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OCTOBER 2018 | YEAR 27 | # 340

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- Market data, trends
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## Welcome to Portugal, a land of opportunities

PRENSARIO had the chance to visit Portugal many times and the most significant impression from those trips has been the quality of its people, its unique architecture (its famous *calçada portuguesa!*) and history, as well as its fantastic and fresh food, weather and skies, sightseeing and, of course, its tiles.

The country offers a great perspective of the Portuguese Empire. The one that has travelled and conquered lands all across the world: from Brazil in South America to Macau in South East Asia, going through Africa. That diversity is perceived in the territory and its people's culture.

For the first time, PRENSARIO produces this special edition 100% focused on the Portuguese audiovisual industry with a double objective: on one side, to highlight the global industry about the big opportunities to develop projects in a unique space; on the other, maybe the most ambitious one, to encourage local players to join forces in order to better promote the country's advantages worldwide.

This edition is full of information about the biggest FTA groups, **TVI, SIC** and pubcaster **RTP**, but also the highly-skilled and equipped production companies, like **SP Televisao, Coral Europa, Valetim do Carvalho**, as well as the international production forces like **Warner Bros., FremantleMedia** and **Endemol Portugal** and **Shine Iberia**.

Along with them, it is being reflected the strong local and international presence of the **Independent TV Producers Association (APIT)** and the **Portuguese Film and Audiovisual Institute, ICA**. Both entities, along with the key distributors, are working together to increase the presence in the international tradeshows, like MIPCOM, where the Portuguese industry is attending again in a unique booth.

It is a challenging time for the Portuguese industry: a new fund from the Ministry of Tourism is being implemented to further promote the national production, and to invite international companies to produce in the country. It is a great tool to amplify Portugal in the global market.

All the players have one specific purpose: to make Portugal know worldwide. And fortunately their aim was the same of PRENSARIO this time: to give a better approach to these unique landscape. Here we are. Take a look to this land of opportunities.



### Prensario International

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# ICA: 'We aim to put Portugal on the map of major film and audiovisual productions'

The **Portuguese Film and Audiovisual Institute** (ICA) is the national film agency that, through project funding, provides support for the development of the Portuguese film and audiovisual industry. It gives financial support to cinema and audiovisual projects annually through a public tender, which includes several areas of the cinema and audiovisual Portuguese industry.

ICA manages more than 20 support (subsidy) programs, including: development (film and TV); production (film and TV); distribution, exhibition, festivals, film literacy, promotion, etc. Regarding the audiovisual industry, it supports the Writing and Development, Innovation; and Production (fiction, documentary and animation).

**Luis Chaby Vaz**, president of the Institute since June 2017, explains to PRENSARIO: 'Portugal has a lot to offer to the international market. One of the main advantages of working with our national producers is that even though we have a very small internal market, our industry professionals are very experienced in coproducing international projects.'

'Our professionals have a long track record on coproduction projects, since Portugal has established coproduction agreements with more than 60 countries, some more recently, like Israel or Morocco, and others that have been in force for several years, like France, Italy and all the Portuguese speaking countries, including Brazil. Also, we have recently created a very competitive incentive system for international projects that consider Portugal as a filming destination.'

Regarding how can Portugal become an audiovisual destiny for the global content production, **Chaby Vaz** answers: 'Portugal created one of the most competitive incentive system in Europe: a cash rebate, funded by the Tourism Board that applies to film and TV with the minimum Qualified Portuguese Production Expenses (QPPE) of €500,000 (USD 600,000) for

fiction and animation and €250,000 (USD 300,000) for documentaries'.

The executive enumerates 10 good reasons of why international projects should consider filming in Portugal. First, *sunnier days*: long hours of sunlight and clear skies almost 300 days of sunshine per year and low levels of precipitation; average temperature of 18°C / 65°F (2017).

Second, *variety*: beaches, castles, monuments, impressive old and modern buildings, churches, cathedrals, monasteries, parks, historical villages.

Third, *accessible locations*: diversity of scenarios in short distance; less than 5 hours from North to South by car; three international airports (Lisbon, Porto, Faro); five international harbors.

Fourth, *experienced and hard working professionals* available at competitive rates. Fifth, *studio facilities & equipment* at Lisbon and Porto. Sixth, *affordable cost of living & great food*.

Seventh, *coproduction treaties* with more than 50 countries worldwide (Portuguese speaking countries representing 250 millions) and Latin American countries.

Eight, *stable and safe country*: Portugal is the third safest country in the world (Global Peace Index and 29th in the Corruption Perceptions Index 2017). Ninth, *cash rebate for film productions*. Tenth, *courtesy location scouting*.

About the future, he remarks: 'We want to put Portugal on the map of major film and audiovisual productions. Until now we didn't had a truly competitive incentive for shooting in Portugal and we believe that with the new formulation of the incentive (a cash rebate system, with lower minimum spending, higher percentage of eligible expenditures, and supported by the Tourism Board, Cinema and Audiovisual Fund) we will be able to place ourselves as a competitive player in the cinema and TV production industry.'

'Also, we have to increase our coproduction agreements and international co-production projects. To reach that goal, ICA is investing in several international promotion initiatives on the most relevant events', **Chaby Vaz** concludes.



Luis Chaby Vaz, president



(Credits: Miguel A. Lopes/Agencia Lusa)



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## APIT: 'We must monetize our contents and make the world know them'

The INDEPENDENT TV PRODUCERS ASSOCIATION (APIT) was born in 1996 with the main objective of defending the rights and interests of the independent television producers. Three years before, private televisions had appeared in Portugal, resulting in the need of producing more contents.

Susana Gato, executive president of the Association since December 2017, explains to PRENSARIO: 'We went from a market with only one public broadcaster, Radio e Televisao de Portugal (RTP) to a market with three broadcasters. This was a big change, which hence created the need of an association to protect these producers'.

Nowadays, AbPIT represents 29 independent producers, which produce mainly for television, but whose companies are very different from each other. 'Small to average companies, multinationals and nationals, specialized in only one type of contents or more diversified ones, everyone feels represented by this association, and that is exactly our daily goal, to represent all interests equally', describes Gato.

'Usually the producers work alone, executing requests from the television channels. There are not many examples of coproduction at a national level. We have to keep in mind that we are talking about a very small market, which makes the development of that kind of projects more difficult. It is very important that the things change'.

The main objective of APIT is to internationalize Portuguese contents. Gato adds: 'For that, we need two things: to produce more and better - quantity with quality; and own the rights on the content that allow it to travel. There is no reason why our fiction, for example, does not reach everywhere, as the majority of the other European countries. The content that we produce is our only patrimony, and it is what allows the producers to work in new projects. We must monetize our contents and make the world know them. We have talent and potential. We must get down to business'.

According to the executive, Portugal is 'totally fashionable'. Tourism had an exponential growth, especially because of the wheatear and the security that this country has. Besides that, it has great professionals and infrastructures. Rare light conditions and a lot of willingness to work: 'There are endless advantages', she summarizes.

'Without any doubt, and acknowledging all the programs that are broadcasted on national television in our daily basis, we have a natural predisposition to the production of telenovelas, or what we call "big fiction", although the "knowing how to do it" is completely transversal. There is an elevated capacity and technical and digital resources of national producers that might be able to compete internationally, in terms of quality of produced contents, with contents of any type'.

At MIPCOM it is fundamental for the Portuguese industry to show what the country does and how it does it. 'About the tax incentives, sooner this year, was created a fund of incentive to international production in our country, with of course the aim of promoting not only Portugal, but also our language and culture. It is very stimulating for foreign producers, especially if they associate themselves with a national producer', remarks Gato.

Regarding the future, she comments: 'We have to be more competitive. Offer more incentives and supports and, meanwhile, bet on the promotion of what we are already doing. Knowing the way that we produce would make it easier for foreign producers to be able to associate themselves with a local one. That would stimulate the coproduction and it would benefit all the

stakeholders. Only that way we would be able to grow internationally and attract productions for the country'.

'Our main objective is to increase the market of national contents. How to do it? In two different ways: first, internally by supporting and incentivizing the current redaction and the future transposition to our legal order from the AVMS Directive and its prevision of establishing obligations of investments for on-demand and other operators which direct their services to our country, targeting our audiences, but are established in another territory'.

According to Gato with this, it will be able to change the national law, which currently makes unfeasible any kind of jurisdiction of the Portuguese State towards these services, and to become fairer the competition between broadcasters. 'If we are able to, in the future, implement (just like Brazil did) a minimum number of hours of Independent National Production in these channels and services, we will make the market grow. It is, in fact, the only way', she adds.

And second, externally by supporting the internationalization of contents, either promoting coproduction with other countries or negotiating rights that allow its transaction. 'That is the only way of building a real industry', concludes the executive.

Susana Gato,  
executive  
president, APIT



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# Portugal, an industry prepared to take the scene

Portugal is a very unique market in Europe and the world. It has a widely developed television business, which is trying to focus in the global market, in order to gain volume and recognition, while digital and Internet are taking the scene and producers are getting ready to serve them. The State role, new funds and the global promotion are the keys to success.

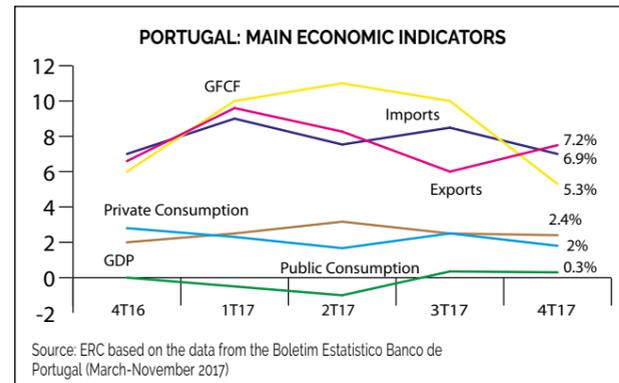
'Portuguese audience is more and more segmented, dynamic and participatory. In the last years, it is observed a preference of the indoor consumption, especially audiovisual contents, and a reduction of the number of attending to cinema, theatres and expositions.'

crisis (2009/2010), reinforced the domestic cultural practices that have resulted into smaller cinema incomes, and a reduction of the number of people attending cultural places', stands the report. 'The media companies had to adapt to this market context by supplying an integrated and competitive offer that allow them to be closer to the consumers. This resulted in the development of different strategies towards the digital media', it concludes.

independent productions and original Portuguese productions for all operators (even the ones outside Portugal); more complete and comprehensive incentives that combines fiscal and finance supports for audiovisual production', describes.

Portuguese market is adding new supports. The creation of the "Fund Support to Tourism, Cinema and Audiovisual" is a key element to transform Portugal into a more competitive audiovisual destiny to attract international productions.

It was funded by the Tourism Board and implemented by the **Portuguese Film and Audiovisual Institute (ICA)**. It includes the creation of an inter-Ministerial work group to implement the fund all across



This is one of the main conclusions of a study released at the beginning of 2018, by the **Independent TV Producers Association (APIT, in Portuguese)** in partnership with **Ernst & Young**. This work has proposed a number of specific regulations in order to generate an 'adequate context' for the audiovisual sector and its internationalization.

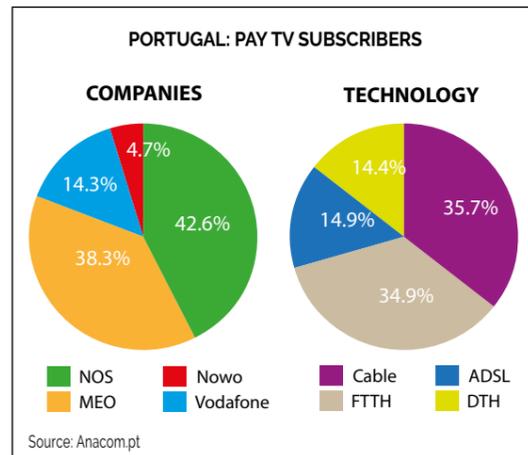
This paper is a continuation of a previous work entitled as "Strategic Study of the Content Production Sector in Portugal" from 2016-2017, done by consultants **Augusto Mateus & Associados**, which described the main global trends for local audiovisual products.

