WHY ARE SO MANY FILMS SHOT IN SPAIN?

A LONG INTERNATIONAL FILM TRADITION - GREAT TAX INCENTIVES - AMAZING VARIETY OF LOCATIONS
A PERFECT CLIMATE - A SOLID AUDIOVISUAL SECTOR - TOTAL MOBILITY AND SECURITY
TOP HOTEL AND HOSPITALITY SERVICES

FOREIGN COMPANIES SHOOTING IN SPAIN
20% — 40% TAX INCENTIVES

13,450 MILES OF RIVERS
SNOW-CAPPED MOUNTAINS 9 MONTHS YEAR
4,900 MILES OF COASTLINE
63 CITIES WITH > 100,000 INHABITANTS
103,020 MILES OF ROADS
1,650 SQUARE MILES OF DESERT
2,600 MILES OF MOUNTAINS
10 DIFFERENT CLIMATES
AND MUCH MORE...

shootinginspain.info / icaa.es
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 (Philodilophos), Oscar winner Penélope Cruz (Vicky Cristina Barcelona), Javier Bardem (Blu(y), Oscar winner directors José Luis Garci (Volver a Empezar, 1982), Fernando Trueba (Belle Epoque, 1993), Pedro Almodóvar (Todo sobre mi madre, 1999) and Alejandro Amenabar (Sleeper, 2004), and Hollywood directors Juan Antonio Bayona (A Monster Calls), and Alex de la Iglesia (Performance). The international acknowledgement of the Spanish cinema was followed since early 1990 by successful TV dramas from Globo (Medicos de Familia, Ganga Cuentame Cómo Pasó), Boomerang TV (Matías Pernalete), 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 conglomérates 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 merger of Gestevision Telecinco + Cuatro, and the following year Atresmedia TV, from the combination of Antena 3 + talenta.

Netfix, 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 (53 announced), Las Chicas del Cable, Alto 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!

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Spanish companies producing and distributing contents for worldwide audiences

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ICEX: ‘The international path is key to strengthen 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 free 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 us 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.

Conde says Spain is the fourth TV fiction format exporter and the second fiction European producer, according to The Witt. ‘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 Mediaplex 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 strengthen 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 or 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 organisation 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.

Co-production is the new key world, 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 strengthening our business relations with Asian and African countries. We have a great opportunity and ICEX will support our companies to achieve it.’

* * *

PRENSARIO INTERNATIONAL
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 industry in Spain is in effervescence,' says Navas.

The audiovisual industry in Spain is taking 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 ‘Bermuda, 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 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-A效力 or Píxida, 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 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.

According to the directive, Spain would find similarities—cultural and professional—tries 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: 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 of one single global success, but because it has traditionally produced strong drama content, first as movies and then, as TV series. Nowadays, 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 Cuarenta como Pico (Ganga, 2002) and Antena 3’s Aquí no hay Quién Viene (2003).

They were the pioneers, and were followed by Telecinco’s Los Serranos (Globomedia, 2002), RTVE’s Amor en Tiempos Revueltos (Diagonal TV, 2003) and Atresmedia’s El Internado (Globomedia, 2007) or the teen series Física Química (Boomerang, 2008) in a market that was already making the difference in Europe for two main reasons:

1. 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 productions.

ADVERTISING

In 2018 the estimated ad investment recorded €12,855.5 million, 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% in 2017 to €5,323.0 million, 1.3% higher than the €5,228.7 million registered in 2017. The estimated investment in conventional media reached €5,112.6 million, a figure that represents a growth of 2.9% over the one registered in 2017. Televisions continues to be the leading media by volume with a participation of 39.6% 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 €2,143.5 million the previous year.

National Free TV has been €1,915.1 million in 2018 with a decrease of -0.8% from €1,931.4 million that has registered in 2017. Televisions also experienced a decrease of 10.5%. On the Pay TV channels the total investment has been €107.3 million (+15.4%) while local TV has gone down: 15.3% compared to 2017, placing the investment at €2.3 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 Media Set 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 (-5.3%). The rest of the DTT and regional channels had to be satisfied with €83 million, just €1 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 within 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 €7,313 million, 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.

In Germany, Italy, Greece, Belgium, Hungary, Romania and Latam

“La Casa de Papel” is one of the top drama productions with several successes on the Spanish TV, such as Telecinco’s Las Chicas, the second most adapted Spanish in Latin format abroad, and most recently Cantos from its production company Big Bang Media, available in 300 territories through Amazon Prime Video.”

The Mediapro Studio is one of the top drama producers with several successes on the Spanish TV, such as Telecinco’s Noche Flamenca, the second most adapted Spanish in Latin format abroad, and most recently Cantos from its production company Big Bang Media, available in 300 territories through Amazon Prime Video.”

KEY FACTS

• 10% • PRENSARIO INTERNATIONAL • 11 •

SPAIN: SOCIAL AUDIENCE ON TWITTER, BY NETWORK (AUGUST 2019)

<table>
<thead>
<tr>
<th>RANK</th>
<th>CHANNEL</th>
<th>RAT.</th>
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<tbody>
<tr>
<td>1</td>
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<tr>
<td>2</td>
<td>FOX</td>
<td>0.3%</td>
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<tr>
<td>3</td>
<td>AXN</td>
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<td>4</td>
<td>CALLE 13</td>
<td>0.3%</td>
</tr>
<tr>
<td>5</td>
<td>TNT</td>
<td>0.3%</td>
</tr>
<tr>
<td>6</td>
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</tr>
<tr>
<td>7</td>
<td>HISTORIA</td>
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<td>8</td>
<td>FOXY LIFE</td>
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</tr>
<tr>
<td>9</td>
<td>COMEDY CENTRAL</td>
<td>0.2%</td>
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<td>10</td>
<td>#0</td>
<td>0.2%</td>
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</table>

Source: Kantar Media/Barlovento Comunicación

Channel # TWEETS %
MEGA 551,419 21.2%
LASEXTA 458,307 17.6%
ANTENA 3 414,067 16.6%
TELECINCO 377,047 14.3%
LAS 223,400 8.6%
CUATRO 217,147 8.4%
MTV 188,506 4.6%
DIVIFTY 86,288 3.4%
NOVA 86,368 3.3%
TV3 70,298 2.7%

Source: Kantar Media/Barlovento Comunicación

* 10 • PRENSARIO INTERNATIONAL

SPAIN: AUDIENCE SHARE, PER GROUPS (AUGUST 2019)

