CEE… time for the next step in media evolution

The recovery of Central & Eastern Europe, awaited for 6-7 years and missed since the 2008 global crisis — ten years ago! — it is already a fact. It is not so strong as it would be wished, but it opens a new step for media evolution facing the digital boom, as it happens in other regions.

At this edition, we provide a deep report about the Hungarian market, showing that the country global economy is 4% up this year, the same as last year, and the ad pie is 11% ahead. Last MIPTV, we talked with some Greek broadcasters and they told that their media market was up about 10% last year, and it is 7% up again this year. We are talking about two of the most problematic CEE economies recently. Russia is again 12% up this year, though the political problems with U.S.A. Every solid broadcaster is buying and producing again. Not only entertainment formats, but also fictions, which mean important bets. And they are entering the digital environments, with fully international VOD platforms as RTL in Croatia and Hungary.

The challenge of CEE now is to qualitatively evolve in TV and digital convergence. To leave the idea of TV channels and pass to multiple-screen content factories. To grow again in international alliances, to both access and generate original content that gain global markets. Latin America and Asia are doing this, CEE have now more stability to infrastructure investments.

Of course, this doesn’t happen fast. One step takes the next one. But the evolution now is from survival to quality business. Right decisions must be taken this year.

Print & Online
Apart from this Prensario print issue, you can follow Natpe Budapest and Conecta Fiction through our online daily reports, day by day at our website www.prensario.net or receiving our daily newsletter service. If you want to receive the latter, please contact info@prensario.com
Hungarian market takes shape and grows

Prensario’s longstanding report on Hungarian television, one of the most important markets of CEE, shows that the country is finally recovered after two good years of the industry: the advertising market is solid again, showing similar numbers to the ones before the 2008 crisis. Fragmentation, content diversification and new programming trends.

In the past 10 years number of the Hungarian-speaking channels has been increasing by almost 75% so currently there are around 120 networks competing for the audience meanwhile the number of viewers has been continuously decreasing. This fragmentation has a serious impact on the key players of the market, primarily the leading cable channels and the big Free TV channels suffered the biggest loss in the key players of the market, primarily the leading cable channels and the big Free TV channels suffered the biggest loss in the year 2018, we became the #1 TV channel in 18-59 (JAN.-May, 2018)

The Protagonists

RTL Hungary, which operates the market leader free TV broadcaster RTL Klub and seven cable channels is reinforcing its position in the market with big entertainment formats for prime time, expanding its content production, introducing programming twists and going digital after successfully relaunching a local VOD offering. Fresh news are yet to come this Autumn.

Tíbor Forúis, director of content acquisitions says: “The Hungarian economy is in better shape as the country is growing around 3% again on a yearly level. According to the Hungarian Advertising Association spending on advertising in Hungary rose more than 11% in 2017, with online ads taking a very big portion with an almost 17% increase. TV ad incomes grew, too. To keep positions, main TV groups can choose two paths: to bet on volume (launching more channels, etc.) or to be confident on quality, doing business issues better or differently. We intend to proceed with the latter”.

In the non-scripted arena RTL Klub airs shows like X Factor (FremantleMedia), which year by year keeps itself extremely successful, and Survivor (Banijay Rights), which has been expanded from a weekly format to a daily fare generating great ratings throughout the weekdays. “In the upcoming Full season, we are planning new format hits which we cannot announce yet, that will be aired either on a daily or weekly basis”, adds Forúis.

“We are very proud of our scripted lineup, too. This proved to be a good “game changer”. We have our daily soap Among Friends on its 20th season and we achieved our goal with three locally adapted weekly series so far: the dramedy Discover, which ended recently with its third season; the comedy Our Little Village — the Death Star of Hungarian TV as one top journalist in the country named it based on its smashing audience shares — commissioned for a third season”.

“Last but not least this year we’ve added another show to the repertoire called The Teacher (Der Lehrer), based on a highly successful German format which performed according to our expectations in the Spring season. The last two series aired in a very competitive prime time slot on Saturdays, where they found a very loyal audience and the series became constant rating boosters.”

Forúis continues: “When it comes to our cable channels, films seem to outperform series, so they are getting more slots in the schedule. There are different reasons, generally the U.S. series are not so successful as they were in the past. American movies, on the opposite, especially the very commercial studio titles, keep or improve their figures even after several runs on the various channels”. “About foreign language series we are trying to scout new and trendy crowd-pleasers especially from Europe. However some more recent experiences showed it is hard to please mass audiences with fresh acquired content so we decided to better produce stuff ourselves.”