The increase of the speed in content circulation, the access and the technological resources of content reproduction, but also the economical

## STATE SUPPORT

Regarding the public policies to develop the sector, **EY** indicates that the TV and Audiovisual Services Law No 27/2007 guarantees a healthy and equilibrated competition, but the protagonists of the market consider that this normative is still insufficient and needs some changes to adapt to the nowadays landscape.

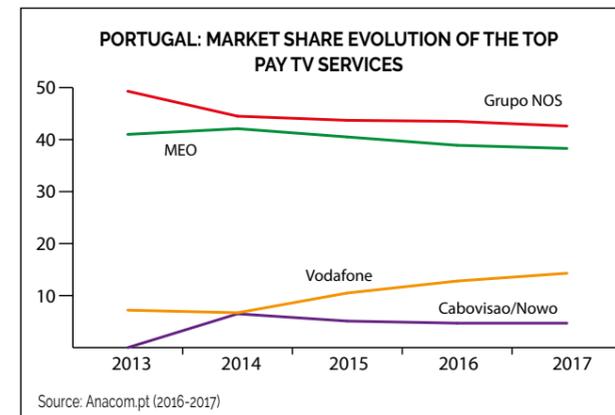
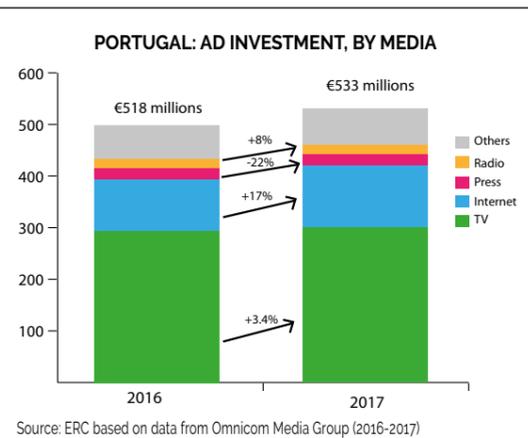
'This legislation must be assumed by the establishment and the accomplishment of European programming quotas, independent production and Portuguese-language programming for all operators; the obligation in the investment of European contents,



the nation, and the creation of a **National Film Commission**.

To apply for this fund, the project could be a fiction series or animation with a minimum investment of €500,000; documentaries and post-production with a minimum of €250,000. As a general rule, the maximum amount a project can receive is €4 millions.

There is also a cash rebate, a payment made in advance that means between 25%

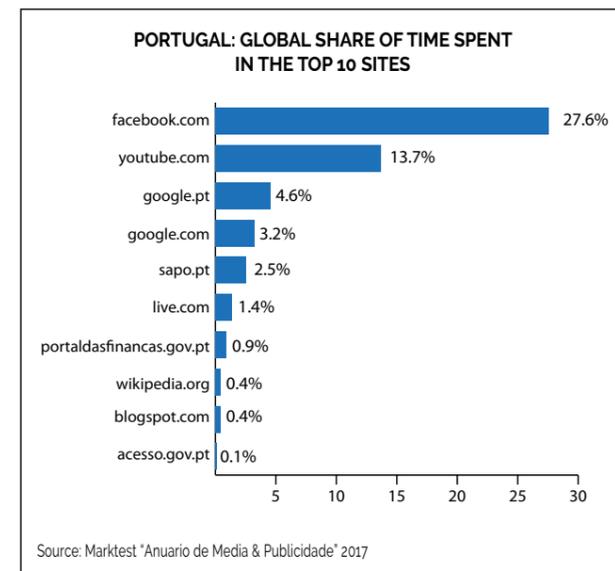


to 30% of the eligible expenses. The fund is destined to national and international productions, which must have a local producer or be produced by a temporary society in Portugal. The projects have to use local teams.

## MARKET

The most updated report from Portuguese watchdog the **Entidade Reguladora para a Comunicacao Social (ERC in Portuguese)** indicates that 2017 was the year of the recovery of the Portuguese economy: the GDP keep positive during all the trimesters of the year, and bigger compared to the last trimester of 2016. There was an increase of the private investment, as well as a growth in the domestic consumption, following the trends noticed in the Euro Zone. During last year, Portuguese economy grew 2.4% vs. 2.7% in the Euro Zone

Advertising continues to be the main incomes source for media companies. According to IPG Mediabrands, the Portuguese ad market received €533



millions of investments, an increase of 2.9% compared to 2016. TV was the main receptor of those investments with more than €300 millions, followed by digital with €120 millions and Out of Home with €70 millions, among others.

Regarding economic groups, ERC data indicated that close to 54.3% of the ad market was in hands of **Cofina, Impresa (SIC), Media Capital (TVI)** and **RTP,**

falling from the 56.7% figure of 2016. According to Omnicom Media Group, all advertising segments grew, with the exception of press (-22%); Internet was the biggest one with 17% compared with 2016 followed by Radio (+8%) and TV (+3.4%). The biggest investors in media ads were **Unilever-Jeronimo Martins** (18% of the total), **Portugal Telecom-MEO** (12%), **NOS** (10%), **P&G** (10%), among others.

In 2017, Portugal leading broadcaster **TVI** gathered the biggest ad quota in television: 39.4%, followed by **SIC** with 35.4% and **RTP** with 10.2%. "Others" includes the top Pay TV channels, and the most representative ones were **TVI24** and **FOX** with 2.4% and 2% respectively.

If we analyze the last 10 years, the "Others" category was the most important one, tripling the ad investment received because of an increase of the penetration of the pay TV service. About the free TV channels, **SIC** showed an increase of +137.6%, with an annual increase of 8.2%; **TVI** and **RTP1** grew, too, but in a lower rhythm with an annual variation of 5.8% and 4.2%, respectively.

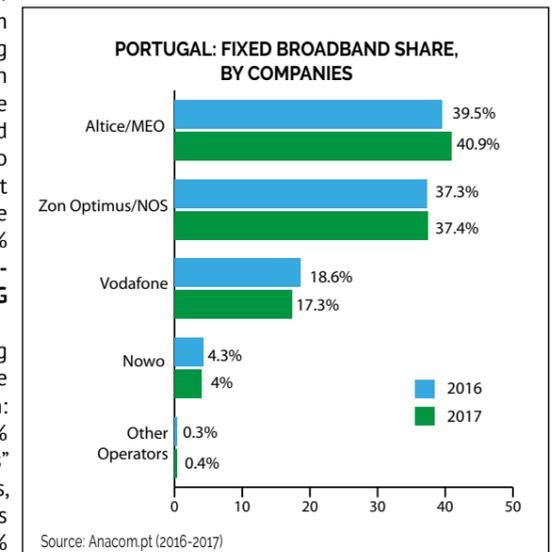
## FILM COMMISSIONS

Portugal is already a top destination for content production: many high end movies have been shot in the country, thanks to the

key role of a dozen Film Commissions. From next year, there is a plan to launch a National Film Commission to promote the country's advantage in the global market.

The first FC was created in 2006 in Algarve. 'We always have a good relation with **ICA** and since 2007 we started to sensitize the Congress and Government to create fiscal incentives', explains **Eduardo Pinto**, from **Algarve Film Commission**. 16 movies have been produced there like *Un Gato, Un Chino y Mi Padre*.

Municipal Chambers from Porto and Lisboa created their own structures. **Cristina Matos Silva** leads the **Lisboa Film Commission**, created in 2012: 'We always



get financial support, what we didn't have was a structure. Now there is a political and cultural will to make all the process easier and quicker. We can now have a license for shooting in three days'.

The capital city of Portugal supports cinema and commercial productions. It has received 700 requests last year, which meant a grow of 22% compared to 2013. 24% of them came from international companies. These requests represents six productions a day, €265,000 in municipal support (taxes exemption and prices), €486,000 in municipal taxes incomes, and €10 millions of expenses from producers (only for cinema production).

**Porto Film Commission** has a similar objective by facilitating the realization of audiovisual production through its intervention. Among the top recent production, they received *My Story*, *Bad Bad Investigate*, *NBK 101* and *Entre Sombras*.

# CPFC, to built up a “film friendly” region



Bruno Manique, president CPFC

**Centro Portugal Film Commission** (CPFC) is a non-profit and autonomous organization that which aims to attract film and audiovisuals productions to the Central Region of Portugal, formed by eight districts and more than 600 potential sceneries.

One of the most important aspects in a cinematic production is to have the right decors that satisfy the needs and requirements of the producer/director. And Portugal have them: beautiful and natural scenarios, amazing buildings in the main cities, and 300 days a year of sunlight.

‘But that’s not enough: it is necessary to create the right conditions and adapt to the foreign producer’s needs’, stands **Bruno Manique**, president of **CPFC**. ‘We have to be a facilitator: a dynamic body that has to act between the production and the local structures. One of the main problems in our country is the excessive bureaucratization.

Our role is to accomplish the requirements as quickly as possible.’

To be able to do that, **Manique** believe the Municipalities ‘must be sensitized’. The **CPFC** has allied to the local Tourism Office, whose president, **Pedro Machado**, is also a member of the Centro Portugal Film Commission: ‘We have the talent, beautiful landscapes, geographical and historical resources, so our main objective is to position the region in the

international scene, and transform it into a competitive place for content production. Portugal has a fiscal incentive policy - Cash Rebate - that could reach up to 30%, which will allow to attract more international productions.

**CPFC** is made up of a multidisciplinary team with expertise in the film, audiovisual and tourism industry. ‘The objective is to recover the national and regional backwardness already mentioned, contribute to economy of the region and meet among others for the following purposes: a) creating more favorable organizational conditions for film production; b) to strive the capture of audiovisual productions; c) contributing to the renown of the “Centro de Portugal” brand; d) creating databases with the resources available in each region; e) supporting all incoming requests’, adds **Manique**.

‘We aim to contribute to define a development policy for the cinema and audiovisual sectors; establishing program-contracts with the Central Region’s autarchies; and acting as an interlocutor between cinematographic production companies and all public and private entities from here’, he stands.

‘Also, to create synergies with film festivals from the region and support initiatives that favor innovation and the creative economy, focusing on cinema and the audiovisual; and to promote the Central Region at international level through specialized forums’, concludes **Manique**, who finally reveals that there is a growing demand from international producers for commercial films, TV series, documentaries and fiction films.



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# SIC: great challenges, new strategies

**Sociedade Independente de Comunicação** (SIC) was the very first private network to be launched in Portugal back in 1992. 'Since our launch, we managed to continue our own and unique path', highlights **Vanessa Tierno**, director of acquisitions and format management.

Apart from the flagship network **SIC**, which holds an average audience share of 16.5% (January-May 2018), the group owns thematic channels like **SIC Mulher**, **SIC Radical**, **SIC Caras**, **SIC Notícias**, **SIC K**, **SIC**

Saturday. We also have morning magazines like *Queridas Manhãs*, *Linha Aberta*, as well as some entertainment formats'. Approximately, 90% of the grid is original production.

