disrupted the domestic ad market, which suffered from sanctions imposed by the US and the EU, the sanctions it imposed on Russia, 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's exports in 2014, and devaluation of the both countries currencies.

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

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 be100% 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 billion. “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 (45.6%) in 2016 and onto 77 million (61.8%) 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 $1 million pay TV subscribers at end-2016, so some of these 23 million subscribers will choose to convert to FTA DTT rather than 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 6.6 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 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 these 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 Kvartal 95, respectively, the Czech Republic: Coeka telese 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 MTV is strengthening its distribution arm; Armenia, where Shant TV launched its international division one year ago; and Albanian Vision 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.

Eastern Europe Pay TV Households by Technology in Thousands (2013-2022)

Markíza, Slovakia: drama for export

The Markíza 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. Markíza 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 Markíza 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 Troja tvar číte povdome (Your Face Sounds Familiar) and comedy series Horná Dolná (In the Middle of Nowhere) on our main channel Markíza, 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 Knows? and entertainment shows like Ultimate Chartshow, and a makeover 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 channel has also aired a special event – live from the Oscars ceremony. On the second one, which is profiled as an action, 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 (Fortune League), boxing events including Klitchko vs Joshua, Ice Hockey matches of the Slovak national team and soon UEFA 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 local content via a variety of platforms, from an AVOID 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 Batelov Vino (Taste of Love) was sold to Estonia and Hungary, and is being adapted in Slovenia with its localized version Udano Vino. Our series Horna Dolna was adapted into the Hungarian version A mi kis falak, 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, Only Lady, which was developed from a television sketch show aired on Markíza. 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.

Comedy series Batelov Vino is not only a key audience driven in Slovakia, but also one of the most sold titles abroad. The original series was broadcast in Poland, and Hungary produced a local version.

The most recent entertainment show on Markíza: Ultimate Chartshow.

The regional language for the Slovak national team

SLOVAK REPUBLIC: AUDIENCE SHARE ON MARKÍZA GROUP NETWORKS – PRIME TIME (Q1 2013- Q1 2017)

SOURCE: PMt/tNS SK

Slovenská Republika: časť aktuálnych až historickýchاین

MARKÍZA: MARKÍZA

INTEGRALE

TIERRAS SALVAJES

UNSTOPPABLE CONTENT

Natpe Budapest 2017 Intercontinental Hotel SUITE / 915

PRENSARIO INTERNATIONAL

6
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 18-34. 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 International 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 – Todch.Nacht. The second part is original shows developed and produced by the channel: *The Auditor* (Revizor), *Love for Survival* (Kohannja no vikhranom), *Cheap and Cheerful* (Dobrovo i bondo), *Swindlers on the Web* (Aferyst v setyah), *The Ladettes: New Life* (Paradnye. Nove zhyttia), etc. ‘The combination of our own projects with acquired ones gives balanced ratings and allows satisfying the needs of the local viewers’, he remarks.

*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 *Aferisty v setyah*.

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 project on its schedule. *Kyiv Day and Night* has run successfully for three seasons. This year, we are launching another novelty 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. Evdokimov

*Sergey Evdokimov, general producer, Novy*

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**Ukraine: audience share, per networks**

<table>
<thead>
<tr>
<th>Network</th>
<th>Audiences Share</th>
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<tbody>
<tr>
<td>ICTV</td>
<td>15.1%</td>
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<tr>
<td>STB</td>
<td>10.21%</td>
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<tr>
<td>tVN</td>
<td>8.82%</td>
</tr>
<tr>
<td>Novy</td>
<td>8.17%</td>
</tr>
<tr>
<td>Novy Channel</td>
<td>7.84%</td>
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**Source: Analytical Department, Novy Channel**

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*For more TV series see contentsales.ORF.at*
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 premiers 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, TVN, Poland: how to reach the most demanding audience

Edward Miszczak, Programming Director, TVN, Poland: how to reach the most demanding audience.

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 run 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 Cpas 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’.

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 A VOD service. Thanks to this business model, play-er.pl users were able to watch five episodes of the series Singielka, those international formats from HGTV’.

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

Recently, e-commerce has become a major part of the Polish retail market. In 2016, Poland was 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.

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The Hungarian ad market has been suffering from the global economic slump for many years. Market players were facing a declining advertising price for the last five years. The market started to grow 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 12.1% increase over the previous year. This figure does not include TV advertising, which was informed finally in May: the official number was €180 million, representing a growth of 8.5%, 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 provoked by 27% 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 3.5% 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 reinstate 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 report. Display was up 19.2% 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 RTG Group continues to be the leading company in the market. Their FTA channel RTL Klub plus seven cable networks, and it plans to launch on July 3 a new channel, RTL Gold, following the transformation of Film2. The channel will offer Hungarian-produced content, such as Aniko Nádai’s new talk show, Aniko Show, and will also carry popular RTL quizzes, among them Minősít to Win, Hollywood Game Night, The Chef, Who Wants to be a Millionaire?, etc.

The cable portfolio of RTL Hungary has a very stable leading position. Films and Cool are market leaders in their categories, while several other channels have been growing recently, including RTLII, RT4 and Soroutsz. The company has decided to take Film2 to a new level; the channel 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 M+; the premium entertainment channel PRIME, where popular series and blockbuster movies are aired; Chill TV, for grocery lovers; sport channel Sport2 TV with Premier League and Moto GP; Kívüli TV, entertainment to the kids; Izauza TV for the telewoma fans; the music channel Zenebutik. Humor with comedians; and the lifestyle channel, FENDO.

