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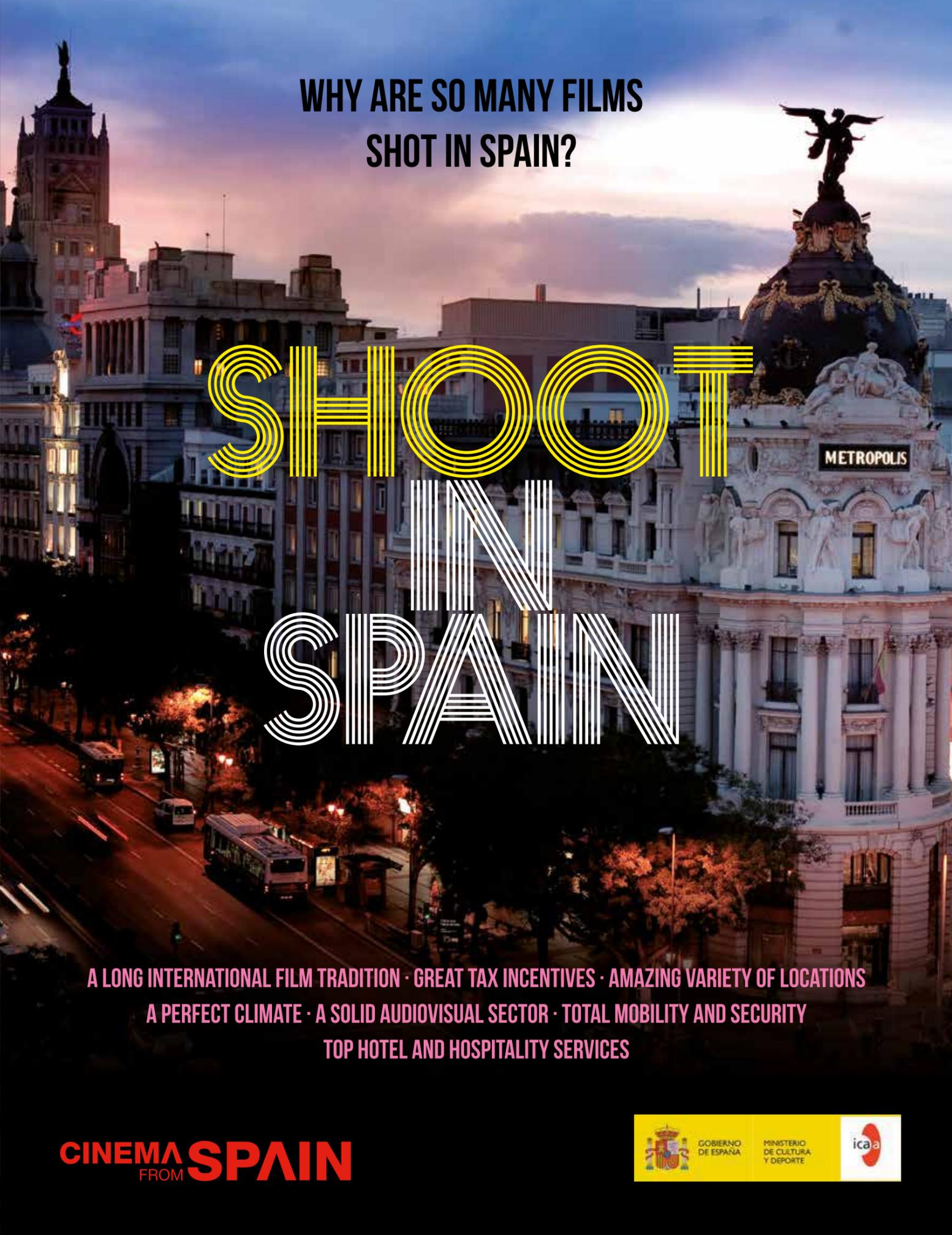
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**CINEMA FROM SPAIN**



## Spain: the three phases of Spanish evolution

The good moment of the Spanish industry has been assembled many years ago. Global hit series *La Casa de Papel* positioned again among the top demanded drama, but the reason why the country is now the main content hub for global drama in Spanish is not because the recent creations but mainly for the works forged in the past.

Since early 1970s the country has generated first-class cinema, which was rapidly recognized abroad. Several Spanish talents have succeeded in Hollywood: **Antonio Banderas** (*Philadelphia*), Oscar winner **Penelope Cruz** (*Vicky Cristina Barcelona*) or **Javier Bardem** (*Biutiful*); Oscar winner directors **José Luis Garci** (*Volver a Empezar*, 1982), **Fernando Trueba** (*Belle Époque*, 1993), **Pedro Almodovar** (*Todo sobre mi madre*, 1999) and **Alejandro Amenabar** (*Mar Adentro*, 2004); and Hollywood directors **Juan Antonio Bayona** (*A Monster Calls*), and **Alex de la Iglesia** (*Perfectos Desconocidos*).

The international acknowledgement of the Spanish cinema was followed since early 1990 by successful TV dramas from **Globo-media** (*Medico de Familia*), **Ganga** (*Cuentame*

*como paso*), **Boomerang TV** (*Motivos Personales*), etc. that started to travel as ready-made and scripted formats to Russia, Italy, Portugal, CEE, USA and Latin America, generating the first phase of expansion.

On a second stage, dominant private conglomerates were shaped operating in the creation, production and distribution of content, taking the evolving business to a new stage. They were **Mediaset España**, formed in 2011 with the merge of **Gestevisión Telecinco** + **Cuatro**, and the following year **Atresmedia TV**, from the combination of **Antena 3** + **laSexta**.

**Netflix**, **Amazon** and **HBO** are since 2015 major responsible to make available Spanish drama on a global scale: *La Casa de Papel*, *Vis a Vis*, *Time in Between*, *Grand Hotel*, *Ministry of Time*. And also the originals like *Elite* (S3 announced), *Las Chicas del Cable*, *Alta Mar*, among others. This success confirmed the third phase of expansion: Spanish digital originals consolidated the country as the main hub for drama creations in Spanish.

Moreover, big European Indies like **Gaumont** (France) and **Beta Film** (Germany) are opening offices to build new successes from Spain to the world. Also, new small and medium-sized producers have appeared, while existing talents are emerging into new alliances and partnerships to generate content that can travel worldwide.

Spain now is a big global asset. And that's the reason why Prensario decided to develop this special edition 100% focused in the country that everyone is talking about. Welcome to Spain, let's discover together what this country has to offer. Enjoy it!



In 1982 Spanish director José Luis Garci won the very first Oscar for an Spanish movie and the very first one for a Spanish-language production, *Volver a empezar*



Sonia Martínez, head of drama at Atresmedia with Alex Pina and Esther Martínez Lobato, Vancouver Media co-creators of *La Casa de Papel*, which gave Spain its first Emmy International in 2018



Pedro Almodovar, the most important Spanish director outside Spain, has received the Golden Lion for Lifetime Achievement at the 76<sup>th</sup> Venice International Film Festival last August



### Prensario International

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# ICEX: 'The international path is key to strength our audiovisual industry'

**ICEX Spain Trade & Investment** is the State agency for the internationalization of Spanish businesses operating abroad through the Economic and Trade Offices of Spain. Through the umbrella **Audiovisual From Spain**, it has supported the Film & TV industry for years, helping to create a permanent meeting point with Spanish content in all major international markets and complementing the industry in those areas they had more weaknesses when competing at international level.

'Our efforts have contributed a tiny bit to the current moment of visibility of Spanish industry in the world', underlines **Pablo Conde**, Cultural Industries Director **ICEX**, as the entity supports international production and distribution companies, while it helps opening new business opportunities.

### ICEX MAIN OBJECTIVES

- Increase the number of companies exporting on a regular basis.
- Diversify the export markets for Spanish products and services.
- Increase the number of exporting sectors and their share in the overall Spanish economy.
- Promote Spanish investment abroad. - Improve the image of Made in Spain.

'We keep fostering the co-production of TV series by helping our shareholders to participate in the main international co-pro events. Moreover, we will keep an open eye for more niche opportunities in the documentary field and entertainment formats. Another major goal for us is to help our companies with diversifying and increasing their client agenda in territories such as Middle East and Asia.'

'Spain is among the top ten TV markets globally but this is not causal. The emergence of drama is the result of the evolution of several factors: the know-how of Spanish

producers, their maturity in the distributing brands at international level and the change of the consumption model OTTs have supposed.'

'Spanish content stands out for having good stories and high quality production, but until few years ago it reached a smaller number of territories and audiences due to the decision making power to decide what was bought and consumed on TV being only in the hands of the TV programmers. Today there are many more options, and global audiences like Spanish content. Latin America is no longer dubbing our series into neutral Castilian. They have responded positively to our accent and this fact has undoubtedly been one of the most important battles that have been fought for many years by Spanish distributors', adds **Conde**.

Spain is the fourth TV fiction format exporter and the second fiction European producer, according to The Wit. 'We have witnessed how well-known international companies have put their eyes in Spain, how they have opened headquarters and have bought some key companies. On the other side, we have seen the international consolidation of **Movistar+** or **The Mediapro Studio**, and how **Atresmedia** and **Mediaset** have set up own international studios to produce on a global scale.'

'One the main challenges is to take full advantage of the momentum we live in order to strength our industry and to open it to new strong players. And the international path is key for achieving this goal. Film and TV industry is evolving so quickly that adaptation is one of the most relevant points to grow; diversification is the other way', comments **Conde**.

On the one hand, Spain needs to have strong companies who foster and feed themselves with the talent of smaller creative companies. 'And the secret is to keep the IP

and to manage partnerships with local and international associates in order to develop all kinds and sizes of projects', he highlights.

From the public organization side, the role of ICEX is multiple: to help companies to develop their business internationally as smooth as possible, while we have an important role in gathering information and tools, so our companies can compete in the global arena face to face with more resourceful partners. We have to take advantage of our importance in the fiction field, but we need to keep an eye on what's going on in the rest of genres. Coproduction is the new key word, so **ICEX** is helping Spanish companies to develop their business in this area.'

**Conde** remarks: 'Spain has traditionally produced strong drama content. And the same talented companies are producing factual, animation, TV formats (scripted and unscripted). We have to keep on working on expanding this phenomenon to other genres. For example, in the production of documentaries Spain leads together with Japan and a small group of countries, the assumption of the production standard in 4K and 8K.'

And he concludes: 'Besides, there are Spanish entertainment formats around the world, in the USA, Canada, Germany... It is a great challenge for all of us, producers, distributors and public institutions to gain visibility over all these areas. Moreover, we still need add the challenge of broadening our audience coverage by strengthen our business relations with Asian and African countries. We have a great opportunity and ICEX will support our companies to achieve it.'



Pablo Conde, Cultural Industries Director

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AUDIOVISUAL FROM SPAIN

# ICAA: 'The audiovisual industry in Spain is in effervescence'

As an organism handling the national budget for the subsidies for film production, the Spanish **Institute of Cinematography and Audiovisual Arts** (ICAA) has always had a great responsibility in finding a balanced position in the market.

**Beatriz Navas**, General Director, explains: 'We are the public funding body, but we don't want to be seen only as that, since a great part of our efforts are also focused in the promotion of Spanish cinema abroad and in our country. We promote distribution, support the organization of film festivals, and the films selected in the main international festivals, too.'

ICAA also works as an intermediary to encourage professional relations: 'We are in the privileged position of knowing what needs there are, but also what is there to offer. Connecting those two perspectives and helping to generate a more dynamic industry is also our aim. We are revitalising the image of our cinema and per extension of our Institute. We aim to gain the trust and confidence of our industry, which our professionals feel close enough to share their views on what works, what doesn't and how can we help,' she completes.

'The audiovisual industry in Spain is in effervescence. There are a lot of young emergent professionals, creative and talented filmmakers with ambitious projects. Nowadays, Spain has a solid sector, which is talking beyond

film, but also in terms of content such as series, advertising, etc. On animation we are very strong, with more that 200 companies and studios that are offering everything that an international project could look for, making Spain very attractive to set a brand and developing it,' says **Navas**.

Proof of this is the healthy presence of Spanish professionals in big markets like **MIFA-Annecey** or **Pixelatl**, where this year ICAA support a delegation of more than 25 professionals from 16 companies as guest Country in Focus. Tax incentives are another key aspect: 'Spain has taken steps towards becoming more competitive going from 15 to 20% tax rebate on a national level, with a flamboyant 40% tax rebate in the Canary Islands and 35% tax credit in the region of Navarra,' she explains. And we are working to become even more competitive.'

Spain is part of **Ibermedia**, and since last May **Navas** is president: 'It is one of our goals to encourage and stimulate coproduction with Latin America. Given that Italy is now part of **Ibermedia** and Argentina part of **Eurimages**, we feel there's an opportunity to encourage the birth of projects that can apply to both programs generating bridges between the continents. We are very attractive partner since we share cultural roots with both sides of the Atlantic: out two main partners for coproduction are Argentina and France.'

According to the directive, Spain would like to become 'even more' competitive in tax incentives, and it is working on that: 'Any improvement of this sort would benefit both cinema and TV. Beyond that, docs and ani-



Spanish film industry is targeting China, with two recent coproductions such as 'Best Animation' Goya nominee film *Bikes*

mation –film only– are specially protected within the line of subsidies to film production. We still have a lot to explore in terms of fiction series. One step at a time, first there's a transposition of the audiovisual European directive to go through and in that process we might find the ways to new or improved funds,' completes **Navas**.

Regarding the synergies between TV and cinema industry, she stands: 'Both now share professionals: we have no longer film professionals, but audiovisual professionals and production companies are venturing more and more in series production or participating in productions funded by platforms.'

About the new international ventures, one of **ICAA's** 'obsessions' is how to explore and connect with the Asian market. **Navas**: 'Therefore we will be doing some prospection in events such as the Asian Film Market at Busan, Korea, having meetings with potential partners, talking to film institutes and public funding and promotion bodies of Asian countries in order to see what the possibilities are, find similarities –cultural and professional– and try to connect South Korea, which is very attractive as a model to study in terms of handling subsidies and promoting their film.'

And she concludes: 'China has a very interesting industry, and there are some recent cases of successful coproduction with the country, such as the "Best Animation" Goya nominee film *Bikes*, or animation project *Dragon Keeper*, headed by **Manuel Cristobal**. But yes, we can say that tending bridges with Asia is one of our priority challenges in terms of international venturing nowadays.'

SPAIN: RANKING OF TOP SPANISH MOVIES (2019, AS OF AUGUST)

Rank	Title	Distribuidor	Premier	Home Office	Spectators
1	Lo dejo cuando quiera	Sony	12/04/2019	11,375,359 €	1,890,606
2	Padre no hay mas que uno	Sony	01/08/2019	8,640,696 €	1,511,912
3	Dolor y gloria	Sony	22/03/2019	5,733,642 €	941,938
4	Bajo el mismo techo	Sony	01/02/2019	3,595,755 €	598,627
5	Perdiendo el este	Warner Bros	15/02/2019	2,940,128 €	482,764
6	Los Japon	Warner Bros	28/06/2019	2,750,672 €	474,993
7	Superlopez	Walt Disney	23/11/2018	1,547,171 €	264,184
8	La gran aventura de los Lunis y el libro mágico	Filmox	18/01/2019	1,330,426 €	228,234
9	Taxi a Gibraltar	Warner Bros	15/03/2019	1,282,086 €	209,050
10	Gente que viene y bah	DeAPlaneta	18/01/2019	1,116,835 €	188,150



Beatriz Navas, General Director, ICAA



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# Spain: the market that everyone talks about

Spain is among the top 10 television markets worldwide and it has recently become the ultimate destination for drama production in Spanish, especially after the global success of *La Casa de Papel*, the biggest Spanish TV brand of all times. But this “Spanish Drama Fever” started time ago. Let’s take a look into this amazing market.

Spain is among the most developed television markets in the world, not just because one single global success, but because it has traditionally produced strong drama contents, first as movies and, then, as TV series. Now, all big major groups are posing their

eyes on it, but in mid-’90 there was a (still) “silent revolution” that allowed emerging independent producers to set the pillars of the nowadays Spanish drama industry with key series such as **Telecinco’s** *Medico de Familia* (**Globomedia**, 1995), **RTVE’s** *Cuentame como Paso* (**Ganga**, 2001) and **Antena 3’s** *Aqui no hay Quien Viva* (2003).

They were the pioneers, and were followed by **Telecinco’s** *Los Serranos* (**Globomedia**, 2003), **RTVE’s** *Amar en Tiempos Revueltos* (**Diagonal TV**, 2003) and **Atresmedia’s** *El Internado* (**Globomedia**, 2007) or its teen series *Física Química* (**Boomerang**, 2008) in a market that was already making the difference in Europe for two main reasons:

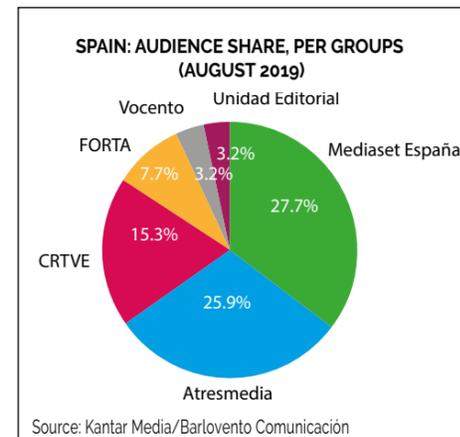
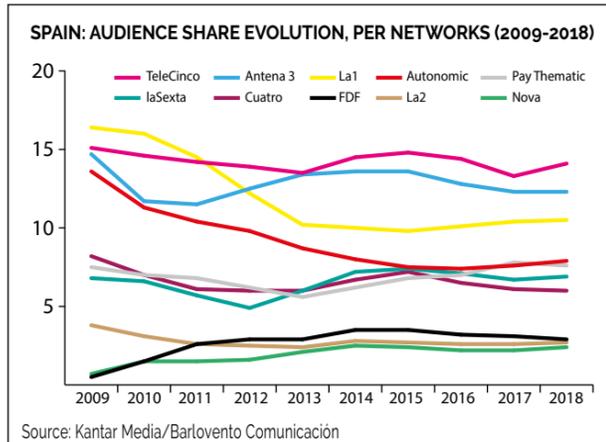
Key historical series such Boomerang’s *El Tiempo entre Costuras*, and Diagonal TV and TV3’s *La Catedral de Mar*



*La Casa de Papel*, the biggest Spanish TV brand of all times: first and second season were produced by Atresmedia and Vancouver Media; third and fourth by Netflix and Vancouver Media, which is now participated by Atresmedia in 20% of its stakes

first, because of the competitive production costs; second because Spain took the lead in producing high concepts series for the prime time and day time.

From that time to now, Spain continues to be one of the European markets with better balance between quality vs. price, taking advantages from its main competitors such as Italy, Germany, France and UK. In the Ibero-American region, it is the third largest market after Brazil and Mexico in terms of investment and volume of production



## ADVERTISING

In 2018 the estimated ad investment recorded €12,835.5 millions, which represented a 2% growth over €12,584.6 million reached in the previous year. The growth rate of conventional media has been 2.9%, going from €5,355.9 million in 2017 to €5,512.6 million in 2018. As consequence, conventional media obtained a total market share of 42.9%, three tenths higher than the previous year while the unconventional media represented 57.1% of the total investment with €7,323.0 million, 1.3% higher than the €7,228.7 million registered in 2017.

The estimated investment in conventional media reached €5,512.6 million, a figure that represents a growth of 2.9% over the one registered in 2017. Television continues to be the leading media by volume with a participation of 38.6% among all conventional media, going down 1.4 points from 2017. The reduction of investment experienced by TV has been -0.8%, placing its figure at €2,172.2 million compared to €2,143.3 million the previous year.

National Free TV investment has been €1,915.1 million in 2018 with a decrease of -0.8% from €1,931.4 million that has registered in 2017, while the Autonomic Televisions supposed an amount of €102.2 million which means a fall of -10.5%. On the Pay TV

channels the total investment has been €107.3 million (+13.4%) while local TV has gone down -15.5% compared to 2017, placing the investment at €2.5 million.

According to the CNMC data presented in July, the free TV registered last year €1,797 million, 1.8% less than in 2017. From that figure, **Atresmedia** and **Mediaset** took 89% of revenues together. The first group, with seven channels, invoiced €777 million (+0.6%) and the second one, with six, reached €774 million (-3.2%). The rest of the DTT and regional channels had to be satisfied with €85 million, just €3 million more than a year ago. This fall in the incomes of Free TV responds to a clear change in consumer habits. By the end of 2018, 75% of the audience watched DTT (82% 4 years ago), while IPTV already reaches 12% (5% in 2015).

Digital occupied the second position with conventional media and as a whole it has had an increase of 12.6% with a volume of ad investment of €1,743.2 million compared to €1,548.1 million in 2017. The percentage that digital means in the total investment during 2018 was 31.6%. Regarding unconventional media, it stood at €7,323 million,

RANK	CHANNEL	RAT.
1	MOVISTAR LALIGA	0.3%
2	FOX	0.3%
3	AXN	0.3%
4	CALLE 13	0.3%
5	TNT	0.3%
6	CANAL HOLLYWOOD	0.3%
7	HISTORIA	0.2%
8	FOX LIFE	0.2%
9	COMEDY CENTRAL	0.2%
10	#0	0.2%



‘The Mediapro Studio is one of the top drama producers with several successes on the Spanish TV, such as Telecinco’s *Los Serranos*, the second most adapted Spanish scripted format abroad, and most recently *Caronte*, from its production company Big Bang Media, available in +100 territories through Amazon Prime Video’

representing an annual growth of 1.3% compared to 2017. From the 17 vehicles that composed the group, eight grew compared the previous year, while the other nine decreased.

CHANNEL	TWEETS	%
MEGA	551,119	21.2%
LASEXTA	458,397	17.6%
ANTENA 3	414,067	15.9%
TELECINCO	372,047	14.3%
LA1	223,400	8.6%
CUATRO	217,147	8.4%
MTV	118,506	4.6%
DIVINITY	88,338	3.4%
NOVA	86,368	3.3%
TV3	70,298	2.7%

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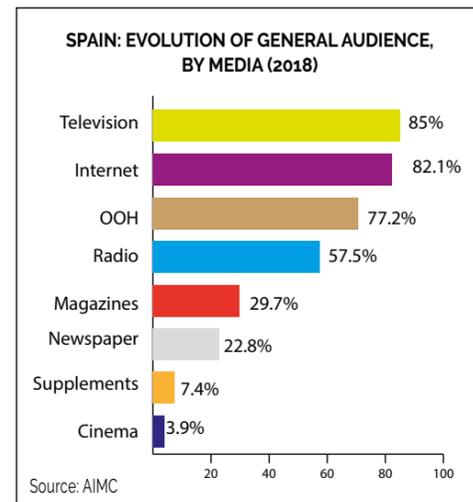
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## Spain: the market that everyone talks about

### AUDIENCE

The Association for Media Research (AIMC) has presented the results of the "2nd Wave" of the General Media Study (EGM), which collects the data obtained in the field work carried out from March 27 to June 11, 2019.



Since this report, the category of family role for "housewives" has been renamed as Responsible for Home Purchases at Home (RCH).

In this "2nd Wave", the level of 80% penetration for the Internet has been exceeded for the first time in an average day, a figure very different from the collection in 1997 (the first time he was asked about this type of access), which was 0.9%.

In terms of television, **Mediaset España**

and **Atresmedia** groups control 55% of the total audience, according to July's Kantar Media report. They are followed by State-owned group **Corporación Radiotelevisión Española** (CRTVE) and **FORTA**, formed by the Autonomic networks all across Spain. Among them, **TV3** from Catalonia took the lead with 12.4%, followed by **Televisión de Galicia** with 9.2% and **Aragón TV** with 8.3%. Others are **ETB2** (7.5%), **Canal Sur** (7.3%), **CMM** (6.1%), **TPA** (5.8%), **Telemadrid** (5.5%), **TVCán** (5.1%) and **Canal Extremadura TV** (4.8%).

Last July, private television got 70.5% of the audience. From all TV consumption on the Pay TV field, the channels exclusively distributed on that media took 34.9% of share, while the remaining 65.1% is the viewership of Free TV channels through the Pay TV operations, from which 58.6% corresponded to national free to air and 6.3% to autonomic networks.

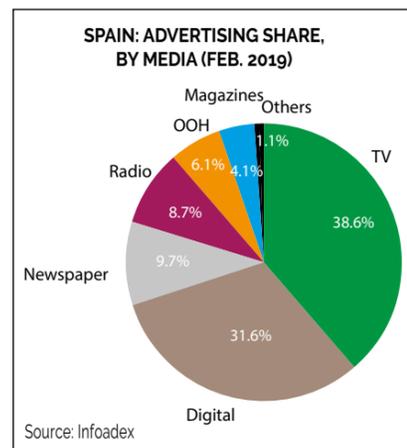
Following a report from Barlovento, 4 out of 10 premiers (almost 40%) have been a success on the prime time of generalist national TV stations, while autonomies, thematic DTT and pay thematic registered a success on 2 out of 10 premiers. Talent shows and reality are the most successful prime time premiers along with Spanish fiction.

On a national level, the genres that have worked better on prime time are contest, talent, realities and Spanish drama, but on autonomic stations, apart from these genres, there are others: entertainment shows, humor programs, docu-soaps and documentaries. On thematic DTT, foreign drama and telenovelas work very well.