This strategy paid off! Glori- ous Girls (White Cupid) a 100-episodes straight-to-series commissioned Hungarian teleenerima based on an original IP proved to be a key hit for RTLII which became one of our best rated cable channels in the last couple of months”, he completes.

Oppositely TV2 Group managed to increase its market share mostly due to its cable portfolio expansion in 2016 launching seven new channels besides the existing four. The difference between the two leading media groups has never been so small since 2010.

Gabor Fischer, program director, describes: “Portfolio-minded program strategy is the key to success. In the first month of 2018, we became the #1 TV channel in 4+ during all day and in prime time also. Compared to the same period of the previous year, this means a 9.4% audience share increase in all day and 13.6% in prime time.”

The increase continued and in May 2018, TV2 Cable portfolio had a 1.1% lead before RTL Hungary’s portfolio. The entire Group is also on the way to become market leader, the difference is only 0.2% (18-59, AD) between RTL and TV2 Group.

Looking at the cable portfolio, Izaura TV and Prime boasts the “most spectacular” results says Fischer, and he added: “In January 2017 in the 18-59 age group Izaura’s audience share was 0.4% during all day but this January increased to 1.6% representing a 300% increase over the previous year. The channel’s attractive program structure easily found its audience and breaking the records day by day. In April 176% and in May increased its audience share by 200% compared to the previous year’.

Prime was repositioned in the past few months and the results are well-marked. In May it reached a record, the 2.7% (18-59, AD) audience share is the best result so far in the channel’s history, and increased its audience share by 50% compared to the previous year.

Last month, TV2 Group announced that its portfolio will expand to 15 channels by

RTL in Hungary: SHARE ON TOP 10 TV CHANNELS - 4+, A18-59 AND A18-49, ALL DAY (JAN.-MAY, 2018)

Source: AGB Nielsen

HUNGARY: AUDIENCE SHARE, PER GROUPS - 18-59 (JAN.-MAY, 2018)

Source: Prensario based on AGB Nielsen data of Top 10 channels
the end of the year and the main goal of the media group is to reach the number one position on the Hungarian TV market. "Local productions have key role to reach our goal building the number one television portfolio in Hungary", stands the executive. Fischer: 'This year’s biggest hit is Pirosan, our daily game show aired in the 7.00pm slot on our main channel, TV2, followed by a returning success, Dear or No Deal (Endemol Shine). Moreover, our most recently launched format, Raid The Cage (Sony) premiered on April 9th on TV2 has become a market leader in its slot very quickly. Compared to RTL. Kibb’s The Wall the program kept its advantage in all three important target groups.'

As for the fall it is planning a number of new and returning shows on its flagship channel: ‘We will bring back Ninja Warrior Hungary (Dentsu Aegis) with its second season which was an absolute success on TV2 last year, and I am happy to confirm that our dramedy series Step Dad (all Media) will come back to the screen with new episodes too. Among the new shows the original version of the MasterChef brand (Endemol Shine) will have its exclusive debut on TV2 as well as the original big shiny floor entertainment show, I Can Do That (Armosa). And new daily game show, Vivendi’s Couple or not? is also coming to the screen soon.

About the programming, he finalizes: ‘If we look at our whole TV portfolio the last year’s report’s figures show that the most watched program genres are the entertainment shows, feature films and news programs. On the two big main channels though the dominance of the local productions are beyond dispute: in prime time viewers preferences are clearly the locally produced shows so we put a huge effort to invest and develop new entertainment and game show formats, which can offer a real alternative to viewers. On the cable side feature films are still popular as well as a bit older, classic series as viewers continue to show interest in the established brands.’

The third largest broadcaster of the Hungarian TV market is the State-Owned MTVA. Balázs Medveczky, director of Television Services, Duna Media Service Provider Non-profit, explains: ‘Generally speaking local audience is looking for entertainment, education, such as Blue Planet II and Planet Earth II on our cultural and educational channel M5. The audience is also looking for shows which are made on the Hungarian market’.

Several original productions are successfully running on the Public Group services: Csak zsinházi és más semmi and Együtt bálnak, and quiz show Honfoglaló, originally a Hungarian online strategic quiz game on air every evening on Duna Televízió since the end of 2016. ‘With this show the Hungarian public media aims to fulfill its mission to create value since the game contains questions on national and international topics of culture, history, nature and art. Honfoglaló became an international success: French company Adventure Line Productions has already bought the TV format’, explains Medveczky.