While the third group of channels is pulsating MVT Media, other private channels 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, celebrates 20 years this year, 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’. ‘For our group, ‘TV’ is not the abbreviation of ‘television’, it means ‘Total Video’.

Tibor Foris, 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 digital strategy’.

About RTL Gold: We are re-launching Film2 which previously aired movies 24 hours a day. We’ve seen a lot of movies airing in Hungary lately. Including movie and general channels, about 350 movies are broadcasted each month in Hungary. So we decided to start launch on July 3rd, a channel focused on our wide variety of locally produced talk shows, games and shows. There is no channel like this in the market. Here we will also reinvent a tradition by producing a brand new daily talk-show, Aniko Show, at 5pm with a popular female host, as there are no daily talk shows offerings in the market’.

Regarding RTL Klub, he stands: ‘Own production 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, which is a daily slot. The premiere episode’s market share was 18.5% (18-59) and an absolute slot winner. ‘Our chart-topping event show Nagy Duett (fifth season) and the second season of comedy Among Friends (Barátközös)’, he stands: ‘Own production 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’.

Hungary: Audience Share, for groups – A18-59 prime time (January – May 2017)

HUNGARY: AUDIENCE SHARE, FOR GROUPS – A18-59 PRIME TIME (JANUARY – MAY 2017)

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<thead>
<tr>
<th>Network</th>
<th>All Day</th>
<th>Prime Time</th>
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<tbody>
<tr>
<td>RTL Klub</td>
<td>19.64%</td>
<td>22.16%</td>
</tr>
<tr>
<td>Fox</td>
<td>5.6%</td>
<td>8.1%</td>
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<tr>
<td>others</td>
<td>2.16%</td>
<td>2.58%</td>
</tr>
<tr>
<td>Viacom</td>
<td>1.39%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Discovery Digital Media</td>
<td>1.93%</td>
<td>2.16%</td>
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Tibor Foris, director of content

Ökőcs Gergely, program & creative director

Tivador Sándor, network controller

John Brown, GMI, Sony Pictures Carousel TV Group

The group increased its market share by 34% in one year (18-59, AD). The cable portfolio aiming at the 24 and older group tripled its prime time market share since May 2016. The gap between RTL Group and TV2 Group prime time market share from 15,999 decreased to 0,205 in one year (2016 May vs. 2017 May) and from 12,39% to 40% regarding all day.

‘In one year we increased our portfolio from 4 to 11 channels’, he remarks.

‘Our goal is to build the 1st 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’.

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<tr>
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<td>18.77%</td>
<td>21.94%</td>
</tr>
<tr>
<td>Fox</td>
<td>6.35%</td>
<td>8.56%</td>
</tr>
<tr>
<td>others</td>
<td>2.16%</td>
<td>2.58%</td>
</tr>
<tr>
<td>Viacom</td>
<td>1.39%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Discovery Digital Media</td>
<td>1.93%</td>
<td>2.16%</td>
</tr>
</tbody>
</table>

Hungary: Audience Share, for networks – A18-59 prime time (January – May 2017)

Tivador Sándor, network controller

John Brown, GMI, Sony Pictures Carousel TV Group

The group increased its market share by 34% in one year (18-59, AD). The cable portfolio aiming at the 24 and older group tripled its prime time market share since May 2016. The gap between RTL Group and TV2 Group prime time market share from 15,999 decreased to 0,205 in one year (2016 May vs. 2017 May) and from 12,39% to 40% regarding all day.

‘In one year we increased our portfolio from 4 to 11 channels’, he remarks.

‘Our goal is to build the 1st 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, which is a daily slot. The premiere episode’s market share was 18.5% (18-59) and an absolute slot winner. ‘Our chart-topping event show Nagy Duett (fifth season) and the second season of comedy Among Friends (Barátközös)’, he stands: ‘Own production 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’.

Brand strengthening is getting more important because viewers are hard to reach through a
Asia Express

the international markets TV2 will broadcast
success of adventure reality game shows on
international formats. Acknowledging the
goals and building the number one television
million page impressions per month'.

Group

channels have their own website, in 2017
the #1 in the media sector. Each of our eleven
so we bought
alternative to music competition shows in the

Palvin

is ahead of us. On
YouTube

Facebook

is the most popular among
viewers and more than 30,000 interactions'.

A Nagy Duett

event show
reached 2 million

importance of integrated communications, so
designed content. TV2 recognized in time the

developed mobile application

Gergely

iut has appeared on the most popular social

Prenario International

single platform. Viewers need extra, platform-
designed content. TV2 recognised in time the
importance of integrated communications, so
air 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/
tables. 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
canals 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 (MTG).

sounds familiar (Endemol) will return with its
fifth season and True 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 Stay Dtons, 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
canals portfolio so we are looking for
movies, series, formats for kids, gastronomy,
original daily entertainment, reality show,
game shows, and weekly high-concept
tertainment 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, MTV, 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, Ulbruswolfs 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
canal, features one of the most popular car shows in the country, TourCar’.