<table>
<thead>
<tr>
<th>GROUP</th>
<th>Hospital</th>
<th>Mediaset España</th>
<th>Atresmedia</th>
<th>CTS</th>
<th>Mediaset International</th>
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<td>Mediaset España</td>
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Source: Kantar Media/Barlovento Comunicación

Source: Kantar Media/Barlovento Comunicación

SPAIN: AUDIENCE SHARE EVOLUTION, PER NETWORKS (2009-2018)

<table>
<thead>
<tr>
<th>NETWORK</th>
<th>2009 %</th>
<th>2012 %</th>
<th>2014 %</th>
<th>2016 %</th>
<th>2018 %</th>
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<td>19.9</td>
<td>20.2</td>
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<td>19.5</td>
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<tr>
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<td>18.2</td>
<td>18.5</td>
<td>18.4</td>
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<td>13.2</td>
<td>13.5</td>
<td>13.4</td>
<td>12.9</td>
</tr>
<tr>
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<td>11.7</td>
<td>12.0</td>
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<td>La1</td>
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<td>10.8</td>
<td>11.1</td>
<td>11.0</td>
<td>10.5</td>
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<tr>
<td>Nova</td>
<td>9.8</td>
<td>10.3</td>
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<td>DIAS</td>
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</table>

Source: Kantar Media/Barlovento Comunicación

Key Historical series such as Boomerang’s El Tiempo entre Costuras, and Diagonal TV and FTV are also in the mix.

La Casa de Papel, the staggered 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.
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). Since this report, the category of family role for “housewives” has been renamed as Responsible for Home Purchases at Home (RCH). Since this report, the category of family role for “housewives” has been renamed as Responsible for Home Purchases at Home (RCH). Since this report, the category of family role for “housewives” has been renamed as Responsible for Home Purchases at Home (RCH).

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 (RTVE) 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 Aragon TV with 8.3%. Others are ERTV (7.5%), Canal Sur (7.3%), CHM (6.1%), TPI (5.8%), Telema-
drid (5.5%), TVCan (5.1%) and Canal Extre
dadura TV (4.4%).

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 54.9% of all time, while the remaining 26.3% is the viewership of Free TV channels through the Pay TV operations, from which 38.6% corresponded to national free to air and 6.1% to Autonomic networks.

Following a report from Barlovento, 4 out of 10 premiers (almost 40%) have been a success in 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, doc-soaps and documentaries. On thematic DTT, foreign drama and talent, realities and Spanish drama, but on autonomic stations, apart from these genres, there are others: entertainment shows, humor programs, doc-soaps and documentaries. On thematic DTT, foreign drama and talent, realities and Spanish drama, but on autonomic stations, apart from these genres, there are others: entertainment shows, humor programs, doc-soaps and documentaries. On thematic DTT, foreign drama and talent, realities and Spanish drama, but on autonomic stations, apart from these genres, there are others: entertainment shows, humor programs, doc-soaps and documentaries. On thematic DTT, foreign drama and talent, realities and Spanish drama, but on autonomic stations, apart from these genres, there are others: entertainment shows, humor programs, doc-soaps and documentaries. On thematic DTT, foreign drama and talent, realities and Spanish drama, but on autonomic stations, apart from these genres, there are others: entertainment shows, humor programs, doc-soaps and documentaries. On thematic DTT, foreign drama and talent, realities and Spanish drama, but on autonomic stations, apart from these genres, there are others: entertainment shows, humor programs, doc-soaps and documentaries.

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 work, its audience and budget. It is not the same 10% on Antena 3 work, its audience and budget. It is not the same 10% on Antena 3 work, its audience and budget. It is not the same 10% on Antena 3 work, its audience and budget.

Television industry has been trying to find the best ways to subsist. Right before the analogue switch off from 2010, RTVE announced that it was no longer offering ads, changing forever the
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, marched 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 Telefónica to move towards the television industry through reinforcing its Pay TV operation, Movistar+.

Movistar+ strengthened its TV offering through then 56% to Prisa (56%, April 2015). With this move it strengthened its TV offering through the brand new operation Movistar+, becoming the leading Pay TV operator of Spain now serving ~4 million clients (60% of the market). And since 2017 it has produced more than 55 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 these years have been the merge of the biggest TV groups Mediaset España plus Prisa-Soge-cable’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 37.32%, 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 of 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.
Atresmedia: ‘There is a fluid relationship between viewers and platforms’

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

José Antonio Antón, 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” of Atresmedia was eliminated as such and its objectives included 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 audio-visual companies in the country is to cater those audiences in every way possible, making sure they can enjoy the best local content, how and where they want it 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 or on a digital platform, when 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-paid packages of its series and TV shows, including 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 Nido (Diagonal TV), Lenora and the miniseries Gatito Bodi is a remake of the successful global romantic comedy. The group’s strategy is to maximize the effectiveness of its contents by seeking its own content producers and the greater performance part 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 will allow 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 Doby sound, offline content download, last 7-day viewing, subtitles and original language video casting and international platforms in all systems.

Regarding the OTT of the group, Antón 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-branded, flow, with content targeting Generation Z that is only located in Atresplayer. There is also the SVOD channel Axelós Nova that offers only telenvision 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 the brand new channel ATRESplayer Naranja, or some others we are currently discussing with very important content providers; concludes Antón.

Atresmedia España: “alive and closer” programming

Atresmedia 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 more than 60 series produced, where we own 7.

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Among them, the top one has been “Serie TV, with an average audience of 17 million people, 19% of share and 300,000 viewers on Time Shift.”

The group takes 80% of the TV market share and Telecinco takes the lead with more than 90% of its grid composed of 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. The top shows, are realities like Big Brother and Supervivientes, as well as talent shows 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 Date, which are transcendent.

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.

Mediastar España’s contents are available in all devices, with a new line of television and linear or non-linear owned platforms (web, apps, YouTube channels). On the digital side, we led the market with Mitelé and Mitelé Mite (native digital contents), and most recently with Mitelé Plus, which complements the trad-
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 become 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: Mon报纸nedido, 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.

The eight-episode series Malaka, shot in Malaga premiered in September in Spain.

La Caza: Mone平enedido, a combination of noir and local series.

Boo-
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, which have diversifies, facilitating the Spanish fiction to gain new territories abroad.

The Spanish fiction market has multiplied its size in the last four years, going from 18 series in 2015 to 31 in 2018, with a 67% increase of 4,115€ millions in 2018 compared to 2017. This growth has been more evident in countries with strong audiovisual policies such as Argentina, Chile, Croatia, Spain, Italy and France.