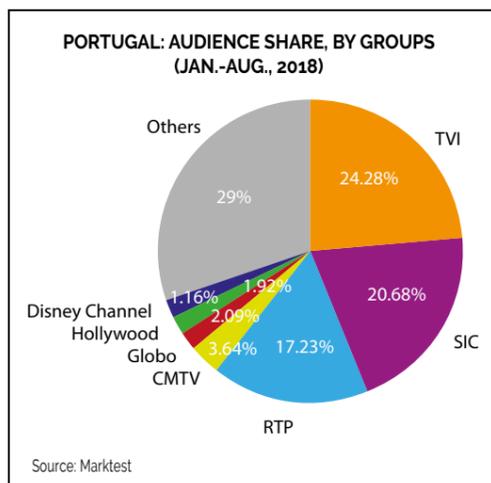
Before the telenovelas, there is a prime time news *Jornal da Noite*. At midnight there is a full slot dedicated to **TV Globo's** *O Outro Lado do Paraíso*. It holds a strong alliance with the Brazilian company, with whom it has produced the Emmy International winner *Laços de Sangue*, created and co-produced by **SP Televisão**.

'We have renewed our sports rights with *UEFA Europa League* for the coming seasons as well as partnered with **RTP** as a host for *2018 FIFA World Cup Russia*. Light entertainment is another key genre with *Fama* and *Alta Definição*, and interview show with **Daniel de Oliveira**, which has successfully won its time slot. Viewers are responding to programming dedicated to significant anniversaries for icons and moments from popular Portuguese culture', stands **Tierno**.

On the weekends, Hollywood films from **Disney**, **Warner** and **Paramount**. 'Big primetime entertainment show premieres on Sunday evenings. We are airing a stand up show, *Terra Nossa*, and preparing the local adaptation of *Married at First Sight*. Good clip shows still are performing well on weekends, especially gag shows like *Não Há Crise!*, she adds.

Regarding the thematic cable channels, **SIC Mulher** launched *E agora o que é que eu faço?*, a home renovation show, developed with the retail chain **IKEA**. **SIC Radical** focused on summer music festivals with live events such as *Rock in Rio*. Viewers continue to show interest in the established brands like, *MasterChef*, *Got Talent*, *American Idol*, etc. 'Many times **SIC Mulher** test these and, if successful, we consider the development for a local version on FTA', comments **Tierno**.

Stripped programming that draws viewers in and then keeps them there is what we aim to do. 'This form of horizontal programming is common in Portugal, because of the telenovela viewing habit', she says. Primarily all content on FTA, must be in the Portuguese language. The channels do not have a dubbing



tradition. 'Foreign content is usually programmed on cable networks where it is aired with subtitles. While Free TV primary successful genres are telenovelas, entertainment formats and, of course, football'.

About digital, **Tierno** says: 'We are confronting a significant shift in viewer behavior toward digital delayed viewing on connected devices and mobile. Connected device usage is growing we are seeing a bigger consumption in digital, DVD, DVR, **YouTube**, gaming and streaming platforms. What we call "Others" has had increase of 33% from 2017 to 2018'.

'We are talking about target from 4 to 25 years old, AB segment, which is transitioning to these platforms. We need to be aware of these changes and be prepared to act in response'. As TV consumption is changing quickly we have to invest more in Live events and local production and offer a more differentiated offer of contents to our viewers', concludes **Tierno**.



Stand up show, *Terra Nossa*

# TVI, a new way to narrate Portugal

Owned by Spanish **Prisa**, **Media Capital** runs leading FTA broadcaster in Portugal, **Televisão Independente** (TVI), launched in 1993. It also operates four thematic/cable networks, **TVI24**, **TVI Fiction**, **TVI Reality** and **TVI Africa** (Angola and Mozambique) plus **TVI International**, seven radio stations and **TVI Player**, the OTT with 1 million users per month.

Flagship network is also a leading telenovela broadcaster produced by the Group prodcó **Plural Entertainment**, supported by its technology provider **EMAV** and scenery builder **EPC**. It generates 3-4 titles a year of some 250x50 episodes (two seasons), which are also available for the global market.

**Bruno Santos**, GM of programming: 'We celebrate our 25 anniversary, having lead the last 13 years, which means 143 months. This is our major achievement, the base from which we work for the future'.

The Group gathers an audience share of 24.74% (May 2018). 'We are doing better with less channels compared to our competitors', he underlines. The pillars are telenovelas, entertainment and news. 94% of its production is generated in house, including the dramas produced by **Plural**.

From Monday to Friday **TVI** broadcasts morning magazines, kids programming and daytime and prime time telenovelas; in the weekends, entertainment formats and movies. 'Our programming grid is very similar

to Latin American networks, and pretty different from the European. To replace *La Heredera Guitana* (9.30pm, divided in two seasons) we have *El Valor de la Vida*, shot during the summer in Salvador de Bahia (Brazil) and Lebanon; and *Jogo Duplo*, a more sophisticated thriller for the 10.30pm slot. We are making a strong effort to diminish the number of episodes in order to make this product easier for global distribution', explains **Santos**.

Telenovelas are **TVI's** top product, followed by entertainment formats such as *Dancing with the Stars*, *Ride the Cage*, *Masterchef*, *Kitchen Nightmares* (the biggest phenomenon of 2017) and *Big Brother*, still on air with an edition called *Secret Stories*. 'We have output deals with **NBCUniversal**, but the times of big volumes of US content is finished. They don't work as they used to, because of the cable penetration increase. We only program them on the weekends and daytime'.

Pay TV penetration is around 95% in the country, so **TVI** decided to change its content strategy because an important part of the audience went to those screens, as well as to OTTs like **Netflix**. 'We made drama productions more sophisticated, adding suspense, action, while we increased the production values. We need to offer a differentiated product. On the other, we made shorter dramas, which meant a biggest effort from writers. Our programming became simpler but more efficient. Not only for the local market, also for international distribution. All in all, we get a higher quality-value and a cheaper telenovela product, while it helps our sales process'.

**Santos** continues: 'Up to know there are no original productions on Pay TV or OTTs, except for some series on **FOX**. Pay TV channels are taking

over 40% of the viewership. Investments are too high, so for cable channels it becomes very difficult. OTTs are in a similar situation. Still there is not a business model that can support the production of original programming in Portugal. Language is a limitation, as well', he completes.

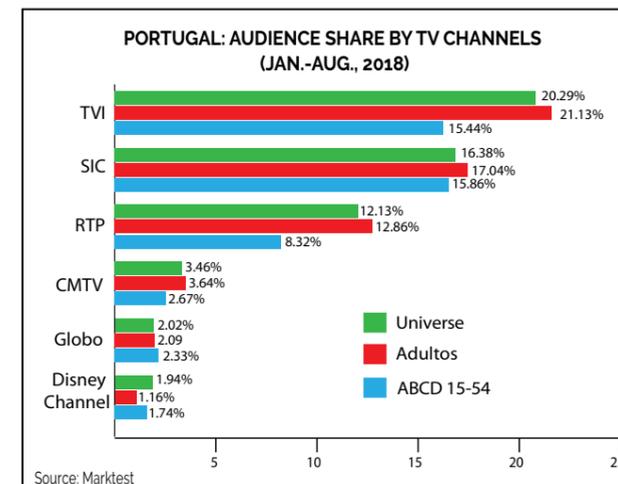
**Santos** is worried with the expansion of **Google/YouTube** and **Facebook**, not in the content side, but in the advertising market. 'They have gained a good part of the ad dollars, taking over 30% of the pie and that is complicating the scenario'.

There is also a revolution on the content consumption in this area. 'TV viewership goes down, while they go up. Monetization? I think companies are going automatically behind the ROI and still there is not much to do there. That's why several brands are now returning to the TV', he concludes.



*El Valor de la Vida*, the prime time telenovela that is more sophisticated, adding new topics like suspense and action, without losing the love story

Bruno Santos, general manager of programming, TVI



# RTP: valuable, diverse and cultural



With a unique history built over several decades, RTP is Portugal's Radio and Television public broadcaster. It has a very rich heritage of irreplaceable audiovisual content. As public broadcaster it is active around the values common to European Public Services: universality, independence, excellence, diversity, responsibility and innovation.

**José Fragoso, RTP 1 and RTP Internacional international programming director:** 'Our mission goes beyond informing, educating and entertaining, as we understand that we should contribute to enriching citizens lives. Our offer integrates a rich and diverse universe of television, radio and online brands: eight TV channels, seven radio stations and an OTT platform. We are a cultural reference for all Portuguese living in Portugal and abroad.'

Regarding Portuguese fiction, RTP broadcasts four new series in prime time: *3 Mulheres* (13 episodes) nominated for Prix Europa 2018: it is a historical series based on three women who played a very active role in the fight against dictatorship in Portugal in the second half of the 20th century; *Soldado Milhões* (3 episodes), another historical fiction centered on a World War I Portuguese hero; *Teorias da Conspiração* (13 episodes) and *Circo Paraíso* (26 episodes).

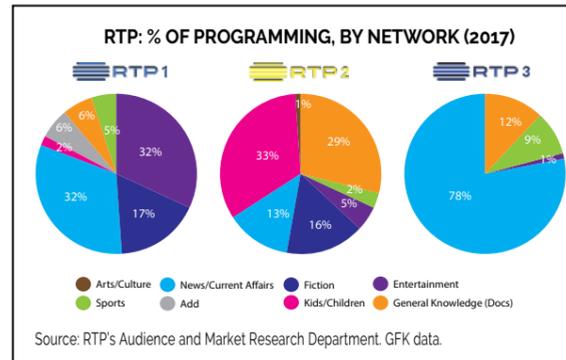
**Fragoso:** 'Producing historical fiction is, incidentally, one of our main directives in RTP1's global content strategy. All these series are original productions and will debut in the network. Six other Portuguese series that will be released next year are at different stages of production. The channel annually supports the production of 10 to 12 series within a logic of thematic diversification and transversal connection with Portuguese producers: historical works, biopics, fiction based on themes of our contemporary reality and comedies.'

'Throughout the year, directors, screenwriters, producers, technical teams and dozens of national actors work on projects chosen by RTP1, creating a relevant market dynamic in the Portuguese audiovisual industry and ensuring a strong connection with the public', he adds.

Entertainment is another of our programming directives at flagship channel. This season the big releases are the Portuguese version of two successful international programs: *The Voice* (weekly) and *Joker* (daily). 'Before the end of the year, we will also debut two other programs that combine entertainment with talent and knowledge: *Sewing Bee* and *L'Artisan*. The regular production of international or national programs is ensured by a group of producers operating in the Portuguese market', he remarks.

**Fragoso:** 'RTP1 produces several light entertainment programs 'in house', mainly talk shows, daily and weekly, that offer great diversity to our program schedule.. It also produces regularly live and live audience programs throughout the country, promoting events related to gastronomy, tourism, heritage, environment and Portuguese popular traditions, which creates a constant interaction with people from small villages, towns and cities across the country.'

The public group regularly engages in co-production projects, especially in the



field of cinema, fiction and documentaries. In strategic terms, public TV channels in Portuguese-speaking countries, most notably Brazil, Angola, Mozambique and Cape Verde and the various European countries, are our most common partners in co-productions. In Europe's case, due to geographical and historical proximity, the Spanish public channels, autonomous and TVE, have frequently participated in co-productions with RTP.

'At the moment, we are collaborating in the development of two projects of fiction, of high budgetary scale, one involving TVE and other international partners and the other with TV Galicia and Spanish producers', Fragoso explains.

And he concludes: 'Despite the small size of our country, the Portuguese television market is undergoing a dynamic period with a strong competitiveness between the main generalist channels and a significant growth of subscription channels, especially in the field of information and sports. RTP maintains a strong commitment to produce content in Portuguese, making it available on all platforms and guaranteeing our audience permanent access to our programs.'



Joker, the Portuguese version of Global Agency format produced by VC Filmes



# 10 YEARS

## Telling Stories

## Creating fiction

2011 | 39<sup>th</sup> International Emmy Awards  
WINNER - LAÇOS DE SANGUE | BLOOD TIES

2012 | 40<sup>th</sup> International Emmy Awards  
NOMINATION - ROSA FOGO | THE FIRE OF THE ROSE

José Fragoso, RTP 1 and RTP Internacional international programming director

## Globo Portugal: expanding *Brazilianness*



Ricardo Pereira, managing director

TV Globo (Brazil) has in Portugal a key market, where it has been operating since the 1970s with content licensing and, in recent decades, with the Pay TV channels **Globo Now** and **Globo**. The brands feature complementary proposals, but with two very strong and common elements: the Brazilian way of life and our passion for storytelling.