Among the hottest programs on the Public service is Virtuózok, a music talent show focused on classical training and talent. Scouts look for young talents who can give an excellent performance on a classical musical instrument or are highly talented classical singers. ‘This program has been a big success in promoting classical music and classical musical education in Hungary’, says the executive.

And he concludes: ‘Főlszállott a páva is a folk music and folk dance talent show jointly organized by MTVA, Duna Media Service and the House of Traditions. Solo singers and singing ensembles; instrumental soloists and orchestras; dancing soloists and pairs compete. The show had seasons with children competing and also seasons with adult contestants’. Back in 2015, Sony Pictures Television acquired Viasat business in Hungary, and now operates five networks: Viasat3, Viaskat, Sony Max, Sony Movie and AXN. John Rossiter, general manager, SPT
Hungarian market takes shape and grows

Real Houseswives of Hungary in addition to network originals like the series Carter and Abominia are all exclusive contents available on all our platforms boosting total consumption. It also broadcast hit US series close to their original release date, for example SWAT and Perception amongst movies, which are an absolute trigger of viewership.

Rosier completes: "Contents supported by major brands work better (celebrity brands, comics universes, franchises, global formats) – it seems that viewers need help in deciding what to consume and they wish to minimize ‘risk’. Full throttle high-season is longer (spring season starts earlier, full season starts in late August). Trends in data sketch up a story where linear TV is becoming the second screen for given generations, dayparts, segments and genres so the value of local production and other platforms increase further."

Digital and future

In the digital field, RTL re-launched last February RTL Most, transforming a simple catch-up offering into a modern VOD platform, using the 6play technology from M6 Group (France). "Technological deployments included broadcasted and thematic channels, live streaming, video catchup encoding and playout, video resuming, local ad-servers, etc. We do already see some of the results we were expecting: we’ve grown 72% in video views compared to last year which is quite impressive", remarks Forizs. "At this moment the idea is to build a tree of charge, advertisement funded, VOD platform service for registered users who will be able to indulge a carefully curated and continuously growing long-form and short-form content library together with a rich variety of catch-up offering from our TV channels."

He concludes: "Fischer adds about the next steps on TV2: "The current trends show that there is an increasing demand for locally produced drama so one of our main goals for the upcoming years is investing more in local fiction production and introducing and establishing new prime time series on our main channel. Besides local drama big shiny floor entertainment shows still seem to be the most popular genre in the weekend prime time slots and sports live events can still attract viewers to the screen so we would like to keep investing in sport rights also."

MTVA is in the middle of a strategic planning of a new OTT related subscription/advertisement based VOD platform. "The current solution only covers the aggregated video platform, thus we would like to open towards a more sophisticated video service", remarks Medveczky. "Last but not least, Rosier says that on a regional level ‘the acceptance of VOD is much developed in Poland than on the Hungarian market’. In Poland users are concerned about its price, while in Hungary the service itself is still unknown by most of the population."

"There is a tendency towards content driven consumption on all of our markets. In digital we devote huge efforts to community building, expanded our services with ‘Digital only’ content lineup and second screen interactivities and as part of our content boost strategy we offer unique digital VOD lineup and secondary digital storylines.

He concludes: ‘Content driven consumption has arrived and we are happy to serve viewers’ demand on every platform. There is a shift in business models, the return on investment of productions is now understood on a total consumption level, but monetization factors propose questions to be figured out by market players. Synergies within conglomerates play a bigger role than ever, in-house distribution and production could be a way to go on the long-run’."

Some of the hottest programs on the Public service are Ultraviolet by Fölszállott a páva (credit: Levente, varadi-lumidance), a folk music and folk dance talent show jointly organized by MTVA, Duna Média Service and the House of Traditions.

Networks, Central Europe, explains: ‘The Hungarian market has started to focus on Total TV consumption finally. To handle fragmentation and the limitations of acquisition library, original production is the way to differentiate yourself and support 360° deals. Content has to work both on linear and non-linear platforms and boost digital, marketing and PR.’

Original shows like Ultraviolet and The Young Empress are exclusive contents available on all Sony Viasat platforms.
Florian Skala, CEO of bTV Media Group (Bulgaria), describes the moment of the leading local media conglomerate, owned by CME Group: ‘High quality content, based on first class journalism and powerful storytelling in diverse entertainment and fiction genres, and delivered with state-of-the-art technology, is what Bulgarian viewers appreciate most now’.