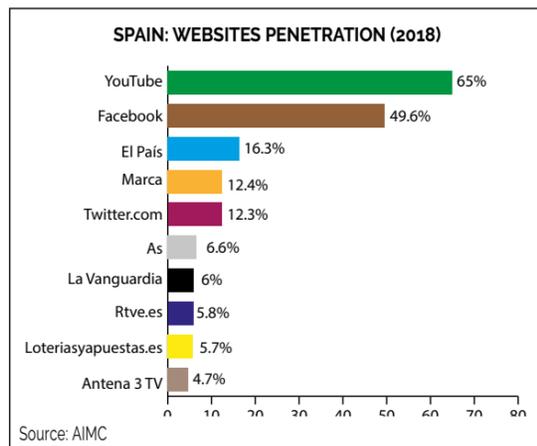
"Television success is very difficult to obtain but also to define because it is complex and relative. First, it depends of multiple factors, some quantitative like audience and others like strength of the competition; the program costs and its advertising ROI; and its economic profitability; and qualitative like image, values, social commitment or its public service mission. Second, because it depends on the network, its audience and budget. It is not the same 10% on Antena 3 than **Cuatro** or **laSexta**", explains the report.

### TV MARKET

Since the beginning of the last decade, and alongside the worldwide economical crisis of 2008-2009, the Spanish TV in-



Long running Spanish TV series on RTVE: DiagonalTV's *Amar en Tiempos Revueltos* and Onza's *El Ministerio del Tiempo*



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## Spain: the market that everyone talks about

Spanish TV market: the pubcaster left the historical leadership, and the ad market concentrated in the two private networks, **Antena 3** and **Telecinco**.

Both processes, the public television new financing model and the crisis that had in Spain –as other countries around the world– terrible consequences, match with the emerging Digital Terrestrial Television model, in which Spain was a pioneer in Europe and worldwide. While budgets decreased, the number of TV screens to show content increased substantially.

The Spanish production and creation space reconfigured: prices went down and were adapted to the new reality. It was like this for at least 1-2 years, but it changed deeply with one key fact: the decision of **Telefonica** to move towards the television industry through reinforcing its Pay TV operation, **Movistar Fusion TV**.

**Telefonica** confirmed in April 2015 the acquisition of **Distribuidora de Televisión Digital (DTS)**, **Canal+** Pay TV brand in Spain, first acquiring 22% to **Mediaset España** and then 56% to **Prisa** (56%, April 2015). With this move it strengthened its TV offering through the brand new operation **Movistar+**, becoming



Daniel Ecíjja's *Medico de Familia* was a pioneer prime time drama series on Telecinco reaching in nine seasons 7.6 million viewers and an average audience share of 43.5%



ing the leading Pay TV operator of Spain now serving +4 million clients (60% of the market). And since 2017 it has produced more than 35 originals, including series and many seasons, movies, animation and other formats.

That resurgence was good news for the content business, as the telco giant move decisively to the creation of TV brands. Industry members agreed to Prensario that this process was the starting point for the recovery of the Spanish industry. **Movistar+** is now producing 10-12 series a year, but at that point it was an important asset for the whole business.

Another important hinge in those years have been the merge of the biggest TV groups **Mediaset España** plus **Prisa-Sogecable's Cuatro** (2011), and **Atresmedia** plus **laSexta** (2012). Both were noisy news, but undressed a problem: how to finance so many digital channels with an advertising pie that was weakened as a result of the international crisis of 2008-2009.

The reinforced private market where **Mediaset España + Atresmedia** received almost 90% of the ad investment on TV, pushed the fiction business to the next level. Moreover, during those years, even **RTVE** stopped broadcasting advertising it didn't mean the creative declined. On the contrary, it was seen the biggest development of Spanish drama. All these must be understood in a context where the economy and ad pie improved, and the industry evolution complemented the exposition of the Spanish drama worldwide.

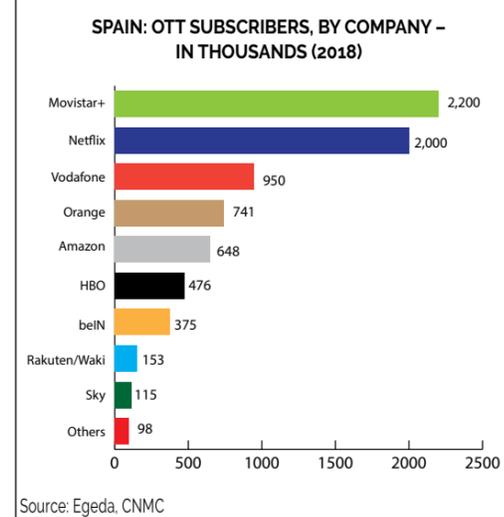
According to a report from **CNMC** (2016), TV groups have doubled their investments in the genre, which grew 188% that year. Drama has been the top audiovisual product in



which they have dedicated more resources: €155.14 millions, representing a total of 57.64% compared to 33.19% from 2015. In 2013 and 2014, drama had also been the main destiny with 46.25% and 37.52%, respectively.

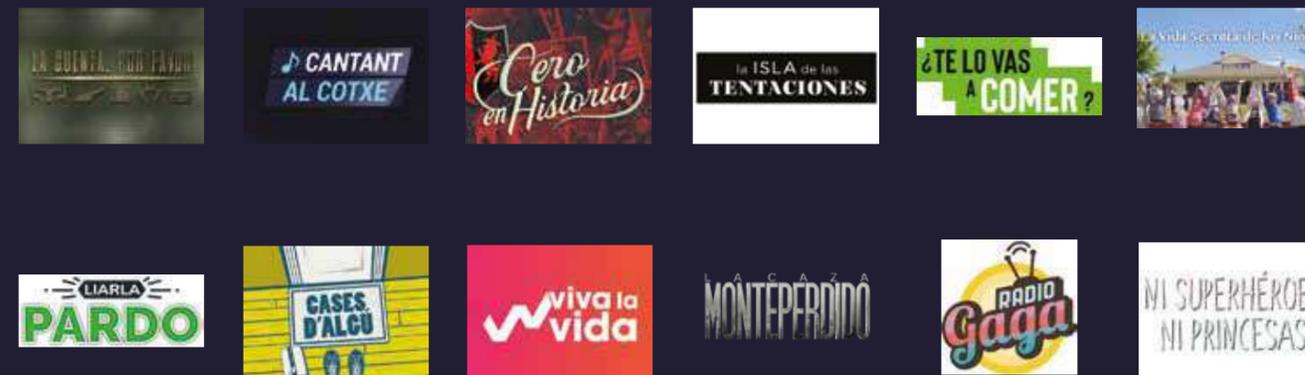
Four players concentrated 99% of the investment, a group led by **Atresmedia** Television with €78.9 millions (+50%), followed by **Mediaset España** with €32.8 millions (21.6%), **RTVE** with €24.1 millions (15.4%) and **Telefónica de España** with €18.3 millions (11.7%). This report explains the obligation of European programming quotas of the television service providers in Spain.

The *Ley General de la Comunicación Audiovisual* from 2010 indicates that private companies have to allocate 5% of their incomes to the finance European audiovisual productions; and 6% if those companies are State-owned. 60% must be for cinema, and from that amount 60% to some co-official Spanish languages. If the company is State owned, the percentages are 75% and 60%, respectively.



**Banijay**  
Spain  
We are Banijay

# We are Content



## Atresmedia: 'There is a fluid relationship between viewers and platforms'



La Voz is one of the top show son Antena 3

Since 1993, **Atresmedia** is a leading communication group in Spain with key positions in all sectors. **Atresmedia Television** operates six networks: the flagship station **Antena 3** plus **laSexta**, **Neox**, **Nova**, **MEGA** and **Atreseries**; **Atresmedia Radio**, **Atresmedia Publicidad**, **Atresmedia Diversificación** and **Atresmedia Studios**, a third-party producer that integrates the film production of **Atresmedia Cine** (see special interviews in this edition of these two former division).

**Jose Antonio Anton**, TV programming and digital business director digital of **Atresmedia Television**: 'We consider content creation and distribution as a whole, and therefore the teams that work on these areas have in mind every way of distributing the content whether it is through traditional linear channels or on demand digital platforms. The strategy is combined, and the synergies are constant. More than a year ago the "Digital Department" in **Atresmedia** was eliminated as such and its objectives included



José Antonio Anton, TV programming and digital business director digital (Credit: Concha Gonzalo)

within each of the content departments of the company'.

'Audiences are looking for the best content possible and depending on the moment they might look for it on a linear TV or OTT. That is why our aim as one of the leading audiovisual companies in the country is to cater these audiences in every way possible, making sure they can enjoy the best local content when, how and where they want in each occasion'.

'Every content can work in every medium because there is a fluid relationship between the viewers and the platforms. Live news works better on TV but that is not the case when someone is watching the main news program on **Antena 3** on **Atresplayer** when they are on the bus. Drama series are better watched on demand on a digital platform, but then we forget the series events that glue people in front of the screens to watch together and be able to comment on social media', he adds.

### ATRESPLAYER PREMIUM: CONTENT AT THE CENTER OF THE BUSINESS

The group launched last July **ATRESplayer Premium**, available to more than 75,000 Pay TV subscribers. With this new release, **Atresmedia** offers an innovative option for the pre-primers of its series and TV shows, before the Free TV premier. Moreover, it will include a quality, original and own produced content through the brand **ATRESplayer Original**.

Many fiction, entertainment and documentary productions are taking shape. Among them, the series **El Nudo (Diagonal TV)**, **Veneno** and the miniseries **Cuatro Bodas y un Funeral**, a remake of the successful global romantic comedy. The group's strategy is to maximize the effectiveness of its contents by seeking new incomes and the greater performance and sustainability of its formats.

On the launch, **Javier Bardaji**, counselor of Atresmedia and general director of **Atresmedia Television**, remarked: 'It is a new step in our plan of placing our content in the center of the business. This new proposal allows us to manage our enormous capacity to generate exclusive content in a more efficient way and with greater synergies. Thus, we are moving forward in a long-established policy in which, through hyperdistribution, we extend and diversify the economic life of our products, further optimizing their profitability'.

**ATRESplayer Premium** has state-of-the-art technology and unique and non-existent functionalities in those of its open competitors: 4K image and Dolby sound, offline content download, last 7-day viewing, subtitles and original language, video casting and international platform in all systems.



Mas de 100 Mentiras, digital original for Flooxer

Regarding the OTT of the group, **Anton** says that is the 'perfect extension' to its "content everywhere" strategy. He explains further: 'Not only can you find all the live channels, and that can be watched in every device including smart TV's, but it also offers the on demand experience for all of this content when and where the user wants'.

**Atresplayer** includes original and exclusive and a whole channel-brand, **Flooxer**, with content targeting Generation Z that is only located in **Atresplayer**. There is also the SVOD channel **Novelas Nova** that offers only telenovela content for a very small fee.

'Our future will mean to continue growing as the leading content creator in Spain, reaching audiences through all the media and platforms possible and developing new business models, such like us the brand new channels as **Novelas Nova**, or some others we are currently discussing with very important content providers', concludes **Anton**.



Carlos Fernandez, content director, Atresmedia TV, and Jose Antonio Anton, programming and digital business director (borders) with the actors Natalia Verbeke, Javier Calvo and Javier Ambrossi of the new digital originals for ATRESplayer Premium (credit: Atresmedia)

## Mediaset España: "alive and closer" programming

**Mediaset España** is the leading media group in Spain in both, the linear and non-linear, direct and on-demand markets. It operates seven free-to-air networks with **Telecinco** being the flagship and leading channel of the domestic market, together with **Cuatro**, **Factoría de Ficción**, **Energy**, **Divinity**, **Boing** y **BeMad**. On the digital side, **Mitele** and **Mtmad** plus several vertical websites. Recently, it has launched the paid offering **Mitele Plus**.

Through **Telecinco Cinema** is also a reference on cinematography production with the top watched movies of the last years. 'Our contents are protagonists in an audiovisual market in clear expansion, Spain, but also international reaching 190 markets through **Mediterráneo Mediaset Group** (see interview with Ana Bustamante in this edition), highlights **Manuel Villanueva**, general director of channels and contents.

**Mediaset España** is fiction powerhouse in a booming drama market. 'We are experiencing a growth and evolution in developments and creations. Considering all players, FTA, Pay TV and OTTs, there are more than 60 series produced, where we own 7. Among them, the top one has been **Vivir sin Permiso** with an average audience of 2.7 million people, 19% of share and 300,000 viewers on Time Shift', he adds.

The group takes 30% of the TV market share and **Telecinco** takes the lead with

### MFE-MEDIAFOREUROPE

**Mediaset Spa** (Italy) and **Mediaset España** have agreed last June the launch of **MFE-MEDIAFOREUROPE NV** (Holland), including the participation of 9.6% on Germany's **ProSiebenSat1**, recently acquired by the Italian group. With a Consejo Administrativo presidido por Alejandro Echevarria, **Mediaset España** maintained its operation without changes.

'This union opens new opportunities for developing new business difficult to get separately and will allow to increase the investments in Italy and Spain. Moreover, all synergies could grow exponentially with the adding of a third or fourth country to the project', it was announced.



The leading Spanish prime time drama is **Vivir sin Permiso** with an average audience of 2.7 million people, 19% of share and 300,000 viewers on Time Shift



more than 90% of its grid composed by own and live programming. 'We offer "alive and closer" contents that informs and entertains. The channel is #1 in news programming with more than 6 hours in the morning and 4 hours in the afternoon. On weekends, it is the only network maintaining own and direct programming in all the slots. Our top shows are realities like **Big Brother** and **Supervivientes**, as well as talent shows us **Got Talent** and **X Factor** combined with the best Spanish fiction', completes **Villanueva**.

The executive highlights that on linear TV, the most important volume of audience 'concentrates on entertainment programs', which also provide unique users and plays on digital platforms; a key genre that complements those platforms' leadership are dating shows like **Mujeres y Hombres y Viceversa** or **First Dates**, which 'are transcendental'.

Regarding trends, in Spain as in every part of the world there are new consuming habits on TV. In that sense, the digital platforms have been a 'great complement' for the company's strategy: 'Linear consumption is still strong with 4 hours a day per each Spanish. Conventional TV is a big referent and the media that concentrates the biggest audience and ad spending because it can rapidly reach the targets and needs from the brands', underlines **Villanueva**.

**Mediaset España's** contents are available in all devices, direct or "a la carte", through linear or non-linear owned platforms (web, apps, YouTube channels). 'On the digital side, we led the market with **Mitele** and **Mtmad** (native digital contents), and most recently with **Mitele Plus**, which complements the tradi-



The reality **Big Brother** and dating show **Mujeres y Hombres y Viceversa** are key audience drivers in both, linear and non-linear platforms

tional paid television business offering the top football competitions along with **Mediaset España's** top shows without interruptions'.

Another key digital offerings are **Yasss**, contents for **millennials**; **Uppers**, for +45 years old audience; sport platform **El Desmarque**; and the websites from its linear channels and main shows. 'It is a very complete offer: in June we've revalidated our position as the leading communication group in Spain in digital video consumption, after reaching our second best result in a month with a total of 465 millions videos watched', says **Villanueva**. And he completes: 'PC and mobile data from the last ComScore's **Videometrix Multiplataforma** research revealed that our company has reached the second best historical position with 192 millions non-advertising content videos'.

Manuel Villanueva, general director of channels and contents



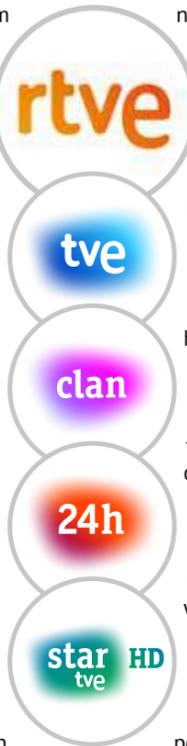
# RTVE: the icon of Spanish fiction adapts to the new times

This is a time of great optimism for the Spanish market and especially for **Radiotelevisión Española** (RTVE), a pioneering public media corporation and leader in generation of audiovisual content, with a strong focus on fiction in recent years.

The company's director of content, **Fernando López Puig**, explains: 'It is clear that the bubble has taken an unexpected turn, producing a change of habit among content consumers. In Spain, and in the world, there are more production and producers: a real snowball, which it is important to modulate.'

Fiction series are, in the executive's judgment, the artistic format of the 21st century, as opera, theatre, film and TV were previously. It is a real industrial revolution in entertainment. 'To survive in this new environment, it is important to tell relevant stories quickly and efficiently,' he maintains.

'Even entertainment has been fictionalised,' explains **López Puig**, and mentions as an example the format of *Boom!* (*Keshet*), where he points out that viewers become attached to one of the teams, and the production editorialises the space to build loyalty among the audience. 'We are seeing hybridisation of genres and formats,



Fernando López Puig, director of content, RTVE



not only in fiction, but also in other content,' he underscores.

RTVE stopped selling advertising in 2010, following a change in government regulations. 'Unlike commercial television companies, we do not depend on advertisers, but on the audience. Culture and information are two pillars of our programme schedule. But fiction is a great driver of growth, both in linear TV and OTT,' he notes.

However, he indicates that in linear TV, genre is a little more affected by the dominance of prime time, which requires the viewer to sit down at a specific moment of the day to access the content. 'The advance of OTTs made us think about new formats and ideas for fiction online, without giving up our engagement with the old television model.'

'In favour, we can say that being a television medium enables us to give that fictional content a second life on OTTs, while the opposite is not true. At least not until now. At times, there is the feeling that the industry is a little lost in this scheme. These are confusing times, although the data show that the TV is the most-used device in the home (70%).'

RTVE's strategy is thus to reduce risk through co-production and a 'window-shopping' strategy. 'Viewers are more erudite and sophisticated. They don't watch everyone shown on the screen. They choose and watch when they like. We must seek out new formats, but look after the existing ones. Linear TV is a natural outlet for fiction, but it is necessary to make more competitive and commercial products that allow us to have a presence in several windows, better stories and options,' he stresses.

'Local fiction series work very well, but they must have a global component that draws people in. The thriller is a good genre for this. Things went very well for us with *La Caza: Monteperdido*, a combination of noir and local series, but also with a production such as *Isabel*, which we knew would be a success locally, but it had very good sales at the international level,' **López Puig** points out.

*Inés del Alma Mía* is the new bet: with a cost of €1 million per episode. RTVE, Boomerang, Amazon, Promocine and Chilevisión are co-developing this superproduction (8x55), an adaptation of the book by **Isabel Allende**. Amazon will hold the SVOD rights in Spain and Latin America. **López Puig**: 'It is a historical series with a focus on a unique woman, beyond her time. Her story resonates in this era, when women have taken on a predominant role.'

'The great classics are a safe bet.' *Cuéntame*, for example: despite the modern, nostalgia is appealing. This year, RTVE has other productions: *Néboa*, an 8-episode thriller filmed with **Voz Audiovisual** in Galicia; *Promesas de Arena* (6 episodes), about a volunteer worker in Libya, filmed in Tunisia with **Atlantia**; and *Malaka*, 8 episodes, filmed in Málaga with **Globomedia**.

'We really like the eight-episode format, and especially filming in various regions of Spain to lend diversity and relevance to the stories and narratives,' **López Puig** concludes.



The eight-episodes series *Malaka*, shot in Malaga premiered in September in Spain



*La Caza: Monteperdido*, a combination of noir and local series



*Néboa*, 8-episode thriller shot with Voz Audiovisual in Galicia



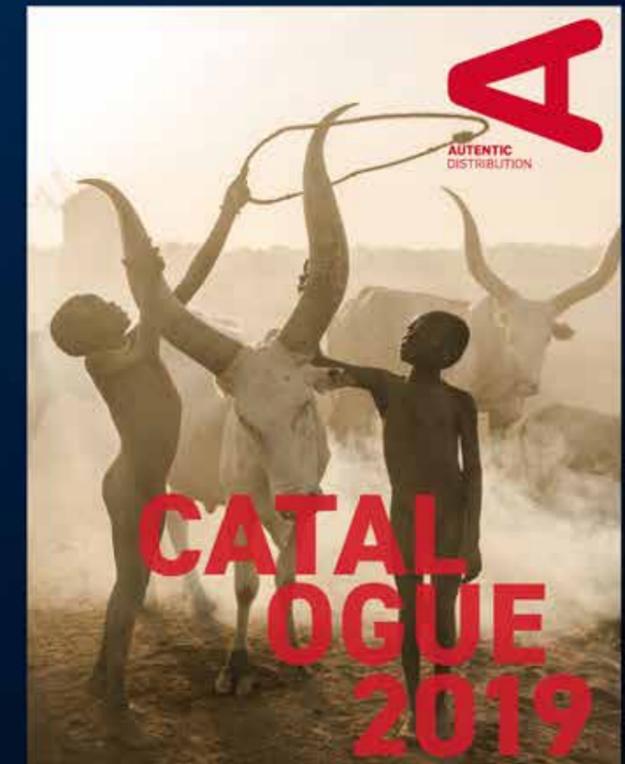
Betrayed Heart (120 x 60')



The Trap (180 x 60')



Frenemy (60 x 60')



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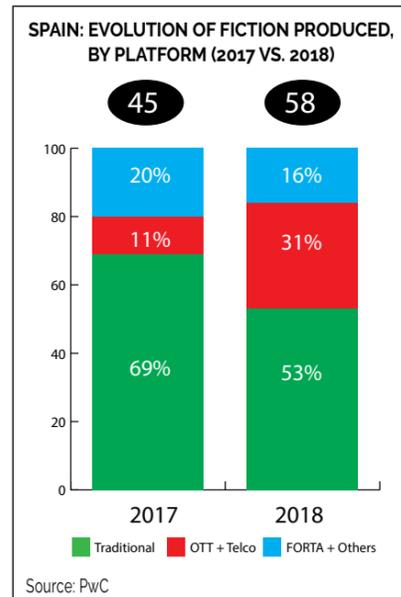
# The Spanish fiction market: future and beyond

Spanish fiction is enjoying a global boom. Recent productions for global platforms such as Netflix, Amazon or HBO, and for local broadcasters, have demonstrated this achievement. But this success is not new: it has been built since mid-1990s. Prensario analyzes the Spanish phenomenon.

Fiction has always been a key genre in Spain, but from almost a decade to now the domestic scenario has changed dramatically with a very positive impact in the international field: the number of drama hours produced have grown, with new platforms and producers, while topics have diversified, facilitating the Spanish fiction to gain new territories abroad.

The Spanish fiction market has multiplied its size in the last four years, going from 38 series in 2015 with a GDP contribution of 429€ millions to 58 series in 2018 with a contribution of 655€ millions. It is expected to reach 72 series in a consolidated market, contributing with 812€ millions to the country's GDP, and generating 18,443 quality employments.

The industry of content generation is one of the pillars of the audiovisual business, which had incomes of 4,115€ millions in 2018, according to PwC "Global Entertainment & Media Outlook" (2018-2022). These figures were taken from a recent study from PwC Spain, which has analyzed that the fiction series industry could transform the Spanish audiovisual into a strategic sector for the



national economy as the tourism, as it happens in other countries'.

Since the mid-1990s, Spanish dramas have defeated the US series on the local free-to-air channels. Key serials of those years were **Globomedia's Medico de Familia**, **Un Paso Adelante**, **Los Serrano**, **Aida** and **El Internado**, **Ganga**, **Cuentame como Paso** and **Desaparecida**, **Boomerang TV Física Química**, **Los Misterios de Laura**, **El Secreto del Puente Viejo**, **BocaBoca**, **El Comisario**, **Bambu Producciones' Gran Hotel** or **Plano a Plano**, **El Principe**.

More than a decade ago, the Spanish serials conquered key screens in Eu-

rope, as ready made and formats. **FRAPA's** Report "TV Formats to the World" (2009) already positioned Spain among the Top 10 global format exporters with 17 formats that saw at least 27 different adaptations worldwide. Based on data from extinct **FAPAE**, the reports stated that revenues from audiovisual content export grew by 50% between 2001 and 2007, with TV accounting for 39%.

According to data from **The Wit Scripted Formats** database as of August, 23, 2019, Spain was the fourth largest exporting country in terms of scripted formats (based on total number of adaptations) with 141 adaptations behind USA (221), Argentina (199) and UK (176). When the source considers the number of formats with at least one adaptation by countries (which reflects the diversity and richness of the format offer) Spain ranks on the fifth position with 42 formats.

## INDEPENDENT PRODUCERS

The independent production market started to take shape by the end of 1980 with three main players: **GestMusic** (1987), **Zeppelin** (1992) and **Globomedia** (1993), plus other companies like **Grundy** (now **Fremantle**) and **Europroducciones** (1991), the Catalan prodco **El Terrat** (1996), **Grupo Ganga** (1997) and **Boomerang TV** (1998). All them were followed by **Banijay's Cuarzo** (2000), **Zebra** (2001), **Mandarina** (2006), **Vertice 360** (2006), **Bambu** (2007), **BocaBoca** (2007), **Secuoya** (2008), **Warner Bros.** (2009), as well as **Plano a Plano** and **Onza Partners** (both in 2012).