The Top 10 global format exporters with 17 formats that sold between 2001 and 2007, with TV as 10 television series, and with 17% in 17 countries of the world, the demand for formats has been very positive in the international market.

The independent production market started to take shape by the end of 1980 with three main players: GestMusic (1987), Zeppelín (1991) and Globomedia (1993), plus other companies like Grundy (now Fremantle) and Europroducciones (1991), the Catalonian producer El Teret (1996), Grupo Ganga (1997) and Boomerang TV (1998). All them were followed by Banijay-Caserta (2000), Zebra (2000), Manda-Ratina (2002), Secuoya (2005), Warner Bros. (2009), as well as Planeta a Planeta and Onza Partners (both in 2012), which contributed to 64% of Gestmusic in 1994, and renamed as Gestmusic Endemol. After that, the group acquired Zeppelin TV and Diagonal TV (2012). In 2016, Mediaprod merged with Grupo Abril (Globomedia), creating the company’s largest one in the studio and one of the most important content exporters; since 2016 has unified all the business under the same brand: The Mediaprod Studio. In January 2019, Cuatro Producciones merged with Banijay Entertainment and four years later they bought DLD, creating Banijay Spain.

Vertice 360 was founded in 2006 by Jose Maria Hisaria, a key name of the Spanish industry, having integrated key producers like Merang TV, Nothry TV and Telecinco. On December 7, 2007, the Spanish Stock Exchange, and in 2008-2009 economically, the company went through some difficulties and in January 2012, the company Vertice 360 was rescued a couple of years ago by Spanish Capital, which recently sold 6% of it to the Italian Gigio Group. After leaving Vertice 360, Hisaria created along with Nicolas Bergangora and Gonzalo Sagraida Onza Partner, a company that combines four divisions: onza distribution, onza entertainment, onza communication and onza capital. Secuoya was formed in 2008, after its first externalization of Morena, when the company was created one year after, and last year Grup Secuoya, led by Raul Berdomez, 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, Zeljen productions was created, gathering the pioneer producers Zebra Productions, Boculca, Europroducciones, Hill Valley and Proima Zebastur. 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 companies.

Most recently, it was noticed a new wave of Spanish production companies founded by founders key executives of the industry such as Daniel Esca’s The Good Mood, Jose Miguel Contreras’ LAOProducciones, Francisco Pou’ Mediacentro, TWG Productions, Weekend Studio, Alex Pina’s Vanguard Media (participated by Atresmedia with 20%). They all agree that the reason why they launched these companies (within the last 2-3 years) was the new creative spaces that allow the discovery and development of the next generation of Spanish showrunners. Spain main drama series have also been the three largest media groups Mediapro España, Atresmedia and Radiotelevisión Española that not only produce and program a huge number of drama series on prime time and day-time, but also sold them abroad. To them, it must be added Movisat, the key player on the telecommunication 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 Bambú (participated by French Studio Canal with 31%), Portocine and CTV Media, Basque Pauzaika and Balseko, and Catalanian Filmax and Diagonal TV (Endemot Shion), among many others.

This geographical diversification is a key asset, and brings to the table another interesting aspect of the Spanish Fiction: its development does not depend of its capital city, Madrid, but the contrary production houses are spread all over the territory, giving the production different focus, thematic and landscapes. This characteristic is also explained by the fact the local and regional channels have as much as “Autonomic Networks” are usually the first windows for their premieres. During the last years, local drama series (crime, especially) from Islas Baleares, Basque Country, Galicia and Balearics have been picked up by platforms like Netflix for global broadcast with acceptable success. Local becomes global, and vice versa.

On the global scenario, the appearance of key ‘Studio to produce for third parties must be highlighted: first Atresmedia Studios, led by Ignacio Corrales, second, The Mediaprod Studios, gathering all the group production companies and concentrating the international business, and third Mediart, the new international company from Mediaprod España which from operates key business
The Spanish fiction market: future and beyond

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

HIGHER 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 Piñar’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 international.

In the last year, three series from Spain positioned themselves among the 20 top series in Netflix, only surpassed by US serials. On its first week available in Netflix, 34 million households watched La Casa de Papel ST 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 it 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 5% 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, such as the national production of Spain destined 4.2% to its scripted format sold abroad. The Time in Between (Isabel’s) had built a reputation outside Spain thanks to its scripted format sold abroad. Mediaset España’s Éamos 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 ran for 20 seasons on RTVE, has been adapted in Television Publica Argentina as well as in RTP (Portugal), Rai (Italy) and Canal 13 (Chile).

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! (The Time in Between Antena 3) and Diagonal TV’s (dubbed 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 Éamos 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 ran for 20 seasons on RTVE, has been adapted in Television Publica Argentina as well as in RTP (Portugal), Rai (Italy) and Canal 13 (Chile).

Globomedia’s Las Sonrientes 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 in Serbia, Turkey and Slovenia.

Pulseras Rojas, from Catalonian Filmx, broadcast on TVI, TNT and Antena 3 in Spain, and sold in TV Azteca (Mexico), Telete (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).
The Spanish fiction market: future and beyond

Spanish formats adapted in the US includes Isla Audiovisual’s Star-Cross by CES Studios for The CW and Boomerang’s Last Mistras de Lauro, with two seasons on NBC, Bambo’s period drama Grand Hotel premiered on ABC last June, while the Spanish version El hotel de las Segretas was premiered in Univision for the US Hispanic market (2016). As ready was premiered in Univision last June, while the Spanish version period drama premiered on one month after it premiered.

Spanish drama has moved from local costume dramas (e.g. Cuantumo como pasa) 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 has pushed them globally have been the international OTTs.

Apart from La Casa el Papel, other Spanish dramas reaching 190 territories through Netflix are The Mediapro Studio’s Vis a Vis and La Véctima Numero II, coproduced with Telemadrid and ETB (Basque Country); CTV, TVS and Camarín El Salvador los Magosíparos, 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 after one month after’. Also Mediterranean Cosas (Big Bang Media), available on Amazon Prime Video, and Vivir Sin Permiso (Alia Media on Netflix, R Telecinco (Almeida Studios/Vanouver Media/Movistar+/Beta Film) sold in 125 territories worldwide, S-q-ros (Filmax/Mediterraneo) in 115 (La Véctima (Plano a Plano/Mediaset) in 105, Angel o Demonio (Plural Entertainment/Mediaset) in 80 and El Principe (Plano a Planamediaset) in 65.