“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
canals 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
great value, as viewers identify the channel
with these shows, which is a clear USP for the
distribution and advertising partners as well’.

‘With ADS New 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
eventually 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
digitally produced shows for the Hungarian
market for our Viasat channels, and we will
be delivering exclusive original scripted series
for Hungarian viewers’, he concludes.
Hungary:
market fragmentation, new
channels and original dramas

BY NICOLÁS SMIRNOW & FABRIZIO FERRARA

Traditionally home of NATPE Budapest—and former Discop East, acquired in 2011 by NATPE—, Hungary is a key market in Central and Eastern Europe: country’s total population is around 10 million and there are close to 120 Hungarian channels. Pay TV is growing, but Free TV is still the leading platform, while digital is on its early stage. Prensario interviews the biggest media groups for this special report.

TIBOR FORIZS, Director of Content Acquisitions, RTL Klub
ÖKRÖS GÉRGEY, Program & Creative Director, TV2 Group
MONIKA GYURITY, Programming Director of MTVA
EDINA BALOGH, Senior Acquisitions Manager, Digital Media and Communications Zrt.

RTL Klub: Divorced (talpa) is the first localized Hungarian drama series that will have a second season; and Budapest Day and Night is the local version of the constructed reality format (all3media).

TV2 makes the difference with prime time entertainment shows: The Big Duet, an in-house developed format is a prime time leader, and with My Man Can (red arrow) the broadcaster increased its prime time share by 30% in 18-59.
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 Provno 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...’

**Average Audience Share, by Networks & Countries - Total Viewers**

<table>
<thead>
<tr>
<th>Country</th>
<th>Network</th>
<th>Audience Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>ERT1</td>
<td>25.6%</td>
</tr>
<tr>
<td></td>
<td>ERT2</td>
<td>11.1%</td>
</tr>
<tr>
<td></td>
<td>Epsilon</td>
<td>9.9%</td>
</tr>
<tr>
<td></td>
<td>Mega</td>
<td>7.8%</td>
</tr>
<tr>
<td></td>
<td>Skai</td>
<td>6.2%</td>
</tr>
<tr>
<td></td>
<td>Alpha</td>
<td>4.8%</td>
</tr>
<tr>
<td></td>
<td>Epsilon</td>
<td>2.7%</td>
</tr>
<tr>
<td></td>
<td>POP TV</td>
<td>1.2%</td>
</tr>
<tr>
<td>SLOVENIA</td>
<td>POP TV</td>
<td>24.6%</td>
</tr>
<tr>
<td></td>
<td>TVS2</td>
<td>21.1%</td>
</tr>
<tr>
<td></td>
<td>Kanal A</td>
<td>20.8%</td>
</tr>
<tr>
<td></td>
<td>OTO</td>
<td>11.7%</td>
</tr>
<tr>
<td></td>
<td>TVS1</td>
<td>9.7%</td>
</tr>
<tr>
<td></td>
<td>RTS2</td>
<td>8.9%</td>
</tr>
<tr>
<td></td>
<td>B92</td>
<td>3.1%</td>
</tr>
<tr>
<td></td>
<td>RTV1</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

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 con-
tent that reflects and represents the society in
which they live. The popular acquired content tends to be European or from the US, in par-
ticular sitcoms and dramas’.

Smith: ‘Audiences want to see homemade
original dramas and local adaptations of inter-
national formats and franchises. While there
is still an appetite for US content, the highest
ratings are for local programs: dramas like
Brooklyn Nine-Nine or The Good Doctor on Planet TV draw in large audiences’.

‘Together with Vice Media, we have pro-
duced weekly shows for broadcast on PRVA
and Ant1, as well as special documentaries,
web TV series and have localised existing
content for Vtelenom. The linear broadcasts
have rated incredibly well in all markets and
we have won a number of awards for the orig-
inal 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 oper-
ate 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 penetra-
tion increases, bandwidth increases, the qual-
ity 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 di-
versify our digital offering. We have already
partnered with digital brands such as Thrive
Global to launch local versions in new terri-
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
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 ver-
sion of Arianna Huffington’s Thrive Global
in Greece, a deal we announced at the end of
last year’, finalizes Smith.

International success

Greek long running drama series
Brousalo (800 episodes) was a huge suc-
cess because it combines compelling
storytelling and an original, creative
concept. ‘It provides the right mix of
romance, adventure and originality while
also appealing to the networks’ target
audiences’, explains the executive.

‘We want our content, whether it is
acquired, commissioned, produced in-
house, to appeal to audiences beyond the
local market. Drama is expensive to pro-
duce and often has more than one com-
missioning broadcaster, so it instantly
becomes less local and more global in
nature. With the emergence and prolif-
eration 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 suc-
cesses 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.

The original sitcom Andjela & Andjelka got an
audience share of 20% on PRVA Serbia.

Long running drama series Brousalo was
sold in 40 territories globally, including 10
territories in Latin America.

800 words
bTV: ‘Audience is more focused on the story and production value’

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 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 focused 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 have 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.

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 to a non-linear experience will affect the audience and we are positioned to provide rich and entertaining opportunities on every platform or device’.

“We offer VOVO 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, 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’. The audience is becoming even more demanding of quality content, and is focused 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 have 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.