**Endemol** bought 60% of **Gestmusic** in 1994, and renamed as **Gestmusic Endemol**. After that, the group acquired **Zeppelin TV** and **Diagonal TV** (Barcelona). In 2006 **Mediapro** merged with **Grupo Arbol (Globomedia)**, creating **Grupo Imagina** one of the largest studio and one of the most important content exporters; since 2019 it has unified all the business under the same brand: **The Mediapro Studio**. In January 2009, **Cuarzo Produc-**

## RANKING OF THE TOP EXPORTING COUNTRIES, BY NUMBER OF ADAPTATIONS LAUNCHED (AUGUST 2019)

COUNTRY	# FORMATS (AT LEAST 1 ADAPTATION)	TOTAL # ADAPTATIONS
USA	98	221
ARGENTINA	59	199
UK	84	176
SPAIN	42	141
ISRAEL	25	88
COLOMBIA	38	82
GERMANY	27	78
FRANCE	27	69
SOUTH KOREA	43	61
CANADA (FRENCH)	14	54

Source: The Wit

## TOP 5 SPANISH SCRIPTED FORMATS ADAPTED GLOBALLY (AUGUST 2019)

TITLE	# OF ADAPTATIONS
ESCENAS DE MATRIMONIO	17
LOS SERRANO	10
POLSERES VERMELLES	8
AQUI NO HAY QUIEN VIVA	8
CUENTAME COMO PASO	7

Source: The Wit

**ciones** merged with **Banijay Entertainment** and four years later it bought **DLO**, creating **Banijay Spain**.

**Vertice 360** was founded in 2006 by **Jose Maria Irisarri**, a key name of the Spanish industry, having integrated key producers like **Manga Films**, **NotroTV** and **Telespan**. On December 2007, it debuted in the Spanish Stock Exchange, but after the 2008-2009 economical crisis, the company went through some difficulties and in January 2012 **Irisarri** left the company. **Vertice 360** was rescued a couple of years after by **Squirrel Capital**, which recently sold 6% of it to the Italian **Giglio Group**. After leaving **Vertice 360**, **Irisarri** created along with **Nicolas Bergarecha** and **Gonzalo Sagardia Onza Partner**, a company that combines four divisions: **Onza Distribution**, **Onza Entertainment**, **Onza Comunicación** and **Onza Capital**.

**Secuoya** was formed in 2008, after its first externalization contract. The content division was created one year after, and last year **Grupo Secuoya**, led by **Raul Berdones**, CEO, announced that it has produced more than 1,000 hours of content of different genres for 10 Spanish TV networks, accompanied with an expansion to Latin America, operating in Chile and Colombia with local companies. The most recent milestone has been the partnership with **Netflix** to build the 22,000sq2 in **Tres Cantos**, Madrid, and become the first European production hub for the global SVOD.

Back in 2014, **iZen Producciones** was created, gathering the pioneer producers **Zebra Producciones**, **BocaBoca**, **Europroducciones**, **Hill Valley** and **Proima Zebrastur**. The new group has more than 25 years of experience in the Spanish market and it has participation and partnerships in France, UK and Middle East. It produced more than 1,000 hours per year, working with national and autonomic networks, as well as global productions for many countries.

Most recently, it was noticed a "new wave" of Spanish production companies founded by former key executives of the industry, such as **Daniel Écija's The Good Mood**, **José Miguel Contreras' LACOProductora**, **Francisco Pou' Mediocreast**, **Tomas Cimadevilla's Weekend Studio**, **Alex Pina's Vancouver Media** (participated by **Atresmedia** with 20%). They all

agree that the reason why they launched these companies (within the last 2-3 years) is to inaugurate new creative spaces that allow the discovery and development of the next generation of Spanish showrunners.

Spain main drama referents have also been the three largest media groups **Mediaset España**, **Atresmedia** and **Radiotelevisión Española** that not only produce and program a huge number of drama series on prime and day time, but also sold them abroad. To them, it must be added **Movistar+**, the key player on the telecommunications field that has become a fundamental actor in the creation and offering of Spanish drama in Spain and worldwide.

## DIVERSITY

Outside the Community of Madrid, many other companies must be highlighted: Galician **Bambu** (participated by French **Studio-canal** with 33%), **Portocabo** and **CTV Media**, Basque **Pausoka** and **Baleuko**, and Catalanian **Filmox** and **Diagonal TV (Endemol Shine)**, among many others.

This geographical diversification is a key asset, and brings to the table another interest aspect of the Spanish fiction: its development does not depend of its capital city, Madrid; on the contrary production houses are spreaded all over the territory, giving the productions different focus, thematic and landscapes. This characteristic is also explained by the fact that the local and regional channels (know as "Autonomic Networks") are usually the first windows for their premiers. During the last years, local drama series (crime, especially) from **Islas Baleares**, **Basque Country**, **Galicia** and **Barcelona** have been picked up by plat-

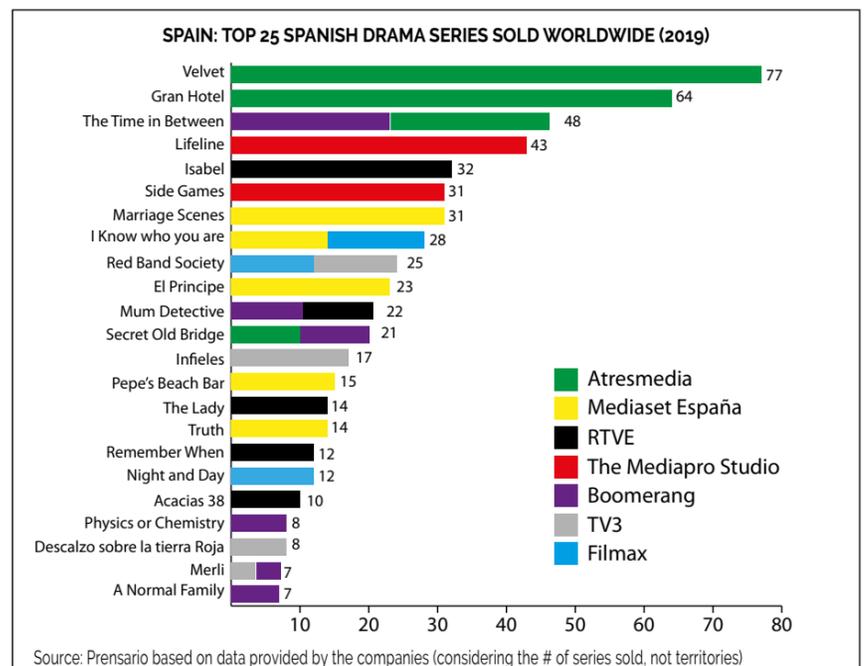


Boomerang's *Presunto Culpable* received the Magnolia Award in the 2019 Shanghai TV Festival and Plano's *La Verdad* was sold to more than 100 countries worldwide by Mediaset



forms like **Netflix** for global broadcast with acceptable success. Local becomes global, and vice versa.

On the global scenario, the appearance of key 'Studios' to produce for third parties must be highlighted: first, **Atresmedia Studios**, led by **Ignacio Corrales**, second, **The Mediapro Studios**, gathering all the group production companies and concentrating the international business, and third **Mediterraneo**, the new international company from **Mediaset España** from which it operates three key busi-



Netflix: *La Casa de Papel* S3 was watched by 34 million households on the very first week available on Netflix, having done extremely well in Argentina, Chile, Colombia, Spain, Italy and France

## The Spanish fiction market: future and beyond

nesses: content distribution, coproduction and the offering of its international network **CincoMAS**.

### HIGH-OCTANE DRAMA

One of the reasons of the high volume of drama production in Spain is that its consumption is very high. Spain has a very strong national market with 86.7% of the total content being local. After the success of **Alex Pina's** *La Casa de Papel*, the Latin American market appeared to be more open to the Hispanic content, increasing the potential of Spanish fiction; the market shows a higher quality, positioning the national production as truly global series.

In the last year, three series from Spain positioned themselves among the 20 top in **Netflix**, only surpassed by US serials. On its first week available in **Netflix**, 34 million households watched *La Casa de Papel S3* globally, transforming into the most popular non-English drama series in the platform's history. It did extremely well in Europe and Latin America. In Argentina, Chile, Colombia, Spain, Italy and France was the most watched title in the first seven days of each of those countries. *Elite* has been another one, connecting with 20 million households.

The growth in both, volume of production and international recognition, has one strong reason: the appearance in the Spanish market of major OTT players, which meant the growth of 53% in the number of series between 2015 and 2018, according to the PwC report.

Another important topic mentioned in the study are costs: 'The price for fiction production in Spain is still lower compared to other countries, which has allowed the country to keep being competitive in this field. The biennium 2019-2020 is critic for the consolidation and growth of Spain compared to the historical leaders in Hispanic fiction production, such as Mexico and Colombia.

The support of the State administration has become fundamental to the definitive and sustainable momentum of Spanish fiction!

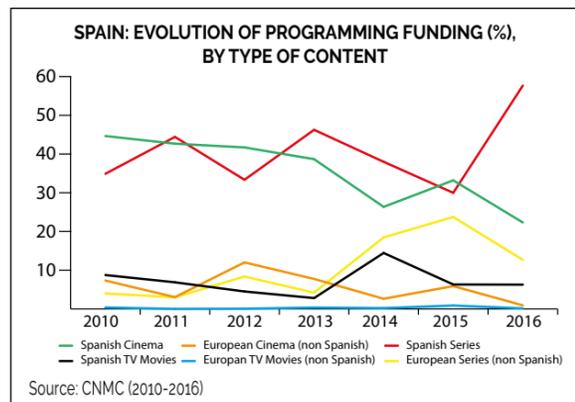
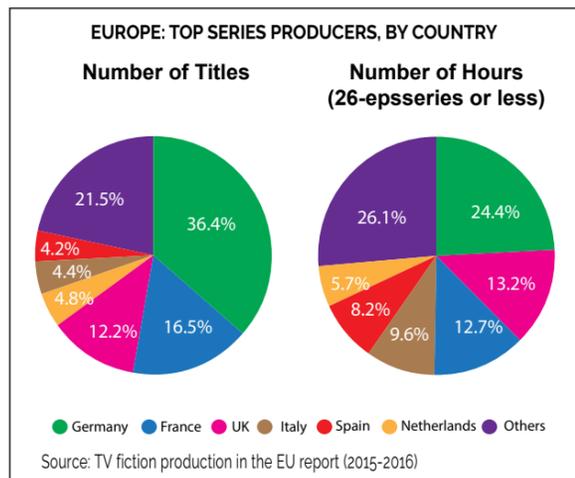
Even the cost of production is lower, it is well known and regularly highlighted by local players, that the national supports (20-25% of deductions) are still small compared to the other three big European producers: France (30%), UK (25%) and Germany (20-25%). Spain destined €70.3 millions in movie production and distribution in 2017, while during the same year France supported the industry with €275 millions.

'The public administrations can help to this consolidation by cooperating with the private sector to attract more international investments; introducing modifications to the present fiscal legislation; transposing in the new general audiovisual law approved in the EU that obligate to a larger minimum volume of European production', recommended PwC.

### EXPANSION

As many protagonists agree, the development of an independent production pole since 1990 was the starting point of the present Spanish fiction expansion worldwide. Original versions of series such as **Boomerang's** *The Time in Between* (**Antena 3**) and **Diagonal TV's** *Isabel* (**RTVE**) were sold to more than 50 countries, just to mention two of the most important.

But it is also clear that Spanish fiction



had built a reputation outside Spain thanks to its scripted format sold abroad. **Mediaset España's** *Escenas de Matrimonio* (2007) is a top scripted format from Spain, adapted in 17 countries, and still on air in **M6** France and Greece as local versions. **Ganga's** *Cuentame como Paso*, which run for 20 seasons on **RTVE** has been adapted in **Televisión Pública Argentina**, as well as in **RTP** (Portugal), **Rai** (Italy) and **Canal 13** (Chile).

**Globomedia's** *Los Serranos* has been another of the top Spanish dramas worldwide: the finished version was sold in close to 20 territories in Europe and Latin America, while its format has been adapted in **TVI** (Portugal), **Mediaset** (Italy), **Mega** (Greece), and **Česká televize** (Czech Republic), as well as Serbia, Turkey and Slovenia.

*Pulseras Rojas*, from Catalanian **Filmax**, broadcast on **TV3**, **TNT** and **Antena 3** in Spain, and sold in **TV Azteca** (Mexico), **Telefe** (Argentina), **Yle** (Finland) and **Vme** (US Hispanic), among others. It gained adaptations in Europe as *Club der roten Bänder* on **VOX** (Germany), *Braccialetti Rossi* on **Rai** (Italy) and *Pulseras Rojas* on **TVN** (Chile), but the most important one was *Red Band Society* for **ABC** (USA).



Spanish successful scripted formats: Ganga long running series *Cuentame como paso* (RTVE) earned key adaptations worldwide, while Jose Luis Moreno's *Escenas de Matrimonio* is the most adapted Spanish fiction in 17 territories, still on air on France M6 as *Scènes de ménages*

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## The Spanish fiction market: future and beyond

Spanish formats adapted in the US includes **Isla Audiovisual**' *Star-Cross* by **CBS Studios** for **The CW** and **Boomerang**'s *Los Misterios de Laura*, with two seasons on **NBC**, **Bambu**'s period drama *Grand Hotel* premiered on **ABC** last June, while the Spanish version *El hotel de los Secretos* was premiered in Univision for the US Hispanic market (2016). As ready made, *Gran Hotel* and *Velvet*, also from **Bambu** were acquired by **Hulu** and **Netflix**.

**La1** top drama *The Ministry of Time*, from **Onza Partners**, was adapted in **RTP Portugal** as *O Ministério do Tempo*, while it was sold to China, and it is under negotiations with Germany, France and Italy.

Spanish drama has moved from local costume dramedys (i.e. *Cuentame como paso*) and daytime long running series to more universal stories for prime time and international screens, including medical, period and police/narco dramas. And when that happened, the big engine that have pushed them globally have been the international OTTs.

Apart from *La Casa de Papel*, other Spanish dramas reaching 190 territories through **Netflix** are **The Mediapro Studio**'s *Vis a Vis* and *La Víctima Numero 8*, coproduced with **Telemadrid** and **ETB** (Basque Country); **CTV**, **TVG** and **Comarex**' *O Sabor das Margaridas*, which had received the "Mestre Mateo" award for the "Best Series" in 2018 and was ranked by **Netflix** in the "Top ten most watched non-English language shows in UK and Ireland" one month after it premiered.

Also **Mediterraneo**'s *Caronte* (**Big Bang Media**), available on **Amazon Prime Video**, and *Vivir Sin Permiso* (**Alea Media**) on **Netflix**; *El Embarcadero* (**Atresmedia Studios/Vancouver Media/Movistar+/Beta Film**) sold in 125 territories worldwide, *Se quien eres* (**Filmmax/Mediaset**) in 113, *La Verdad* (**Plano a Plano/Mediaset**) in 105, *Angel o Demonio* (**Plural Entertainment/Mediaset**) in 80 and *El Príncipe* (**Plano a Plano/Mediaset**) in 65.



Filmmax's and TV3 *Polseres Vermelles* has been adapted in 8 countries including ABC (USA), Rai (Italy), VOX (Germany), TVN (Chile), Peru, Russia, France and Arabic countries.



The Mediapro Studio bets on international coproductions, such as *The Paradise*, coproduced with Finish pubcaster Yle

### OPPORTUNITIES

Spain accounts with a unique opportunity in the fiction content production including both, Spanish-language and drama series for the international market. The country has become a global hub of content production, especially when **Netflix** partnered **Grupo Secuoya** to build "La Casa Netflix" in Tres Cantos, Madrid. But we can also mentioned **Amazon Prime Video**, **Movistar+** and **HBO**, among others.

As described by **José Miguel Contreras**, CEO of **LACOPRODUCTORA**, the fiction series has been chosen as the audiovisual format of this Era, as it is easier for a rapid consumption. In 2015, 70 movies and 54 TV series were produced in Spain, but one year after, the number of movies decreased to 63 and serials augmented to 155. The more international agents arrive to Spain (**Sky**, **Apple**), the more number of series will be produced. In 2017, the original productions from OTT and telcos represented 11% of the total 45, but the following year they jumped to 31% from the 58 series produced.

Latin America also represents a big opportunity for Spain, as those territories are importing more Hispanic content produce in Europe. The largest presence of international Hispanic content is in Uruguay

(95.6%), followed by Ecuador (84.5%), Venezuela (82.1%), Peru (74.2%), USA (70.5%), Chile (63.1%), Argentina (46.2%), Mexico (37.6%) and Colombia (37.1%); but in the last three countries, the local content is bigger.

Compared to Latin America, Spain has better conditions: first, it has a trained industry producing prime time fiction series in the new format of 40 minutes; and second it has positioned itself in non-English territories (*Money Heist*). From the Top 20 series in Netflix during 2018, three are from Spain: *Money Heist* (#2), *Elite* (#9) and *Cable Girls* (#19).

Spain has also demonstrated that it can produce successful series with a lower budget: *Vis a Vis* (**FOX**), *La Peste* (**Movistar**) and *Patria* (**HBO**) had an average cost of USD 600,000 per episode, while French's *Le Bureau* (**Federation Entertainment**) had a budget of USD 1.6 million per episode and British's *The Crown* (**Netflix**) or *Vikings* (**MGM**) cost between USD 4 to 13 millions.

The positioning of Spain in the global market has a clear impact in the tourism and "Marca España". The capacity of attracting global tourism thanks to the fiction content grows and improves the experience of the tourist. 80 millions of travellers have chosen their destiny based on movies or TV series, and that figure has doubled from 2012. These tourists generate a bigger activity on social media to tell their experiences (+27%), a bigger participation in cultural and nature activities (+19%), and bigger trend on travelling out of high season (which helps to reduce tourism seasonality).

The implementation of a global production hub in Spain could generate an additional income to the country of close to €200 millions thanks to the bigger size of the productions. The study arrives to that figures, by multiplying 10 series a year with an average cost of €20 million each (€2 millions per episode).



Two seasons of *El Embarcadero* were coproduced by **Atresmedia Studios** and **Vancouver Media** for **Movistar+** and distributed by **Beta Films** that sold the series in 125 territories worldwide; and *Brigada Costa del Sol*, coproduction between **Mediaset España** and **WBTV** Spain with the collaboration of **Netflix**, shot in Malaga

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PEREAWELCOME TO THE PLACE WHERE MEMORIES KILL  
**THE PARADISE**

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## Atresmedia Studios: beyond Spain



Ignacio Corrales, general director, Atresmedia Studios

Launched in 2017, **Atresmedia Studios** is the content producer of the **Atresmedia Group** that generates IPs for national and international platforms and broadcasters, and also manages **Atresmedia Cine**. It is headed by **Ignacio Corrales**, General Director, **Sonia Martínez**, Editorial Director, **Nacho Manubens**, Content Director, and **Laura Miñarro**, VP International Business.

'Globalization and digitalization reaffirmed the Group's strategy, and accelerated our expansion', affirms **Corrales**. Two seasons of *The Pier* co-produced with **Vancouver Media** for **Movistar+**, and two seasons of *Little Coincidences* with **Onza** and **Medio Limón** for **Amazon Prime Video**, are good examples.



Also, *La Templanza*, a 10-episode TV series based on **María Dueñas'** homonymous novel for **Amazon Prime**, and directed by **Guillem Morales**, **Alberto Ruiz Rojo** and **Patricia Font** with cast from Spain and the Americas. Last but not least, *Veneno*, *Not A Whore*, *Not A Saint*, based on the life of **Cristina Ortiz**, an LGBTI icon in Spain, directed by **Javier Ambrosi** and **Javier Calvo**.

**Corrales**: 'The goal is to make the production and distribution of contents one of the more profitable lines of business in the Group. Our target markets are Europe, Latin America and US Hispanic, and on a second phase USA and China. We also generate original content for third parties, by participating in co-productions that we have either developed in-house or incorporated because of their attractiveness and potential in the international market.'

'Spain is a very competitive market, full of innovation and highly-talented and experienced professionals, infrastructures and optimal production conditions. We shall continue to navigate the significant impact that new consumer habits are having on the film industry and keep on making movies that appeal to the communal experience of the audience in movie theaters. As to China, we are still doing business besides **Oriol Paulo's** movies, and our goal is to keep that moving forward in the years to follow.'

**Corrales** concludes: 'We are working in three new productions that will begin shooting soon and in three international projects into development. We are interested in reaching alliances prioritizing working with partners with whom we share a common vision of goals and values that lead us to generate projects that resonate, that make a difference for the audience.'

Two seasons of *Little Coincidences* have been produced with Onza and Medio Limón for Amazon Prime Video



## The Mediapro Studio: 360-degrees

The **Mediapro Studio** has nowadays 10 creative offices around the world, and has commissioned 34 series on different stages either in writing, preproduction, production or postproduction, meaning an investment of €200 including fiction and non-fiction to be produced in Spain but also in Italy, UK, Finland, Colombia, Mexico, Argentina, Chile and USA.

The company gathers 360-degrees set of services including development, creation, production, audiovisual services, direction and distribution, being the leading production company in the Spain with +4,000 hours of content produced in 2018 for **TVE**, **Mediaset**, **Atresmedia**, **Movistar**, **Fox**, **TNT**, **HBO**, **Amazon**, **Netflix**, **Viacom** and **Orange**.

**Javier Mendez**, CCO: 'We hold historically an outstanding position referring to drama. Our franchises have succeeded along the years in many different countries, among them we can highlight TV series like *Los Serrano*, *Los Hombres de Paco*, *Aída* or *UPA Dance*. All of them achieved great audience results in many different countries with different cultures. Nowadays we have *Vis a Vis*, which has conquered British and Japanese audiences, *Estoy Vivo* with three seasons or *El Ministerio del Tiempo* on its fourth season, both for **RTVE**.'

Other titles include *Malaka*, which recently premiered on **TVE**; *Nasdrovia* for **Movistar**; *Caronte* for **Mediaset**; *Perdida* for **Atresmedia**; *Por H o por B* for **HBO España**, *Paraíso* for **Movistar**; and *Vis a Vis: El Oasis* for **FOX**.

**Mendez**: 'Our main strategy is to create and produce great stories with no borders, able to touch international viewers, working together with the best possible talent. We are the first independent Studio in Spain, being able to develop content from its first step, the concept, to the last one, broadcasting.'

'For us the key is the storytelling, together with the talent and I'd like to mention *The New Pope* as an example of it. We are also working hard in creating big and long lasting franchises, capable of generating fan bases all over the world. The Spanish market is in a peak right now and platforms and channels all around the world are looking for Spanish content', concludes the executive.



Javier Mendez, CCO



Perdida, drama series for Atresmedia



▶ A different view  
// 21 x 70'



▶ Acacias 38  
// 16 seasons



▶ The secret of old bridge  
// 33 seasons



▶ La templanza  
// 10 x 50'  
◆ Coming soon



▶ Inés del alma mía  
// 8 x 50'  
◆ Coming soon



▶ Presumed guilty  
// 13 x 70'

2019 PRODUCTIONS



# The Good Mood: the next generation of Spanish showrunners



Daniel Écija, CEO, The Good Mood

**Daniel Écija** is a top fiction referent in Spain, having created more than 30 TV series and 8 movies that received nine Ondas Awards and one from the TV Academy. He founded **Globomedia** back in 1993, which then merged with **Mediapro** in **Imagina Group**, and two years ago he launched with his brother, Hugo, **The Good Mood**, described as a 'new creative space'.



30 people form this new company that began in April 2017. 'It is a new place for content development, production and executive direction. Our objective is to look for the new talents. We've sealed alliances with cinema academies from Madrid and Barcelona because we believe in talent: we want to be source of the next generation of Spanish showrunners', he remarks.

Since 2017, it has developed and produced *El Accidente*, Spanish adaptation of Turkish series *Son (Ay Yapim)*: starred by **Imma Cuesta**, it has been one of the top rated shows in 2018; with three seasons, *Estoy Vivo* is a leading prime time drama on **RTVE**; and *La Valla*, the brand new series on **Antena 3**: it is a drama series with some condiments of science fiction, which reflects a devastated Madrid after a World War that changed the political order in Europe.

**Écija** defines its own fiction concept: 'I like talking about personal relationships in imaginary sceneries. Modern and emotional stories narrated through optimistic and magical characters: *Aguila Roja*, *El Internado* or *El Barco* are high concept, demanding and bold TV series, from the production point of view and scripts'.

'Spanish producers have understood the amazing power digital platforms have to build global hits. But the success of our fiction is not new, we have built a reputation since 1990 that allowed us to reach where we are. What has really changed is the distribution model: these players have given a better exposure to our creations, which are very competitive against the US dramas. Thanks to that we have exported them to Russia, Turkey, Finland, France and Italy, etc.'

**The Good Mood** is working in more international coproductions. 'It is a natural step for all producers in this competitive context.



La Valla, brand new post apocalyptic series for Antena 3



Estoy Vivo, for RTVE

Platforms have democratized and given visibility to new creators. Ibero America has a key role in the creation of new dramas: we are working in a great project with Colombian talent, the script and bible are already done', comments.

**Écija** concludes: 'Distribution has changed the business forever. Apart from the traditional business model (giving the rights to the TV channels for local and international exploitation), we are implementing new strategies to own part of the creations. Producers have built new relationships and have learned that it is fundamental to share the IPs for international distribution'.