And he continues: ‘The global trend, in which content and not the channel, drives the market, is here for several years already and was proven again by the latest viewership results of bTV Media Group as the leader and trendsetter. This spring we offered, with great success, several first class locally adapted formats in different genres, and also a brand new daily series, which changed TV consumption habits’.

Premium sports content has always been wanted, as demonstrated by the viewership results of UEFA Champions League matches on the thematic channel bTV Action, as well as on the VOD platform, Voyo. ‘In terms of terms of news and current affairs, due to the spreading “fake news” phenomenon and the growing awareness of its damage, the demand for high quality TV journalism is also growing. bTV is the most trusted source of information, according to a journalism is also growing. bTV is the most trusted source of information, according to a recent survey by Market Links (April-May 2018, among people aged 18-54)’.

‘Fiction, both local and acquired, is a vital part of our successful program mix, and our quality series this spring once again had great impact with the audience. The TV phenomenon of 2018 in Bulgaria is undoubtedly our original daily drama, Dear Heirs, and its launch in January introduced a new trend in local fiction consumption’. We extended prime time for TV viewers an hour earlier, now starting at 6pm on weekdays, and the series reached an average share of 38.7% (for AD44a) and 38.0% (for 18-49), which is an impressive result. At the same time, since the it is suitable for multiphase platforms watching, each episode attracted tens of thousands more fans online on our free catchup platform, btvnovinite.bg, which is generating more than 4.6 million views, seven times more than the same period last year’.

bTV local fiction portfolio this spring was strengthened by season 12 of the longest-running and most successful Bulgarian series Capital Hillbillies. ‘Our focus and most of our efforts are clearly on local content, but acquired fiction will remain very important for the diversity of our program. We offer the best movie and series titles from Warner Bros., NBCUniversal, 20th Century Fox, Paramount and trendy titles from Turkey, Europe, and many others’, states the executive.

Regarding the content strategy, Skala re-mark: ‘Our core entertainment shows, such as The Voice of Bulgaria, MasterChef Bulgaria, Home Makeover and Wife Swap attracted the greatest part of the total audience. One average prime time share for the season is was 38.5% among all viewers. The diversity of genres covered (music, culinary, reality) was backed by uncompromising quality of the production. The Farm was the most memorable TV event in 2017, according to 11% of the respondents in our nationally representative annual survey, conducted with Market Links (April-May among people aged 18-54)’.

‘In terms of news the thematic channel bTV Action, as well as received big interest, and also bTV News, current affairs and entertainment shows both live and up to seven days after broadcasting: btvnovinite.bg was created to host these last three contents, specifically. As it is also a mobile device, it has attracted Bulgaria’s most active population segment: some 88% of the platform’s users are aged 18-44, while 77% live in the capital Sofia or one of the other big cities’.

Skala concludes: ‘We are focused on state-of-the-art technologies, balanced and objectively verifiable news programming instead of fake news, and world class storytelling in a rich variety of TV genres. This is the healthy TV business formula which bTV Media Group applies to remain the leading media group in the country. And it is this quality programming and journalism that keeps TV as the most trusted medium for advertisers’.

### BULGARIA: AUDIENCE SHARE, PER GROUPS 18-49 ALL DAY VS. PRIME TIME (FEB. 18-MAY 31, 2018)

<table>
<thead>
<tr>
<th>Network</th>
<th>All Day</th>
<th>Prime Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>CME Group</td>
<td>25.2%</td>
<td>51.6%</td>
</tr>
<tr>
<td>MFT Group</td>
<td>24.4%</td>
<td>48.2%</td>
</tr>
<tr>
<td>RTL Group</td>
<td>15.7%</td>
<td>28.2%</td>
</tr>
<tr>
<td>others</td>
<td>14.9%</td>
<td>27.8%</td>
</tr>
</tbody>
</table>

Source: GarBFlorian Skala, CEO of bTV Media Group
Markíza: foreign formats, local tastes

Owned by CME, Markíza Group is a leading television operator in Slovakia, where it obtains 30.7% of audience share on its three networks: the flagship TV channel Markíza (22.6%), Domá (4.3%) and Dajto (3.8%), according to data from PMT/TNS (Q1, 2018).

Previous interviews Michael Borec, PR & Marketing Director: ‘We have had great success with fiction, especially lighter comedy and family series. After years of local concepts, we tried various foreign formats such as Dear Dadies from Viacom Telefe (Argentina) and we are very happy with the results. It was a big hit as we adapted the original script to local needs.

In entertainment, we continue with proven hits such as Idols (FremantleMedia), Chart Show and Who Knows.