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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 Singer, The Jewelers Clan and the scripted realities Real Mysticorn, 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, Superexpo, Systeleokho), and for shows (Sixties, Dots, Euro Check-in), 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 expected to launch to the SVOD global members around 2018. The drama focuses 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.

Tralpa 100% owner of SBS Broadcasting

The Netherlands last April, Talpa Holding acquires a 67% stake in SBS Broadcasting from Sanoma and thereby achieves full ownership of TV-stations SBS6, NET5, Veronica and SBS9. This operation complements the company in further developing a new Dutch multimedia company with strong positions in TV, radio, print and online. As part of the transaction, Talpa’s stake in the TV guide business Veronica Uitgeverij will be sold to Sanoma. Talpa expects to close the acquisition relatively shortly, pending regulatory approvals and completion of other customary review and approval procedures.

Talpa owner John de Mol considers this acquisition as an important step towards building a new Dutch multimedia company. Achieving full ownership of SBS represents a unique opportunity as one of only two free-to-air commercial TV groups in the Netherlands. Together with Talpa Radio, SBS will become an important pillar of a new multimedia company.
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 Promovastory (Cognitive) the broadcast of TV channel Toned Channel will start. 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. Couch). The regional channel Varyag will be broadcast within ZALA IPTV basic package.

Russia: Mail.ru makes its kids channel ad free

Starting from June 2, MTV’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 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

CRIME SERIES - LATINO FILMS - DOCS

ROMANIA: 7.3 million subs of Pay TV in 2016

Romania holds 7.3 millions of pay TV subscribers, up 5% 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%.

BIH: BH prep for future launch of 4G networks

At the proposal of the Ministry of Communications and Transport, the Council of Ministers of BH has adopted the Decision of Sector Policy of electronic tele-communications 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 con-nection in the country.

Hungary: MTVA makes its kids channel ad free

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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 Makaddam 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 Lazareti Club in Dubrovnik. The opening ceremony takes place on June 12-13, 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 discussion 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 television, Czech Republic), Ivana Mikloušová (RTS, Serbia) and Kazimir Bačić (HRT, Croatia).

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) discuss 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-making. 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 output of home and the understanding of the consumption 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 (11-11.45am) with Karin Heijink (Viasat), Mike Muriarity (AMC Networks), Bartosz Witak (Viacom), Salim Makaddam (BBC Worldwide), John Rossetter (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 am 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

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 (86x60’), 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 an strong fraternity links. The Goddess (80x60’) 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 failure, disappointment and despair of thousands of drug addicts, drug dealers, merchants of dreams, and interspersed with love, faith an strong fraternity links.

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

Globo: more than dramas

Globo (Brazil) arrives with a strong catalogue that mixes big tele-novelas and dramas with a twist. Heading the slate is True 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 modelling contest. Time After Time (100x60’), a forbidden love story set in radio’s golden age during the 1950’s. 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 (86x60’) is set in radio’s golden age during the 1950’s.

Liongate: 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 Liongate, a pioneer in generating live series for OTTs, bought Starr 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 Liongate has it for each type of customer. Original series, blockbusters and good cinema, cable package. Latin material for niches like Blim is 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 Tell, 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 starred by Abigail Breslin (Little Miss Sunshine).

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.

From the slate of series it stands Supernova (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 (86x60’) is set in radio’s golden age during the 1950’s.

In ministries 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 The White Princess (8x60’) and The Eternal Son (86’), 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 The White Princess (8x60’) and The Eternal Son (86’).
**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 months, 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”.

“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 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 first original content. Starring Haluk Bilginer (*Winter Sleep*, *Eylül*), Nur Sütter (*Under the Trees, Sorrows*), Ali Atay (*Leyla and Mevlum*), Okan Yalabık (*Magnificent Century*), Serkan Keskin (*Leyla and Mevlum*), Tülin Özen (*Magnificent Century: Kösem*) and Battal Küçükçay (Alpınar, the series is directed by award winning director Seren Yüce and produced by D Productions.

*Possessed* is the first horror genre mini-series 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 Mesci, one of the best directors of Turkish Horror movies and starring Fırat Giray (*Broken Pieces*), Buran Ahbubat (*Forbidden Love, Behzat Ç*), Sai Geyn, Feri Kaya (*Time Goes By, Fallen Angel*), Koray Salihaç.

**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 MeiYapım & 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 *Sıla* 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, Boforia, 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.

CBS Studios International (USA) highlights for this season two big dramas: *Seal Team* (13x60’), starred by David Boreanaz (*Angel*, * Bones*), which follows the professional and personal lives of the most elite unit of Navy Seals, and *Valor* (13x60’), an 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 *J.R.L. (13x30’)* is a comedy centered on a divorcé and actor between projects moves home to New York to regroup, living in an apartment sandwiched between his doing, meddlesome parents on one side and his competitive brother, sister-in-law and their new baby on the other.

Lastly are *Instinct* (13x60’), which 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’s* drama with David Boreanaz
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 Bober, Vorotolinograd, Egzopers, The Stronghold, Queret & Mers, Toloka, and documentary Panorama.