## Plano a Plano: going further



Emilio Amare, CEO, Cesar Benitez, founder, y Alvaro Benitez, business development (credit: Pipo Fernandez)

Headed by veteran producer **César Benítez**, **Plano a Plano** is a leading Spanish production house founded in 2012. Launched with *El Príncipe* (**Telecinco**), it produces more than 200 hours of contents a year, including five drama series for the three biggest media groups, plus one big project with **Netflix**, 2-3

entertainment shows and a movie.

*Allí Abajo* (**Atresmedia**), *El Caso. Crónica de Sucesos* (**RTVE**) and *La Verdad* (**Telecinco**), as well as *Servir y Proteger* and comedy *Sabuesos* (**RTVE**) are top developments. 'We've produced in Malaga and Marbella the new **Atresmedia** thriller *Toy Boy*, a betrayal, sex and manipulation series, and **Telecinco's** *Desaparecidos*, but we are going further exploring new narratives and formats', explain **Emilio Amare**, CEO, and **Alvaro Benitez**, business development.

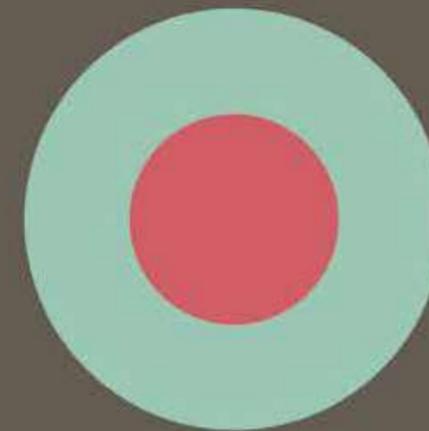
The company has produced the **Instagram** drama series *Pasionaria Millennial* (10x'1) and **Play Z's** *Abducidos* (6x'15). 'We are also exploring the international coproduction. We begun with *Spask 99*, the movie we are pre-producing with Kazakhstan Ministry of



Pasionaria Millennial, Instagram drama series

Culture through the State-owned prodco **Kazakh Films**. It will be produced since 2020. We plan to develop 1-2 movies a year, exploring new business models', they add.

**Plano a Plano** has developed 35 projects this year, including *Valeria* for **Netflix**, an adaptation from Spanish saga: 'We try new genres and formats all the time, is part of our DNA', Amare and Benitez conclude.



media content creation



AUDIOVISUAL FROM  
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## Mediacrest: predictive selection of content investment



Francisco Pou, CEO

Launched in 2019, **Mediacrest** is a brand new producer in the Spanish market that uses "Big Data" and the experience of its high-level executives to make a predictive selection of investments in content. Founded by **Francisco Pou**, CEO, and **Sergio Palomino**, CEO of the advertising agency **Manifiesto**, it is based in Madrid and Barcelona, and has **Daniel Domenjó** as executive director, **Xavier Borrel** as

responsible for production and development, and **Josepx Palenzuela** as CCO and heading the international business.

**Pou:** 'Our aim was to bring together the top talents in the industry so we could go onto the market with a solid team with a view to the future. Talent is crucial in light of the audiovisual revolution we are currently undergoing. That, combined with the fact that we are working with our own Big Data tool and have our own ad agency.'

Regarding projects, the company works 'with all platforms' on an international level: '*Untameable* (13x'50) is a story about a group of troubled teenagers united by therapy involving an extraordinary horse, Napoleon, and offering dramatic moments, adventures and humor; *Squadron* is an action-packed, air force thriller that combines action, adventure and mystery; and *Seduced* (8x'50) tells the story of a woman cheated by a man who turns out to be a psychopathic predator that changes her world forever', describes the executive, who also highlights *El Clásico*, a documentary about the social, anthropological and economic implications of a Real Madrid-Barcelona football match.

'Spain is a creative, imaginative and flexible country, with a cultivated and growing audiovisual industry and a great capacity for high-quality production. There is also its language to consider: a language spoken by 600 million people around the world', comments **Pou**.

'We are a young company but with a team that's highly experienced in the audiovisual world. This allows us to not only to move forward with guarantees of success in fiction and entertainment, but also affords us a list of contacts that allows us to work with renowned producers with extensive experience in the field and, above all, to seek out synergies in which each member of the team can contribute their own value added', concludes the executive.

*Untameable*, brand new series

## Onza: international coproductions

Founded in 2013 by **Jose Maria Irisarri**, **Nicolas Begareche** and **Gonzalo Sagardia**, **Onza Partners** has become a key player in the Spanish audiovisual market through two divisions **Onza Entertainment** and **Onza Distribution**. Several prime time shows have been produced for the networks, as well as key dramas for **Amazon**



Gonzalo Sagardia, CEO

**Prime Video**. The company is rebranding for MIPCOM.

**Gonzalo Sagardia**, CEO of the audiovisual unit: 'We have established our model of collaboration with the great creative talent that exists in Spain. In addition, a year ago we bet on our own department of both fiction and entertainment. In the entertainment field, we have produced several programs with good results. In fiction, we are close to launching the first show fully developed by us. Our bet and hope is now to combine the two models. The primitive, working together with external creators, and the conventional producer that creates its own concepts.'

Since its creation, **Onza** has taken its DNA to a clear international strategy. 'We've produced *Hernan* with **Dopamine** (Mexico), which will premier soon and we'll keep betting in that line', confirms **Sagardia**. 'We are working in a new development agreement with a big studio, which will be closed soon', he adds.



*Hernan*, historical coproduction with Mexican Dopamine will premier soon

**Onza Distribution** offers a wide variety of content, including dramas such as *The Ministry of Time* or *Little Coincidences*, and from Spanish (**Bambu**, **CTV**, **Plural**, **Isla Producciones**) and international producers, such as the Portuguese **TVI**'s Emmy-winner *Payback*, and **Coral Vision Europa**'s *The miracle of Fatima*, as well as close to 10 entertainment formats.

**Sagardia** concludes: 'In the next years we'd like to bet on quality fiction + entertainment, adapting our developments to each operator and their needs. Our commitment to international co-productions is unequivocal: we created a specific position headed by **Jessica Ortiz**, former director of **Onza Distribution** and now VP of co-productions and content development. We are shaping a great alliance that will undoubtedly strengthen our position in the international market, and allow us to address larger projects also locally.'



Buenos Aires  
Mexico City  
São Paulo  
Madrid



Madrid  
Málaga



## LACOpactora: a new way to make fiction

Launched a little less than a year ago, **LACOpactora** is a new initiative of **Jose Miguel Contreras**, a veteran executive with great experience of Spanish TV. He describes the company as 'back to origins'.

'We are a small, agile company. We look for ideas and talent, and we take care of the rest. We are not looking for employees, but partners. Change of model: we do not buy ideas, we associate. The future belongs to the creators, and we are going towards them.'

'*El cielo puede esperar* is a good example of the project we are aiming at. From an idea, we make "cocktail of development" and generate a product to present to the client, in this case **Movistar+**. Now we are selling it outside of Spain. It is an idea that enters industrial processes. No more big structures', he further explains.



[www.nonstoptv.tv](http://www.nonstoptv.tv)

[www.tobogganstudios.es](http://www.tobogganstudios.es)

## CTV: 'Quality drama is the best strategy for us'



Alberto Dominguez, Business Development Manager

With more than 80 professionals and 14.000m2 of studios, **CTV** is a leading producer in Galicia and Spain, having created and produced +12.000 hours of series, documentaries, feature films and formats, including the three most successful prime time shows of **Televisión de Galicia**.

Besides content production, it offers a full range of services from content conception to broadcast. 'Since the beginning we focused on mastering every detail of the Galician audiovisual. Now, backed by more than 30 years of knowledge and experience, we've decided to go a step further: internationalization. And how do we picture it? Becoming global', states **Alberto Dominguez**, Business Development Manager.

*O Sabor Das Margaridas* is **Netflix's** first Galician series and available in +190 countries after its launch on **TVG**, highly recognized outside Spain. Second season's shooting starts around November. 'On top of three weekly primetime shows, the second season of *O Sabor Das Margaridas* and the development of the series *Three Merciless Flowers*, which has secured production funding from regional audiovisual agency, we are working on entertainment formats for global audiences'.

**CTV** is working with **Comarex** for global distribution in actual and future works: 'We are partnering **Plano a Plano** and **Comarex** for a new series. Quality drama series is the best strategy for our company to enter the international market. We have great expertise in the creation and production of formats and we are actively seeking to develop this side of the business to go international'.

'Spanish production market is booming and has received global recognition by the critics and audiences, and this creates more demand for high quality productions while it stimulates the development of the industry. Global markets are showing a growing interest in literary adaptations and powerful stories based on actual facts either recent or historical', concludes the executive.



Three Merciless Flowers, new series from CTV

## Portocabo, from Galicia to the world

Distributed by **DCD Rights** (UK), **Portocabo's** new crime drama *Dry Water* (6x'60) is coproduced with **SPi** (Portugal) for **Televisión de Galicia** (TVG) and **RTP** (Portugal). It is being screened on October 16 at 12pm on Auditorium K.

Another series is *Hierro*, for **Movista+** and coproduced with **Atlantique Productions** and **ARTE France**. It is distributed internationally by **Banijay Right**, who is launching at MIPCOM S2 of this series shot in Canary Island.

**Portocabo** is one of the most active Galician producers with a clear international focus, having developed 9 productions. 'Competitive projects cannot be done by our own. We need partners, companies and players that think like us and that, together, can reach strategic objectives', summarizes **Alfonso Blanco**, CEO.

Teen comedy *The Avatars* (52x'23), plus the comedies *Luci* (25x'25), coproduced with **TVG**, and *La Revoltosa* (26x'55), shot in Canarias, and two seasons of the dramedy *Grand Nord* (26x'55), from Catalonia. Movies, entertainment formats and documentaries, as well as series such as *Vidago Palace* (6x'50), coproduced with **TVG** and **RTP** (Portugal) also distributed by **Banijay Rights**, and live action series *Miracle Toons*.

'We aim to work regularly with the collaborators we feel comfortable. Our north is to generate IPs that can travel abroad. We have an aggressive plan of expansion for the next seven years. We are a boutique production company surviving in a complex context with less TV channels, less supporting plans from the Governments and no cash rebates, with some exceptions'.

'We need to avoid losing competitiveness and a good plan could be that audiovisual do not depend on Culture, but on Industry. Global audiovisual consumption has multiplied for 10 and production for 5. Platforms are more opened to new financing models, and Spain's context is great to develop new global projects', concludes **Blanco**.



Alfonso Blanco, CEO



Dry Water: global launch at MIPCOM

## Weekend Studio, a "showrunner factory"

Spain is offering the best context for drama production and new companies are emerging with disruptive proposals. One of them is **Weekend Studio**, founded in 2017 by **Tomás Cimadevilla**, CEO, and **Jorge Iglesias**, CBO, and **Juan Domínguez**, Chairman. 'We are a different production company: we combine know how and expertise, bundled with a new narrative and a global vision', describes **Cimadevilla**.

'We are at the service of the screenwriter, not the other way. We work to give them the necessary resources, so they can have in 6-8 months the materials to start working. We accelerate the generation of talent, but we finance the productions to 100%. We have built a "showrunner factory", a needed development in Spain'.

The most important project has been *Hache* (8x'60), **Netflix's** third original in Spain from **Verónica Fernández**, editorial director of the production company, which is scheduled for 4Q 2019. Among others, are: **David Muñoz's** *Nemrod*, a young adult horror series; **Roberto Santiago** and **Angel Arnedo's** *Oxígeno*, thriller; **Carlos Lopez's** *Encadenados*, an espionage thriller inspired by real events in post-war Spain during WWII coproduced with UK; *Colonización*, science fiction series that shows a group of astronauts colonizing the land itself; and two comedies: *Una liga para ella* (8x'45) y *Felicidad* (8x'50).



Tomás Cimadevilla, CEO, and Jorge Iglesias, CBO Weekend Studio

# onza

## WHERE TALENT CREATES REAL EMOTIONS

Onza is a TV production company based in Spain with global reach. Creative talent is always at the center of all our projects, supported by a great team of professionals in charge of running production and delivery with a focus on quality. There is only one thing that we like more than good ideas: make them come true



select your content  select your emotion

## Banijay Spain, a bridge to Latin America



Stefano Torrisi, EVP, Banijay Group Spain

**Banijay Group** is one of world's leading independent production and distribution companies, spanning 16 territories globally and operating in Spain three units: **Cuarzo**, **DLO/Magnolia** and **NSP Media**.

**Banijay Spain** has more than 450 people and works with all Spanish TV networks and platforms, as well as opportunities for financial collaboration and co-productions. **Cuarzo** produces *Viva la vida* for **Telecinco**, and *Te lo vas a comer* and *Carretera y manta* for **laSex-ta**; **Madrid Directo** in **Telemadrid** and it has recently produced **Banijay Group** hit *La Isla de las tentaciones* for **Mediaset**, expected to air later this year.

**Stefano Torrisi**, EVP: 'We have adapted *Singing in the Car* for **A punt**, the TV of the Valencian Community, and one of the most striking documentaries of the last year, *Yo fui asesino, el crimen de la catana* for **DMAX**. The latter has since been released to over 100 countries worldwide.'

Acquired by **Banijay** in September 2013, **DLO** is specialized in fiction and entertainment having produced *El angel de Budapest* for **TVE**, the series *Alatriste*, co-produced by **Mediaset** and **Beta Films**, comedy series *El Hombre de tu vida* for **TVE**, and most recently **TVE's** series *La caza. Monteperdido*. It is well reputed due to **Movistar's** *Radio Gaga*, *Cero en Historia* and *La Vida secreta de los niños*, while it has experienced success with the adaptation of *Restaurant Rocks*, which has been well-received on **TV3** (Catalonia), **ETB** (Basque Country) and **Telemadrid**.

**Torrisi**: 'Spain has become a leading creative center and essential territory within the Group, acting as a key bridge to Latin America. A great source of projects and format adaptations. We have replicated Italy's model of investing in production startups and plans to continue with this entrepreneurial approach. The vision of our shareholders, led by Chairman, **Stéphane Courbit**, is to attract producers and authors, who want to build a business with us. This is the same model we are using in Italy, where the company is already working with three startups.'

**Banijay Rights**, the international business unit of **Banijay Group**, is distributing since last year its very first Spanish drama, *Hierro* (8x'60): it has global rights with the exception of France, Germany, Spain and Latin America. On its second season, **Movistar+** crime thriller series it is co-produced by **Portocabo**, **Atlantique Productions** and **ARTE France**, which premiered S1 on September 19 in France and Germany. The story takes place on a secluded island at Canary Islands, and was created by **Pepe Coira** and directed by **Jorge Coira**.

Founded in 2009, **Warner Bros. International Television Production** (WBITVP) produces local scripted and non-scripted programming through its network of local production operations in 15 countries, including Europe, Scandinavia and Australia-New Zealand.

## Warner Bros. ITVP Spain: evolution

**WBITVP Spain's** operations are responsible for both original programming and local versions of formats owned and/or controlled by the **WarnerMedia**, such as *First Dates*, *Game Of Games*, *Who Do You Think You Are?*, *The Bachelor*, *Love Connection*, etc., as well as developing and producing original shows. **Sebastian Moguilevsky**, MD: 'We are leading producers in Portugal and Spain developing, adapting and producing a huge variety of formats for the major television channels for more than 15 years.'

'We lead in docu-realities, dating shows and current affairs programs, but also talent shows and fiction, a new focus we are putting strong emphasis', he explains. 95% of the company is related to entertainment, while the remaining 5% is fiction. *Brigada Costa del Sol* is a narco series with **Mediaset España** in Malaga with the collaboration of **Netflix**. It has also announced two key deals with Argentina's **Polka** and **Kapow**. With the first one is developing an eight episodes' black comedy teen thriller; and with the second one there are three projects, two based on real facts: one story about the judgments of Latin American dictatorships in the '70, and *Más allá del Mar*: the story of Chilean writer Pablo Neruda that was not able to save the killing of his friend, Spanish writer **Federico Garcia Lorca**, but he saved 2,000 people embarked to Chile during the Spanish Civil War.

Top shows in Spain are *First Dates*, the top brand of the network within the last 3 years, whose spin off *First Date Crucero* is produced for **Cuatro**; *Ven a cenar conmigo Gourmet Edition* (*Come Dine with Me, ITV*) is gaining recognition on **Telecinco**; also for **Mediaset** is *Job Interview*, an English observational format where two companies select two new employees.

'We are producing new episodes of *Kitchen Nightmares* 8th season for **lasexta**, while *Who Wants to be Millionaire* is celebrating its 20th anniversary on **Antena 3** with a "Champion League" of winners from several Spanish shows. *Top Photo* is a branded content funded by **Huawei** for **Movistar+**: we want to expand in this field, based on the deep changes the industry is going through', he adds.

Two years ago the market has re-installed the "legend formats" (*Survivor*, *Who wants to be a Millionaire*). **Moguilevsky**: 'Linear TV has understood that big entertainment formats are the best content to join again the family around the TV. Even there is a smaller risk with a proven format, what broadcasters generate is a bigger impact in less time.'

Created 25 years ago, **Boomerang** is one of the key Spanish producers, settle in Madrid and Barcelona (**Veranda**) and producing fiction and entertainment for top Spanish broadcasters and SVODs for the domestic market and Latin America, where it has a subsidiary in Chile serving as a gateway to new markets.

## Boomerang: dynamic & changing



Juanjo Diaz, CEO

invest heavily in originals: they are in expansion. Traditional broadcasters are consolidated companies that must defended, as their revenues dependent on ads. Not only new players affected them, the new ads formats, too. They are trying to become creators, producers and distributors. This is a fun and exciting market, and where we, as **Boomerang**, want to be as we have been doing for more than 25 years', he concludes.

It produces over two hours of fiction a day, including *Acacias 38* (2 years on air), emblematic *Old Bridge Secret* (more than 6 years on air and continues to draw great ratings in Spain, Italy and Chile), **TVE's** *Another View*, **Antena 3's** *Presumend Guilty*, which won as "Best International Series" of the 2019 Shanghai Festival; also **Maria Dueñas** best-selling novel *The Time in Between*, as well as shocking thriller *Plastic Sea* and miniseries *Our Guys*. On the entertainment side, *Patricia's Diary* and *The Prison Choir*, as well as the global hits *The Voice*, *Top Chef* and *Peking Express*.

**Juanjo Diaz**, CEO: 'We are producing **Isabel Allende's** *Ines del alma mia* (8x'55), an €8 million project for **TVE** taking place in Chile (74%), Spain (17%) and Peru (9%). It is coproduced by **TVE** (63%), **Boomerang** (23%) and **Chilevision** (14%) and will be also launched by **Amazon** in Latin America and Spain'. Moreover, the production for **Atresmedia Studios** and **Amazon**: the adaptation of *The Vineyard*, also from **Dueñas**.

'Spanish market is dynamic and constantly changing. With the new players, audience has diversified. Spain has become the reference dish for a wide part of the Spanish-speaking audience. Opportunities have opened, which allowed us to create and produce new contents, although creating uncertainties because... it's supportable the currently model?', he thinks over.

And he answers: 'There is a common denominator in all broadcasters: they need the audience regardless the model. Platforms

invest heavily in originals: they are in expansion. Traditional broadcasters are consolidated companies that must defended, as their revenues dependent on ads. Not only new players affected them, the new ads formats, too. They are trying to become creators, producers and distributors. This is a fun and exciting market, and where we, as **Boomerang**, want to be as we have been doing for more than 25 years', he concludes.



Sebastian Moguilevsky, managing director

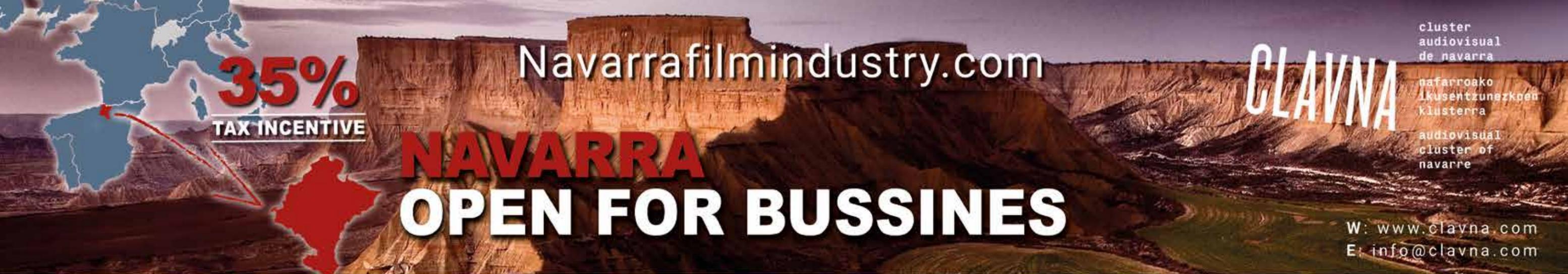


*First Dates Crucero*, spin off the classic format from Warner which has started production



*Ines del alma mia*, top coproduction between Spain and Chile





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## Secuoya, building the future



Raul Berdones, president

**Secuoya** is one of the biggest Hispanic audiovisual groups with more than 1,700 employees in Spain & Latin America. Based in Tres Cantos, Madrid (Spain), the Group divides its activity in the areas of Services, BPO, Contents, International and **Nexus** (content marketing).

**Raul Berdones**, president: '2019 has been a

hinge year, after closing one of our biggest contract in history with **Netflix** to provide services in our three studios of 1200sq2 each, totaling 22,000sq2: the biggest global OTT has produced here *Money Heist 3*, which premiered last July 19, and season 4. By the end of the year, we will add two more studios of 1500sq2 each.'

But the project is much more ambitious: with 160,000sq2 **Madrid City of Content** plans to become by 2020 the second largest facility in Europe, after **Pinewood** (UK) and bigger than **Cinecittà** (Rome) and French **Cite du Cinema**. '2019 has been the best year ever for our company, having produced six movies, including *El mejor verano de Tu vida*, which was second most view title in Spain; the series *Jefa* (**Movistar**) and more than 1,000 hours of contents for **RTVE**, **Mediaset** and **Atresmedia**, as well as automatic networks, **Movistar** and **Disney**', he adds.

'Spain holds the biggest TV market in Europe and even the business is going through deep transformation, it has remained stable and healthy within the last five years. The country offers its best moment in history to the world, combining great quality and costs. Majors such as **Netflix**, but also **Amazon**, are betting on Spanish talent', completes **Berdones**.

'If we are going through a bubble? Definitely not. The big challenge is to take opportunity of this moment and boost Spain to the next level. The country's drama production has tripled compared to 2016, and it is a big pride, for the sector and the citizenship, to see that **Netflix** has chosen us to build this content production hub.'



*El mejor verano de Tu vida* was second most view movie in Spain

Headed by **Alejandro Samanes**, it also has presence in Latin America, where is working with Chile, Colombia, Mexico, Peru and Miami. 'We have finally built a solid and stable relationship with our Latin American clients. We met the objectives with **Canal 13** and we grew in services in Colombia (+200 employees, 13 hours of production), where we will build a production hub in the near future. We have exciting plans for the region', concludes **Berdones**.

## Non Stop/Toboggan: Spain, a "global studio"

Seventeen years ago, international producer **Patricio Rabuffetti**, president and founder of **Non Stop TV**, has established itself in Madrid to develop businesses in the domestic market and to boost its operations in Argentina, Colombia, Mexico, Brazil and USA.



Patricio Rabuffetti, president and founder of Non Stop TV, and Juan Pedro Rodríguez de la Ossa, director general, Toboggan



'To prop up and reinforce this objective, we have created **Toboggan Services** together with **Juan Pedro Rodríguez de la Ossa** and **David Gonzalez**. On few years of operation, it has made a performance far superior to that projected, providing both companies with comprehensive production services for a higher percentage of productions on **Movistar** and the Spanish networks', explains **Rabuffetti**.

**Toboggan/NonStop** operate studios installed in Madrid and Malaga of more than 23,000sq2. The first one has opened up facilities of 7,500sq2 with 2,500sq2 dedicated to studios of the highest international standards. 'There, we are producing the daily fiction of **Diagonal TV** for **RTVE**. We are projecting to build more and bigger studios to attend a growing demand', add **Rodríguez de la Ossa** and **González**.

**Rabuffetti**: 'Spain has always produced with high quality and talent. What has changed now is that great successes are no longer exclusive of generalist networks. As a result of the arrival of the platforms and Pay TV expansion, the business grew and diversified. Spain faces a fantastic opportunity to consolidate itself as a unique destination for content development and production.'

After *La Casa de Papel*, the country positioned as a "global studio": 'Its presence has grown not only because of the globalization of its productions but also thanks to an important internal transforming process, competitive advantages like the geography, weather, talent and fiscal incentives', highlights **Rabuffetti**.

According to the executives, the 'huge and growing' demand of local content gives 'full sense' to the production capacity installed in the country and the bigger investment in technology to tackle all the productions taking place. 'We work with the main producers and channels. All the Spanish ecosystem, leveraged by great and talented artistic and technical people, created a brilliant atmosphere: Spain deserves to be in the mouth of the global industry'.