**Globo Now**, previously known as **Globo Premium**, offers a programming focused on news, sports, talk shows and reality shows and it is available by subscription in all Portuguese operators **MEO**, **NOS**, **NOWO** and **Vodafone TV**. The channel discusses current events in Brazil and around the world in an articulate and captivating manner, with an authentic Brazilian touch.

Operating in Portugal since 2012 and also available in the basic packages of all operators, **Globo** is one of the most watched pay TV channels in Portugal. Its programming grid offers the characteristically intense emotions of Brazilians through original telenovelas, series and limited series, as well as stories that moved people around the world.

**Ricardo Pereira**, managing director: 'Portugal is very important for historical and cultural reasons. We speak the same language and share a lot of history. We started our relationship with the licensing of *Gabriela* for SIC in the 1970s: the first telenovela to air in the country. Since then we have licensed other titles that are in the imagination of the Portuguese, such as *Tieta* and *Brazil Avenue*'.

'Besides our head office in Lisbon, we

also have co-productions with local players and two channels launched in the country. And this year we have revamped our brand, products and both of our channels in the country, aiming to strengthen our ties and interaction with the audience'.

This work, carried out by Portuguese agencies, involved a local survey to understand how Portuguese viewers perceive **Globo** and what are the main elements of identification. 'The contagious joy of Brazil, our passionate and intense way of looking at life, and the sweeter and more melodic way of speaking the Portuguese language are the most attractive features among the audience. Therefore, further exploring our *Brazilianness* became the leitmotif of the company's repositioning in this territory', he adds.

During August, in particular, **Globo** marked excellent ratings.

On the 15<sup>th</sup>, it was the most-watched channel on Portuguese Pay TV with eight programs ranked in the country's Top 10. 'This performance showcases not only the relevance of our content among the Portuguese audience, but also how it is recognized by the market', explains **Pereira**.

**Globo** was nominated for the "Meios & Publicidade Awards" in the best entertainment channel category for the second year in a row. 'We also have licensing deals for broadcast TV. Our partnership of more than 20 years with **SIC** remains strong and our telenovelas are still part of SIC's night grid, always reaching excellent ratings', he adds.

Pereira continues: 'We really value exclusive content. This year, for instance, we launched **Globo's Sem Cortes**, hosted by the Portuguese actor Ricardo Pereira. The show features behind-the-scenes reports, cast interviews and trivia about daily life at **Globo**, in Rio de Janeiro, as well as interviews with actors and actresses that participate in our productions'.

Globo Portugal also launched a new edition of the *Interactive Slot*, a public relations initiative in which people have the power to choose what will air on **Globo**. that sets us apart and launches us towards the future'.



Ricardo Pereira, actor from Sem Cortes (crédito: Globo / João Cotta)

### PAY TV & DIGITAL PLATFORMS TAKE THE SCENE

The Portuguese market is changing quickly and new players taking the scene: Pay TV networks and digital platforms are the main protagonists. As highlighted in the different interviews of this edition, **FOX** is one of the most active: the group is developing and producing a lot of original contents for the seven networks it manages for Portugal, **FOX**, **FOX Life**, **FOX Movies**, **FOX Comedy**, **Kitchen 24**, **FOX Crime** and **National Geographic**.

Another recent news is that **HBO** will open an office in Portugal employing 10 persons in Lisbon. There are also new channels being launched like **Eleven Sports**, launched this year in Portugal with the purchase of *Champions League* and *Spanish League* rights, and a Chinese new TV channel **IUTV HD**. Digital player are also very active, there are new productions taking place in Portugal for broadcasters OTTs **RTP Play** and **TVI Player**.

On the production side, there are very interesting examples, too: producer **Ministério dos Filmes** developed its first TV series, *Sara*, a satire of the Portuguese Cinema and TV industries whose first season debuted on **RTP2** on October 7; it is now available on Spanish **Atresmedia's** OTT **Flooxer**; and **Netflix** will premier *S2* this year and *S3* will come in 2019. It is expected this series to become a huge success internationally.



Sara, brand new TV series from Portuguese producer Ministério dos Filmes that is expected to become a global hit



**Warner Bros.  
International Television Production  
Portugal**

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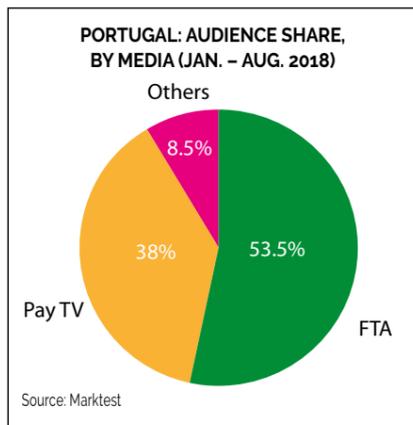
# Portugal: the future of television with the shadow of the digital media

Although Portugal has a small TV market, in the recent years the Pay TV networks, global SVODs and local digital players have become strongly enough to compete fiercely with the three largest television groups: TVI, SIC and RTP.

Better and more stable Internet connections are allowing the development of new digital offers in the Portuguese market, and the audience is adapting to them very quickly. With the launch of Netflix, then Amazon in December 2016, and OTTs from the telecommunications companies NOS, MEO and Vodafone new content consumption habits are emerging among Portuguese people.

Traditional television groups continue to hold more than a half of the total audience share, if compared to Pay TV and "Others", which includes digital, DVR, gaming, etc. In terms of contents, the three biggest national broadcasters produce the most relevant TV brands of the country, especially in drama series.

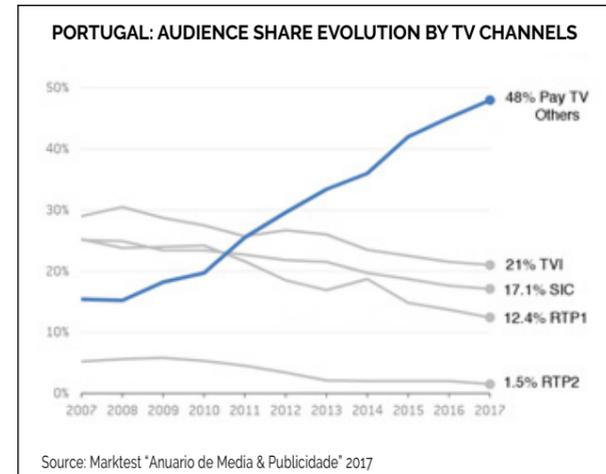
It is true that this market scenario could rapidly change if Portuguese producers are able to generate contents for the global SVODs. With the creation of the Digital Single Market in May 2015 by the European Commission (EC) those players and the



international Pay TV networks can be obliged to invest in local production.

Last April, 25 European authors and producers' association expressed their position in the revision of the *AudioVisual Media Services (AVMS) Directive*, which is currently in inter-institutional negotiations between the EC, Parliament and Council. The EC proposal for a revised *AVMS Directive* suggested in May 2016 introduced many ideas.

For example, Article 13.2 provides for the possibility



for Member States to require financial contributions (direct investment in content) from on-demand audiovisual media services established in other Member States but targeting their territory, that will contribute to funding local and European creations.

The entities remarked: 'This is a very good approach to address the forum shopping from which we are all suffering in Europe. But where the Council is pushing for an application of this rule to all media services (on-demand as well as broadcasters) on a technologically neutral basis, the European Commission and Parliament are embracing a timid approach by excluding broadcasters in this measure. We express our support for the Council position and welcome this ambitious attempt to establish a level playing field regarding obligations related to the promotion of European works.'

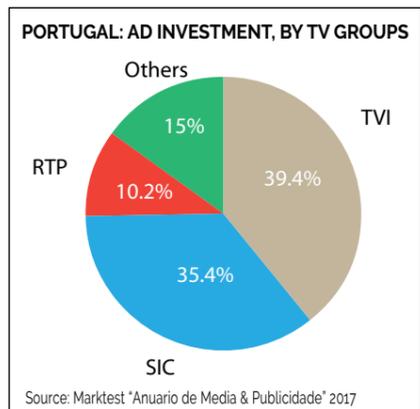
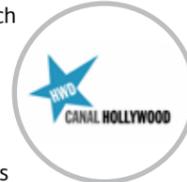
According to **Susana Gato**, executive president of the **Independent TV Producers Association (APIT)**, this could be a 'very interesting' opportunity for the sector in Portugal. 'We are very active and interested in participating in a solution that can benefit the national production market', she remarks. This change could mean a grow on a local level, but also a good chance to position the Portuguese industry in the global marketplace.

If the DSM is finally approved, every EU member will have to establish these quotas for local programming. The other option that is under discussion is to set a tax for the OTT players, which will then have to revert it into the production sector. 'Tax is not a good option, we believe the quotas are better, as we need to create jobs, new companies, and give work to actors and other talents', concludes **Gato**.

**Jean-Claude Juncker**, EU president at that time, proposed the idea of creating a unique market to give answers to the present challenges brought by Internet and digital technologies. 'A fully functional digital market could contribute with €415 billions annually for the European economy and create thousands of new jobs', he said a couple of years ago.

## THE MARKET

Television plays a key role in the Portuguese people's life, who spent between 4 to 5 hours watching TV, even in a market where 70% of the audience (15-24 years old) watches films, series and documentaries online. This situation has allowed an increase of the product-placement as an alternative to traditional advertising.



According to the "Anuário de Media & Publicidade 2017" from Marktest, 83.3% of Portuguese people watch TV. Women (especially the ones +64 years old) and people from classes D and E, are the biggest consumers.

From January to mid-August 2018, the market share for Pay TV networks was 38% and 8.5% for "Others". The remaining 53.5% is distributed among the FTA channels: TVI with 20.8%; SIC with 17%; and the two channels from RTP with 15.8%. These are the consolidated values, including linear, live + 1 and live + 7. Others include viewership of recordings older than 7 days.

The usage of TV set besides live TV, catchup and live +7 ("Others") is steadily growing, almost reaching 10% of viewership. 2017 closed with 6.9%, but in August 2018 it raised 9.5%. This could be viewing and or playing (DVR, Netflix, gaming, YouTube, Fortnite, piracy, etc.). In a given day around 85% of TV set consumption is linear, with pay TV having values of around 40% (of the total 100%). This 40% value is bigger in weekends and days with important football matches.

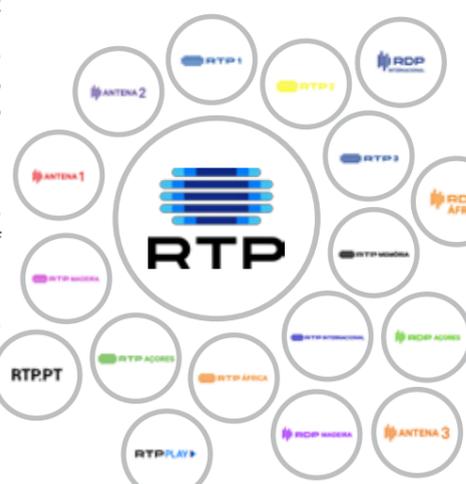
## PAY TV & DIGITAL

Another important source of incomes for the media companies are Pay TV subscriptions. The sector regulator **Autoridade Nacional de Comunicações (Anacom)** informed that the Pay TV continues to grow in 2017, reaching 3.79 million clients, driven mainly by the FTTH offer that totalized 34.9% of the total subscribers last years, this is 1.32 million.