About the top shows recently released, the executive explains: ‘We are happy that in the spring season we were able to strengthen our position in each segment. As mentioned the scripted series Dear Dadies was a big hit in access prime time this year. We also completed the reboot of our legendary series Neighbours, which opened each week during the spring season with great audience shares’.

At Markíza, the balance of original vs. acquired content was about 60-40% in all day.

Acquisitions are most important for our niche channels. ‘The audience is always looking for good original content. In the fall and spring season almost all of prime time on our main channel is based on local production. There are no rules or patterns we achieve above average ratings with local comedies, entertainment or even prime time quiz shows. Our viewers usually prefer light entertainment, but drama series can also be successful in attracting an audience’, adds Borec.

Regarding the digital world, the executive highlights the Group’s OTT subscription service, VOYO, in which the viewer can find all of our local production, as well as an extensive film library from the distributors with whom it cooperates as a TV broadcaster.

‘VOD distribution of our content is a key digital product for us. Within Slovak TV broadcasters we have historically been the only provider of a full-fledged VOD platform. The plan for the future is to offer exclusive VOD content through the widest range of devices, while continually improving the distribution and consumption of VOD content.

To conclude, Borec refers to the future & health of the TV business in Slovakia: ‘We don’t anticipate a radical change in the TV business in Slovakia. There are no rules or patterns: we achieve above average ratings with local comedies, entertainment or even prime time quiz shows. Our viewers usually prefer light entertainment, but drama series can also be successful in attracting an audience’.

That said, we do see the online environment as an important means of distribution and, in this respect, it will behave like a classic television channel that will share its top content online. So the traditional revenue from GRPs on TV will partly shuffled into the online environment. Consequently, the basis should be market-wide measurement of e-GRPs and classic TV GRPs, and the difference between online and classic TV will eventually disappear’, finalizes.

Michal Borec, PR & Marketing Director, Markíza

Acquisitions are most important for our niche channels. ‘The audience is always looking for good original content. In the fall and spring season almost all of prime time on our main channel is based on local production. There are no rules or patterns: we achieve above average ratings with local comedies, entertainment or even prime time quiz shows. Our viewers usually prefer light entertainment, but drama series can also be successful in attracting an audience’, adds Borec.

Regarding the digital world, the executive highlights the Group’s OTT subscription service, VOYO, in which the viewer can find all of our local production, as well as an extensive film library from the distributors with whom it cooperates as a TV broadcaster.

‘VOD distribution of our content is a key digital product for us. Within Slovak TV broadcasters we have historically been the only provider of a full-fledged VOD platform. The plan for the future is to offer exclusive VOD content through the widest range of devices, while continually improving the distribution and consumption of VOD content.

To conclude, Borec refers to the future & health of the TV business in Slovakia: ‘We don’t anticipate a radical change in the TV business in Slovakia. There are no rules or patterns: we achieve above average ratings with local comedies, entertainment or even prime time quiz shows. Our viewers usually prefer light entertainment, but drama series can also be successful in attracting an audience’.

That said, we do see the online environment as an important means of distribution and, in this respect, it will behave like a classic television channel that will share its top content online. So the traditional revenue from GRPs on TV will partly shuffled into the online environment. Consequently, the basis should be market-wide measurement of e-GRPs and classic TV GRPs, and the difference between online and classic TV will eventually disappear’, finalizes.

Michal Borec, PR & Marketing Director, Markíza

Now in production on Season 2!

She knows the art. He knows the law. Together they solve the...
FTV Prima, the perfect mix

FTV Prima is leading media group in Czech Republic, operating the third largest television conglomerate comprised of six networks: Prima, Prima Cool, Prima Max, Prima Krimi, Prima Love and Prima Zoom. CEE TV interviews Jan Rudovsky, Head of Acquisitions and Business Affairs, who describes its moment in the local TV market, while it shares the content trends.

‘Czech viewers, and I think in this regard they’re not that different from viewers in other countries, they prefer local content, so that’s what’s on our main channel’, remarks the executive.

But there is also a strategy towards the acquired content for the smaller networks, like Prima Cool. On it, BBC contents such as Top Gear or the documentary Planet Earth II were some of the top-watched foreign factual on that specific channel and on the main channel, too. Other titles from the distributor are MalýLike with Roman Atkinson.

Rudovsky explains further about this show: ‘We had the first season last year, with the new one this year, and in both cases it was one of the most viewed non-local titles on the main channel. So, these are the type of shows Czech viewers like’.