The list of currently being produced intercontinental co-productions with Ukraine includes several dozen films. Among the most anticipated ones: The Line by Peter Behajak (Slovak Republic, Ukraine) that will premiere at Karlovy Vary International Film Festival 2017; Easy by Andrea Magnani (Italy, Ukraine) to be released this September; Magnani (Italy, Ukraine) to be released this September; Slaboshpytskyi (Ukraine, Germany, France, Korea, UK, Poland, Turkey, India, Czech Republic, Bulgaria, Hungary, Vietnam, Middle East, ex-Yugoslavia and Baltic states). Negotiations with North and Latin America 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. Vsevolod Mironov’s local release is planned for March 2018. And despite the projects are 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 portfolios, Marks: The Forest Song, 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 creator Stom 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 already locally 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 Sniffer (FILM.UA) was licensed as a format to TFI (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 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 Severstal 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. 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 greatest one for foreign producers as far as even without any rebates Ukraine is the cheapest European country to produce in’.

Ukrainian TV channels are also conquering international attention: the Japanese version of The Dragon Spill (FilM.Ua) released in 2015 and broadcasted at USD 4 million, grossed locally close to USD 400,000.

Discover Ukraine in Cannes Film Festival 2017

Head of the State Film Agency Philip Ilienko and Viktoria Yarmoshchuk, the 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 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. Ilienko expected at least 15 big this year, filmed with IMAX.

According to Yarmoshchuk, the Annual 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.
**Azteca: real stories, with a twist**

**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 **The Last Emperor** (40x45’), 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 pushes **El César** (26x45’), 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 Rodriguez are told parallel to those of Guillermo and Rodrigo, coming together in this drama of perseverance and victory. And **Women Breaking the Silence** (130x42’), 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.

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**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 highlights from **TRT/MISTCO’s** catalogue is **Reservation: Erenagol**, which, according Aysegul Tuzun, VP sales & marketing, and Boyza Nur Turan, 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. Besides current broadcasters, we are about to add new broadcasters from different territories", they add. Set in the13th 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 **Eye 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 Outsider: Discover Life** (13x26’), about experiences of a wildlife photographer about nature in the world’s different regions and the mysteries of ethnic cultures.
**Televista, into Wild Lands**

Televista 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 (72a06), 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 (100607), 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 (127606) is set on the village of El Salado, where traditions, beliefs, and old customs are maintained.

Lastly are In Love with Ramón (127607), 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 Silencio (12b06) 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 know 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.

**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 program 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 deci-Series Bundes 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 renowned fashion celebrity Caroline Rennie. 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.

**Mediabiz: 10 years of constant evolution**

Since its foundation 10 years ago, Mediabiz (Argentinian) 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 exaspered 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 imme-

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**EXHIBITORS**

Mediabiz: 10 years of constant evolution

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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 PERINARIO, 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 certainly 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 30% of the total; secondly, the existence of one or more other investors ("counterparts") that will contribute with 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 the 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 allow the producer to have a value that can be negotiated with the “counterparts”.

The experimental projects (series/narratives) 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 independent 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 MIIPS in Cannes, NATPE Miami or the L.A. Screenings, as well as newer venues, such a 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 Facebook’, states Haiek.

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 fifty producers from the interior of Argentina. Business rounds were also held to exchange ideas and networking, with the participation of HBO, Netflix, AMI, Disney, History, Fox, Clariovideo, Televisa, Viacom, Turner, Sony, Discovery and DirecTV, among others. Comparing the new policy with the earlier procedure in INCAA, this is a ‘paradigm change’ for 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: ‘This is a clear aim at deepening the strategy of bringing together the projects and the screens’. Later this year INCAA will be hosting MARDOCRASS, devoted to documentaries and scheduled to be held during the 22nd MiDiFilm Festival, November. Screens from the entire world, including Canal 22 (Mexico), Rai (Italy), the Danish Film Institute, Scalaf Columbus, PBS (USA), Sundance Institute, Deutsche Welle (Germany), the Scottish Documentary Institute and Visions du Real Switzerland, among others, will be taken 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 generally are not well known at foreign markets; concerning animation, we have to provide this sector with the elements required to be at the level of the world-class industry; it’s a specialty that requires lots of service and we want to focus on providing it with the needed support’.

The INCAA goals include also the signing of television and digital platforms bilateral cooperation agreements that exist for the movie industry. ‘We are working on this with Italy, Canada, Brazil and Galicia; we believe it is an essential tool to bring closer our producers to these markets, and vice-versa’, he adds.

‘We have a market with about 500 audiovisual producers all around the country. Leaving aside the twelve most important ones, there is a bulk with very good ideas and locations. They need support from the State to allow these ideas to travel outside the country and receive the necessary recognition. The international strategy is of essence when building up an industry’.

Contests

The INCAA is calling this month for proposals regarding its new contests. The first stage of the TV and digital media encourage participation plans features support for the industrial production of a 60-episode HD fiction series, with a budget—stated as a reference, of 75 million Argentine pesos, about USD 4.7 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 425,000 (USD 29,500) per project. The petitioners must provide an associate investor; eight of these projects will be chosen.

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 petitioners must provide an associate 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 films, whose content will be uploaded on the Internet shown at the Guau- movie theatre, which is managed by the ENT. The title in the middle of the pyramid, leaving aside the twelve most important ones, is a bulk with very good ideas and locations. They need support from the State to allow these ideas to travel outside the country and receive the necessary recognition. The international strategy is of essence when building up an industry’.