The penetration of the service is over 90% in the nation, and the market is dominated by **NOS**, with 1.614 million (42.6%) and **MEO** with 1.45 million (38.3%) clients. Both showed a decrease in the number of subscribers, being Vodafone, the third largest operator, the only one that increase its market share thanks to the extension of its



fiber infrastructure: 540,00 clients (14.3%). The fourth and last company is **Nowo** with 178,000 clients (4.7%) By the end of the last year, according to the Barómetro de Telecomunicações da Marktest, 6.1% of the people in Portugal with 10 years or more have subscribed to VOD services like **Netflix**, **FoxPlay**, **NPlay** or **Amazon Prime Video**. OTT still shows a small penetration in Portugal, but the trend is to increase in the near future. According to Marketest BTC in 3T 2017 the percentage of people of 10 years or more subscribing to one of these services reached 5.5%, an increase of 2.3% compared to the previous year.



## THE NEW CONTEXT

On the **APIT/EY** study mentioned in the main report, it is highlighted that, because of this changing context, the main companies and producers are reconverting their identities as "audiovisual producers" instead of only-TV producers. 'It is noticed an increase of intellectual property rights and the capability of producing content with international focus', it adds.

To finally reposition themselves as "audiovisual producers", the study recommends that the sector must be benefited with at least 40% of the public investment from the **Portuguese Film and Audiovisual Institute (ICA)**, as today it receives 20%. The president of ICA, **Luís Chaby Vaz** said in March that this is a 'reasonable proposal, difficult to concretize but not impossible'.

In Portugal there are more than 30 production companies of different levels and sizes, including



3-4 major producers owned by big indies or Hollywood Studios, such as **Endemol Portugal**, **Shine Iberia Portugal**, **FremantleMedia** and **Warner Bros**. With the exception of this last one, they are all gathered at **APIT**. The biggest local producers are **SP Televisao**, **Coral Europa** and **Valentim do Carvalho**, all them reflected with standalone interviews in this special edition.

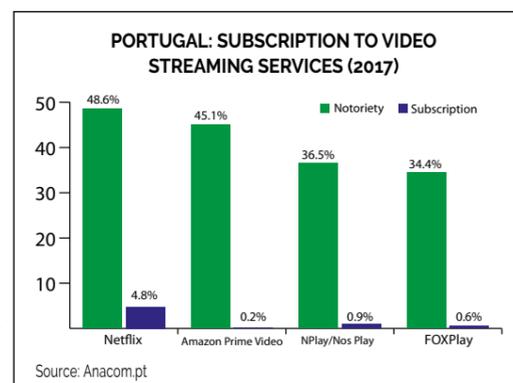
Another good example is **Ministério dos Filmes**, one of the most important producers (also outside APIT) awarded in Cannes and Lions, and also very prestigious in cinema as it's owner, **Marco Martins**, is a very important director. It has produced its first TV series *Sara* that aims to become a huge success worldwide.

## INTERNATIONAL SALES

About the content international sales, the ERC report indicates some figures based on the financial reports of the three main distributors. 'On the contrary of the double-digit growth of 2016, during 2017 there was a decrease in the international sales', it stands.

International content sales from **Impresa's SIC** were lower in 2017, but they reached €1 million as the company conquered new markets as Canada. At **Media Capital's TVI** sales have fallen 16% in Portugal, and 21% if Spain is included. The explanation to this phenomenon is, according to the ERC report, the breakdown of the content production in Portugal.

**Pubcaster RTP** informed that its international channels distribution business, which is a more mature area, had a positive variation of 2% last year compared with 2016, while the content sales, which a more recent area of development, it showed a growth of 1000% in the same period of time.



# SP Televisão: diversified and in expansion



Jorge Marecos, administrator, and João Pedro Lopes, CEO of SP Televisão

SP Televisão is the biggest independent production company in Portugal with more than 10 years on business, having produced until now 18 telenovelas and 15 series, which represent an average of 700 of 45-minutes episodes produced a year (which could become 900 episodes).

It is the only independent producer in the country that has won an Emmy International (*Laços de Sangue/Blood Ties*), apart from many awards and nominations. It has 150-200 permanent employees that can become 600 persons during the shooting of the regular projects for SIC and RTP broadcasters. In three different buildings across Lisbon, it operates six studios in total: one of 1500sq2, two of 1000sq2, one of 800sq2 and two of 500sq2.

More than 35 authors/writers regularly work at the company, which has 18 edition rooms and two teams working in each project: one for the exterior and another one for the interior shootings. It produces



an average of 18 episodes a week.

During 2018, it had on air *Vidas Opostas* and *Paixão* at SIC, and it has begun the production of *Alma e Coração*, the next prime time telenovela to be premiered in September. It also produces movies and entertainment formats, this former one through SP Entertainment

headed by Piet-Hein Bakker, launched in 2014 (more information in the separate article).

Recently, it has founded its international division, SP International led by José Amaral, who is in charge of the ready-made content distribution plus some paper formats. This division works closely with SIC in the global sales, offering some 40 titles.

As part of this expansion, the company acquired a company in Colombia, creating SP La Different, which is already developing a pilot. Other business area is the management of soft sponsoring and brand licensing of the contents produced by SP Televisão.

João Pedro Lopes, CEO, and Jorge Marecos, administrator at the company, explain: 'Portugal is a very small market, but has been stable. The three main television networks compete strongly with the Pay TV, which has around 90% of penetration. We have to generate highly-success projects because the risk is big. A telenovela success (+1 million viewers) secures the continuity in the production.'

'There has been a strong crisis in the Portuguese market, so it is very important to have a good administration of the investments. The main

challenges of the Portuguese market are: first, to continue improving the quality of the scripts and narratives; second, to be aware of the new opportunities like cable TV and video on demand in the domestic market (OTTs) and consumption habits; third, to invest in international coproduction's developing a strong international strategy', they remark.



Vidas Opostas, drama series produced for SIC



According to the executives, there is a key role of ICA, the National Film and Audiovisual entity, which has launched new funds for TV projects, especially one based on the incomes from the tourism.



Regarding co-productions is a business model that SP Televisão would like to explore more. It has developed *Vou Direto* together with Angolan prodco Semba and simulcast on RTP1 and TPA2. It has also co-produced with TV Globo and SIC the telenovela *Laços de Sangue*, the second Emmy International winner from Portugal in 2011. 'We want to focus in new markets for co-productions: Latin America, USA and Europe', stand the executives.

A new business unit from the company has been the brand new producer Santa Rita Filmes, headed by Patricia Sequeira, which has produced movies like *SNU*, and and TV series like the 13-episode *Verão* for RTP.

Finally, SP Televisão is working on its biggest project: new studios that are being built in the same space at São Marcos. 'We'll be building four new studios of 1000sq each plus an entertainment studio of 1200sq', they finalize.



Verão, TV series produced by SP Santa Rita for RTP

## LISBON CALLING

Joker	Sim, Chef!	Hidden Treasures of PT Cuisine	Carlos Paredes	The Art of Amália
DDT	Cá por casa	Movie - Amália	Misterios de Fatima	Maddie

[valentim.pt](http://valentim.pt)

## Coral, focus on drama production



José Silva Pedro, director general, Coral Europa

**Coral Europa** is a leading *prodco* launched in 2009 by **José Silva Pedro**, general director of the Portuguese office, where 60 persons are working including the advisor **Jose Eduardo Moniz**, former GM of **TVI**, and **Juan Baena**, president, based in Madrid (Spain), where the company started 30 years ago. In Spain it has also the major participation of **Isla Producciones y Atlantia**.

'We produce two daytime shows for **TVI**: *A tarde Sua*, daily talk show with **Fátima Lopes** since 2009; and *Somos Portugal*, a program that promotes the most popular celebrations of Portugal since 2011', says **Pedro**.

Two years ago, it acquired two **Plural Entertainment** studios in **Vialonga** (800sq2 each).

It has production and post-production facilities for dramas, considered by the executive as a 'key genre' for the future. 'We've produced comedies for **FOX Africa**, as *Tuneza* (26 episodes) or *Inspector Max* (39 episodes) for **TVI** plus a telenovela for **RTP**, *Água de Mar. Jacinta* is a 2-episodes miniseries for **TVI** sold in 15 countries. We made a movie from it, premiered in 2017: it became a top ranked Portuguese movie of all times', he remarks.

'We won three **ICA** funds for development category for *Sá Carneiro*, a political drama series about the former Portuguese Prime Minister, and two religious series *Santo Antonio* and *Lucia de Fátima*. We are working on the scripts and we plan to start production next year'.

**Coral Europa** has been producing 1,000-1,500 hours per year, but it plans to reach to 2,000 in 2019. 'We want to get closer to the Pay TV networks and digital platforms. International co-productions and production services are two key assets to improve our position globally. But there are three main limitations: language, budgets and promotion/marketing of the country's advantages'.

'Portugal is a small market of 10 million people, so budgets are not high. Moreover, Portuguese is the sixth language in the world. So, if we produce it will be for Portugal only, as Brazilian don't understand our accent. It's important to make bigger efforts in sponsoring our advantages for audiovisual production', he comments.

According to the executive, the country has several benefits: 1) security, 2) weather and daylight (270 days over 365), 3) production values, 4) highly-skilled technicians and talents; 5) fiscal facilities for human resources and incentives; 6) unequalled prices. 'The budget for a telenovela is €45,000 per episode, while a series could be from €70,000 to €100,000', concludes **José Silva Pedro**.

Jacinta, a 2-episodes miniseries for TVI sold in 15 countries



## Warner: adapted to local trends



Pedro Cardoso, Executive Producer, Warner Bros. International Television Production

Founded in 2009, **Warner Bros. International Television Production** (WBITVP) produces local scripted and non-scripted programming through its network of local production operations in 13 countries, including UK, France, Germany, Spain, Portugal, Belgium, Netherlands, Norway, Finland, Denmark, Sweden, Australia and New Zealand.

**WBITVP's** production operations are responsible for both original

programming as well as local versions of formats owned and/or controlled by the **Warner Bros. Television Group**, such as *First Dates*, *Who Do You Think You Are?*, *The Bachelor*, *Child Genius*, *Little Big Shots*, *Love Connection*, *Sorry About That* and *Impractical Jokers*. Scripted series include *Cold Case*, *Nip/Tuck*, *The Following*, *Gossip Girl*, *The O.C.*, *E.R.*, *The*

*Mentalist* and *Pretty Little Liars*.

'The growth of WBITVP has been sustained and in 2017 we produce more than 14.000 hours. This year, only at the first semester we've already produced on average 9.500 hours', describes **Pedro Cardoso**, executive producer, Warner Bros. International Television Production, Portugal.

'In the last years, have been noticed the changes in the behavior of the viewers, with the growth of the consumption of cable operators, as well as online platforms. In general, we produce entertainment. In 2018 we are producing the following original formats: *Portugueses pelo Mundo* (2010-2018) for **RTP**, *Super Nanny* (2018) and *Terra Nossa* (2018) for **SIC**, and *Apanha se Puderdes* (*Raid the Cage*) and *First Dates* for **TVI**', he adds.

**Cardoso** further explains: 'The Portuguese market is in constant evolution. The main international entertainment formats are produced in Portugal with low budgets. For example *The Voice*, *Got Talent*, *Masterchef*. The challenges we have are the low budgets and the small size of the market with only three potential clients'.

To conclude, he completes: 'The advantages of the Portuguese market are the budgets, locations and geographical and meteorological conditions. In the medium term, our goal is to start producing fiction and formats for the upcoming digital market'.



*Apanha se puderdes*, the Portuguese version of *Raid the Cage*, produced for TVI



*Supper Nanny* is a good example of doc-reality formats adapted for the Portuguese market, in this case for SIC

## VC Filmes, where tradition meets modernity



Manuel Duque, CFO

Founded in the mid nineteenth century as a music publisher, in a downtown shop in Lisbon, **Valentim de Carvalho** emerged as a major music producer in Portugal from the beginning of the twentieth century till the present days.