He continues about the local market: ‘Czechs are not too keen on the newer darker stuff, which is something we’re trying to change, but none of the channels on the Czech markets has recently been able to successfully launch any of the ambitious new shows. These are the shows they’ve got everybody talking about, but it’s not necessarily the ones that would work in Czech Republic’.

The trend in CEE is that viewers enjoy new prime time dramas, but the executive says that in Czech Republic this is quite different: ‘We are a rather conservative country and viewers in general prefer stuff they are familiar with. They don’t like trying new stuff too much, which is challenging for us, as we would like to bring in new content, keep viewers up to date with what’s trending in the rest of Europe. But Czech really is a very specific market, I would say’.

Rudovsky: ‘We shop for specific channels the factual series go to Prima ZOOM, while series such as Top Gear to Prima COOL, and crime shows to the main channel! Prima. Whenever we buy something it’s always channel-specific, it’s not that we would buy something first and then look for a place to put it in the schedule’.

‘Mostly we buy factual content, mainly natural history, science, travelling, because we have a dedicated factual channel which air a lot of these contents. We are constantly on the lookout for the next crime show, light crime show. We’re not much in the market for the dark and gritty stuff, we are always looking for the next Midsomer Murders or something similar’. Rudovsky was interviewed during the BBC Showcase, so he describes the opinion on this year edition: ‘It’s much more compact. You get to see the breadth of the spectrum of the programs that they can offer and it’s much more quiet, it’s much more relaxed because at the MIPs and NATPEs you just run from meeting to meeting, you’re just constantly talking to people, and you don’t have the time to sit down and focus on what really matters, which is the content’.

‘In here, you get the right mix of being able to focus on the content, meeting people you want to talk to and getting some inspiring talks and presentations. You realize how big BBC is and how valuable a partner it is, so I think it works in that regard very well’, concludes the executive.
Natpe Budapest International: unifying differences

After near a decade of crisis, the TV markets in the CEE region have experienced a growth in recent years and setting up the bases to an instability, a reality that is expected to be reflected on NATPE Budapest International, which comes to Hungary for third time in a row between June 25-28.

The organization expects the presence of more than 420 buyers from 55 countries (+4% vs 2017), and a total of 130 exhibiting companies from 30 countries. Among the former, CEE represents the majority, followed by Europe (15%), MENA (8%), Asia (5%), and USA (0.5%). ‘There is an increase in digital buyers, which already represents 10% of the total’, explains JP Ronnel, CEO of NATPE.

The market

Once again, a robust schedule of business sessions is one of the top basis of the 2018 edition, with global industry experts covering topics such as “International Drama Production: Maximising Cross-Regional Partnerships”, “New Opportunities and New Audiences in MENA”, “A World of Formats: Distribution Insights and Strategies”, “All The World’s a Stream: Game Changing OTT Platforms”, and an in-depth look at “The Current Advantages of Latin America”.

Regarding the first, Turkish dramas started to lose ground in most of the countries with some exceptions like Czech Republic or Slovakia, and the importance of local content, mainly in Free TV and the OTT services. Some countries have been receiving the benefits of the growth of digital distribution, but it is not enough for others to catch up.

The Region

Unlike other regions, CEE is a complex union of ‘fragmented markets’, and according to buyers like ‘Tiber Puriz’ director of content acquisition, RTI, Hungary, ‘it’s starting to be what it used to be’. ‘Companies are buying again and searching new formats for their own markets, especially in countries like Hungary, Ukraine, and Poland’, he emphasizes.

But despite each country’s individuality, the entire region is starting to change. The market is again opening to some regions like Latin America but also new ones, and public broadcasters are more open to new opportunities and strategies similar to commercial networks, but under its own rules: while most of the countries are programming more and more Turkish dramas and betting on co-productions, CEE goes in the opposite direction.

SHARE OF BUYERS PER REGION (2018)

CEE MENA Asia USA

Content

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like Netflix aren’t having the same results as in other territories such as the US, where it surpassed the cable TV. “The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand”, says Felix Woeseler, AllSofina.

Regarding original content in general, there are some issues too: ‘Companies are afraid to invest and take risks. They prefer to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far’.

Conclusion

Cable and Telcos

Content growth from emerging markets and the emergence of linear OTT services can offer opportunities for satellite operators to continue to stay relevant in the video business despite an overall trend towards IP delivery and away from broadcast in the region.

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like Netflix aren’t having the same results as in other territories such as the US, where it surpassed the cable TV. “The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand”, says Felix Woeseler, AllSofina.