The Mediapro Studio has productions on international coproductions, such as ‘The Mediator’ coproduced with Finish pubcaster Yle, and ‘The Crown’ coproduced with Finish pubcaster Yle.

Filmax and TV3’s Pelé’s Vendetta has been adapted in 8 countries, including ABC, USA (Fox), VOI (Germany), TVE (Spain), Peru, Russia, France and Arabic countries.

**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 LaC/Producer, the fiction series has been chosen as the audiovisual format of the ‘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 65 and serials augmented to 155. The more international agents arrive to Spain (Sky Appel), 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 produced in Europe. The largest presence of international Hispanic content is in Uruguay (95.6%), followed by Ecuador (84.5%), Venezuela (82.1%), Peru (74.3%), USA (75.5%), Chile (65.1%), Argentina (46.2%), Mexico (37.6%) and Colombia (37.3%), but in the last three countries, the local content is bigger.

Compared to Latin America, Spain has better conditions: first, it has a tailored 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 30 series in Netflix during 2018, three are from Spain: Money Heist (92), Elite (93) and Cobra Girl (13).

Spain has also demonstrated that it can produce successful series with a lower budget: Vis a Vis (50), La Véctima (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 Britain’s The Crown (Netflix) or Vikings (History) 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 tourist 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).

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Atresmedia Studios: beyond Spain

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 Milán, 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 Temporalora, a 10-episode TV series based on María Dueñas’ homonymous novel for Amazon Prime, and directed by Guillén Morales, Alberto Ruiz Rojo and Patricio 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.’

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, China and USA.

The company gathers 360-degrees set of services including development, creation, production, audivisual services, direction and distribution, being the leading production company in the Spain with +4,000 hours of content produced in 2018 for TVE, MediaSat, Atresmedia, Movistar, Fox, TNT, HBO, Amazon, Netflix, Viscom 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 Las Serranos, Los Hombres de Pelo, 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, Esto Vive with three seasons at El Ministerio del Tiempo on its fourth season, both for RTVE.

Other titles include Malaka, which recently premiered on TVE; Nostalgia for Movistar; Corazon for Mediasat; Pedrilo for Atresmedia; Por H a por B for HBO España, Parasol 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.’
Since 2017, it has developed and produced El Accidente, Spanish adaptation of Turkish series Son (Ay Yapım); starring Imma Gues- ta, it has been one of the top-rated shows in 2018; with three seasons, El Rey is a leading prime time drama on RTVE; and La Vida/la, 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 scenarios. Modern and emotion-al stories narrated through optimist and magical characters. Aguilo, Rojo, El Internado or El Barco are high concept, demanding and bold TV series, from the production point of view and scripts.’

‘Spanish producers have under-stood the amazing power digi-tal platforms have to build global hits. But the success of our fiction is not new, we have built a reputation since 1990 that al-lowed 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.’

The Good Mood is working in more inter-national coproductions. ‘It is a natural step for all producers in this competitive context.

Platforms have democratized and given vis-ibility to new creators. Ibero America has a key role in the creation of new dramas: we are working in a great project with Colom-bian talent, the script and bible are already done,’ comments.

Écija concludes: Distribution has changed the business forever. Apart from the tradi-tional 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.’

Media content creation

Culture through the State-owned prodco Ka-zakh Films. It will be produced since 2020. We plan to develop 1-2 movies a year, ex-ploring new business models, they add.

Plano a Plano has developed 55 projects this year, including Vivos 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.
Mediacrest: predictive selection of content investment

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 Manifesto, it is based in Madrid and Barcelona, and has Daniel Doménech as executive director, Xavier Borrell as responsible for production and development, and Josepa Paleniuera as CEO and heading the international business.

"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 (15x30) is a story about a group of troubled teenagers united by therapy involving an extraordinary horse, Napoleon, and offering dramatic moments, adventure and humor; Squadron is an action-packed, air force thriller that combines action, adventure and mystery; and Seduced (8x50) 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 Cisallo, 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 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.

Onza: international coproductions

Founded in 2013 by José Maria Irurzun, Nicolas Begureche 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 Prime Video. The company is rebranding for MIPCOM.

"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 it creation, Onza has taken its DNA to a clear international strategy. We've produced Nemesis with Dopamine (Mexico), which will premiere soon and will be betting in that line; confirms Sagardia. We are working in a new development agreement with a big studio, which will be closer soon," he adds.

"Onza Distribution offers a wide variety of content, including dramas such as The Ministry of Time or Little Coincidences, and from Spanish (Bambú, CTV, Plural, Isla Producciones) and international producers, such as the Portuguese TV5’s Emmy-winner Playbox, and Coral Vision Europe: 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.'"
CTV: ‘Quality drama is the best strategy for us’

With more than 80 professionals and 14,000 m² 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 ‘Television 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 50 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 Des Margaridos 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 Des Margaridos 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,’ says Dominguez.

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.

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 Toni Cimadevilla, CEO, and Jorge Iglesias, CBO, and Juan Dominguez, Chairman. ‘We are a different kind of 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, we finance the productions to 100%. We have built a “showrunner factory”, a needed development in Spain.

The most important project has been Hache (8x60), Netflix’s third original in Spain from Verónica Fernández, editorial director of the production company, which is scheduled for Q4 2019. Among others, are: David Muñoz Nemiro, a young adult horror series; Roberto Santiago and Ángel Amedo’s, an espionage thriller; Carlos López Encarnado, an espionage thriller inspired by real events in post-war Spain during WWII; coproduced with UK, colonies; sci-fi fiction series that shows a group of astronauts colonizing the land itself; and two comedies: Uno liga para ella (8x45) y Felicidad (8x50).

Portocabo, from Galicia to the world

Distributed by DCD Rights (UK), Portocabo’s new crime drama Dry Hills (6x60) is coproduced with SPI (Portugal) for Televisión de Galicia and RTP (Portugal). It is being screened on October 16 at 11pm on Auditorium K.

Another series is Niño, for Movistar+ and coproduced with Atlántico Producciones and ARTE France. It is distributed internationally by Banijay Rights, who is launching at MIPCOM 52 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 (2x23), plus the comedies Luci (2x23), coproduced with TVG, and La Revolcons (2x13), shot in Canarias, and two seasons of the dramedy Grace North (2x30), from Catalonia. Movies, entertainment formats and documentaries, as well as series such as Elidoso, Locura (8x50), coproduced with TVG and RTP (Portugal) also distributed by Banijay Rights, and live action series Missto Towels.