The company owns the biggest music catalogue in Portugal, that spans over 100 years of recorded sound, covering all genres of music, highlighted by the recordings of **Amália Rodrigues**, considered the greatest Portuguese artist of all times, that was under exclusive contract with the company for over 50 years.

In 1991, it decided to invest in the video business and launched a content production division and their first TV studio. Today it owns seven different facilities of this kind with areas ranging from 1500 m2 to 144m2. In addition, it also operate 10 editing units and 2 OBI vans with 12 HD cameras. With over 50 persons as their permanent staff, the studios are operated by over 150 people on production days and produces over 1,000 TV hours a year.

'Today music represents less than 10% of our business, but is something that means a lot to us. We are proud of our tradition and we mean to carry on this great flag, but our main focus is to serve local broadcasters and to offer production services for their shows', explains **Manuel Duque**, CFO.

With shows like *The Voice*, *Got Talent*, *Idols* and other shiny floor productions, **Valentim de Carvalho** teams often with major producers like **Shine Iberia Portugal** or **FremantleMedia** to deliver the best TV programming in Portugal.

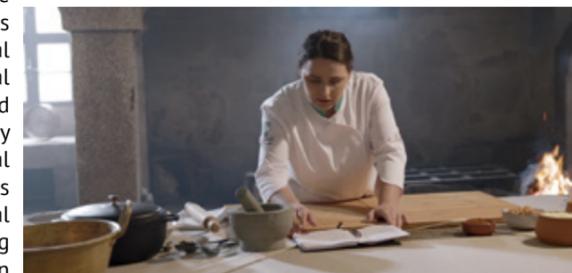
**VC Filmes**, its content production company, produces weekly shows like *Cá Por Casa* and *Donos Disto Tudo*, both comedy series on **RTP**, starring major Portuguese talent like **Herman José**, **Joaquim Monchique**, **Eduardo Madeira** and **Manuel Marques**, among others. On the same station, it has on air the daily game show *The Joker*, the Portuguese version of the format licensed to **Global Agency**.



It was also the first Portuguese company to produce a *Netflix Original*: *Na Ponta da Língua* starring **Salvador Martinha**. Fiction and factual are the most recent areas of expertise: **VC Filmes** has recently produced two series of the format *Sim, Chef!* licenced from **CBS**, and released to date 40 motion pictures, six TV series and finished *História da Gastronomia Portuguesa* that will be broadcasted soon.

Using the exceptional conditions arising from the local weather, technical abilities, talent and cost, the company has done several coproduction deals with international players, including historical fiction like *Maison Close*, a 10-episodes series done for **Canal+**, and plans to reinforce this area due to the availability of funds recently approved for **ICA**, through the Ministry of Tourism of Portugal.

'In the current industry environment, and specially in a small market like Portugal, it is very important to be able to diversify and is not possible to stay within a single area or genre. We have to master a much wider range of formats and markets, and that's what we do, without sacrificing a single bit of quality. And I tell you for sure, cost to quality we are second to none' concludes **Duque**.



*História da Gastronomia Portuguesa*, the most recent projects from VC Filmes



VC Filmes has recently produced two series of the format *Sim, Chef!* licenced from CBS

## SP Entertainment: formats with global appeal



Piet-Hein Bakker, managing director, SP Entertainment

Launched in 2014, **SP Entertainment** is a key division from **SP Televisão**, the leading Portuguese production company, in charge of developing and producing new entertainment formats for the local and international market.



It is led by **Piet-Hein Bakker**, managing director, with a big experience in the entertainment and format business since mid-nineties. 'We are focused in the development of programs that can be licensed as formats in the global market. A good example is *Brainstorm*, a quiz show created and produced for **RTP**: it is the first time the *pubcaster* bet on a daily original show.'

**SP Entertainment** has produced 280 programs, broadcast 3-4 times a week at 9.30pm. The show is being negotiated in Poland for adaptation, globally distributed by **Dentsu Story Lab**. 'We were able to gain continuity with this formats, following the big American

shows. Eleven questions, two players, one host. It is a cultural-didactic show, that perfectly fit on the *pubcaster* screen', says **Bakker**.

*Noticias do meu pais* it's a weekly docu-reality about the Portuguese Diaspora. It offers news of Portuguese living abroad in two different countries per program. Two seasons have been produced: first, with 9 programs, and second one with 16 programs shot in France, Luxemburg, Switzerland, South Africa, Thailand and Argentina, among others. The show is offered internationally by **Maluc Entertainment** (Mexico), and there is an interest from the USA for a local adaptation.

The company has also produced two kids programs for **Panda**: one augmented reality show called *Codigo Panda*, and one virtual reality show *Cademeta Panda*. 'There is a huge opportunity in the VR/AR field to explore new business opportunities and we want to go towards them', concludes **Bakker**.



Brainstorm, a quiz show created and produced for RTP

## Endemol Portugal



Lurdes Guerreiro, Executive Producer, Endemol Portugal/Coral Europa

With 25 years, **Endemol Portugal** serves the three national broadcasters, plus the cable network **24 Kitchen** and **MundoFox**.

**Lurdes Guerreiro**, executive producer: 'We have produced drama series in the past, like *Miúdo Graúdo* for **RTP** (19 episodes, 2016-2017). In the entertainment field, we've been producing *Big Brother* or *Secret Story* (7 seasons), *Your Face Sounds Familiar*, both for **TVI** and *E agora o que é que eu faço?* a DIYS day time weekly show (Saturday) for **SIC** and **SIC Mulher**, done along with **Ikea**'.

**Endemol Portugal** has produced the culinary show *Cozinha com Twist* for **24 Kitchen**, and five seasons of the stand-up comedy *Tropa D'Os Tuneza* for **MundoFox**. For **RTP**, the local version of *The Brain*, *Os Extraordinarios*, a talent show about people with extraordinary abilities.

'Portugal is an atypical market: it is not Europe but it is not Latin America, either. We have a unique offer on game and talent shows and we also develop own formats here, like the dating show *Love on Top*, whose seventh season premiered last August on **TVI/TVI Reality**. It is a co-development, and we distribute the format globally', concludes **Guerreiro**.



## Shine Iberia Portugal

Operating since 2012, **Shine Iberia Portugal** works as a separated office from **Endemol Portugal**. **Rui Ávila** and **Hélder Marques**, executive producers: 'Sixth edition of *The Voice* will premier on **RTP**, same as *Missão: 100% Português*, and *Kitchen Nightmare* on **TVI**. Second season of *Cosido a Mão* (**BBC**) will premier on **RTP**, and docu-reality *Married at First Sight* is being produced for **SIC**'.

'We have own and third-party formats to adapt. Production cost is highly competitive in Portugal, as well as the atmosphere for TV work. We produce the same quantity of hours as in other developed market, but our budgets are lower'.

A big budget prime time show can cost around 100,000€ per episode: 'We produce over 120 hours a year. The big challenge is to produce for other platforms. On cable TV, we have worked with **SIC Mulher** for *100 Tabues*, or *Papa Quilometros* for **24Kitchen/FOX**'.

'From now till end of the year will be having shows competing each other on TV: last month, we had prime time shows in **RTP** and **TVI**; and next we have one show in the main broadcasters: **TVI, SIC** and **RTP**', conclude **Ávila** and **Marques**.



Rui Ávila and Hélder Marques, executive producers, Shine Iberia Portugal



Married At First Sight for SIC



## Universal Cinergia: focus in Portugal



Liliam Hernández, CEO, Gema Lopez, COO, and Elisa Aquino, sales & marketing executive

**Universal Cinergia Dubbing (USA)** starts the fall season consolidating its position as one of the leading global dubbing studios in the industry with clients such as **FOX, NBC-Telemundo, Lionsgate, Deluxe, Televisa, RCN, Caracol** and **Nippon TV**, among others.

The studio offers dubbing and subtitling in Spanish, Portuguese, English, French and Castilian to distributors, digital platforms, channels, content aggregators and independent producers.

**Liliam Hernandez**, CEO: 'Our newly renovated studios in São Paulo (Brazil) have been working non-stop in Portuguese with highly efficient turnaround time. The Mexico studios are working at full capacity, leading to the possibility of opening new studios there, in order to meet the growing demand for Spanish language dubbing.'



*Unreal, The Crown, La Selección, Second Chance, That is My Life, Pope – The Most Powerful Man in History, Matter of Respect, Nashville, Anger Management, Verdades Ocultas, Señor de los Cielos, Broken Pieces, La Doña*, among others are some of top titles recently dubbed. 'We continue working with most important Turkish distributors, as Turkish dramas dubbed in Spanish are very successful, as well as telenovelas, feature films and animation.'

The company has a unique approach to Portuguese TV industry, having dubbed the Emmy International winner series *Blood Ties*, co-production from **SIC** and **Globo TV**, sold in many countries from Latin America.

**Cinergia** is looking to enlarge that relationship with the community and that's why **Elisa Aquino**, sales & marketing executive, has travelled to Lisbon before MIPCOM to meet the top content companies in Portugal. 'The objective is to present our services to distribution, acquisitions, producers and offer them our expertise, experience, competitive pricing and outstanding customer service', she highlights.

**Universal Cinergia** sponsored for the first time the International Emmy Awards. 'This action placed us in a unique position to reach out and connect with top production and distribution companies at a global level. We are the first dubbing studio to join the prestigious group of companies sponsoring the event', adds Hernandez.

She concludes: 'Our passion for our work is what drives us. Being close to the customers, knowing their needs and demands is key to delivering good quality and maintaining a lasting business relations'.

## Macias Group: 50 years of dubbing

Since **Macias Group** started in 1968, it has grown from a small company to a multinational company with offices and studios in Mexico, USA and Brazil. The growth was also noticeable on its output capacity as well as on its technical infrastructure.

**Mar Enriquez Macias**, EVP, explains: 'One recent big leap was a couple of years ago when the industry changed dramatically into a fully digital and tapeless workflow and our company did a complete update and upgrade on our IT infrastructure.'

Today, its production workflow is 100% digital and tapeless. This rapid pivot during that big change helped the company to innovate and provide new services to its clients such as accelerated delivery of their localized titles, video game localization as well as Closed Captioning and Audio Description for the blind services. **Macias** opened our new location in Mexico City: **International Dubbing Factory (IDF)**, where it has a Dolby certified theatrical dubbing and mixing stage.

'We have dubbed thousands of hours in our 50 years of being in business: *Friends, Seinfeld, The Sopranos, Barney, ALF*, among others. The most recent have been *Gotham, Star Trek: Discovery, My Little Pony, Supermax, Cidade Proibida, Riverdale, Billions, Flash, Señor Avila, Chicago Fire, Will and Grace, Young Sheldon*. Also, various feature films such as: *IT, The Nun, Smallfoot, Storks, Game Night, Crazy Rich Asians*'.

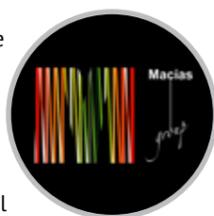
**Enriquez Macias** continues: 'Our main languages have traditionally included Latin American Spanish and Brazilian Portuguese. We have recently renewed our studios in Miami to offer HQ English dubbing. With the increased need for content from streaming platforms, a new need for high quality English dubbing has come to the industry. We renewed our studios in Miami specifically for English dubbing, and we are building more dubbing rooms in order to accommodate the increase demand for it.'

'The biggest challenge is to make sure that the clients are able differentiate between established studios like us and "pop up" studios that do not have the infrastructure or the experience to give clients the service they need. These studios usually provide substandard quality and service but they offer cheap prices that lure clients to work with them and more often than not, the clients have to re-dub their content is rejected by broadcast networks or streaming platforms', he remarks.