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## D'Ocon: the return of a legend



Carla D'Ocon, director of *The Fruitties*

Founded in 1976, **D'Ocon Films** has more than 43 years in the production of animated series and films having created the most unforgettable stories with legendary characters that have captivated all audiences throughout the years.

From this icon studio is now coming a new version of the worldwide famous hit *The Fruitties*, originally presented at MIPCOM 1990. 'It was the very first animated show produced and painted with our own digital computer system, the "D'Oc Animation System" created and patented by my

father, **Antoni D'Ocon**, explains **Carla D'Ocon**, director of the new series.

The show became a world-renowned hit and was broadcasted in countless languages in almost every country around the globe. To this day, the characters count with millions of fans in each continent. '*The Fruitties* are a community of peaceful and cheerful fruits that live in a volcano. They will learn to work together as a team as well as the values of friendship, generosity, compassion and especially equality regardless of their shapes, colors or gender.'

This year MIPJunior and MIPCOM, **D'Ocon Films** presents to the clients the first episode (the series' pilot) out of the 52x'11 currently in development. **Carla D'Ocon** says: 'The pilot reboot has been animated entirely in Barcelona and has counted with the collaboration of the original talent that already contributed to its creation in the late 80's. Original idea from Antoni D'Ocon, scripts by Josep Viciano and Antoni D'Ocon; music by Josep Roig and storyboard by Segundo Garcia (Esege).'

D'Ocon's daughter is the generational relay of the company, and has given *The Fruitties'* reboot a new appealing, charming and colorful look that will captivate the new generations but while maintaining the warmth of the original story and characters that so many people fell in love with.

She remarks: 'Spanish animation has had more visibility in the world for quite some time now. **Diboos**, the association of Spanish animation producers, together with **ICEX**, promote Spanish productions and co-productions with great success in the international markets of both cinema and TV. *Tadeo Jones*, *Planet 51*, *Boom and Reds* and *The Fruitties* are a good example of that.'

More and more studios are being established in Spain and companies that provide animation services to foreign producers in Barcelona, Madrid and the Canary Islands. 'Our talent, which has always existed thanks also to the help of new technologies, made Spanish productions travel around the world for several decades and we see the future as very hopeful', she adds.

Other projects from **D'Ocon Films** include a coproduction agreement with **Brites Films** to carry out a new production on the classic little mouse Perez, *Ratoncito Perez*. 'At this moment the pilot of the new series is being developed and produced', finalizes **Carla D'Ocon**.

Founded in 1976, **D'Ocon Films** has more than 43 years in the production of animated series and films having created the most unforgettable stories with legendary characters that have captivated all audiences throughout the years.

## All The Kids: fresh & original

**All The Kids** (Spain) is a consulting firm specialized in the children's & family world that also develops content and works with brands that need to communicate with the children's environment. It bringing to market fresh and original TV content for the global kids, tweens and teens, actively developing formats for prestigious companies such as **POWWOW**, **Mediapro**, **El Cañonazo**, **Plano a Plano**, **New & Co**, **Funwood Media** and **Tomavision**, among others.

The company has worked alongside celebrated and award-winning scriptwriters such as **Solange Keoleyan** (*Violetta*, *Florencia*, *B&B*) and **Steve Aranguren** (*Littlest Pet Shop*, *Kuu Kuu Harajuku*, *The Penguins of Madagascar*).

**All The Kids** has recently signed with **Javier Ródenas** (*La Pecera de Eva*, *Impares*) for TV script development.

The company has also initiated a strategic alliance with **Onza Entertainment** and **El Cañonazo**, for the development of the innovative transmedia series *Time to Face*, a kids' dance program with Spanish dancer and choreographer, **Sergio Alcover** (*Fame*, aired on **Cuatro**); it also has two strategic partnerships with the producers **Onza Partners** and **POWWOW** for international projects.

**All The Kids**, whose services include consultancy in the Entertainment arena, is currently developing a project for the **Museo Thyssen** in Madrid, as well as the development of a consumer products IP, *Lua y Marcos*, to take it to TV. Also, *Terror Valley* (6x'50), a transmedia horror miniseries in which a mixed group of explorers aged 17 to 21 are lost in a valley with no easy way out, and have to use their ingenuity, resilience and will to survive as a group to overcome the terrifying situations in which they find themselves.



Joana Carrion and Pablo Vinuelas, partners at All The Kids



Time to Face with Onza and El Cañonazo



Terror Valley (6x'50), a transmedia horror miniseries

## Motion Pictures, an animation pioneer



Tony Albert, CEO, and Jorge Patiño, Sales Manager and Executive Producer



etc.', say **Albert** and **Patiño**.

'But Spain has very few tax incentives compared to other European countries which make us less competitive in coproductions and service work. We must improve the financing support coming from public and private entities, especially from televisions and



MyaGO, the last production in 2D

VOD platforms, as well as the return of the investment to animations series coming from the Ministry of Culture', they conclude.

**Motion Pictures** is an award winning studio founded in 1976, having produced during the last 18 years more than 12 animated series and films: *Raindrop* (New York Film Festival, Young Public Award Grenoble Festival), *Glumpers* ("Best Animated Series", Chupete award) and *Pumpkin Reports* (Pulcinella Awards, SICAFF).

**Tony Albert**, CEO, and **Jorge Patiño**, Sales Manager and Executive Producer: 'We specialize in quality animation. We represent **Rainbow** (Italy) in Spain and Latin America, and we are looking for original IPs that can add potential to our catalogue. As service provider we adapt to different animation techniques (digital 2D, CGI) like the preschool show *Mice Builders* (3D) from **Baby TV**, and services for **Movistar** and **Endemol** on the anime series *Virtual Hero*, based on the comic book from famous youtuber, *El Rubius*'.

The latest production is *MyaGO* (104x'5), a 2D animation with *Peppa Pig/Ben & Holly* script editor **Sam Morrison** and over eight UK scriptwriters. Coproduced with **Piranha Bar** (Ireland), it was sold to **SVT** (Sweden), **YLE** (Finland), **Discovery Kids MENA**, **Hop!** (Israel), **RTEjr** (Ireland), **TVE** (Spain), **TVNZ** (New Zealand), **Globosat** (Brazil), **TV3** (Spain), etc.

'Animation industry in Spain is having a sweet and sour moment. We have great talented people, competitive prices. *Buñuel y el laberinto de las tortugas* was finalist to represent Spain in the Oscars, studio **EL Ranchito** won and Emmy for best special effects on *Game of Thrones*. Our industry represents 20% of the labour work in the audiovisual industry, the investment of €1 in animation generates 2,1€ in the Spanish economy, and 1 job in animation generates 2,3 indirect jobs in other industries,

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# Spain, a sophisticated and developed OTT market

The reason way Spain has become a key global player is not only its strong domestic TV market, but mainly because it has transformed into a strategic hub for digital original productions, starting with Netflix, and followed by Amazon, HBO and many more to come.

After Netflix launched its service in the country in 2015, Amazon and HBO followed by the end of December 2016. Before all them, Movistar, from the local telecommunication company Telefonica was taking the lead with an exclusive service for its clients; last April, Spanish telco presented *Movistar+ Lite* for the broadband subscriber in Spain, and the market gave another jump. Another pioneer has been Filmin, launched in 2007: it has been the very first streaming service in Spanish.

The "Informe de Telecomunicaciones y Audiovisual 2018" from the CNMC, presented by counselor Bernardo Lorenzo revealed last June that OTT players gathered more than 6 million clients, being Netflix the leading one followed by Amazon and HBO as the three top three. The number is almost the same of the Pay TV subscribers in Spain: 6.9 million, from which Movistar took 4.09 millions showing an annual growth of 6%; IPTV grows on average 3-5% a year. DTT still has a high penetration of +60%. The average spend in communication services by Spanish homes is €75 (€30 per person).

According to Barlovento Comunicación, 1 out of 4 homes in Spain (26% or 4.8

million homes) have a subscription to Netflix or HBO. Those who don't have access to these platforms have different consumption habits about traditional TV. On 1Q 2019, Spanish people consumed 5:18 hours; the ones that received HBO/Netflix consume 4:18, but the ones who don't increased the consumption of traditional TV on 80 minutes, this is 5:38hs (+31%). The average spend per household in communications is €75 per month (€30.30 per person).

## HINGE

Last April, Netflix presented its first European production hub in Madrid to bolster Spanish-language production. This was part of a multi million Euro investment to supports Spain's growing creative community: the facility sprawls over a 22,000sq2 campus at Tres Cantos, Madrid. Grupo Secuoya developed and manages the space in a multi-year partnership, providing management and other services, as its exclusive production services partner.

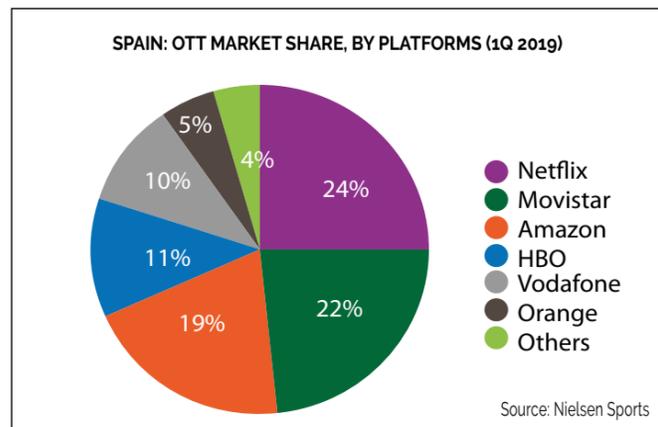
*El inocente, El crimen del siglo, Alta Mar, Las chicas del cable* (S4), *Paquita Salas* (S3), *Elite* (S2), *Criminal, El vecino, Hache* and *Días de Navidad* and films like *Elisa y Marcela, A pesar de todo, ¿A quién te llevarías a una isla desierta?, Diecisiete, Klaus* and *Hogar* have been produced here. 'Our aim is to be part of the Spanish creative ecosystem. We are investing for the long term. We are here to stay and to participate', said Reed Hastings

during the presentation.

Raul Berdones, president of Grupo Secuoya, adds: '2019 has been a hinge year, after closing one of our biggest contract in history with Netflix to provide services in our three studios of 1200sq2 each: the biggest global OTT has produced here *Money Heist 3*, which premiered last July 19, and season 4 is on the way. By the end of the year, we will add two more studios of 1500sq2 each'. But the project is much more ambitious: with 160,000sq2 Madrid City of Content plans to become by 2020 the second largest facility in Europe, after Pinewood (UK) and bigger than Cinecittà (Rome) and French Cite du Cinema.

## THE 'BIG 3'

Francisco Ramos, Netflix VP, Original



Series: 'Great stories can come from anywhere. So our goal is to work with the world's best storytellers and give them the freedom to tell their stories, regardless of the language. Since launching in Spain four years ago, Netflix has invested heavily in Spanish language shows: local stories created by local talent and produced locally. And the more local a show or movie is, the more global it is'.

'We have great production facilities here and we are producing all over the country including Galicia, Catalonia, Cantabria, Islas Canarias. This goes hand in hand with our strong investment in local talent. In 2018, over 13,000 cast, crew and extras have worked on Netflix Originals. This year, that number is set to increase to 25,000. We help local filmmakers to tell stories that open new windows to the world and in Spanish, a language spoken by +600 million people worldwide'.

Ramos: 'No matter the place or language, people look for real stories. Consumers value the vision of passionate creators who are based on their reality, their culture, but who also portray universal themes and feelings. The more audiences



**Francisco Ramos,**  
Netflix VP, Original Series:

*'No matter where you live or what language you speak, people are looking for real stories. Consumers value the vision of passionate creators who are based on their reality, their culture, but who also portray universal themes and feelings.'*



**Georgia Brown,**  
director European originals,  
Amazon Prime Video:

*'Our Spanish audience is looking forward to watching local series: we are developing authentic stories combining drama, comedy, romance and action in order to build an international success series, not just in Spain.'*



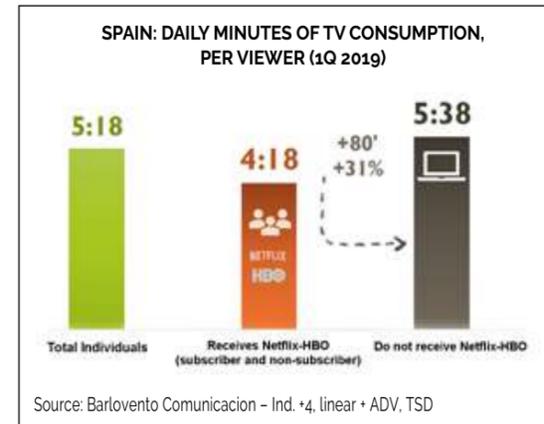
**Sergio Osle,**  
president of Movistar+:

*'We are revolutionizing the audiovisual market in Spain with Movistar+ Lite, our OTT offer accessible to all for €8 per month with two simultaneous reproductions'*



**Miguel Salvat,**  
director of HBO España:

*'Everyone talks about original production today, but we've been pioneers, taking advantage from the rest because of our innovation in quality (4K, HDR), aesthetics and narratives.'*



us strong in our commitment. There is enough demand to coexist and many possible collaborations between the one and the other. We have worked with more than 13 production Spanish companies on more than 40 films and series using different co-production models. We have sealed a global agreement with the Spanish publishing-house, Grupo Planeta, to publish books based on *La Casa de Papel, Elite*, and *La Casa de las Flores* for both Latin American and Spanish markets', he completes.

these creative communities find, the more the world will be open to hearing new stories and perspectives'.

'We are living in a great moment in Spain. Competition challenges us; it keeps

Georgia Brown, director European originals, Amazon Prime Video: 'Our Spanish audience is looking forward to watching local series: we are developing authentic stories combining drama, comedy, romance



As in other parts of the world, Amazon Prime Video is betting on unscripted productions such as *The Dinner of a Lifetime*, produced with The Mediapro Studios

and action in order to build an international success series, not just in Spain'.

Among them is the eight-episodes drama series *Un Asunto Privado*, from Bambu: set in the late 40s, this contemporary, fun and dizzying drama goes through a wom-



On its fourth season, *Las chicas del cable* has been the very first and most emblematic original series from Netflix in Spain

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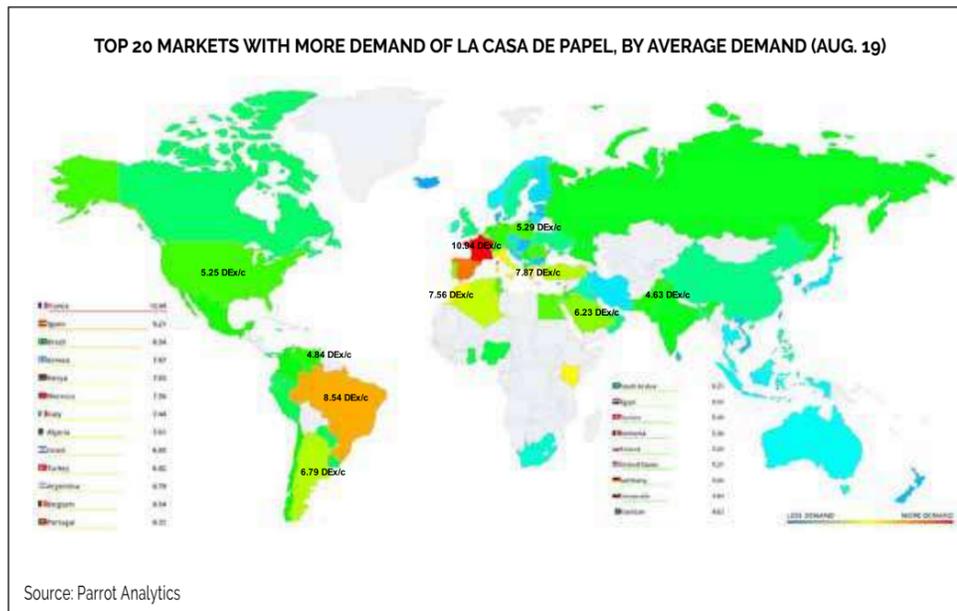
## Spain, a sophisticated and developed OTT market

an fight against all stereotypes to fulfill her dream of becoming a detective in a world of men. Also, the romantic drama *La Templanza* (10x'50) based on **Maria Dueñas's** bestseller novel and produced by **Atresmedia Studios**, which highlights topics such as love and identity. Both will premier in 2020 in 200 territories worldwide.

The most ambitious production in Spain will be epic drama *El Cid* about Rodrigo Diaz de Vivar, which begun shootings in September. *La Casa de Papel'* **Jaime Lorente** will led the Castilian knight's series. Filming is taking place on a location in Castilla and in a 4,000mt2 set, with hundreds of extras, special effects and a team of over 200 professionals.

The OTT is also producing unscripted formats like *Una vida, una cena* by **The Mediapro Studio** and the documentary series *Huesca FC* (working title), while it has acquired Spanish productions from **Mediaset España**, *La que se avecina* and *Señoras del (h)AMPA*, the documentary series *Tres caminos* (**Ficción Producciones** and **Beta Films**), *Pequeñas coincidencias* (**Onza**), *Hernan* (**Onza** and **Dopamine**), *El pueblo* and *Inés del alma mía* (RTVE, **Boomerang**, **Chilevision**, **Prociné**).

**Miguel Salvat**, director of **HBO España**, announced in mid-2019 five high end projects from the most recent division of the Group. 'Everyone talks about original production today, but we've been pioneers, taking advantage from the rest because of



our innovation in both, quality, aesthetics and narratives', he stands.

The first local project is *Patria*, based on the successful novel and produced with the showrunner **Aitor Gabilondo** and its production company **Alea Media**; *Foodie in Love*, directed by Goya Award winner **Isabel Croixet**; the terror comedy *30 Monedas* (8 hours) from **Alex de la Iglesia**, an historical referent of the Spanish cinema that is now producing TV series in Castilla La Mancha, the comedy *Por H o por B* (10x'30) and the documentary *El Pionero*. 'Variety has been a pillar in Latin America and it will also be in Spain. It is not a consequence, it is the starting point. These projects represent five ways to narrate, record and show', highlights **Salvat**.

'The three top elements of our model are: great diversity of titles, variety of contents and low subscription prices', he remarks, and concludes: 'Original production has two objectives: in the short term, clearly commercial; and in the long term, add value attributes so that the perception of **HBO** at the local level goes up.'

### TELCOS/TECH

More than 350 entertainment shows, a dozen annual original productions, more than 4,600 fiction stories, and more than 20 global sport competitions (Wimbledon, NBA, Liga Endesa, Serie A, Ligue 1, SuperBowl, rugby, Indycar, Diamond



Alea Media' *Patria*, the very first original project from HBO España, shot in the Basque Country

League, etc.) plus reference programs and eight direct channels is the proposal from **Movistar+ Lite**, the brand new OTT offering for all Spanish from the leading national telecommunication company **Telefonica**.

**Sergio Osle**, president of **Movistar+**: 'We have been revolutionizing the audiovisual market in Spain and since we launch *Movistar+ Lite*, our OTT offer accessible to all for €8 per month with two simultaneous reproductions, we are going further'.

Among the top programming are the original series *Instinto*, *La Peste*, *La Zona*, *Arde Madrid*, *Gigantes*, *El Embarcadero*, *Félix*, *Merlí* *sapere aude*, *El día de mañana*, *Mira lo que has hecho*, *Vergüenza*, *Hierro* or *En el corredor de la muerte*; also *Mientras dure la guerra*, the very first original movie directed by Spanish director **Alejandro Amenabar** premiered in 2019 and in co-production with **MOD Producciones**, **Himnoptero**, **K&S Films** and **MDLG A.I.E.** and



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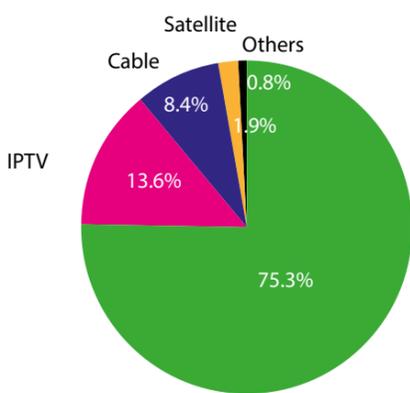
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SPAIN: AUDIENCE SHARE, PER MEDIA (JULY 2019)



Source: Kantar Media/Barlovento Comunicación

## Spain, a sophisticated and developed OTT market

with the support of ICAA.

For 2020, **Movistar+** is producing with **The Mediapro Studios' Globomedia Paraiso** (8x'50), a fantastic and adventures series situated in the Spain of 1992 from **Fernando González Molina**; and a female-led thriller (6x'50) from Goya Award winner **Rodrigo Sorogoyen** that started production in 4Q 2019 together with **The Lab Cinema** and **Caballo Films**.

**Huawei Video** is a mobile-first video service offered to **Huawei** and **Honor** smartphone users. It comes preloaded all the smartphones and tablets and it opens a window to discover a catalogue of titles adapted to any kind of user and consumption needs. The catalogue exceeds 3,000 hours with close to 5,000 videos from different genres and topics. It is part of the **Huawei Mobile Services Ecosystem**.

'Being mobile-centric means that we have to delight our users at any time and therefore we have compiled a large variety of genres and formats: movies, series, but also short-movies and short-form series, documentaries and short stories, comedies, kids and young oriented series and even Asian contents', explains **Fernando Garcia Calvo**, director of **Huawei Video** service.

'We care about offering freedom of choice so the user can freely browse the



Movistar+: Alejandro Amenabar first original movie for the platform, *Mientras dure la tormenta*, and the epic drama series *La Peste*

## LOVEStv: the answer from the broadcasters

Free TV has not wasted the time seeing how these big international groups launch their services and increases their presence in the Spanish market. **Mediaset España**, **Atresmedia** plus **RTVE** announced in November 2018 **LOVEStv**, a joint HbbTV-based platform created by Spanish broadcasters that aimed to target 2 million TV sets by the end of 2018. The service provides access to 7-day catch-up from its partners, as well as the possibility to start watching a currently on air program from the start, an improved electronic program guide and a recommendation service.

The total number of homes in Spain with TV is 18.54 million, of which 12.04 million receive DTT, 0.67 million Satellite and 5.82 millions IPTV. The total number of televisions is 38 million, of which 31.5 million receive DTT, 0.67 million Satellite and 5.82 millions IPTV.

From the 38 millions of televisions, 3.9 millions Hbbtv can be connected with **LOVEStv**. From this number 1.7 million are connected to the Internet and 1.2 million to **LOVEStv**. Almost 80,000 plays are being recorded daily and about 2.4 million per month.



Representatives from the three main broadcasters in Spain during the launch of LOVEStv in November last year



whole service, opt to watch some free content, rent or purchase a new release or library movie or subscribe to our **Huawei Video** package (4,99€ per month) or more add-ons coming soon. The service uses **Huawei** optimized **WiseVideo** technology for optimal video streaming. It also supports download to play, download to own (EST) and **Chromecast** connectivity.

**Huawei Video** was launched first in China in September 2016 and in Spain and Italy in September 2018. 'Spain is a strategic market for several reasons: it is one with the highest penetration of **Huawei** smartphones countries, Spanish are eager to explore new OTT services with a low penetration of traditional Pay TV services and it also a good bridge for Latin American countries where our content partners can work in both regions easily', he adds. Spain is one of the best testbed countries for OTT services and it has one of the best FTTH connectivity in Europe, relatively low penetration of Pay TV, used to have high piracy rates and has adopted quickly the subscription paradigm for OTT Video

services.

'We add the production skills, creativity and quality that has placed Spain in the focus all over the world. There are more than 20 OTT platforms, and more are coming. Mobile has become the most "enjoyable" device that we ever had as human beings, it has reached a level of quality in image and sound that it is also creating opportunities for video discovery and watching that we never thought about. We feel like we are pioneering somehow this new wave', says **Garcia Calvo**.

According to the executive, **Huawei Video** has seen a 'huge traffic'. Some formats that never were considered as mainstream are demanded and consumed by our users, such as short-movies or short-form series: 'Sessions tend to be shorter than in TV as smartphones has more interruptions. The challenge is to present quickly something that fits the time, the appetite, the location where the user is and moreover, using a small screen to show thousands of contents', he finishes.

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# Spanish animation & visual effects industry: at the forefront

The animation has become one of the most complex industries in the audiovisual business, as it branches in more business segments such as licensing, merchandising (toys, back to school products), music, live shows, among others, allowing IPs creators to keep building up the brand. Spain is a key representative worldwide: great talents meet the best global stories.



The Ibero-American industry strengthens its global position: Carlos Biern, president of Spanish Diboos, Silvina Cornillon, Ventan Sur Animation!, Jose Luis Faria, director of Premios Quirino de la Animación, Silvia Barraclough, ICT and Digital Content Department, Spanish ICEX, and Jose Iñiesta, director of El Festival-Pixelatl at Annecy 2019, where they launched the "White Paper of the Ibero-American Animation"

This year, the Spain animation and visual effects industry has been in the mouth of the top global executives. For many reasons, but one important is because its talent is being recognized worldwide for its work. Also, the country is being highlighted as country of focus in many international events as Pixelatl, the biggest Latin American show, held in September in Cuernavaca, Mexico, or *Animation! Ventana Sur*, to be organized by the end of this year in Buenos Aires, both initiatives supported by ICAA.