‘We aim to work regularly with the collaborators we feel comfortable. Our north is to generate IP 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 support 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.

*52* PRENSARIO INTERNATIONAL
Banijay Spain, a bridge to Latin America

Banijay Group is one of the world’s leading independent production and distribution companies, spanning 16 territories globally and operating in Spain three units: Guzzari, 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. Guzzari producers were in the market for “Telecina”, and it was a career and Torrentia y mante for “La Sexta”, Madrid Directo and TeleMadrid and it has recently produced Banijay Group hit La Isla de las tentaciones for Mediaset, expected to air later this year.

Stefano Torrentia, 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, El juli entrar el crim de la ona for DMAX. The latter has since been released to over 100 countries worldwide.

Acquired by Banijay in September 2011, DLO is specialised in fiction and entertainment having produced El angel de la guarda for TV3 and most recently TV3’s series Los cazadores. It is well regarded due to Movistar’s Radio Gogo, Giro 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 (Catalan), RTB (Basque Country) and TeleMadrid.

Territorial 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 entrepreneur approach. The vision of our shareholders, led by Chairman, Stephane Courtiau, 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, Herro (8x60); it has global rights with the exception of France, Germany, Spain and Latin America. On its second season Monstrum, a thriller series its is co-produced by Portobello, Atlantique Productions and ARTE France, which premiered S1 on September 19 in Francia and Germany. The story takes place on a secluded island at Canary Islands, and was created by Pepe Coira and directed by Jorge Coira.

Warner Bros. ITVP Spain: evolution

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.

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 Island, etc., in addition to 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 on; 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 Policia 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 dictators in the ’70, and the other a story by Mexican writer Pablo Neruda that was not able to save the killing of his friend, Spanish writer Federico García 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 5 years, whose spin off First Date Crucero is produced for Cuatro; and a Cloo Campano Gourmet Edition (Cone Dine with Me, ITY) is gaining recognition on Telecina 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 a 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, Magaly电视台). Linear TV has understood that big entertainment formats are the best content to join again the family audiences and the TV. Even there is a smaller risk with a proven format, what broadcasters generate is a bigger impact in less time.”

Boomerang: dynamic & changing

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.

It produces over two hours of fiction a day, including Acudir (8x2) on air, emblematic Old Bridge Secret (more than 6 years on air and continues to draw great ratings in Spain, Italy and Chile). Another Index, Antena 3’s Presumido Guilty, which won as “Best International Series” of the 2019 Sharqi Festival, also Maria Duhas’ best-selling novel The Time in Between, as well as shock-thriller Plastic Sea and miniseries Our Guy. On the entertainment side, Petrosky’s Dirty and The Prison Choir, as well as the global hits The Voice, Top Chef and Dancing Express.

Juanjo Diaz, CEO: “We are producing Isabella Alcindor’s Ines del alma mia (8x55), 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 Starsvision (14%) and will also be launched by Amazon in Latin America and Spain. Moreover, the production for Atresmedia Studios are the adaptation of The Vineyard, also from Duhas.

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 content, although creating uncertainties because... it’s supportable the current model?”, he thinks over.

And he answers: “There is a common denominator in all broadcasters: they need the audience regardless the model. Platforms
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Secuoya, building the future

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 1,000sq2 each, totaling 22,000sq2, the biggest global OTT has produced here Money Heist S3, which premiered last July 19, and season 4. By the end of the year, we will add two more studios of 2,500sq2 each.

But the project is much more ambitious: with 160,000sq2 Madrid City of Content plans to become by 2020 the second largest dramatic production hub in the world. Other countries have facilities like Pinewood, Cinecittà or Long Island Studios, but none have the same infrastructure as our new city of content, which will have the capacity to produce 1,000 episodes a year.

Ten years of the biggest hits for our company, we have produced two of the biggest hits for Netflix, Money Heist, which was the most viewed title in 2017 and the second most viewed movie in Spain; the series Jefa, El mejor verano de Tu vida, which was second most view title in Spain, the series Jefa/Movistar and more than 30,000 hours of contents for RTVE, Mediaset and Atresmedia, as well as automated systems. 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 advantage 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 city, to see that Netflix has chosen us to build this content production hub.

Headed by Alejandro Samañas, 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 be building 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. To jump up and reinforce this objective, we have created Toboggan Services together with Juan Pedro Rodríguez de la Ossa and David González. 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: operates studios installed in Madrid and Málaga 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 project to build more and bigger studios to attract a growing demand," adds 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 geographies, 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’."

Following his own precept, in 1905 Albert Einstein broke ranks and produced his Theory of Relativity, an essay that rewrote the laws of motion and changed our perception of the universe.

At Mediacrest we don’t know much about space physics, but we do want to change another world: that of audiovisual production. And we’ve started with the method. Now, in addition to an exceptional team with long years of experience, we use Business Intelligence and Big Data to produce the content our audiences are looking for.

Barcelona | Madrid | www.mediacrest.es

PRODUCERS

Secuoya

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

Non Stop/Toboggan: Spain, a “global studio”

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

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Insanity is doing the same thing over and over again and expecting a different result.
D’Ocon: the return of a legend

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 iconic 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’Ocon 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 countries in almost every corner 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 Viciana and Antoni D’Ocon; music by Josep Reig and storyboard by Segundo Garcia (Erieq). D’Ocon’s daughter is the gianterral relay of the company, and has given The Fruitties’ reboot a new appealing, charming and colorful look that will captivate the new generations while but 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. Dibobo, 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. Telede Jones, Planet 51, Boon and Rest and The Fruitties are a good example of that.

More and more studies 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, the ad.

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, Rentero Perez. At this moment the pilot of the new series is being developed and produced, finalizes Carla D’Ocon.

All The Kids: fresh & original

All The Kids (Spain) is a co-producing 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 brings to market fresh and original TV content for the global kids, tweens and teens, actively developing formats for prestigious companies such as POWOW, Midepato, El Calonazo, Plano a Plano, New & Co, Funwood Media and Tomovision, among others.

The company has worked alongside celebrated and award-winning scriptwriters such as Solange Kioleyan (Viola, Parecienca, BÁJE) and Steve Acquing (Latest Pitt Stop, Kuu Kuu Harajuku, The Penguins of Madagascar). All The Kids has recently signed with Javier Rodenas (La Pequeña de Eva, Impere) for TV script development.