'We plan to expand our output capacity to accommodate the increased demand for localization services and we will continue to improve our technology to keep up with the demands of the industry. We are also expanding to offer more services to clients such as the production and localization of audiobooks', concludes the executive.



Mar Enriquez Macias, EVP, and Valeria Macias COO



## SBT: Brazilian drama with global taste



Carolina Scheinberg, sales manager, and Goyo Garcia, sales executive

**SBT (Brazil)** main attraction at MIPCOM this year is the telenovela *The Adventures of Poliana*, based on the classic novel by Eleonore H. Porter, *Pollyanna*, which tells the story of a happy young girl who always looks at the bright side of things, no matter what happens.

The drama is expected to have 450x45 episodes and in three first months of exhibition it has reached an average of 20% share in the 8.30pm timeslot. 'The telenovela appeals to the whole family with a storyline that is safe for kids, with no strong content, and at the same time interesting for adults', explain **Carolina Scheinberg**, sales manager, and **Goyo Garcia**, sales executive

Another hot show **SBT** highlights is *The Motorcycle Girl*, a 26x45 drama series featuring a young woman who gets pregnant after a quick affair. Unbeknownst to her, her lover is married and a millionaire. His greedy wife, after learning of the baby, poisons her husband and sends killers after Joana and her son. Joana decides to runaway from Rio and move to São Paulo to start a new life, working at a motorcycle express delivery service. Season 2 will be ready in 2019.



The Adventures of Poliana reached 20% of share in the slot of 8.30pm

Another important move for **SBT** is the development of its international channel. The second largest TV network in Brazil is planning to expand its feed to the world in 2019, with Portugal as one of the main targets, 'due to the common language as well as the large Brazilian colony that lives in the country', say the executives. 'One of

SBT's objectives in MIPCOM this year is to secure a partnership that will ensure that the international feed of the channel will be in Portugal in 2019', they conclude.



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# ICA: competitive incentives to foster Portuguese audiovisual



The newly created supporting funded by the Tourism Board and implemented by the Portuguese Film and Audiovisual Institute (ICA) is a key tool to promote Portugal in the global marketplace. But there are more local programs to increase the Portuguese national production. Let's take a look.

As a public institute integrated in the indirect administration of the State, the main purpose of the ICA is to support the entire process of developing film and audiovisual work in Portugal. The Institute has been the main contributor to enlarging cultural diversity, with particular focus on the film and audiovisual sectors.

'Portugal has a large installed filmmaking capacity with highly skilled professionals, signifying that we can increasingly not only export our films to international markets but also bring international filmmaking to the country. In that regard, and in the aim

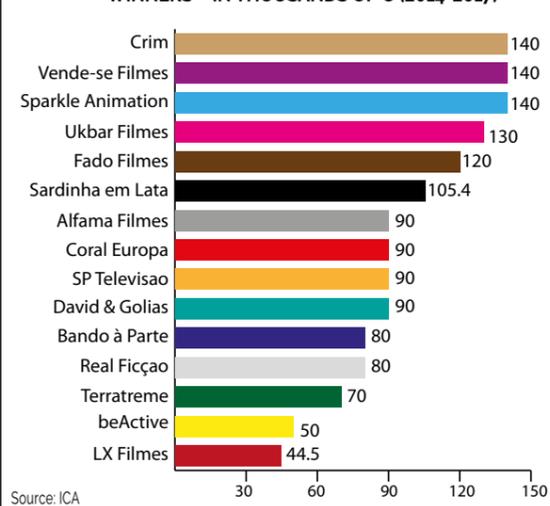
of promoting our territory as an attractive filmmaking destination, in 2018 ICA has strengthened the incentives available for producing or co-producing films in Portugal, initiates the 2018 ICA Cinema/Audiovisual Brochure.

ICA has also broadened the scope of application to the audiovisual sector and reduced the amount of eligible expenditures (from €1 million to a minimum of €500,000 or €250,000 for documentaries). This focus on the international expansion of the Portuguese film and audiovisual sector also involves attending the sector's main events, an effort we will seek to extend to the industry professionals.

2018 is marked by the intense efforts to legislate and regulate the sector. These efforts, which apply to the entire sector, are aimed at endowing the film and

audiovisual industry with a legal framework that best serves the interests of creatives and professionals and best

PORTUGAL: WRITING & DEVELOPMENT PROGRAM WINNERS - IN THOUSANDS OF € (2014-2017)



Source: ICA

complies with public service in this area. The 2018 ICA Cinema/Audiovisual Brochure presents around 80 Portuguese films and audiovisual creations made in 2017 with the support of the Institute, covering fiction, documentaries and animation.

### TOURISM FUND

Interviewed by PRENSARIO in this edition, **Luiz Chaby Vaz**, president of ICA explains how Portugal can become a strategic audiovisual destiny for the global content production thanks to this new fund that aims to promote the country's advantages, but offering strong benefits to international producers.

He describes: 'Portugal created one of the most competitive incentive system in Europe: a cash rebate, funded by the Tourism Board that applies



Carga, a thriller feature films premiered in 2018



Blue Breath, documentary supported by ICA funds

PORTUGAL: ICA FUNDINGS, BY PROGRAMS (2014-2018).



Source: ICA

to film and TV with the minimum Qualified Portuguese Production Expenses (QPPE) of €500,000 (USD 600,000) for fiction and animation and €250,000 (USD 300,000) for documentaries.'

Up to know, sixteen projects have applied to the cash rebate supporting system created by that has taken shape in Portugal and is being promoted internationally since MIPCOM 2018. There are productions co-productions on cinema with Spain, three with France, Germany, and one between Portugal/Spain/France, as well as productions in Portugal (three), USA (two), India and Brazil. On the audiovisual side, there are productions in Portugal and Germany



Omen, an animation coproduced with Zero de Conduite (France)



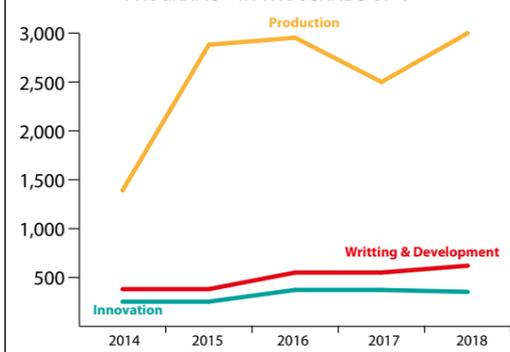
The King's Favorite, an epic drama series for RTP and globally distributed by Beta Films (Germany)

PORTUGAL: NUMBER OF PROJECTS, BY PROGRAMS



Source: ICA

PORTUGAL: ICA FUNDING EVOLUTION, BY PROGRAMS - IN THOUSANDS OF €



Source: ICA

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## TVI/Onza: to position Portuguese drama in the global marketplace



Margarida Pereira, Head of Acquisitions and International Programming



Paula Membiela, sales manager, Onza Distribution

TVI considers the global content sales business as key for the internationalization of Portuguese drama. 'It is the top #1 priority for the group, as the domestic market is very small, so we need to go further. Only with the sales or co-productions we'll reach our objectives', highlights Margarida Pereira, Head of Acquisitions and International Programming.

*The Only Woman* is the top telenovela on TVI's catalogue: 'It was sold in more than 70 countries, and we are receiving new sales every year; another key titles is *The Gipsy Heiress* (2018), sold in four territories. We are very proud of our results, but we have to work harder

to strengthen our presence', stands the executive.

She underlines that Portugal 'is not in the map of global buyers', and that's the big effort the industry must do. 'When we launch a new telenovela, our key territories are Latin America and CEE, apart from the Portuguese-speaking territories, in which we are focused. The rest of the world is in charge of **Onza Distribution** (Spain)'.  
**TVI** has a good presence in African-speaking countries such as Mozambique and Angola with two business lines: first with its channel **TVI Africa**, which has a short window and some times it broadcast the telenovelas up to date with Portugal; and second through direct sales to local broadcasters.

For MIPCOM, the company is promoting 50 telenovelas, six miniseries and 52 TV

movies, all them produced by the Group's prodco **Plural Entertainment**. 'We also have five youth series co-produced with **Coral Europe**, such us *Inspector Max* (26x'50) and *El Portal del Tiempo*', says the executive, who promotes at MIPCOM three big telenovelas: *Payback* (120x'50), *The Gipsy Heiress* and *The Value of Life*.

To improve Portugal position in the global market, **Pereira** believes the Portuguese drama must be 'better marketed'; companies must attend more tradeshow, and have to achieve a sale in a key territory in which that title works very well. 'We also think in co-productions with international companies,

but we understand that the linguistic barrier is big. We are figuring out new strategies in this sense', she concludes.

**TVI** international distribution is in charge of **Onza Distribution** (Spain), excluding the Portuguese-speaking African countries (known as PALOP), which are managed by TVI directly.

After the success of *The Only Woman* in Africa and South America it has arose a new interest of this type of content on the global market. This year **Onza** has started to open the Eastern European market and we have closed important agreements in different territories. The second season of *The Only Woman* is on air at **A+** Africa and first season has recently been premiered at **M6** (France) and **TVP** (Poland).

*Payback* has been acquired by Polish channel **TVN** and the Serbian distribution company **DI & Mavision** for the ex-Yugoslavian countries. In addition, Portuguese series are starting to be demanded in other countries: the distribution company has recently closed a volume deal of six miniseries for **Univision** VOD platform.

During this MIPCOM edition, **Onza** presents two new telenovelas that promise to be a new success: *The Gipsy Heiress*, which tells the story of an exotic beauty raised by a Gipsy family after she was kidnapped as a baby and years after she will inherit a major fortune; and *The Value of Life*, expected to be the last hit of the Portuguese channel. Shot between Brazil, Portugal and Lebanon, this story goes around the lives of a woman and a man who don't know each other but they share a deep bond as they both wake up from an eight-year-old coma on the same day.