Moreover, last April, it was held the second edition of Premios Quirino de la Animación Iberoamericana in Tenerife, Canary Island, a strategic enclave that demonstrate the huge evolution of Spanish industry: seven national and international companies have opened up offices and producing international animation.

Spain is the fifth worldwide and second European animation producer. It is a key global animation player who shows its strength at this edition through its producers, TV channels and public and private organisms.

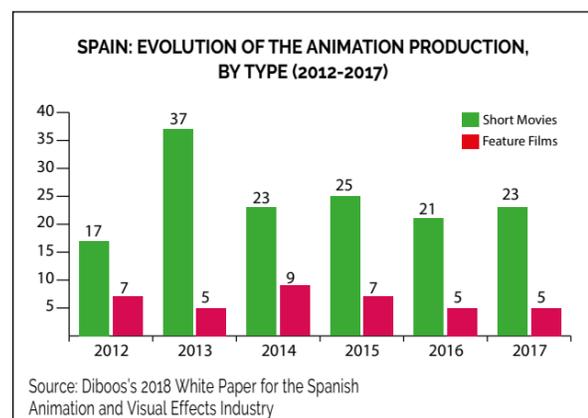
## PROMOTION

With 250 companies, producers and distributors focused on the animation industry, Spain has seen a revival in recent years of the local market. The sector is well supported by State and private organizations. **Diboos** is the **Spanish Federation of Animation Producers**, and a key entity when is time to defend the industry rights.

The two main region concentrate the majority of the business: the Community of Madrid and Catalonia, although 60% of the companies declare that they are willing to relocate to another

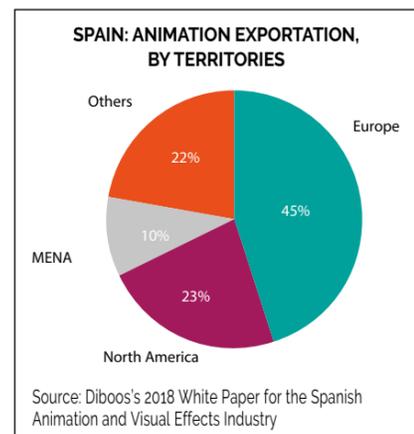
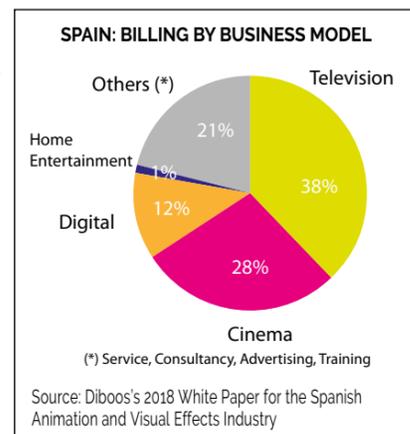


Italian Mondo TV in Tenerife who is producing its new series *MeteoHeroes*, being promoted this MIPJunior



Autonomous Community, which offer advantageous fiscal conditions, according to **Diboos' 2018 White paper of the Spanish Animation and Visual Effects Industry**.

That document informed last year that the sector billed €654 million in 2017 and directly employed 7,450 professionals. This industry represents only 4% of the number of companies in the au-



divisual sector. However, it generates 20% of employment and 9% of the total turnover of that sector. Almost half of the companies active today, did not exist 10 years ago.

'It is an atomized sector, mainly composed of SMEs, with predominantly Spanish capital. 65% of them invoiced less than €500,000. It is expected that in 2020 the Spanish industry will exceed €1 billion, with an average annual growth rate of 24%. Employment growth of 11.17% per year is expected to reach 10,000 direct jobs in 2020 and about 40,000 professionals in total linked to the animation industry. 90% of companies are dedicated to the production of content, both for television and film.

Already half of the companies are engaged in the production of animation content for mobile and new digital channels. 72% of companies generate their own IP and 42% industrial brands. 60% of companies export, 45% do so in European markets, 23% in North America and only 10% in the Middle East and Africa. The market that represents the most weight in the turnover of the industry is the North American, with 52% of total revenues. Markets such as Asia represent important challenges and opportunities, due to the difficulties of introduction and its immense potential in terms of potential audience.

**Carlos Biern**, president of **Diboos**, remarks: 'The animation and visual effects sector is clearly one of the sectors with the greatest possibility of growth internationally and a key element to capture those "small big" changes that the Spanish economy needs to advance in terms of innovation in full digital revolution.'

'Spanish animation companies have led many of the changes in our country regarding the definitive establishment of new business models. In our case of entertainment, by those that have previously been transformed such important sectors like the musical or the editorial. The complement to the contents family or educational animation give way to content interactive in new fields linked to virtual reality, the AI or AR that will not only change the way of telling stories but how to reach the audience.'

'With the establishment of the first impulse measures by public administrations through local investment and International, animation and visual effects companies now have a field on which you can finally root those little seeds digital a model that moves forward, from the technology sector, to be the engine of the Spanish economy and an example of transformation for other traditional sectors', concludes.

## INTERNATIONAL EXPANSION

**Animation from Spain** is the umbrella band created and supported by **ICEX, Spain Trade and Investment**, to promote the Spanish animation industry at all the international shows around the globe, as well attract foreign investment to Spain.



*Lucky Fred* (Imira, Televisio de Catalunya, Rai Fiction and Top Draw Animation) is one of the greatest Spanish animation successes, sold in more than 165 territories, and season two is under production



*Wonder Park* is the most recent American-Spanish adventure and comedy film produced by Paramount Animation and Nickelodeon Movies, with Madrid producers Ilion Animation Studios working on the animation



El Ranchito visual effects supervisor David Ramos has got for Spain one of the two Emmy the country achieved in the last year Emmy International edition: he won the "Best Visual Effects" for HBO's *Game of Thrones* episode 6 of the seventh season, entitled *Beyond the Wall*

## Content Department.

'Our organization allows to encompass any company, without the need to register, providing information and answering for requests related to any region through any of our 98 offices established all over the world. Then, we provide support from a formation perspective with talks and classes actual topics like new agents and business models, and a Media plan where we negotiate rates and we seek to promote companies. What we are trying to do is to support the sector in the most extensive way possible, and give all companies equal possibilities', she adds.

Regarding the Spanish animation industry, **Barraclough** remarks that there were some years where the growth stopped by a general social and economical situation, but now 'tons of new interesting projects are merging again'. She completes: 'Interesting steps are being taken and both internationally consolidated and new companies are emerging, and even companies that at some point had left their international presence are returning refreshed.'

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## CONSULTANCY & TV CONTENT CREATION

AUDIOVISUAL FROM **SPAIN**

## Atresmedia: strong growth



Mercedes Gamero, head of sales & acquisitions (credit: Concha Gonzalo)



Javier Nuche, director general de Atresmedia Diversificación

The international business of **Atresmedia** has grown heavily in the last years: mainly because of the global success of *La Casa de Papel*, but also because of its four 24-hours networks that reach almost 60 million people abroad. **Mercedes Gamero**, head of sales & acquisitions: '*La Casa de Papel*, worldwide distributed through **Netflix**, was the most watched non-English TV series in that platform, and winner of the International Emmy Award as "Best Drama" in 2018.'

'Our dramas are sold in more than 112 countries with series such as *Vis a Vis (Locked up)*, *Velvet* or *Gran Hotel* with international remake adaptations in Italy, USA (**ABC** just premiered the show last month in June), Middle East and Mexico. Daily series such as *El Secreto de Puente Viejo* is currently on the air in Spain with more than 2.000 episodes is sold to more than 50 countries, including successful events in Italy.'

In Cannes it launches *Toy Boy*, a thriller of luxury, power and eroticism: a hot stripper wakes up in the middle of the ocean with the beheaded body of her lover's husband on deck after attending a wild party in which he loses conscience; and also the series *La valla*, *El Nudo* and *Perdida*.

**Gamero**: 'Our goal is to make **Atresmedia Series** brand and local content available for a global audience, either through the new OTT platforms or through traditional operators. We are looking into emerging markets such as Asia and Middle East. The global phenomenon of *La Casa de Papel* together with the Magnolia Award in the 2019 Shanghai TV Festival to *Presunto Culpable (Presumed Guilty)* shall make us more attractive to a new audience.'

**Atresmedia Internacional** distributes **Antena 3 Internacional**, **Atreseries**, **Atrescine** y **¡HOLA! TV**, apart from the group OTT, **Atresplayer**. 'We are the private European operator with more channels and homes outside our frontiers with more than 58 millions subscribers worldwide', highlights **Javier Nuche**, director general de **Atresmedia Diversificación**.

'We multiplied the home passed x4 in less than five years and we keep expanding, especially with **Atreseries** and **Atrescine** thanks to our content partners such as **TV Globo** with +500

*Toy Boy*, thriller that mixes luxury, power and eroticism

hours of dramas, and **Video Mercury** with 7,000 movies, respectively. We have presence in more than 30 countries, being the most recent agreements **DirecTV** and **Verizon**. We've also announced a deal with **AMC Network International** for a new European package and another one with MEO in Portugal', concludes **Nuche**.

## Mediterráneo: all in one place

**Mediterráneo** is a new brand from **Mediaset España** that gathers three key international business of the biggest Spanish media group: production, distribution and international network **CincoMAS**. 'Our main objectives are to optimize costs, to increase the incomes by selling key properties inside and outside Spain, and to reinforce the global presence of our eight production companies, and third party formats and contents', explains **Ana Bustamante**, general director.

'In the last 30 years, we have created very special relations with our clients and we have the best options of the Spanish markets. We are also focusing in co-creating new content through coproduction partnerships. We distribute fresh and varied content with presence in 190 territories: on 1H 2019 we've met the net turnovers of all 2018, while **CincoMAS** has gained new territories in the Americas', she adds.

Top selling titles are *Caronte* and *Vivir sin permiso* available on **Amazon** and **Netflix**, respectively, as well as *La Verdad* and *Sé quién eres* that have been sold in more than 100 countries. 'On the second semester we keep pushing *Señoras del (h)ampa*, recently premiered on **Telecinco**. Second part of S1 has not been premiered yet, but we already confirmed S2', remarks **Bustamante**, who also recommends *Madres* (13 eps.), new production from **Alea Media** about daily situations of a maternity hospital narrated through the patients, families and doctors, and *El Pueblo*, from **Contubernio**, with two seasons of 8 episodes each: it is a humor series about a group of people who come to the call of an ad in which a house and a new life away from the worldly noise are promised.

On factual, the docu-series *Monica y el Sexo* (8 eps.) starred by Spanish singer **Mónica Naranjo**, and *MZUNGU, operación Congo* (6 eps.), a docu-factual with the journalist **José Antonio Ruiz**. 'Last year we sold content to **BBC (UK)** and **SBS (Australia)** and most recently, we have closed our first deals for *Señoras del (h)ampa* in Germany and Belgium'.

'**CincoMAS** keeps expanding through different operators in Central America (Nicaragua, Honduras and El Salvador). Our leadership in Spain allowed us to be a reference in the Hispanic market. We bring the best live content, big international formats, successful Spanish series and news in real time plus interview and investigation programs', concludes **Bustamante**.



Ana Bustamante, general director, Mediterraneo



From Alea Media arrives to Cannes *Madres*, about daily situations of a maternity hospital narrated through the patients, families and doctors

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## RTVE, pioneer and leader



Rodolfo Domínguez, commercial director, María Jesús Pérez, international sales director, and Rafael Bardem head of programs and licensing sales

Rodolfo Domínguez, commercial director, and María Jesús Pérez, international sales director, explain the moment of the international division of the Spanish *pubcaster*, a pioneer player in expanding the Spanish brand worldwide.

'We are seeing a growing interest in the content we offer. Storytelling and quality of our productions are on a par with the best, and our fiction series have succeeded in adapting to the tastes and demands of an increasingly more exacting global audience. We closed deals at all levels and different platforms', they say.

'Programmers who have never before been interested in Spanish content are discovering our programs. Traditional market for our productions has always been

the Americas, with an increasingly stronger presence in the Spanish-speaking US, where our series are meeting with a great deal of success', add Domínguez and Pérez.

Apart from its long running dramas *Cuentame como paso* or *Amar en Tiempos Revueltos*, RTVE is promoting **Plano a Plano's** *Servir y Proteger* and **Globomedia's** *Malaka*,

while sees growing interest in factual and documentaries: 'Outside the Americas, Mediterranean countries, CEE and the Middle East are the regions with the most sales, crowned by audience successes among RTVE series and documentaries', complete the executives.

The company is also promoting its international networks **TVE Internacional**, reaching 100 homes and 450 potential spectators in 200 countries; news channel **24hs**; **Star HD**, reaching 1 million subscribers in the Americas, Europe and Africa; and **Clan Internacional**, a leading kids brand in Spain now available outside the country. Launched in 2017, it offers 80% of its programming of Spanish animation and it is available in Colombia, Argentina, Mexico, Panama and

Costa Rica, etc.

Coproduction has been another key area in charge of **Rafael Bardem**, head of programs and licensing sales: 'Our strategy is a risk/benefits sharing with complementary partners. Linear broadcasters have to assume it for certain kind of productions. They might think in the real commercial time-life of the programs they order for each window.'

'Sharing risks means to establish a clear windows of exploitation and to adapt our other partner interests. **RTVE** has three groups of potential partnerships: 1) Free TV from the Americas and Europe (Italy, Portugal, France and Germany); 2) VODs: just for Spain or worldwide; 3) worldwide distribution companies', he comments.

**Bardem** concludes: 'Some broadcasters have founded production companies or studios. All of them state the same argument: "We are independent and we can produce without the interest of our TV station". That's not our procedure: the first step of our coproduction projects is to clarify the interest of our possible internal user (linear or digital staffs).'



Plano a Plano's *Servir y Proteger* is one of the strongest drama series from RTVE at MIPCOM



Animated series *Turu's Musical Farm* debuts at MIPCOM

goers is increasing. We are centered on the production and distribution of high-quality films like *Truman* and *The Motive*.

'The TV team is developing series in various genres. Furthermore, it has added a new, high-quality animated series for MIPCOM: *Turu's Musical Farm*, inspired by the animated feature *Turu: The Wacky Hen*, which will have its cinematic release this Christmas in both Spain and Argentina and a bunch of other international territories', he concludes.

BOOTH #R7.N1

## The Mediapro Studio: international coproductions



Beatriz Setuain, Co-Productions and Financing

The Mediapro Studio distribution arm with more than 15 years of experience in the audiovisual industry, distributes +300 programs or 14,000 hours to key TV channels and SVOD platforms all over the world.

The Top 3 shows sold worldwide are *Locked Up*, coproduction between **Globomedia** and **Atresmedia** available in 194 territories, *Estoy Vivo*, sold in Latin America, Europe and Asia, and *Side Games* with **DirecTV**: with its second season in production, S1 of the

series showing the darkest secrets of soccer aired on **Spectrum** (USA), **Movistar+** and **Sky México** and it was sold to **TLT** (Venezuela), **Tanweer** (Greece), **Global Content** and **Pickbox** (former Yugoslavia).

Other top recent dramas are *Victim N°8*, from **Globomedia** with **EITB** and **Telemadrid**, available worldwide through **Netflix**, *Lifeline*, also coproduced with **Atresmedia** sold in 43 territories, including Latin America and MENA. '*Locked Up*, *Day and Nights* y *Lifeline* have strengthen our alliance with **Global Series** through a new agreement for Belgium', explains **Beatriz Setuain**, Co-Productions and Financing.

She adds. 'Our catalogue includes not only drama, but entertainment programs, feature films, documentaries, factual, and TV films from all genres. That makes us able to fulfill all our client's needs not focusing ourselves in any particular territory. We are pushing new productions and coproductions at MIPCOM, such as *The Head*, in association with **Hulu Japan** and **HBO Asia**'.

Directed by **Jorge Dorado** is the first se-

ries by **Alex** and **David Pastor** starred by John Lynch, Alexandre Willaume, Katharine O'Donnelly, Laura Bach, Amelia Hoy, Japanese star Tomohisa Yamashita and **Álvaro Morte** (*Money Heist*). Its a thriller exploring the darkest sides of our personalities that confinement and isolation bring to light.

Other international co-production is with Finnish broadcaster **YLE**, *The Paradise*. An ambitious thriller taking place between Finland and Spanish's Costa del Sol, with **Fran Perea** and **Riitta Havukainen** leading the cast. Last but not least, *The Dinner Of A Lifetime*, TV program for **Amazon Prime** in which the three Michelin star's **Chef Quique Dacosta** invites six celebrities to taste their own memories.



*The Head*, in association with Hulu Japan and HBO Asia

BOOTH #R7.J11

## Filmax evolves and diversifies



Ivan Diaz, head of international division

a specialist in genre cinema with *The Machinist* (**Christian Bale**) and *Darkness* (**Ana Paquin**).

Its TV department was founded around eight years ago. Since then it offered many

Based in Barcelona, **Filmax** initiated around 65 years ago as a film distributor in Spain. By the end of 1990 it started producing feature films and selling them internationally, becoming

series, including the big international hit *The Red Band Society*, one of the most internationally acclaimed Spanish TV series. It enjoyed adaptations in top markets, as well as racking up an impressive amount of sales and awards.

The same team, led by **Pau Freixas**, created the thriller *I Know Who You Are* for **Mediaset**, as well as *Dates* and *Welcome To The Family*, a very special, family-oriented series for **TV3**.

**Filmax** is considered a key player for the Spanish fiction global expansion in both, movies and TV series, as well as third-party productions. **Ivan Diaz**, head of international division: 'We have decreased our production of genre cinema, responding to the changes in the industry and especially the Spanish market, where the average age of cinema-

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AUDIOVISUAL FROM SPAIN

## Comercial TV: cooperation



Santiago Gimeno, CEO, and Emanuela Bosco, sales executive

Madrid-based **Comercial TV** is an independent Spanish distributor with operations both in the capital city and Barcelona. **Santiago Gimeno**, CEO, has diversified its business offering the global market not only Spanish or European content but also Portuguese and Latin telenovelas, series, factual and European cinema, among others. It is also a key global content distributor for Spanish customers.

'Our core business today is in Spain, Latin America/US Hispanic and Africa but we are always looking for new horizons, following closely the evolution of the markets and the position of our customers in such markets. Latin telenovelas are being re-evaluated in Europe because production is more and more homogeneous, while economic crisis in Africa forces the channels to rethink its acquisition or its own existence'

**Comercial TV** is offering **RCTV's** *Frenemy* and *Betrayed Heart*, while from Europe it manages **Autentic** (Germany) for Spain and Latin America/US Hispanic and **TVI** (Portugal), from which is promoting *A Teia*, optioned in Greece. **Gimeno**: 'Our partners are **Cristobal Ponte** for Africa and **Daniel Rodriguez** for Latin America. As independents we must learn to work together. Cooperation is the key word and with such partners we have the best sales teams for our territories.'

Company's plan includes starting to produce in the short term: 'We are creating a production team in Madrid to start our first original. We are planning to develop local and international projects, following the great moment of Spanish drama. The sector is going through big changes because there has been a paradigm shift: with the platform arrival "local" has become "global".'

'We need to transform into business agents and good co-producers. We are the ideal partner and our international distribution gives us access to the market and we can fully understand what each player needs. The industry is going through a moment of "emotional intelligence" so we must look for allies: investors and talent, and Spain is a great place for this new context', comments **Gimeno**.

'We have always had a great fiction product but now our dramas travel much better and the world has become smaller. We need to think big: global projects, talents and production services adjusted and supported by fiscal tools (Navarra, Canary Islands, Basque Country). The future is already here and managing it is, in my opinion, an exciting opportunity', concludes the executive.



*Frenemy* and *Betrayed Heart*, from Venezuelan RCTV Producciones with distribution rights to EMEA and Asia

## Mondo TV Iberoamerica, business evolution

Part of **Mondo TV Group** (Italy), Madrid-based **Mondo TV Iberoamerica** started as distribution arm and had enjoyed quite a lot of success. However, following the market trends, it has extended into production and co-production business, building strong and strategic long-term relationships with some of the top players such as **RTVE**, its partner for the animated series *Bat Pat 2*.

**Maria Bonaria Fois**, GM: 'Our **Mondo TV Producciones Canarias** is part of the **Tenerife Film Commission**, and offers is now working on Mondo TV's top series *MeteoHeroes* (52x7), co-produced with **Meteo Expert Centre** about issues like climate change, ecology and respect for nature, but in an action-packed, thrilling adventure format that will totally engage its young audience.'

On the fiction side, it is co-developing adult series *2050*, in negotiations in many territories: this sci-fi drama is coproduced with **VIP2000 TV** (USA) and **Casablanca** (Brazil), based in a post-apocalyptic world where the rules are imposed by the microchip *Limbus*, and only through the banned classics of literature can people see hope for a better world.

'We are also working with a top talent agency in Los Angeles for the American market. Our aim for the future is to develop key fiction projects', completes **Bonaria Fois**. And she adds: 'As an international distributor, we aim to strengthen our position by growing our distribution of the Mondo TV catalogue and of third-party properties. As a producer, our goals are to appeal to a world audience and to specialize in creating highly marketable and *brandable* content featuring top talent, working with international creative partners.'

'We are witnessing a huge wave of original productions worldwide, and now seems crucial moment for the Spanish-speaking markets. We aim to grow **Mondo TV Iberoamerica** as a media content company targeting viewers of all ages', concludes the executive.



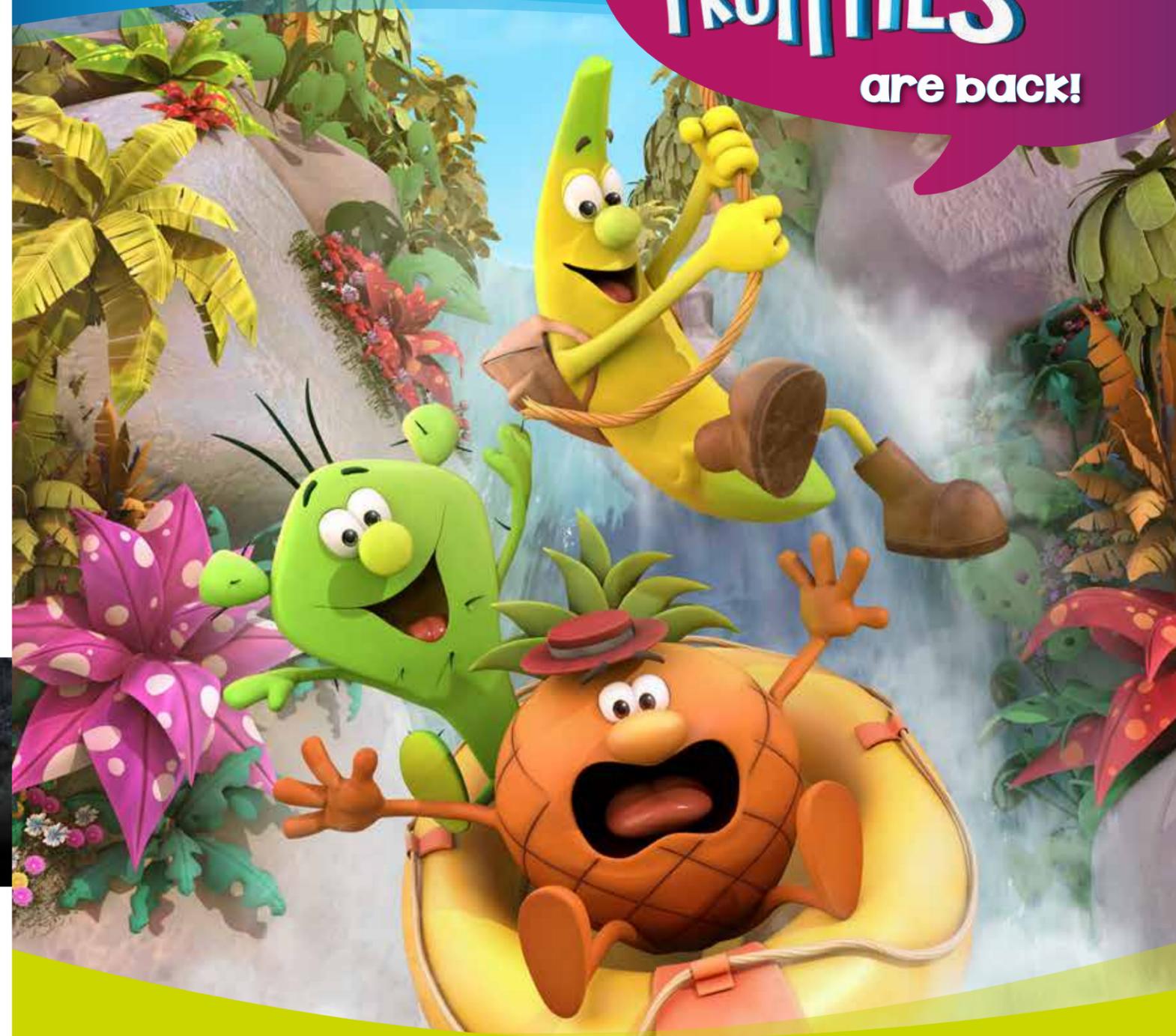
Maria Bonaria Fois, GM



2050, sci-fi fiction series coproduced with VIP2000TV and Casablanca

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# Spain, a key destination for global productions



Spain is one of the European countries with better balance between quality of and costs for production. This, combined with the great State and private support to the audiovisual industry, plus an exclusive and diverse number of cities and locations all across the country, that made Spain one of the top destinations for content production worldwide.