The company has also initiated a strategic alliance with Onza Entertainment and El Calonazo, 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 POWOW 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: Lucy y Moneke, to take it to TV, Alfa, Terror Valley (6x’59), a transmedia horror series 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

Motion Pictures, an animation pioneer

Motion Pictures is an award winning studio founded in 1976, having produced during the last 18 years more than 11 animated series and films: Raindrop (New York Film Festival, Young Public Award Grenoble Festival), Glumpers (“Best Animated Series”, Chupete award) and Pumpkin Report (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 Nice 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 Rubias’.

The latest production is Myoo (104′5), a 2D animation with Peppe Pigioni & 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, Hopp! (Israel), RTÉ (Ireland), TVE (Spain), TVNZ (New Zealand), Globo (Brazil), TV5 (Spain), etc.

Animation industry in Spain is having a sweet and sour moment. We have great talented people, competitive prices. Beforus y el laboratorio de los toros 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 2,14 in the Spanish economy, and 1 job in animation generates 2,5 indirect jobs in other industries, 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 VOD platforms, as well as the investment to animations series coming from the Ministry of Culture, they conclude.

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

Motion Pictures
Spain, a sophisticated and developed OTT market

The reason why 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 Telefónica was taking the lead with an exclusive service for its clients; last April, Spanish telco presented Movistar+ Lite for any 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 subscriber in Spain: 6.9 million, from which Movistar took 4.09 million 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 3-5% a year. DTT still has a high penetration of 6%, with 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 3-5% a year. DTT still has a high penetration of 6%, with 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 3-5% a year. DTT still has a high penetration of 6%, with 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 3-5% a year. DTT still has a high penetration of 6%, with 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 3-5% a year. 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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 the world of men. Also, the romantic drama La Templanza (30x’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 Salome 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 (10x’50) based on La Templanza and the documentary series Huesca FC (work – pamine (10x’30) and the comedy Por H o por B (10x’30) from the Group. Everyone talks about original projects from the most recent division of RTVE, HBO España, shot in the Basque Country, the documentary series (10x’30) and 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 first local project is Patria, based on the successful novel and produced with the showrunner Aitor Gabilondo and its production company Alea Media; Fioade in Love, directed by Goya Award winner Isabel Coixet; 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.

Our innovation in both, quality, aesthetics and narratives, stands.

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 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 Telefónica.

Sergio Oliva, 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, Ate Madrid, Gigantes, El Emboscador, Fú- vox, Menti sare oda, El dia de mañana, Mia lo que has hecho, Vergüenza, Hierro or En el corredor de la muerte, also Mientras duerme la que, the very first original movie directed by Spanish director Alejandro Amenabar premiered in 2019 and in co-production with MOD Producciones, Hime- noptero, K.S.S Films and MDDG A.I.E, and
**Spain, a sophisticated and developed OTT market**

with the support of ICAA.

For 2020, Movistar+ is producing with The Mediapost Studios’ Globomedia Ponsele (6x’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 Q4 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 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 García Calvo, director of Huawei Video service.

We care about offering freedom of choice so the user can freely browse the 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 and smartcast 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 tested 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 “engageable” 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 discovering and watching that we never thought about. We feel like we are pioneering 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 5.83 millions IPTV. The total number of televisions is 38 million, of which 31.5 million receive DTT, 0.67 million Satellite and 5.83 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. For more info please contact us at sales@motionpic.com

**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.

According to the executive, Huawei Video has seen a ‘huge traffic’. Some for the platform Movistar+ is launching and the epic dramas series La Peste.

“...I believe that the Spanish market is the perfect market to learn about how to use HbbTV and how to use OTT and online services. And also how to create different types of content in different formats, such as short-movies and short-form series.”

“...and moreover, using a small screen to engage and watching that we never thought about. We feel like we are pioneering somehow this new wave,” says García Calvo.

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

MyaGo embraces the joy of youth encouraging children to explore and be curious about the world around them.”

Sam Morrison, Scriptwriter

(Peppa Pig, Ben & Holly)
**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 us 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.

This year, the Spanish 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 a case of success in many international events as Fespaét, the biggest Latin American show, held in September in Cuernavaca, Mexico, or Animation/Vertana S.r.l, to be organized by the end of this year in Buenos Aires, both initiatives supported by ICAC.

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 the umbrella band created and supported by the Community of Madrid and Catalonia, by 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.

**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.

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**INTERNATIONAL EXPANSION**
Animation from Spain is the umbrella band created and supported by ICAC, 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.

We participate in three major events a year in an active way: Kidscreen (Milan), MIFA (Annecy) and MIPTV (Cannes), but there are also occasions when we can collaborate with a particular event because we see an opportunity, as is the case of the Premios Quirino (Tenerife), where we support the co-production market by inviting international buyers and distributors, describes Silvia Barraclough, ICT and Digital 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 effective 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.'

**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 audiovisual 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 111.7% 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 platforms. 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, Spanish animation & 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.

'2018 was a year of growth, with many new companies emerging, and even companies that at some point had left their international presence are returning refreshed.'

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**Atresmedia: strong growth**

The international business of Atresmedia has grown heavily in the last 30 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 Gameiro**, 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 dramas are sold in more than 112 countries with series such us Vito & Vlo (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 us 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 (Locked up), which is on the air in Spain with more than 2,000 episodes.

**Mercedes Gamero**, head of sales & acquisitions at Atresmedia Diversificación, explains: ‘In the last 30 years, we have created very special relationships 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: in 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 Coronte and Vivir sin permiso available on Amazon and Netflix, respectively, as well as La Verdad and Sé quién eres in 190 territories.

‘We multiplied the home passed x4 and the international presence with more channels and homes abroad. We’ve also announced a deal with SBS (UK) and SBS (Australia) and BBC Last year we sold content to +500 partners in 190 territories: on 1H 2019 we keep pushing Sé quién eres 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 Mastro (13 eps), new production from Atresmedia about daily situations of a maternity hospital narrated through the patients, families and doctors. The show has already confirmed S2’, remarks José Antonio Ruiz, director.

On factual, the docu-series CincoMAS, a docuseries (8 eps.) starred by Spanish singer Mónica Naranjo, and MZUNGU, operated by CincoMAS, are currently on the air in Germany and Belgium.