Regarding original content in general, there are some issues too: ‘Companies are afraid to invest and take risks. They prefer to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far’.

Conclusion

Cable and Telcos

Content growth from emerging markets and the emergence of linear OTT services can offer opportunities for satellite operators to continue to stay relevant in the video business despite an overall trend towards IP delivery and away from broadcast in the region.

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like Netflix aren’t having the same results as in other territories such as the US, where it surpassed the cable TV. “The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand”, says Felix Woeseler, AllSofina.

Regarding original content in general, there are some issues too: ‘Companies are afraid to invest and take risks. They prefer to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far’.

Conclusion

Cable and Telcos

Content growth from emerging markets and the emergence of linear OTT services can offer opportunities for satellite operators to continue to stay relevant in the video business despite an overall trend towards IP delivery and away from broadcast in the region.

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like Netflix aren’t having the same results as in other territories such as the US, where it surpassed the cable TV. “The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand”, says Felix Woeseler, AllSofina.

Regarding original content in general, there are some issues too: ‘Companies are afraid to invest and take risks. They prefer to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far’.

Conclusion

Cable and Telcos

Content growth from emerging markets and the emergence of linear OTT services can offer opportunities for satellite operators to continue to stay relevant in the video business despite an overall trend towards IP delivery and away from broadcast in the region.

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like Netflix aren’t having the same results as in other territories such as the US, where it surpassed the cable TV. “The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand”, says Felix Woeseler, AllSofina.

Regarding original content in general, there are some issues too: ‘Companies are afraid to invest and take risks. They prefer to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far’.

Conclusion

Cable and Telcos

Content growth from emerging markets and the emergence of linear OTT services can offer opportunities for satellite operators to continue to stay relevant in the video business despite an overall trend towards IP delivery and away from broadcast in the region.

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like Netflix aren’t having the same results as in other territories such as the US, where it surpassed the cable TV. “The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand”, says Felix Woeseler, AllSofina.

Regarding original content in general, there are some issues too: ‘Companies are afraid to invest and take risks. They prefer to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far’.

Conclusion

Cable and Telcos

Content growth from emerging markets and the emergence of linear OTT services can offer opportunities for satellite operators to continue to stay relevant in the video business despite an overall trend towards IP delivery and away from broadcast in the region.

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like Netflix aren’t having the same results as in other territories such as the US, where it surpassed the cable TV. “The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand”, says Felix Woeseler, AllSofina.

Regarding original content in general, there are some issues too: ‘Companies are afraid to invest and take risks. They prefer to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far’.

Conclusion

Cable and Telcos

Content growth from emerging markets and the emergence of linear OTT services can offer opportunities for satellite operators to continue to stay relevant in the video business despite an overall trend towards IP delivery and away from broadcast in the region.

As each country has its singularity, its audience also has it, a key motive to understand the importance of the local content, mainly in Free TV and the OTT services. This strong demand of local content could be a reason why some experts consider that mainstream services like Netflix aren’t having the same results as in other territories such as the US, where it surpassed the cable TV. “The platform has a strong offer but not much local content, and it will take two to five years to produce original content, both in quality and quantity for each demand”, says Felix Woeseler, AllSofina.

Regarding original content in general, there are some issues too: ‘Companies are afraid to invest and take risks. They prefer to find the right partner in the region. Companies want just to receive the money and create the content by their own without having faith on its partner and this model never goes far’. 
Prensario and NEM publish this special report about where some of the leading CEE companies are going to, especially in an ever-changing scenario dominated by the digital transformation and an increase of original productions. Trends and future plans.

Modern Times Group (MTG) entertainment and studio businesses are now combined with Nordic telecommunication company TDC Group, having created Europe’s first fully convergent media and communications provider. MTG is now focusing its resources on the expansion of its global digital entertainment operations. The newly created conglomerate, which reaches 10 million households in the Nordic region, includes mobile, broadband and TV distribution businesses, plus content creation, production, broadcasting and streaming. It also has a prominent Nordic portfolio of third-party content partnerships, having 2.8 million TV subscribers in Sweden, Denmark, Norway and Finland, with already known brands as Viaplay, Viafree, YouSee TV & Film and Get Play.

Viaplay’s customers streamed 32 hours a month during last year, an increase of 25%. More original content is the reason of this growth, with eight originals premiered: *Hassel* was the top watched drama in Sweden and Finland; *Veni Vidi Vivi* was the second in Denmark; *Occupied S2* was the second most watched in Norway; *Alex* was the second most watched new series in Sweden and the fourth most watched in Finland. MTG also offered 50,000 hours of live sport on Viaplay. In parallel, Viafree, the free streaming app service for the Nordic region has been downloaded close to 2.6 million times.