The **Institute of Cinematography and Audiovisual Arts (ICAA)** is an independent body ascribed to the Ministry of Culture and Sport, which programs policies to support the film industry and audiovisual production. It is responsible for films and the world of audiovisuals in Spain, their management, functioning, awards, legislation, agreements, grants and subsidies, etc.

**ICAA** encourages, promotes and assembles Spain's cinematographic and audiovisual activities in its three facets: production, distribution and viewing, while it boosts creativity, increases production and favours the distribution of Spanish productions worldwide.

On the other hand, appears the **Spain Film Commission (SFC)**, a not-for-profit association constituted by a network of 32 film commissions and film offices across the whole country. It is a founding member of the **European Film Commission Network (EUFEN)** and works with audiovisual, commercial and tourist companies in Spain. It provides support for all types of audiovisual shoots in our territory, in collaboration with our network of film offices, and also advice concerning finance, locations, administrative procedures and all types of services.

Last May in Valladolid, the **Ministry of Tourism** along with **ICAA** and **SFC** signed a protocol of intentions to collaborate on film tourism. The Councilor for Culture and Tourism of the City of Valladolid and VP of Valladolid Film Office, **Ana Redondo**, was the host and

introduced **Isabel Oliver**, Secretary of State for Tourism, **Jaime Alejandro**, deputy director of Promotion and International Relations of the **ICAA**, and **Carlos Rosado**, president of the SFC.

Among the highlights contemplated in the protocol are the creation of a catalog of good practices and the preparation of a report to study the cinematographic tourism phenomenon in our geographical area of influence. Both initiatives are already underway and will be announced throughout this year. In addition, the creation of a web page, the implementation of an **Observatory of Cinematographic Tourism** in Spain and the development of an international promotion plan are planned.

## WHY SPAIN?

The SFC highlights several reasons to invite foreign producers and investor to produce in this European country that 'boasts unique locations, wonderful Mediterranean light and warm and friendly people, all of which is



The members of the Spain Film Commission network during the most recent General Meeting at Salon Real de Casa de la Panadería in Madrid

complemented by a well-established audiovisual industry', emphasizes on its website.

First, **tax incentives**: Spain offers tax incentives for international shoots in the form of a tax rebate of up to 20%, except for in the Canary Islands where it is 40%. Navarre offers 35% via tax credit. Production service companies based in Spain are essential when it comes to applying for these tax incentives and benefits, as well as for other production assistance and Inland Revenue enquiries.

In order to obtain these incentives, the company must spend a minimum of €1 million in the country, employ a percentage of local staff, and the incentives plus grants can never be higher than the equivalent of 50% of the production costs. There are also incentives available to national shoots and co-productions.

Second, **locations**: +8,000 km of coastline, 3,000 beaches, nature parks, tropical areas; mountains, deserts, forests, sand dunes, rivers; unique historical and architectural heritage in exceptional conditions. Third, **professionals and production services**: multicultural, technical and artistic professionals with solid training and experience in national and international shoots. Fourth, **infrastructures and cutting edge services**: technical and artistic production teams access to an extensive platform of hotels and Spain's huge network of food, drink and leisure establishments; rent a car, catering, contract, insurances.

Fifth **connectivity**: extensive road network,

railway and air traffic routes at very competitive prices; a well-established tourism industry, telecommunications (4G and 5G). Sixth, **climate**: 3,000 hours of sunshine a year, which on the Mediterranean coast and in the islands, equates to 200-220 days of brilliant light conditions for audiovisual shoots. Seventh, **security** and eighth, **lifestyle**: the country is multicultural and diverse, and a welcoming host.

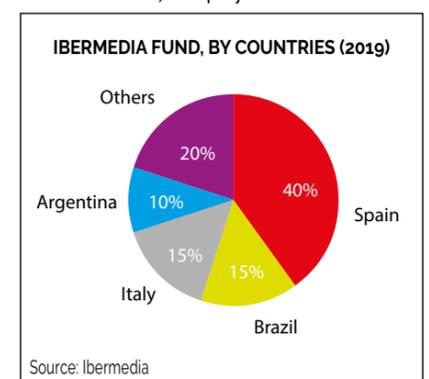
## IBERMEDIA PROGRAM

Back in 1996 at an Ibero-American Summit of Heads of State and Government held on Margarita Island, Venezuela, it was approved the **Ibermedia Program**, whose launch was finally completed in 1998. The actual president of the program is **Beatriz Navas**, also the director of Spanish **ICAA**.

It is formed by 23 entities that promote the Ibero-America cinema, stimulating with public funds the coproduction of fiction films and documentaries made in Argentina, Bolivia, Brazil, Colombia, Costa Rica, Cuba, Chile, Ecuador, El Salvador, Spain, Guatemala, Honduras, Italy, Mexico, Nicaragua, Panama, Paraguay, Peru, Portugal, Puerto Rico, Dominican Republic, Uruguay and Venezuela.

Since 1998, Ibermedia's 27 calls disbursed USD 107 millions for the Latin American cinema during the last two decades (USD 5 millions a year, on average): more than 650 co-productions and 2,700 training grants.

More than 1,975 projects were benefited



with +600 films released and indirect help for 1,200 companies and more than 6,000 professionals in production and business management. The productions were available at **Ibermedia TV**, a network of 19 public TV channels that offer 52 movies a year with 416 already scheduled.

'Our mission is to work for the creation of a regional space through financial aid and through calls that are open to all independent film producers in the member countries from Latin America plus Spain, Portugal and Italy', explains to Prensario **Elena Vilardell**, executive and technical secretary.

Along with **Victor Sanchez**, the executive attended Conecta Fiction (Pamplona) last June to announce the creation of a new program focused in the promotion of TV series, which will be approved by the end of the year and will call for projects since February 2020.

'Following the expansion towards the series, we are opening a new call for TV and digital platforms, which was very well received by the production community in Pamplona. We are also exploring the possibility to expand to animation, but we are in an embryonic phase, still', they add.

The funds for TV and animation will come from the same resources the Program already has, and the total amount destined to them will be similar to what is now invested in development, more than 10%, it was informed. 'Diversity, transparency and traceability are our main objectives: 100% of the winning projects have become movies', conclude **Vilardell** and **Sanchez**.

## PROFILM

**Profilm** represents 90% of the production companies that develop international audiovisual projects in Spain. The current members are **Nostromo Pictures**, **Sur-Film**, **Calle Cruzada**, **Meñakoz Films**, **Fresco Film**, **Volcano Films**, **Babioka Films** and **Palma Pictures** and



Elena Vilardell, executive and technical secretary, and Victor Sanchez, from Ibermedia met at Conecta Fiction in Pamplona with some 30 audiovisual producers and explained to them the new program to promote TV productions, which will call for new projects since February 2020

they invested more than €120 million a year, providing employment to thousands of professionals in this sector.

'The vast majority of foreign productions of series and films shot in Spain, choose producers who are members of our organization because our experience and professionalism', begins **Adrian Guerra**, president of **Profilm**.

'We promote the landscape, and the artistic, cultural and patrimonial wealth that Spain offers to international audiovisual productions. We carry out information campaigns about the economic, social and artistic opportunities that filming brings to the local area, and we work to bring Spanish tax incentives in to line with other European countries to attract more foreign productions of audiovisual works.'

'During 2018 the investment in foreign shooting for cinema and series grew to €123 millions in our country, which hosted 32 productions in total', completes Guerra.

Some of them where *Game of Thrones*, shot in Parque Natural de las Bardenas Reales in Navarra, the third season of English drama *The Crown*, *Terminator 6*, shot in Castilla La Mancha, the French-American *The Sisters Brothers*, *Wonder Woman*, the coproduction *Paradise Hill* or the next British premier of *The Rhythm Section* starred by **Jude Law**, among many others.



SPAIN: TAX REBATES AND TAX CREDIT FOR FOREIGN FILMS AND TV SERIES (2019)			
	Percentage deduction	Deduction basis	Requirements & Service*
National Level	20%		<ul style="list-style-type: none"> <li>The money spent in Spanish territory must be at least 1 million euros.</li> <li>May not exceed 3 million euros per production carried out</li> <li>The amount of this deduction, together with the other aid received by taxpayers, may not exceed 50% of the cost of the production.</li> </ul>
	40% Canary Islands	<ul style="list-style-type: none"> <li>Expenses for creative staff (tax residence in Spain or in another European Union Member State) limited to 450,000 per person.</li> </ul>	<ul style="list-style-type: none"> <li>The money spent in Spanish territory must be at least 1 million euros.</li> <li>The amount deducted may not be greater than 5.4 million euros for costs incurred in the Canary Islands.</li> <li>Products (or Services) with tax domicile in the Canary Islands.</li> <li>The amount of this deduction, together with the other aid received by taxpayers, may not exceed 50% of the cost of the production.</li> </ul>
Regional Level	35% Navarre (Tax Credit)	<ul style="list-style-type: none"> <li>Expenses relating to technical industries and other suppliers.</li> </ul>	<ul style="list-style-type: none"> <li>A minimum of at least one week's filming in Navarre.</li> <li>Application of deduction without quota limit.</li> <li>Application deadline of not more than 15 years.</li> <li>The case of a service company with fiscal residence in the region of Navarre, delivering services international productions.</li> <li>The amount of this deduction, together with the other aid received by taxpayers, may not exceed 50% of the cost of the production.</li> </ul>

Source: Spain Film Commission/ICAA

THE SETTING OF A THRILLING CHASE OR THE SEQUENCE OF THE FINAL KISS

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## Madrid, a rising international production hub



The region of Madrid is becoming a global production hub. On April 2019, **Netflix** opened its first European Production Hub in Tres Cantos, a fundamental piece on the growing slate of Spanish-language content produced for the platform. Almost at the same time, **Viacom International Studios** announced a new production hub set in Madrid, and **Dynamo**, Colombia's biggest producer, is enlarging theirs.

They are joined by other international platforms that have invested in the production or acquisition of Spanish content, as **HBO** and **Amazon**. International platforms are not only increasing their commitment to production but also asking for more recognizable and eye-catching locations of the city, as evident in the new seasons of Netflix series *La Casa de Papel* (**Vancouver Media**) and *Elite* (**Zeta Producciones**).



Shooting of the Hong Kong movie *Line Walker 2* at Plaza de Oriente, and *Way Down* at Plaza de Cibeles (credit: Madrid Film Office)



Shooting of Movistar+ series *La Unidad* at Puerta del Sol, and NBCUniversal Telemundo series *No te puedes esconder* at Gran Vía (credit: Madrid Film Office)

Spanish companies are also expanding. **Mediapro** has set in Madrid a new production company, **The Mediapro Studio**, announcing the production of 34 series in Spanish and English with a global reach. **Movistar+**, the biggest pay TV-SVOD service in Spain, with headquarters set in the region, is planning to increase original drama production to 15 series per year. And major players like **Atresmedia** and **Mediaset España** are also in the process of positioning themselves as global content producers.

Taking into account only the productions set in the streets of the city of Madrid, 32 films and 46 series were shot in 2018, and just in the first semester of 2019 there have been 22 films and 44 different series shot on locations within the City. If we add the productions set in other towns nearby and those shot in some of the multiple existing studios of the region the number rises.

These productions include international blockbusters as **Tim Miller's** *Terminator: Dark Fate* (**Skydance Media** and **Paramount Pictures**), **Reed Morano's** *The Rhythm Section* (**Eon Productions**), Hong Kong action film *Line Walker 2* (**Shaw Brothers**) and **Jaume Ballagueró's** action thriller *Way Down* (**Telecinco Cinema**), or the new title from Spanish most international director, **Pedro Almodóvar's** *Dolor y Gloria* (**El Deseo**).

## Castilla-La Mancha, emerging audiovisual destiny



Patricia Franco, Minister of Economy, Business and Employment of Castilla-La Mancha, the general director of Tourism and Commerce, Ana Isabel Fernández Samper, and the head of Castilla-La Mancha Film Commission, Mike Villanueva visited the HBO office



Spain offers unique locations and very favorable tax conditions in many of its regions. Castilla-La Mancha, two hours from Madrid, is a good case attracting significant investments from international producers. **Mike Villanueva**, film commissioner:

'We depend on the Ministry of Economy of the local government. Audiovisual is a strategic sector with a high impact in our economy. We continue to improve the conditions to continue attracting investments.'

The local media ecosystem revolves around **Radiotelevisión de Castilla-La Mancha** (RTVCM), for which some 14 audiovisual companies work between producers and content generators, and service companies. 'The business generated around the industry is small, but it encourages original production, especially in entertainment, documentaries and reports, although there are plans to add fiction in the short term', Villanueva added.

About the Film Commission he led, the executive adds: 'We are a one stop shop, we offer and negotiate specific locations and permits. We host mainly Spanish cinema, but also Hollywood giants such as *Terminator 6* or *30 Coins*, a new production from **HBO Spain** with **Alex de la Iglesia**. Now there are six Netflix projects underway.'

Advantages of Castilla-La Mancha? 'The distance from Madrid is short, and the cost is significantly less. It is much more easier to cut a road here than in the capital city. We are more agile in the processing of permits, which is another important point. We see an area of opportunity and have taken advantage of it. We attend film markets, but from next year we will add some television to promote both sectors', concludes Villanueva.



## Navarra: strong participation at MIPCOM



Arturo Cisneros, manager, Audiovisual Cluster of Navarra - CLAVNA



Joaquin Calderon, General Manager, Estudios Meliton



Navarra is an autonomous region located in the north of the Iberian Peninsula, and one of the most active in the current Spanish audiovisual scenario. With the arrival of **Conecta Fiction** to its capital Pamplona-Iruña earlier this year, it seeks to show itself to the world, increase the arrival of investments and strongly promote its fiscal aid towards the industry. Thanks to its diversity, it is also a large set of 10,000 square kilometers for the audiovisual industry.

It is one of the three main Spanish regions offering attractive benefits for the sector since the fiscal reform of December 2014: it offers two flavours of tax credit of 35% for national and international productions. Deductions for investments in film productions are regulated in article 65 of the Foral Law 26/2016, of December 28, regulating the Corporate Tax, thanks to the fiscal and tax autonomy of the region.

**Arturo Cisneros** is the Manager of the **Navarra Audiovisual Cluster** (CLAVNA), which gathers 21 Associations, Companies and Public Entities with a global turnover of €35 million and approximately 400 jobs: 'The sectors considered strategic within the 2030 *Smart*

*Specialization Strategy (S3)* of Navarra have an important boost from the Government's Economic Policy Area. The possibility of developing special actions in the field of internationalization allowed us to increase the exposure of Navarra bringing home an international market like Conecta Fiction.'

TV series does not 'weigh much' on the production mix of Navarra today, 'so we can expand a lot', highlights **Cisneros**.

'Together with the **Association of Audiovisual Producers of Navarra** (NAPAR), with 28 companies, **CLAVNA** supports the expansion of the sector that has a long tradition in documentaries and has exported a lot of talent, screenwriters, directors and professionals', he concludes.

Key players of Navarra are attending MIPCOM. First, **Estudios Meliton**, the only film studio in Navarra for cinema, TV and commercials, strategically located in Lekaroz and close to Pamplona (53km), San Sebastian (62km) and Biarritz-France (53km). **Joaquin Calderon**, GM: 'We operate two studios built specifically as film studios, so we have all the facilities a production needs. One of 100m2 and another of 700m2 and 12mts height. We also have meeting spaces, DIT room, dressing rooms, make up room, production offices, etc. We offer accommodation and catering services in the same Business Campus, which means significant savings in transport, time and money of audiovisual productions.'

Also, the international dubbing and subtitling house **DVR Studio**. 'We are a team of professional actors, announcers and sound technicians who have worked on numer-

ous productions. We maintain a competitive edge, working within our client's budgets in these times of crisis', explains **Angel Zuasti**, GM of **DVR Studio**, which has studios in six countries: Spain, Portugal, Argentina, Russia, French and Italy and teams of nine different languages.

Last but not least, **July 7th Productions**, from the same owners of **DVR Studios**: 'The Running of the Bulls or Fiesta de San Fermin is one of the most extreme experiences of the world, and we produced and broadcast from Pamplona to the world', it was explained from the company.

**EncierroFilms** serves as a consultant for announcements related to the running of the bulls in Pamplona. Fiesta de San Fermin has become a celebration of major international impact bringing together more than 2,000 daily runners (up to 3,500 on weekends) within Pamplona's cobblestone streets, and gets a television and Internet audience of over 200 million people. 'Established in 2010, we collaborate with **NBC**, **Squire TV**, **Associated Press**, **Reuters**, **CNN**, **Al Jazeera**, **Canal Plus** and locally, **La Sexta**, **Antena 3**, **Telecinco** and **El País**, while we have a large roster of different channels in USA, Canada, Germany, Italy, France, Portugal, Mexico, Middle East, Japan, Eastern Countries and China', they complete.



## Eiken Cluster boosts Basque Country

The Basque Country is another key Spanish region stimulating its audiovisual industry to the world. One of the most important organizations doing that is **Eiken Cluster**, a non-profit, sectorial business association created 12 years ago that gathers +125 members, from pubcaster **EITB** to producers as **The Blackout Project**, advertising associations, tech companies, universities, public entities, foundations, among many others.

'Our organization serves as an umbrella of the whole sector, and we invoiced €686

millions a year while we generate employment for 5,282 people', explains **Aletxu Echevarria**, president of cluster, which has the supported of the Basque Government's Department of Economic Development and Competitiveness, and is part of the policy of the Basque Autonomous Community clusters.

'Creative Industries are radically changing. The increasing new technology's digitalization, the productive and distribution process modification, the new consumption habits, etc., are having significant impact in the in-



Aletxu Echevarria, president, Eiken Cluster

dustry, redefining the areas where the different sectors configure themselves', completes **Echevarria**.

## Galicia: well-established and competitive



Jorge Algora, president of the CLAG



Galicia is one of the most important regions for generating audiovisual content in Spain. Thanks to its landscape, skills of its companies and professionals, plus the support of the Xunta de Galicia through its **Agency for Cultural Industries**, and the **Galician Audiovisual Cluster (CLAG)**, it has been chosen as a location for many successful local and international productions and coproductions.

The region has a well-established and competitive industry with more than 700 TV and film companies with annual turnovers of +€400 million, generating +4,500 direct jobs. The sector has state-of-the-art technical resources, facilities and specialists in subtitling and drone piloting. Galician companies work with top international players like **Sony**, **Beta Films**, **Mediaset** and **Warner**, as well as **Movistar+**, **Netflix** and **Amazon**.

**CLAG** consists of more than 40 companies and organizations, including the most active players, representing 40% of jobs and about 60% of turnover. 'With their different activities and business lines, our companies represent the entire value chain of audiovisual production', explains **Jorge Algora**, president.

On the production side, **Aba**, **Adivina**, **Agallas**, **Bambú**, **Centroña**, **Congo**, **CTV**, **Ficción**, **Filmax**, **Frida**, **Gaitafilmes**, **Laesponja**, **Matriuska**, **Melgo Cinema**, **Milana Bonita**, **Mondotropo**, **Portocabo**, **60 ráfagas**, **Setemedia**, **Producciones Vigo**, **Productora Faro**, **Tamboura Films**, **Voz Audiovisual**, **Xamalú Filmes** and **Zenit Televisión**. And the broadcasters **CRTVG** and **R Cable**.

On services, **Aeromedía**, **Área 5.1 Factoría Audiovisual**, **CINFO**, **Filamento Iluminación**, **La Panificadora**, **Mundos Digitales Transmedia**, **Pequerrecho Subtitulación**, **Streaming Galicia** and **Studio XXI**; training: **Centro de Estudios Marcote**, **EGACI** and **Servizo de Audiovisuais da Deputación de Lugo**; and innovation centers and other entities such as **ITG**, **CESGA** and **Fundación Averhó**.

**Algora** concludes: 'We promote synergies between the companies, the development of new businesses and the promotion of innovation. We aim to boost the development of our members. One of the cornerstones is internationalization, with plans aimed at expanding into new markets and consolidating the image of Galicia as a land of creative talent and cutting-edge technology.'



## Canary: a land of opportunities

Canary Islands have gained a place as a leading destination for film shooting by offering a highly attractive tax incentive scheme that is well above the ones that apply in the rest of Spain.

It allows deductions of up to 45% to the first million invested (and 40% for the rest) to national productions or co-productions; and up to 40% to international ones. Due to its ultra peripheral status, the Islands enjoy an own special Economic and Fiscal Regime (REF) that guarantees the diversification and empowerment of its economy and advantages for key sectors.

Thanks it, the specific incentives on film production in the Corporate Income Tax Law, are increased by 20% and the limit is 80% higher than in the rest of Spain, in general. Regarding animation, the Government released a modification introducing two improvements in the text applying the tax incentive for foreign productions in the Canary.

The deduction of the incentive for international productions, 40% tax rebate, is now capped at €5,4 million (it was €4,5 until now). For post-production and animation, the minimum expenditure in order to apply the tax rebate is 200.000€, and for all the rest (films, series, documentary, drama), it continues being a €1 million minimum expenditure (from a €2 million minimum total budget of the project).

Other reasons are its mild climate and landscapes; hotel infrastructure and excellent air and sea connections; security and health system; state of the art technology; local talent and ad hoc training programs. Since 2015, several producers have settled down in the territory as a Canary Island Special Zone (ZEC) company, enjoying the benefits to pay a reduced tax rate of 4% on the profits in the Corporate Income Tax, while they were also able to repatriate their dividends back to your mother company with no withholding tax on it.

From 6 producers established in 2015 to 26 in 2018, including Italian **Mondo TV**, Barcelona-based **Tomavision Studio**, Spanish/Mexican **Ánima**, and Germany's **B-Water**; two created here: **People Moving Pixels** (Stafan Fjieldmark and Linni Rita Gad) and **3Doubles**; France's **Birdland** (a branch from **Amuse**) and Austria's **Arx Anima**, as well as **Per-runcho** and **La Casa Animada**.

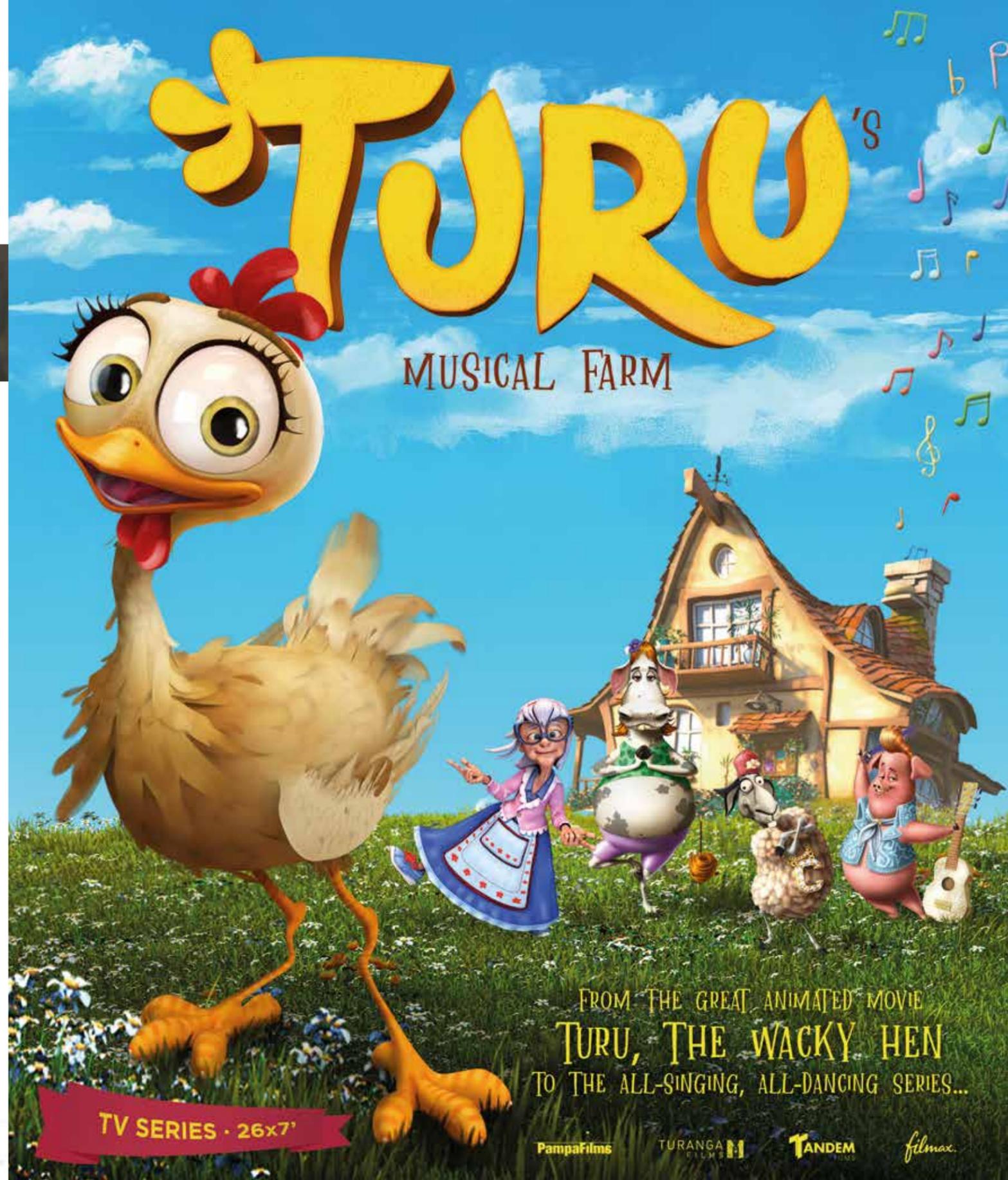
'The top priority is to strengthen the business ecosystem, to create a whole-circle industry with solid companies ranging from original content to animation services, permanent training programs, and an improved tax system', explains **Natacha Mora**, coordinator of **Canary Island Film**.