Atresmedia Internacional distributes Antena 3 Internacional, Atreseries, Atercine y MOLAI TV, apart from the group OTT, Aterplayer. ‘We are the private European operator with more channels and homes outside our frontiers with more than 58 million subscribers worldwide’, highlights Javier Nuche, director general de Atresmedia Diversificacion.

“We multiplied the home passed x4 in less than five years and we keep expanding, especially with Atreseries and Atercine thanks to our content partners such us TV Globo with 500 hours of dramas, and Video Mercury with 7000 movies, respectively. We have presence in more than 50 countries, being the most recent agreements DirectTV and Verion. We’ve also announced a deal with AMC Network International, for a new European package and another one with MEO in Portugal, concludes Nuche.

**Mediterraneo: all in one place**

Mediterraneo is a new brand from Mediaset España that gathers three key international businesses 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 relationships 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: in 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 Coronte and Vivir sin permiso available on Amazon and Netflix, respectively, as well as La Verdad and Sé quién eres in 190 territories. On the second semester we keep pushing Sé quién eres 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 Mastro (13 eps), new production from Atresmedia about daily situations of a maternity hospital narrated through the patients, families and doctors. The show has already confirmed S2’, remarks José Antonio Ruiz, director.

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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.
RTVE, pioneer and leader

Rodolfo Dominguez, commercial director, and Maria Jesus Perez, 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. Traditionally, we have worked at the Americas, with an increasingly stronger presence in the Spanish-speaking US, where our series are meeting with a great deal of success,” add Dominguez and Perez.

Apart from its long running dramas Centenario, dona pava or Amor en Tiempo Revuelto, RTVE is promoting Piano a Piano, Servir y Proteger and Globomedia: Midiota, while seas’ 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 2021, 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/benefit 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 partner interests. RTVE has three groups of potential partnerships: 1) Free TV from the Americas and Europe (Rai, Portugal, Gal, France and Germany); 2) VODs: just for Spain or worldwide; 3) worldwide distribution companies; he comments.

Bardem concludes: “Some broadcasters have found 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 co-production projects is to clarify the interest of our possible internal user (linear or digital staffs)’.

Filmax evolves and diversifies

Based in Barcelona, Filmax initiative 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 a specialist in genre cinema with The Minister (Christian Bale) and Darkness (Ana Paulet). It’s TV department was founded around eight years ago. Since then it offered many series, including the big international hit Money Heist, one of the most internationally acclaimed Spanish TV series. It enjoyed adaptations in top markets, as well as ranking 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 Doña 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 goers is increasing. We are centering on the production and distribution of high-quality films like Tumon and The Motel”.

The TV team is developing series in various genres. Furthermore, it has added a new, high-quality animated series for MIPCOM, Tolo’s Musical Farm, inspired by the animated feature Tolo: 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.
Comercial TV: cooperation

Madrid-based Comercial TV is an independent Spanish distributor with operations both in the capital city of Madrid and in 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 Blind HeART, while from Europe it manages Authentic (Germany) for Spain and Latin America/US Hispanic and TVI (Portugal), from which is promoting A. Rio, 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 (Navarre, Canary Islands, Basque Country). The future is already here and managing it is, in my opinion, an exciting opportunity,’ concludes the executive.

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 Tencent Film Commission and offers is now working on Mondo TV’s top series MetaHeroes (52×7), co-produced with Meteor 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 co-produced with VIP2000 TV (USA) and Caiblanca (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.
Spain, a key destination for global productions

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

The Institute of Cinematography and Audiovisual Arts (ICAI) 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.

ICAI encourages, promotes and assembles Spanish 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 non-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 (EUCFN) and works on audiovisual, commercial and touristic 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 advising concerning financing, locations, administrative procedures and all types of services.

Last May in Valladolid, the Ministry of Tourism along with ICAI 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 Isa-Bel Oliver, Secretary of State for Tourism, Jaime Almánzar, deputy director of Promotion and International Relations of the ICAI, and Carlos Rodado, 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 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 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 15% via tax credit. Production service companies based in Spain are essential when it comes to applying for these tax incentives and beneficial values. As for sales and assistance and Inland Revenue enquiries.

In order to obtain these incentives, the company can choose up to 61 million in the country, employ a percentage of 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, 1,000 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, insurance.

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, equals to 200-220 days of bright 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 ICAI.

It is formed by 25 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 live projects.

More than 1,975 projects were benefited with 600 films released and indirect help for 1,200 workers 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, and explain 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 has already, 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
Profiles represents 90% of the production companies that develop international audiovisual projects in Spain. The current members are: Azulle Films, One Films, Cali櫃, Andalucia Films, Fresco Film, Volcano Films, Balleïa Films and PALM Images and 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 Herrera, president of Profilm.

We promote the landscape, the artistic and cultural 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 52 productions in total, completes Guerra.

Some of them are Game of Thrones, shot in Parte Natural de la Barrera in Navarra, the third season of English drama The Crown, Terminator 6, shot in Castilla La Mancha, the French-American The Sister Brothers, Wonder Woman, the coproduction Paradise Hill or the next British premier The Mythic Rhythm started by Jude Law, among many others.

BY FABRICIO FERRARA

Elena Vilardell, executive and technical secretary, and Victor Sanchez; from Ibermedia met at Conecta Fiction in Pamplona with some 32 audiovisual producers and explained to them the new program to promote TV series, which will call for new projects since February 2020.

Spain is one of the European countries with better balance between quality and costs for production. This, combined with the government’s proactive 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 Members of the Spain Film Commission network during the most recent General Meeting at Salou (Tarragona) on 24 of March 2019.

* 56 • PRENSARIO INTERNATIONAL 57 •
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 in the growing 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 Studios 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 (Vander Media Group) and Elite (Zeta Producciones).

Spanish companies are also expanding. Mediaproduction 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. Movistara, the biggest pay TV-SVD 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 Antena3 Media 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, 13 films and 46 series where 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 in the region the number rises.

These productions include international blockbusters as Tim Miller’s Terminator (SKydance Media and Paramount Pictures), Reed Moorano’s The Rhythm Section (Ron Productions), Hong Kong action film Low Walker 2 (Shaw Brothers) and Jaume Balaguer’s action thriller Way Down (Telecinco Cinema), or the new title from Spanish most international director Pedro Almodovar’s Dolores y Gloria (El Deseo).

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 Radiotelevision de Castilla-La Mancha (RTVCM), for which some 14 audiovisual companies work between producers and content generator, 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 one stop shop, we offer and negotiate specific locations and permits. We host mainly Spanish cinema, but also Hollywood giants such as Remington 6 or 80 Cals, 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 the demand in markets, but from next year we will add some television to promote both sectors,’ concludes Villanueva.