*The Value of Life* and *The Gipsy Heiress*, two highlights for MIPCOM

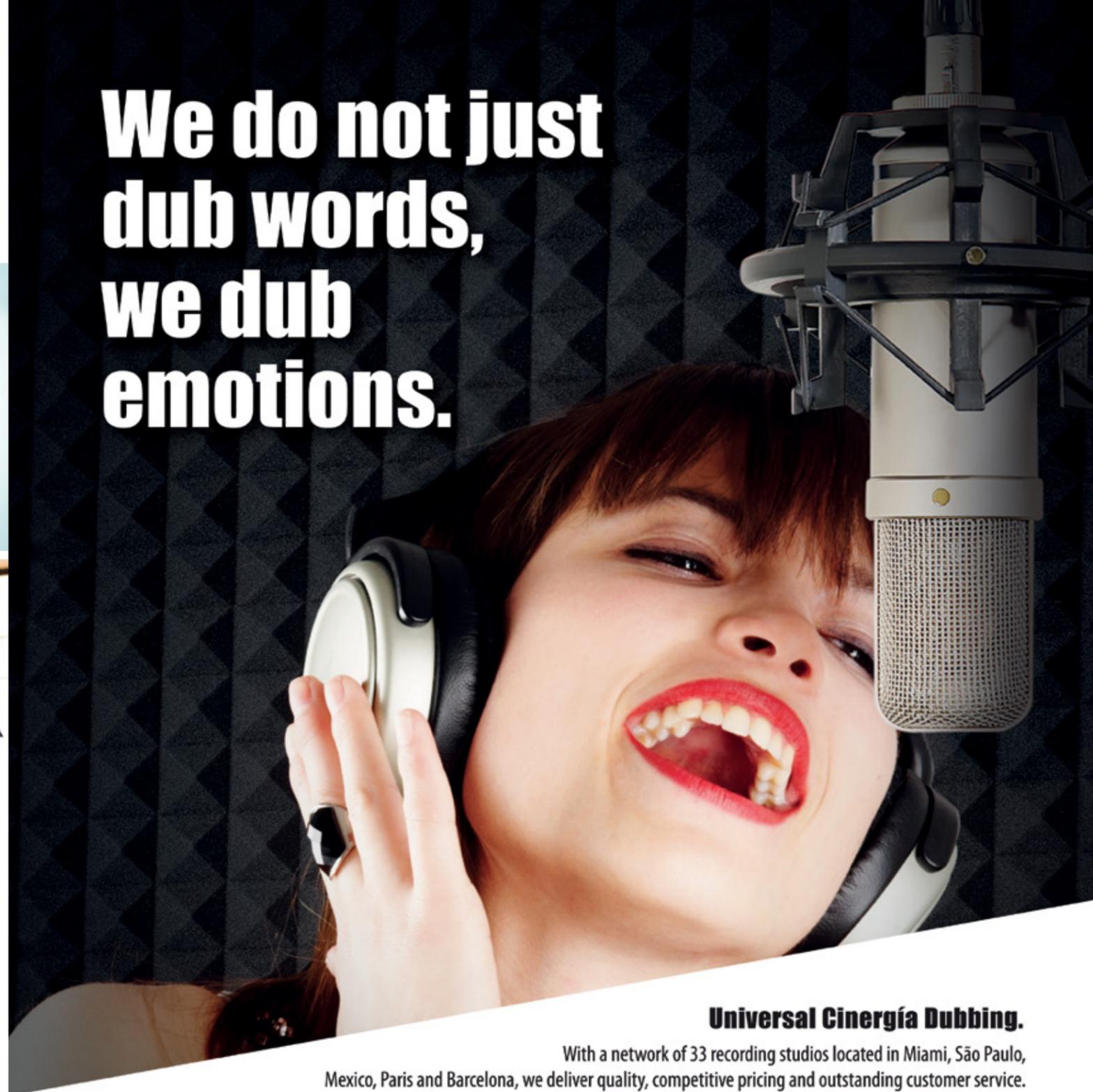


*The Only Woman* sold in 70 countries



*Inspector Max*, youth series co-produced with Coral Europa

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# SPi: expanding the Portuguese taste

SPi is a spin-off of one of the leading Portuguese production companies, **SP Televisão** and operates in the areas of licensing and sale of ready-made and format rights internationally. In addition to the domestic market and led by **José Amaral** it spearheads **SP Televisão's** process of

internationalization in Latin America, with focus on Colombia, country where **SP LA Different** has opened in 2017 with the aim to create original stories for the local market and for OTT platforms. 'Beyond the ready-made and



José Amaral, director

format distribution, **SPi** is especially focused on developing co-production deals in the international market. We are in negotiations to develop three projects, and promoting international productions in Portugal', he explains. From the diverse catalogue of 17 telenovelas and 10 series written and

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Emmy-Winner *Laços de Sangue*, a co-production with TV Globo (Brazil), is one of the top titles on SPi catalogue

produced by **SP Televisão**, either for **SIC** or **RTP**, the top five titles that have been distributed globally are the Emmy-Winner *Laços de Sangue*, in co-production with **TV Globo** (Brazil), the series *Voo Directo* and *Lua Vermelha* and the telenovelas *Perfeito Coração* and *Coração D'Ouro*.



*Voo Directo* co-produced with Angolan prodco Semba and simulcast on RTP1 and TPA2

# RTP: content meant for global audiences



Cristina Viegas, general commercial director, and Vera Taquenho, business development, RTP

**Radio e Televisao de Portugal (RTP)** has an extremely rich audiovisual archive. In the past, its content was not made with the purpose of being marketed abroad, but now almost everything the *pubcaster* produces is meant for global distribution.

'The content we sell the most is fiction and documentary series', highlight **Cristina Viegas**, general commercial director, and **Vera Taquenho**, business development, RTP. Serials such as *Voo Directo Cidade Despida*, *Sinais de Vida* or *Aqui tão Longe (SP Televisao)*, or more recently *Vidago Palace*, globally distributed by **Banijay Rights**; *Madre Paula* sold to Latin America and Eastern Europe; *A Filha da Lei*, sold to Eastern Europe; *2077-10 seconds to the Future*, sold to Europe; and *O Povo que Reza*, sold to Latin America. **RTP** also has good entertainment formats, like *Brainstorm* and *Receitas lá de Casa*.

'What distinguishes us the most is our diverse content, which comes from our obligations as a public broadcaster. We can produce for a mass, a niche or totally digital audience. This translates into a wide

catalogue, with shows such as costume dramas, crime, comedy, web series focusing on dates or even a documentary series about the future with international recognition', describe the executives.

'Being Portugal a small country, it has always been big when it comes to reach capacity, quality and creativity of its professionals. It has a lot to offer and this results in more and more foreign producers wanting to shoot here. We have light, colour, unique vegetation (mainland Portugal, Azores and Madeira), an extraordinary historical and architectural heritage, and producing here, compared to other markets, is significantly cheaper'.

**RTP** experiences relating to international co-production have been 'very interesting and we want to strengthen them', explain **Viegas** and **Taquenho**. *Vidago Palace*, a **RTP/TV Galicia** co-production, is a good example of this. 'For historical relations, common language or geographic proximity we regularly do co-productions with the Portuguese speaking countries, Angola, Mozambique, Cape Vert, Brazil, Spain and other European countries', they add.

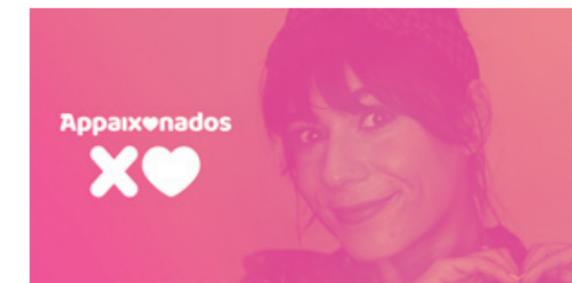
Among other things, co-productions allow **RTP** to work with other kind of budgets, share know-how and incorporate cross-cutting elements in the stories which makes content travel more easily.

'Distribution partners are a key element. With the rise of platforms popping up around the world, the management of licensing

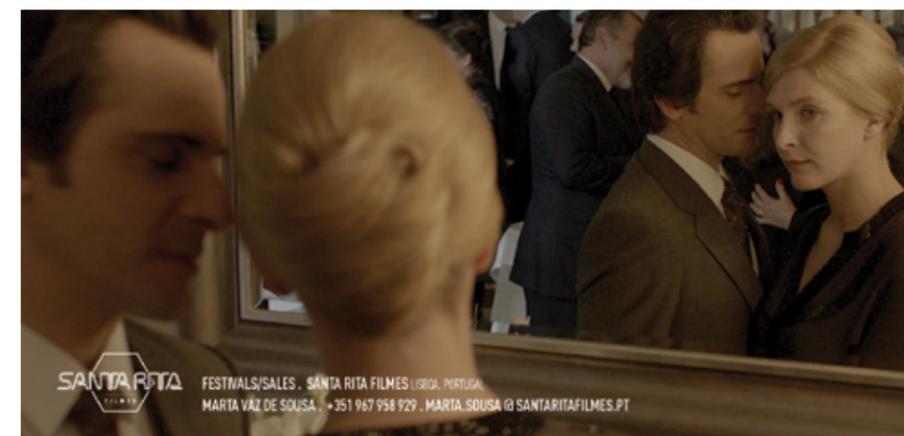
agreements and all the associated exploitation rights has become an extremely complex issue. When we identify a distribution partner, we believe that it can bring real value to our business, be it for its know-how or the markets and clients it holds. It is a relationship of trust build over the years. Yet for each project, and depending on its sales potential, we try to find the partner that better fits its distribution', conclude the executives.



*2077 - 10 segundos para o futuro*, a science fiction series distributed by Authentic (worldwide except Latin America and Portuguese-Speaking countries) and Onza (Latin America)



*Appaixonados*, web series nominated for Prix Italia 2018



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# SIC, from trendy Portugal to Global markets



SIC Content Distribution team lead by Joao Pedro Nava (centre), director, surrounded by Rafael Silva, Cindy Barardo, Carlota Vieira and Andre Silva

As one of the leading broadcaster in Portugal, **SIC** has also built a strong reputation in the global market through the distribution of its telenovelas, formats and documentaries having developed the **SIC Content Distribution** website and LinkedIn presence.

Led by **Joao Pedro Nava**, distribution director, and **Carlota Vieira**, content sales manager, **SIC Content Distribution's** catalogue highlights 12 HD telenovelas (adding on 2 new titles every year). The division is also in charge of the international channel distribution to the OTTs and Pay TV operators.



In the content field, the division handles direct sales with some territories and embraces partnerships on others, with key players in the market, such as: **Global Agency** (Turkey) in charge of CEE, **Côte Ouest Audiovisuel** (Cote d'Ivoire) for Africa, **7A Media** (USA) for the Spanish Speaking countries in America, among other. 'We can do sales globally, but always coordinating the strategies with our partners', explains **Vieira**.



Frozen Memories, brand new series highlighted for MIPCOM



Sold in 42 countries, Emmy winner for best telenovela, *Blood Ties* was, co-produced between SIC and TV Globo executed by SP Televisão

Aside *Blood Ties*, top sales are also *Heart of Gold*, *More than Love*, and *Frozen memories*. 'We are tailoring our telenovelas for international markets by both editing our titles and adapting extra generated content. We are also considering to develop a kind of "super series", adapted to the global market', she adds.

In the Americas, **7A Media** is promoting two key titles in this new format: *Frozen Memories* (110x' 45), winner of Gold World Medal – telenovela category at 19th World Media Festival, and *More than Love* (107x'45) winner of "Best Telenovela of the year" at the

"Soap Awards France 2018, both in negotiations in a key territory. 'In Europe we have sold titles to **Rai Uno** (Italy) and **Novelas TV** (France); in CEE, TVP (Poland), **Tallin TV** (Estonia), **TV8** (Turkey) and **Planet TV** (Slovenia), and FOX Africa has licensed *Blood Ties*', adds **Vieira**.

The division is also focused on the sales to OTTs and digital platforms. 'We have licensed content to **Netflix**, **Amazon**, **Filmin** and **Pantaflix**, mostly focusing on our exclusive stories on **Cristiano Ronaldo**, **Jose Mourinho** and **Jorge Mendes**, concludes the executive.

## Global Agency: high quality, long running Portuguese dramas

**Global Agency**, a leading worldwide distributor, has been following for successful, quality and unique content from Portugal such a long time. **Izzet Pinto**, CEO, explains: 'We have realized that the country's content formed by very high-quality productions and long-running dramas that meet our clients' needs. We met with **SIC** sales team at MIPTV 2015 market for the first time. We kept a close eye on their content and agreed to work together at the beginning of 2017'.



Izzet Pinto, CEO

He continues: 'We are exclusively representing them in Central Eastern Europe and CIS countries. One of our main focus is to increase awareness to Portuguese dramas at the same time and create a popularity for them in the world'.

'Many major broadcasters in this region has niche channels targeted to their female audience. Largest part of these channels' prototypes is telenovelas. The fact that **SIC's** titles has a large number of episodes is a plus as the novelas are being broadcasted daily, meaning it's consumed fast. This is surely an advantage', adds **Pinto**.

Regarding strategic deals, the executive concludes: 'We closed deals for *More Than Love* and *Heart of Gold* to Serbia, Montenegro, Bosnia and Herzegovina, Macedonia and Slovenia. After the successes at these countries, we believe that we will expand many more territories'.



More Than Love and Heart of Gold were sold to Serbia, Montenegro, Bosnia and Herzegovina, Macedonia and Slovenia



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