Natacha Mora, coordinator of Canary Island Film



Portocabo, Atlantique, Arte France's *Hierro* was shot in Canary Island for Movistar+, which recently premiered Season 2



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## Sociograph: understanding audiences



Elena Martin Guerra, co-founder and COO, Sociograph

**Sociograph**, a marketing science consulting firm, combines neuroethologies like facial coding, skin measurement sensors, eye-tracking, as well as traditional methods such as questionnaire or focus group to delve into the understanding of the audiences and the content itself.



standing of the audiences and the content itself.

**Elena Martin Guerra**, co-founder and COO, explains: 'Understanding our consumers is now more important than ever, as the new generations come to play a more important role in the media sector. They are more aware now than ever of what they want and how they want it. And thanks to marketing science, how effective a new project can be, it is now possible.'

Being surrounded by a wide range of possibilities forces the TV and Film industry to make an effort to grab people's attention; thus they need making an impact to remain attractive to their audiences and successfully reach new viewers.

'Thanks to the marketing science, projects can consciously and non-consciously (unaware reactions) be assessed to determine how effective they are as well as identifying which plots attract audiences and those which are rejected, which characters emotionally connect better with them or those which do not move them', adds **Martin Guerra**.

Further, on this matter, **Sociograph** offers an advantage to the market, as it holds the patent of a unique and non-intrusive technology called as the company (Sociograph®). This technology processes data objectively. It understands the group as a whole, not as an average. In other words, individual reactions are deleted and such data can more accurately determine how effective a new project is. And it also allows driving studies in real environments thanks to its high ecological validity.

Companies such as **Warner Bros.**, **AMC Networks**, **RTVE** or **Mediaset España**, among others are applying this revolutionary approach to get a better understanding of their audiences and offer them what, how and where they request it to. 'But also, film festivals are including neuroscience to make attendees participate more actively, and thanks to their emotional reactions identify and award the most impactful one within the tested section. Some examples are *Seminci* in Spain and *Raindance* in London', concludes **Martin Guerra**.

## Scenic Rights, the best partner

With 20 years in business and offices in Madrid, Barcelona and Los Angeles, **Scenic Rights** manages a portfolio of rights with access to over 20,000 literary works for audiovisual adaptation, becoming the largest Agency by volume, focused on adapting Spanish, Latin American, and US Hispanic writers to TV formats, cinema, and theater.

Based on a set of agreements, it promotes and monitors the audiovisual adaptations of major literary brands represented by the leading literary agencies and publishing houses in Spanish literature, such as **Kerrigan, Balcells, Casanovas & Lynch, Schavelzon-Graham, Planeta, Penguin Random House, Feltrinelli** and **Unidad Editorial**, among others.

'We work with them as their audiovisual co-agent to promote and license works of the best-known Spanish-speaking writers like **Jorge Fernández Díaz, Juan Gómez-Jurado, Carmen Posadas, Elena Poniatowska, Claudia Piñeiro, Mikel Santiago** or **Santiago Roncagliolo**, etc', says **Sydney Borjas**, Director General.

**Scenic Rights** tracks more than 50 licenses for TV series projects in over a dozen countries, which are in development, pre-production, filming, or ready for distribution, such as **María Dueñas' La Templanza** (Atresmedia Studios for Amazon); **Laura Gallego's** saga *Memorias de Ithún*, animation series commissioned by **Netflix** from **Endemol**; **Hernan**, a **Dopamine** and **Onza** coproduction for **Amazon**, where **Curro Royo** participates as showrunner; or *El cielo a tiros*, in development by **Polka** based on the latest novel by **Jorge Franco** (*Rosario Tijeras*). 'This year **TVE** premieres *Promesas de Arena*, produced by **Atlantia Media**, based on the homonymous novel by **Laura Garzón**', completes **Borjas**.

At MIPCOM, the agency aims to share its creative proposals based on recent literary hits and original projects from showrunners: *Tu eres para mi* by **Jose Niemetz**; *Justo* by **Carlos Bassas**; the original project for TV series: *The Crossover*, from showrunner **Curro Royo** with **Vinicio Canton** (*Il restauratore*).



Sydney Borjas, Director General, Scenic Rights



RTVE's *Promesas de Arena*, produced by Atlantia Media and based on the homonymous novel by Laura Garzón



Laura Gallego's saga *Memorias de Ithún*, animation series commissioned by Netflix from Endemol

MONDO TV  
THE DREAM FACTORY

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in Endemol

## Mediabank: revolutionary online marketplace



Roberto Sánchez Lugarnuevo, BD & Sales Manager at MediaBank

**MediaBank** is a distributor with a revolutionary online marketplace. 'We offer a complementary distribution platform that connects buyers and sellers worldwide so they can acquire or monetize film and TV rights from anywhere and anytime, providing limitless visibility for contents', explains **Roberto Sánchez Lugarnuevo**, BD & Sales Manager at **MediaBank**.

'We can summarize these last quarters as our best consolidation and expansion period. Our buyers base is growing rapidly and steadily, and we expect to reach +1500 registered users by the end of the year. Our catalogue has grown as well, with diverse contents coming from different countries and cultures on a weekly basis, such as *Cavegirl* (UK), *From the field to the plate* (Uruguay), *Family Ties* (Russia) and more, building up to +3,000 hours.'

'We simplify and ease the sales process delivering the contents ready to broadcast through our app, as we offer transcoding and delivery for all of them. Plus, the whole process is completed through a single interface thanks to our parent company's technology, VSN, and users can do it whenever and wherever they choose to. Furthermore, we provide every service you would expect from a traditional distributor: customized promotion, online marketing, legal assistance, consultancy.'



Nobody's Watching

For MIPCOM, the company has the commitment of encouraging and celebrating diversity and inclusion, which is why we want to introduce contents where ethnic and racial representation, women and the LGBTQIA+ community are the leads of the stories:

'We are presenting *Tara's journey* to her real identity and, ultimately, her transition (*Tara: A journey into identity*, gender, art and noise, 66', 2018), **Claudia Hernández's** research to discover and understand indigenous Mexican culture (*Unfiltered Looks*, 13x50', 2019), a woman's hesitation to reveal her sexual identity due to fear of rejection from her loved ones (*Extra-Terrestrials*, 110', 2016) or the story of an immigrant in the US that leaves a promising acting career in his country to look for better opportunities in New York (*Nobody's Watching*, 102', 2017)', completes **Sánchez Lugarnuevo**.

## The Kitchen boosts the Ibero American market



Alexis Cardenas, VP of International, with Ainhoa Martin Rodriguez y Victor Martinez Escudero

Founded in 2001 with **Ken Lorber** as President, **The Kitchen** began as a localization facility for a leading South American group of TV channels. Its reputation in the Latin American market quickly grew, and within months, the Miami-based operation was offering both neutral Spanish and Brazilian Portuguese dubbing services for major networks, studios, producers, game developers and distribution companies from every continent.

A year ago, the company decided to foster its presence in Madrid, Spain, opening up offices in the capital city, headed by **Ainhoa Martin Rodriguez** y **Victor Martinez Escudero**, who work along with **Alexis Cardenas**, VP of International Sales. The full team attended Conecta Fiction in Pamplona last June and promoted the company's services within the Ibero-American market.

According to **Deeny Kaplan**, EVP of **The Kitchen International**, the company founded 18 years ago has been involved since with Spain and Latin America but now, giving the relevance of Spanish content worldwide 'its time to reinforce' their presence with a local crew.

Led by Cardenas, the Madrid office was inaugurated on October 2018 and it is the third international unit outside the US after Mexico and Brazil. 'We bet strongly on this market. We speak the same language and we have the same time zone, which allows us to work properly on the clients' needs', she says.

The studio in Madrid has five people plus three mixing rooms. 'Last December we confirm a big work for **Lionsgate** who sent 20 movies for Castilian dubbing. We also work on the voices of the animated icon *Pocoyo*, along with another animated series and a commercial from **Red Bull**', comments **Cardenas**.

The executive is not only covering the Madrid market, but also the regions such as Galicia, Sevilla, Barcelona, where the audiovisual market is moving fast. 'We have three main strategies: 1) to know the local dynamic of the Spanish market; 2) to know the biggest and smallest groups, 3) to organize social meetings in the studio with the local community every 3 months', she concludes.



The Kitchen is working on the voices of Pocoyo new season

## ATV: Spain falls in love with Turkish drama



Müge Akar, Content Sales Deputy Manager

**Turkuvaz Media Group** (TMG) is Turkey's one of the largest media group operating in TV and radio broadcasting, newspaper and magazine publication and printing. Its flagship TV Channel, **ATV**, was launched in 1993 and it has not only lead the Turkish TV market, but also the wave of Turkish drama abroad.

The company's international sales division, **ATV Distribution** provides a vast range

of choices and diversity, offering over 40,000 hours in TV series as well as TV shows and movies. The popular TV channel's content sales department is one of the key figures of the Turkish distribution industry, exporting the highest quality drama series to over 60 countries worldwide.

**Müge Akar**, Content Sales Deputy Manager, comments: 'Spain is a key market for our international content sales, we highly value our relationship with Spanish networks. The country is undergoing the Turkish drama boom as rest of the other parts of the world. It was an inevitable process after the Latin American success and the rise of European countries opening up for Turkish drama.'

'As **ATV** we have three titles already entered into Spanish networks. **Atresmedia** acquired the bestseller of all times, *Sıla*, with all seasons, rating record holder *Lifeline* with its two seasons and also brand new prime-time hit *Hercai* with its two seasons. *Sıla* has been one of the most watched Turkish dramas in Spain', she com-



*Sıla*, one of the top series globally sold by ATV premiered in Atresmedia, who also picked up two seasons of the most recent success *Lifeline*

pletes.

The distributor introduced at MIPCOM the high-end period drama *The Ottoman* focused on the story of the father of the Great Ottoman Empire. Osman will be taken to the screen by worldwide popular actor **Burak Ozcivit**. In addition, **ATV's** summer hit *Love and Secrets*, will be carried to the main season and has been added to **ATV** catalogue, being already been sold to Albania while it is gaining strong interest from other countries.

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## Gaumont: building bridges



Ezequiel Olzanski, VP TV Distribution & Co-Production Latin America

Formed in 1895, **Gaumont** is the first and oldest film company in the world, with offices in Paris, Los Angeles, Buenos Aires, Cologne, London, and Sydney. It produces and distributes high-quality TV programming worldwide, like award-winning *Narcos* for **Netflix**, as well as over 800 half-hours of animations.

The company has bet on original series coproduced through **Ezequiel Olzanski**, VP TV Distribution & Co-Production Latin America: 'We are now the in post-production of our first co-pro out of Latin America, *El Presidente*, inspired by the real-life characters behind the 2015 "FIFA Gate" scandal. The show, a coproduction with **Fabula** (Chile) and **Kapow** (Argentina), will premiere on **Amazon Prime Video** globally.'

According to **Olzanski**, shows like *Narcos* and *La casa de Papel* have helped in shifting the paradigm for Spanish language productions: 'Their international success has created a global audience for the content where there wasn't one before. We intend to stay firmly rooted in this space working across both Spain and Latin America to create the next big hit.'

He continues: 'There is an undeniable cultural bond between Latin America and Spain due to the language, but also the history that unites us. We have been collaborating with renowned and talented Latin and Spanish writers and producers to explore and develop new projects together. *Narcos* opened the door and expanded the awareness and accessibility of not only great Latin American stories but also the huge talent pool which exists in the region'

Regarding the immediate future, **Olzanski** concludes: 'The content that is now being developed and produced from Ibero-America, fueled by a growing universe of platforms and global audiences, creates a unique *momentum*, a "perfect storm" that will allow Spanish content to keep growing, in quantity and quality, as it proves its *travelability* and worth, and we are very proud to be part of it.'

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Award-winning *Narcos* helped in shifting the paradigm for Spanish language productions globally

Bionic Max, animation

## Kapow: 'organic links' for coproductions

With the global growth of Spanish-speaking dramas, Argentine producer **Kapow**, founded by partners **Agustin Sacanell**, creative director, and **Lucas Rainelli**, commercial director, strengthens its focus towards this strategic European market. 'Its industry is going through a great moment and we want to work more with them: that's why we've been sealing deals with strategic companies, such as **Warner Bros. International TV Productions Spain**', they underline.

Spain is a market in which **Kapow** would like to disembark with its creations. 'We are looking for complementary, high-caliber allies trying to build bridges between Latin America and Europe, and following what we've been doing with **Fremantle** and **Gaumont** on our coproductions *La Jauria* and *El Presidente*, respectively, in which we were involved with **Fabula** (Chile). *El Presidente* is confirmed to premier on Amazon Prime Video the next year', stand the executives.

**Kapow** builds 'organic links between both regions', such as the three projects that is developing with **WBIVP Spain**: two of them are based on real facts: one story about the judgments of Latin American dictatorships in the '70, and *Mas alla del Mar*: the story of Chilean writer **Pablo Neruda** that was not able to save the killing of his friend, Spanish writer **Federico Garcia Lorca**, but he saved 2,000 people embarked to Chile during the Spanish Civil War.

'We are heading to MIPCOM with more than 10 in house drama developments, from comedy to thriller. And we are having a great reception from our clients. It is a great moment to bet on fiction, and we are aiming to enlarge our partnership, especially in Spain. **Gaumont, Fremantle, WBIVP, Amazon**. Those are the kind of alliances we are building up', conclude **Sacanell** and **Rainelli**.



Agustin Sacanell, creative director, and Lucas Rainelli, commercial director at Kapow



*La Jauria*, coproduction between Fabula and Fremantle in which Kapow is involved

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# GECA: maturity of Free TV series, creative boom on streaming

Despite of the convulse moment of the audiovisual scene, marked among other factors by the decrease of conventional television consumption, the strong fragmentation, the appearance of new actors or the change of habits of the viewers, the Spanish fiction keeps showing excellent health.

The resounding success of some local titles like *La casa de papel*, *Élite* or *Vis a Vis* shows that the muscle of the industry keeps fit and that its positive repercussion knows of no borders. While the free-to-air channels have managed to take the national fiction to some enviable quality levels and create a pool of talent in the whole assembly line (producers, showrunners, scriptwriters, actors, etc), Pay TV and OTT platforms have fuelled in the last few years the definitive impulse for this sector, as stands out the analysis from consultant GECA.

Regarding the first ones, the five big Spanish generalist channels premiered in the season 2018/19 a total of 13 new locally-produced fictions (series and miniseries), figure

that is only two shows away from the number premiered in the previous television season. Among them, the black comedy *Señoras del h(A)MPA* with 16.2% share, and the dramas *Vivir sin permiso* with 19% (both on **Telecinco**), and *La caza. Montepérdido* with 13.9% (**La1**) that stand out as main examples of success of the season, and have been renewed for a new season.

The optimism of the sector also comes hand in hand with the pay television and the unstoppable increase of penetration of the streaming platforms present in Spain such as **Movistar+**, **Netflix**, **HBO** and **Amazon Prime Video**, mainly. According to Kantar, from the 45 million Spaniards, more than 25 millions have Pay TV services in their HHs and more than 14 millions have access to **Netflix** or **HBO** (currently, the measuring company does not separate between both platforms, nor gives it data from others like Amazon Prime Video, Filmin or Rakuten TV). And the future previsions are not any less promising because, as it is highlighted by a study of the consultant PwC, the growth of the OTTs segment in the Spanish market between 2018 and 2022 is estimated in a 13.3%.

## FAR FROM TOPPING OUT

Therefore, it is no surprise that, thanks to



the high quality of the Spanish productions and the growing penetration in the country of those on demand video services, **Netflix** chose Spain to place its first European audiovisual production hub. In fact, in the beginning of April this year the Californian company opened headquarters on the city of Tres Cantos as part of an strategy of 'multimillionaire investment on Spanish content that will help to back the growing Spanish audiovisual sector'.

**Amazon** follows the same path with the creation in Madrid of a team devoted to start an ambitious project to produce its own audiovisual content, but still showing interest in having a large catalogue of already-broadcasted series or buying in exclusive the catch-up rights of others awaiting to be broadcasted. It can also be mentioned the case of **Viacom International Studios**, another multinational company that has announced the creation of a production center in the capital of Spain, from which it will develop, produce and distribute its content. Its first production, the thriller *Atrapa a un ladrón*, based on **Alfred Hitchcock** iconic film, is already announced for its imminent premiere on its channel **Paramount Network** in Spain, but it was already showed in the channels in Italy and Argentina's **Telefe**.

And everything without forgetting **Movistar** that, as it is highlighted by in its analysis, has bet very aggressively on the production of national fiction as a way to give its platform attractive and exclusive content as an added value for its clients. So much so that in the season 2018/19 the platform of **Telefonica** premiered 11 new series (without having into account new seasons of the ones that were already premiered), for the next months it has announced the production or pre-production of another 13 new titles in which are taking part different national production companies like **Globomedia**, **Bambu**, **MOD Producciones**, **DLO Producciones** or **Veranda TV**, among others.

A similar situation occurs with the above-mentioned American platforms giving ser-

vices in Spain: **Netflix** is preparing 11 new national fiction projects against the two original ones premiered in the season 2018/19. **Amazon Prime Video** has announced nine new projects for the next months; **HBO** started its local production this year with *La sala*, in which have participated **FORTA** and its 9 members: **TV3**, **Telemadrid**, **SAMC**, **ETB**, **TVPC**, **CMM**, **Aragon TV**, **RTPA** and **IB3**, and it also has its own portfolio with four projects developed in Spain for its OTT.

It is worth to mention that the strong impulse of the OTT services in Spain has evidently fostered the own local production industry, which has found a way to develop projects aimed to less generalist audiences and with a bigger creative freedom. Creators and producers have been able to do riskier proposals that experience with topics, formats and lengths that in principle would not have place on the traditional generalist television because of its audience. It is no wonder the creation of new projects like **The Mediapro Studio**, with which **Grupo Mediapro** has turned into a key actor of the Spanish industry in the creation, production and distribution of contents worldwide.

On its part, the groups owning FTA channels have fully immersed in the creation of content for subscription platforms, thus creating **Atresmedia Studios** and **Mediterráneo Audiovisual, S.L.U.**, the later started by **Media-**

**set España** to create an organizational structure of the contents production companies in which the company has participation. These veteran operators confirm in this way their historical engagement with the national productions, adapting to the fast changes of the sector, fostering creativity from their deep experience and increasing the horizons towards new business areas.

All in all, and according to the above-mentioned study from PwC, the fiction production industry has gone from 38 series in 2015, with a contribution to the GDP estimated in 429 million euros, to 58 series per year 2018, with an estimated GDP contribution of €655 million. The perspectives are to reach a yearly production of 72 series on a consolidated



HBO España has strengthen its local production this year with *La sala*, a TV series in which participate the 9 organizations gathered at FORTA

market, which will suppose an estimated contribution to the GDP of 812 million euros and 18,443 jobs.

## GECA OTT BAROMETER

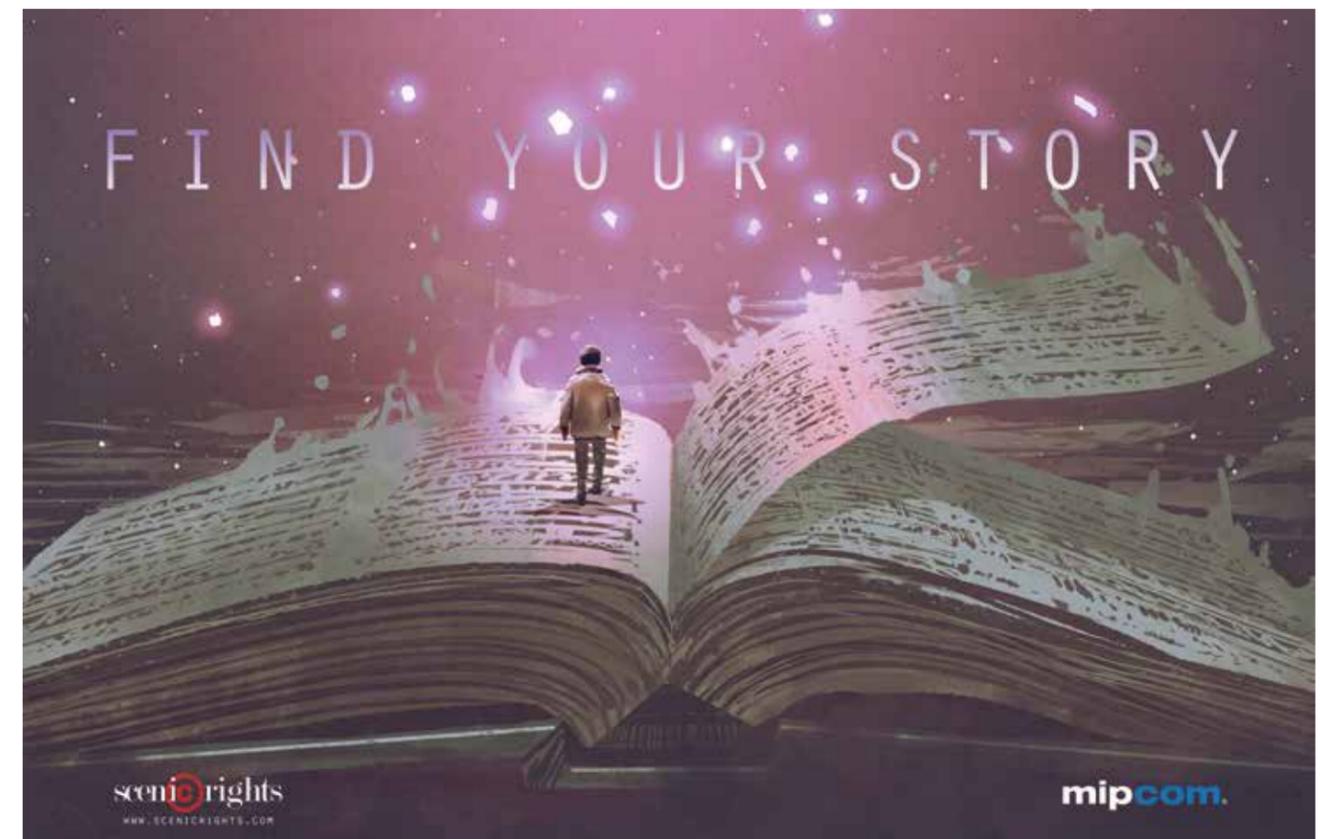
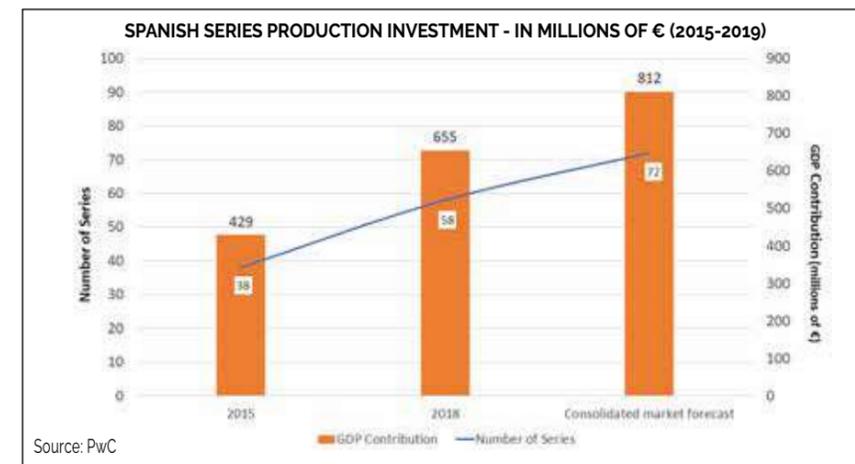
Being always in vanguard on the worldwide television trends, the consultan has launched this year its own study on the consumption of OTT platforms in Spain in order to try to bring light into this emergent phenomenon that still leaves many questions on air.

Among the conclusions that emerge from the first edition of the OTT Barometer by GECA, done from 1,000 polls to active users of these platforms, is worth to mention the interest on the Spanish fiction by those watching content on these platforms.

So much so that, despite of the lower presence of Spanish titles in their catalogues, five out of the 25 most watched series of the OTTs by the end of the study were national productions: *La casa de papel* (16.8%), *Vis a vis* (12.2%), *Arde Madrid* (11.6%), *Las chicas del cable* (11.6%) and *El embarcadero*. All of them are also among the 25 users' highest valued series, being in this case *Arde Madrid* the national fiction appearing on the highest position of the ranking list.



VIS Spain' *Atrapa a un ladrón*, TV series based on Alfred Hitchcock iconic film, was shot in the country and waits for its imminent premiere on Paramount Network Spain



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