The North West: deserts and ancient traditions in the day

The Argentine Audacious cockerel of Buenos Aires during NATPE Miami 2017: Marcelo Gaudio, general counsel of Artes Audiovisuales, along with Ralph Haiek, President, INCAA and independent producers from Argentina.

The Iguazu falls: many international films, TV series and developments to an audience of 50 international buyers.

The Argentine Audacious cockerel of Buenos Aires during NATPE Miami 2017: Marcelo Gaudio, general counsel of Artes Audiovisuales, along with Ralph Haiek, President, INCAA and independent producers from Argentina.
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), TNV Poland or CanalPlay, thanks to our wildlife and current affairs documentaries, as well as our webseries’, explains Sebastián Lami Dozo, head of sales.

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 as A Brick in the Belly or Unusual Houses.

Next step is fiction series’, he adds.

Among those musical series are Sensations (4x52’), an entertainment 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”; Odysa (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 places all around the world.

### Telefe: dramas and strategic alliances

Guadalupe Gonzalez, 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 (10x60’), 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 Cobertura, 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 Telediari. Focused on TV series, Sandro de América tells about the life of Roberto Sanchez, 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, the teen audiences is hired RPM (60x60’), super-production recorded in Viascos International Studios (VIS), produced by Sonuma 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.

Smilehood, at Gilda’s rhythm

Sandra 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 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 Gorban, sold to Latina TV (Peru) and with good interest in markets like Mexico, Brazil and Asia.

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The F Word, DINT: expanding along with the industry

All3media sells 500 hours in CEE

All3media International (UK) has concluded the sale of close to 500 hours of factual and factual entertainment content with CEE broadcasters, including culinary content, as Hungary’s TV2 has secured 65 hours of culinary-themed content, including all five seasons of The F Word featuring Gordon Ramsay, and interior programming, with The Great Interior Design Challenge.

TV2 has also ordered two 90’ festive helpings of Gordon Ramsey’s Christmas Countdown and 28 episodes of Ultimate Cookery Course, a series that sees Gordon revealing everything about cooking.

AMC has ordered a package of content totaling 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, alongside seasons seven and eight of The Great Interior Design Challenge, and season six of Big Dreams.

In Poland, HIT Novision has picked up three series and the Christmas special of North One Television’s Travel Man. 48 Hours In... with Richard Ayad; 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 encompasses 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 Span Gold TV’s Love Your Garden as well as Lion Television’s one-hour special China – Treasures of the Jade Empire and a six-hour series Full Steam Ahead.

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 2002 Night, Fatmaoglu, Forbidden Love, Eyfel and Medecine. “Today we work with the latest Turkish productions like Bruce and Beautiful, Wounded Love and Known, 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. Dona Beija, production of Rede Manchete (Brazil) with actress Maitê Proença, which was a great success at the time.

Christian Barzelatto summarizes: “In 2017 we confirm the quality of our work and our trajectory in this business. Customers recognize and know well who our parents – DINT founders are. We want to bring that experience to other territories. The customers know recognize the seriousness and rigor of our dubbing. Discovery is another of the big clients, who are doubled for programs of all their signals. Netflix, Amazon and Marvel have been added to the list. We are in full expansion and will continue to grow”, complete Menz, Paola and Christian Barzelatto.

Dori Media: love and entertainment

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 peaks 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 Amor A ti (60x40’), 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 (18x45’), coproduced with Pol-ka (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 (10x30’), 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

The F Word, cooking show

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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 fiction 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 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 genres such as Next One! (Endemol Shine/Fox), Keep Your Light Shining (Global Agency), 50/50 (Inter/Media) or Survivor (Endemol Shine Group/Star TV), developed for the international market. Kids content also registered a good performance in 2016 with highlights like KoşulDAY (Endemol ShineFox), which achieved 23K viewers on average between children 5-11), Ironi, with 198.4K viewers, and İstanbul Muhafızlar (172K).

When speaking about consumption, Turkey exceeds the average of TV viewing time, other trend according Eurodata is the evolution of family formats such as 50/50 (atV) was distributed in 45 worldwide markets, while the Japanese drama Mother (Nippon TV) was produced locally under the name of Elıf İstanbul: Karışık ıkı (Kanal D) is the first digital original content produced by Turkish broadcaster Kanal D.

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Crossing borders

Even considering the importance of local industry, it is a receptive market for foreign content, both as finished programs like Aşkın Altında (Kanal TV, India), The White Slaves (Caracol, Colombia) or Lasas de Soneque (MIC, Portugal) as well as formats. Global Agency, for example, acquired the rights of two formats from Nippon TV (Japan): Mother (Amira) and Woman, while Show TV did the same with the Korean romantic comedy Full House (KBS), titled locally as Elıfsame, Karışık ıkı 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 top worldwide rankings). Some examples: Magnificent Century, among the top 15 programs in 9 territories; Magnificent Century: Resurrection, 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/Media) was sold to 80 countries, and was the most watched show in Georgia and Serbia, while Çiçek Koçak’s Star) and Gülseren Sarıçan (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, Ecw was sold in each country; Fatmagül (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 a development deal Mega (Chile), the first one in the history between both regions.

In adaptations, The End has a local version in Spain and Fatmagül in India, while USA bought for first time in 2016 3 series: Secrets (Kırlıç), Kası and Az Time Goes by (Oyle Gecer Zaman).