Castilla-La Mancha, emerging audiovisual destiny

Navarra: strong participation at MIPCOM

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 Huida 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 of the audiovisual 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 26/2015, 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 (CLAUNAV), 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 (53% of Navarra have an important boost from the Governments 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, but we can expand a lot,’ highlights Cisneros.

Together with the Association of Audiovisual Producers of Navarra (NAVAP), 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 Molins, the only film studio in Navarra for cinema, TV and commercials, strategically located in Lekaroz and close to Pamplona (03km), San Sebastian (62km) and Bayonne-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 1000m2 and another of 700m2 and 12mts height. We also have meeting spaces, DI room, dressing rooms, make up room, production offices, etc. We offer accommodation and catering services in our 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 numerous productions. We maintain a competitive edge, working for major clients budgets in these times of crisis, explains Angel Zautzi, 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 Studio: ‘The Running of the Bulls in Pamplona is one of the most extreme experiences of the world, and we produced and broadcast from Pamplona to the whole world, it was explained by the company.

Encierro Films serves as a consultant for nearby and those shots in some 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 5,500 on weekends) with in Pamplona’s cobblestone streets, and gets a television and Internet audience of over 200 million people. Established in 2010, we collaborate with global TV, Associated Press, Reuters, CNN, Al Jazeera, Canal Plus and locally LaSexta, ATres Tele and E1Pais 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 this is Eiken Cluster, a non-profit, sectoral business association created 12 years ago that gathers +125 members, from publisher ETB to producers. At 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 invested €686 millions a year while we generate employment for 5,282 people,’ explains Ateko Echenvaria, president of cluster, which has the supported of the Basque Governments 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 production and distribution process modernization, the new consumption habits, etc., are having significant impact in the industry. We redefine the areas where the different sectors configure themselves completes Echenvaria.
Galicia: well-established and competitive

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 services, Aeromedia, Area 3.1 Factoría Audiovisual, CINIFO, Filmento Iluminación, La Pianificadora, Mundos Digitales Transmedia, Pequierrochó Subtitulación, Streaming Galicia and Studio XXI; training: Centro de Estudios Marcote, EGACI and Servicio de Audiovisuales de la Diputación de Lugo; and innovation centers and other entities such as ITE, CESSA 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 to 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 €4.4 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 (ZIC) 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, Spain/Mexican Ánima, and Germany’s B-Water; two created here: People Moving Pixels (Stefan Fjeldmark and Linni Rita Gad) and 3Doubles; France’s Birdiland (a branch from Amusa) and Austalia Arx Anima, as well as Peruncho 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.

Carried out by • Mondo TV 
Barcelona-based Tomavision Studio, Spain/Mexican Ánima, and Germany’s B-Water; two created here: People Moving Pixels (Stefan Fjeldmark and Linni Rita Gad) and 3Doubles; France’s Birdiland (a branch from Amusa) and Austalia Arx Anima, as well as Peruncho and La Casa Animada.

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Sociograph: understanding audiences

Sociograph, a marketing science consulting firm, combines neuropsychological models, 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.

Elena Martin Guerra, co-founder and CEO, explains: “Understanding our consumers is now more important than ever, as the new generations came to play a more important role in the media sector. They are more aware 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.

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 intrusive technology called as the company (Sociograph®).

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 become 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, Garanivas & Lynch, Schaveitzen-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 Roncaglia, etc.” says Sydney Borjas, Director General.

Scenic Rights 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 la mito, animation series commissioned by Netflix from Endemol, Marro, a Dopamine and Onza production for Amazon, where Curro Royo participates as showrunner, or El cielo a tiro, in development by Polka based on the latest novel by Jorge Franco (Rosario Tijeras). This year TVE premiers Promesas de Armas, 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 mí by José Niemetz; Juto by Carlos Bázas, the original project for TV series. The Crossover, from showrunner Curro Royo with Yolanda Canton (El restauratore).

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.

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The Kitchen boosters the Ibero American market

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 two production companies from every continent. 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. Acemedia acquired the bestseller of all times, Sila, with all seasons, rating record holder Lifeline with its two seasons and also brand new prime time hit Hercus with its two seasons. Sila has been one of the most watched Turkish dramas in Spain, she commented.

For MIPCOM, the company 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 Özçivit. In addition, ATV’s summer hit Love and Secrets, will be carried to the main seas and has been added to ATV catalogue, being already been sold to Albania while it is gaining strong interest from other countries.

The Kitchen is working on the voices of Pocoyo’s new season

ATV: Spain falls in love with Turkish drama

Sila, one of the top series globally sold by ATV premiered in Armenia, who also picked up two seasons of the most recent success Lifeline.
Gaumont: building bridges

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 Oizanski, 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 Oizanski, 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, Oizanski 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 irresistibility and worth, and we are very proud to be part of it.

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 Iauria and El Presidente, respectively, in which we were involved with Fabula (Chile). El Presidente is confirmed to premiere 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 WBITVP Spain: two of them are based on real facts: one story about the judgments of Latin American dictatorships in the ‘70s, and the story of the story of ‘Mas alla del Mar’ is confirmed to premier on Amazon Prime Video the next year, stand the executives.

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La Iauria, coproduction between Fabula and Fremantle in which Kapow is involved.
GECA: maturity of Free TV series, creative boom on streaming

Despite of the convulsive 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*, *Elíte* or *Vis* as *V* shows that the muscle of the industry keeps fit and that its positive reproduction knows 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 *Serious del Madrid* with 16.2% share, and the drama *V* by *V Irvin* premiers with 19% (both on *Telecinco*), and *La casa* Montespedido with 13.5% share 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 million have Pay TV services in their Hbs 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*, *Movistar+* or *Telecinco*). And the future projections 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 effort of multination-naire 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 contents worldwide. In the case of *Movistar+,* another multinational company that has announced an ambitious project to produce its own audiovisual contents worldwide.

**GECA OTT BAROMETER**

Among the conclusions that emerge from the first edition of the OTT Barometer by GECA, among others, it 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 23 most watched series of the OTTs by the end of the study were national productions: *La casa de papel* (11.6%), *Vis* (12.2%), *Las chicas del cable* (11.6%); the 25 users’ highest valued series, being in this case *El embarcadero* (11.6%) and *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 *Arte Madrid* the national fiction appearing on the highest position of the ranking list.
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