Regarding OTT consume, there are 3.5 SVOD users (+5% 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, FilmOn and PopCorn FBX: while from the local market it stands, Digiturk Play, TeleDunya, Turkcell, Turkweb TV, TVıvo 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 ministries Pursued.

Eurodata TV: A look into the Turkish market

BY RODRIGO CANTISANDO

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Conecta Fiction: Europe + The Americas

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/Cablevisión).

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 Oncelops present their projects and offer a vision of audiovisual production in Argentina on a panel moderated by Fabroic Fornari, 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”.

Raya Group: Brave content

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. Don’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.

Lastly, the company promotes the new drama series Roots, sold to Netflix and which revolves around the story of a Lebanese business man who discovers on his death bed the existence 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.
Mondo TV: unique properties

Mondo TV Group (Italy) has 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.

“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 world-wide”, 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 sav- ing 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 the Strauss dynasty. Moreover, the fifth season is even stronger in terms of cooperation with the Strauss Orchestra, which can rightly claim to be one of the most authentic ensembles for interpreting the music of the Strauss dynasty.”

FilmUA: more active

FILMUA Group (Ukraine) completed a first half of 2017 with plenty of news. Inexplicable 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 Close/Cuisine digital projects. In May, Moviek, The Forest Song animated feature participated in two key international events (Animation Production Day business forum & CARTOON 360 pitching). Mozart at Home, dramedy, and Mozart and an Emperor, a girls’ property airing currently in more than 50 countries simultaneously like Italy (Cartoonito), Middle East (Jeem), Portugal (Canal Panda) and Austria (ORF), among oth-
ers. “We work with major operators in whole Europe, mainly within the CEE our cooperation is even stronger more and more, from Hungary, Czech Republic, Poland, Romania, Bulgaria and Former Yugoslavia”, completes the executive.

ORF: wild and natural

ORE-Enterprise, the commercial arm of the Austrian Broadcasting Corporation, Austria’s public broadcaster and market leader, keeps focusing in advertising air- time, sponsoring, international content dis- tribution, licensing and merchandising as a strategy to stand. For this season, the company highlights an intense program- ming 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 (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 Welle. - 30 Years Vienna Johann Strauss Orches- tra (‘90) is a classical music concert that the Johann Strauss Orchestra celebrates its 50th anni- versary, which can rightly claim to be one of the most authentic ensembles for interpreting the music of the Strauss dynasty.

Wild Caribbean - Rhythms of Life, 4k documentary
TRT Screening Days 2017: successful second edition

Turkey’s public service TRT organized on April 26-28 at Radisson Blu Resort & 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 Mosey, The Wit, and Sahar Baghery, Eurodata TV.

TRT compared to other events in the world, the number of buyers from Latin America and Asia Pacific, with new acquisitions and programming executives from Cologne, USA, as well as Australia and Pakistan. TRT top product is the period drama, like The Last Emperor, which premiered on last February or 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 premiere on 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 (AB) and Reyza Nun Torn, marketing and sales executive.

TRT also promotes its TV movies and mini-series. All them are globally distributed by MISTCO. It highlighted five mini-series produced between 2013 and 2015. They are high-budget productions, including game shows, realities and quiz shows.

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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 acquisitions executives attended, from May 16 the earlier ones -Latin America- till May 25, when last Eastern and Latin American presentations took place.

This 2017 was a good edition, with active attitude from buyers and varied product to attend the challenges of new media ecosystems. 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 twist go through the narration mode, new themes within and especially, the introduction of technology to reinforce old tasks: to save players, catch killers, etc. Also, the super-natural stories continue having a good role, while the news were military series, which were much more than in the past, some good and some not.

PRESARIO international
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 NBCUIN’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 TFI (France) and RTL (Germany), Gone (12x60) is a procedural drama based on the novel, One Kick, from bestselling author Charles Caim, Love, Loss (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 & Erik Menendez.

On unscripted formats some of the new titles are The Case Against Adnan Syed (4x60’), the realities Cyrus vs. Cyrus: design and conquer and Invite Only Cuba (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 (12x60’), a story of revenge, betrayal and ambition, but also of redemption, justice and love; The Fan (12x60’), dramady 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’).

key ongoing strategy across the Group. Lionel’s extensive knowledge, Bassetti, CEO, for the Group and François de Brugada for France.

With allianze with Fremantlemedia Poland at a peak. A second project we have is a period adventure series Sofia, in Russia, with huge success, about 30% of audience share at prime time.

Maximizing opportunities in this vibrant and rapidly evolving sector’

Star Media, internationally deeper

Star Media is the Russian and Ukraine group that has skiped to major leagues with big-budget TV series spoken in English language. The first step was Maisa Hari, which was taken in distribution by Red Arrow (Germany) and was shown last Mipcom at the Worldwide Premiere event, with a mix of comedies produced by the Studio and telenovelas and Super Series of from TeleMundo.

Star Media, internally rooted

The digital sector is an integral and important part of the industry, according to the CEO, for the Group and François de Brugada for France.

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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 Francois de Brugada for France.

Lionel: ‘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 Development 360° since 2009.

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Grande Pa / Amigos son los Amigos / Alma de Hierro

RICARDO RODRIGUEZ

Educando a Nina / Sos mi Vida / Son Amores

ERNESTO KOROVSKY

El hijo de la Novicia / Pájaros de Papel / Edha

FERNANDO CASTETS

Mujeres Aesinas / Se Permite Inocente

LILIANA ESCLAR - MARISA GRINSTEIN

La Candidata / Ladrón de Corazones / Primicias

LEO BECHINI - TATY TABERNISSE

Vocías / La Teacher de Ingles / La Suegra

ANA MARTINEZ - CARLOS SOTO

Fronteras / Trumas / Septimo Bastón de Dios

JORGE NISCO - RAMIRO SAN HONORIO

Lasurs / Lucky Laser

CARLOS ESPINOZA FURNISS

La Coponera / Francisco El Matemático

ERNESTO ZAMARRA - ANDRES GUEVARA

La Magia de Lola / Adorables Farsantes

LILIANA BERNARD - MARCELA MARCOLINI

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10th PRENSARIO INTERNATIONAL

Los Angeles

Finding the way

each team member by:

MediaBIZ Entertainment Business Agent

56 PRENSARIO INTERNATIONAL
Latin Media Corp: multicultural

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”).

“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.

Kvartal 95: Crack Them Up

After the global success of Servant of the People, Kvartal 95 (Ukraine), provider of entertainment TV content with over 100 writers onboard, keeps resonating globally, now thanks to its format Crack Them Up, distributed by Eccho Rights (Sweden).

The show, where ordinary people compete to make professional comedians laugh, delivered high ratings for Nelonen (Finland) on its premiere, with 5.9% rating and 24.9% share (channel ave: approx 15%) on 10-44 demos. Within the 10% demos it scored 5.6% rating and 16.2% share (channel ave: approx 10%) with total of 294 000 viewers.

Crack Them Up was also successfully broadcasted in Russia, China, Vietnam and Lithuania and optioned to a number of territories, and has been one of the most popular entertainment formats in Ukraine since 2011, with currently 13th season and 2nd season of Crack Them Up, Kids being on air.

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 portfolios 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 Lilian 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 part 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 Modya, Calinos, TRT, ATV, Eccho 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.

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Cara a cara con content

3 OF THE MOST STRATEGIC DAYS OF LATIN AMERICAN TV BUSINESS UNDER THE SUN

15-17 November 2017
Cancun, Mexico

Latin Media & Universal Cinergia are exhibiting at mipcancun.com

UNIVERSAL CINERGY

Lilian Hernandez, CEO and
Gema López, CCO, during the inauguration of the new studios.

Crack Them Up, format.

Universal Cinergia, benchmark in the business of translation.

Jose Escalante, CEO

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

 Vedran Zelenkovic, Executive producer of Kvartal 95.

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Cable TV in Europe
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 comprises 37%, turning into the backbone of an increasingly connected society, according to IHS’s report “Cable in Europe: the fresh 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 (ARPUs) up 16% in the past 5 years, designed to enable content programmers and operators to roll out branded and configurable skinny TV bundles across all networks and devices are steadily gaining traction among operators, with Sky leading this particular “race”. However, Advanced Pay TV, a solution to deliver connected services for connected lives, has already overtaken the Pay TV 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 so-called “full-fat” services are expected to deliver far higher ARPU’s: Sky and Now TV are two large examples of this, with ARPU’s up to USD111 and USD 69.7 respectively. The first one includes Box Sets Bundle (USD 49), Sky Q Multiscreen (USD 14.5) and Sky Sports & Cinema (USD 47.5). The latter features Entertainment Pass (USD 9), Cinema Pass (USD 12.8), Kids Pass (USD 3.8) and Sports Pass (USD 44.1).

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 new connections were added, among them 1.9M to telephone; 2.09M to internet, and a decrease of 0.98M in TV, considering 2015 and 2016, there where 2.9M net additions (41.4M in Telephone, -1.5M in Internet and -0.7M in TV). According to HIS, 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 lacklustre at best, especially for Liberty and Vivendi, which lost near 2M and 1M subscribers respectively between 2014 and 2016.

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 see that Netflix is in third position in terms of subscribers, following only Liberty Global and Sky, with over 20M subs., while Amazon takes 8th 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 they want to 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 7: 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 Market). 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
**EXHIBITORS**

**all3media: the Constructed Realities, refreshed**

**SUITE #221**

Ben Packwood, responsible for all finished programs sales across CEE, Russia and CiS

Lucy Roberts, format sales manager for EMEA North region

**Step Dave** is a humorous and warm drama

**Undercover Boss**, factual

**Families at the Crossroads**, one of the pioneers in Constructed realities

**Street Cops**, brand new Constructed reality format

**800 Words** is offered as scripted format, and is presently Australia’s #1 drama

**PRESARIO INTERNATIONAL**

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

Igor Fedorov, acquisitions intra Russia

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

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

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

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

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

**20.0 RATINGS ON PRIME TIME**

**las ESTRELLAS**

**ROMANTIC COMEDY**

**NATPE BUDAPEST 2017**

**MEETING TABLE #34**

**INTERCONTINENTAL BUDAPEST**

Co-production:

**Pol-ka Producciones**

Co-production:

**DORI MEDIA**

**Pol-ka Producciones**

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

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