Czech TV is the Czech public service broadcaster, founded 65 years ago. We have actually six free-to-air channels: CT1, our flagship and mainstream channel; CT2, mostly focused on the acquisition of dramas and documentaries, both international and local titles; CT24, news channel, our sport channel CT sport, CT ID, for the kids channel, and the cultural broadcaster CT art. Average total share of the group of channels is 30%.

On the digital side, we also run an extensive web and mobile services, including video catchup and video archive, news and sports coverage and dedicated kids and arts sites, trying to reach all the audiences, no matter where they are.

Czech Republic has long been a heavily TV fiction-oriented market, both for public and commercial broadcasters. CT has three nights of premiere drama in primetime, and three nights of repeats. Commercial channels also fill most of their primetime with locally produced fiction series.

In terms of content, the most successful formats are crime series on all three main channels - CT1, Nova and Prima. Crime series work usually well regardless of the exact type - channels had great results with standard police procedurals, personality-based, rural, period-based etc. Episodic crime series also have a very strong repeat factor.
The Romanian TV market is a dynamic one with highly demanding audiences and strong competition. Pro TV’s leading position is driven by the quality of its programs, both news and entertainment. However, each day we have to reinvent and outperform ourselves: Pro TV appeals to a wide audience, thus they expect a variety of programs and this is what we are proposing to them every day. In regard to entertainment, we propose a good mix of fiction series, entertainment and reality formats. We have well-established shows such as Romania’s Got Talent, Las Fierbinti and The Celebrity Farm, as well as new programs.

When watching TV, Romanians seek an emotional connection, they want to empathize with the content they see. Whether we talk about news, series or shows, they look for this content contextualization and localization.
TVP (Poland) plans to launch its first production created specifically for TVP VOD users and ABO Zone (Strefa Abo) users. Users of the TVP VOD platform and new subscription service ABO Zone will receive access to the first production realized specifically for the Internet. This will be the second part of the implementation of the online strategy of the public broadcaster - the first one is being implemented and consists in expanding the Abo Zone with the premium content. The second edition of the online strategy is already being created. We are talking to several producers at the same time.

These will be shorter forms dedicated to internet audiences, probably miniseries. The length of episodes will not exceed 8-10 minutes. Even when we don’t know which distribution model to broadcaster we will choose, I’m convinced that they will have a very wide resonance in the network, mainly in communities.

With the launch of an HBO Go direct to consumer service in Poland last March, now all 17 countries under the HBO Europe umbrella now offer subscribers a full HBO OTT service. The HBO service is already a great success across our territories within Europe. With this further expansion, we are making it even easier for series and film lovers to become HBO subscribers. We believe new subscribers will be very satisfied with our unique offering of internationally-acclaimed programming and locally-produced drama and documentaries. We will also continue to increase our investment in local programming across all territories in Europe.

In Poland, HBO Go currently offers Polish language versions of over 800 movies and 200 series. The direct to consumer offering is in addition to the already established HBO channels and services in Europe. HBO Go will continue to be available through local distribution partners with TV, internet or mobile packages.

Markiza Group is the leading TV Group in Slovakia with Markiza, the flagship channel with News, magazines, entertainment, reality and shows, the female series channel Doma and the younger more male oriented film channel Dajto. We offer several websites and Apps and run a SVOD platform (Voyo). Markiza started in August 1996 and is a strong and independent voice in Slovak media landscape.

Format rights for shows and reality programs, scripts for adaption of comedy and drama series, all for the main channel Markiza.

Our daily series Otec Kavia (Daddies) is rocking the market with an average share of more than 35% at the 18.00 access slot, it is one of the best performing daily programs ever on the Slovak market. The stories evolve around four daddies who meet first time in the Kindergarten. It is a local adaption of the Telenovela “Senores Papis” from Argentina (Telefe).

Where are CEE broadcasters going to?

NTV-Plus
Konstantin Smirnov, Head of digital products department

TV Markiza
Matthias Settele, General Director

HBO Go
Herve Payan, CEO HBO Europe

TVP VOD
Maciej Stanecki, Member of the board at TVP

Markiza Group is the leading TV Group in Slovakia with Markiza, the flagship channel with News, magazines, entertainment, reality and shows, the female series channel Doma and the younger more male oriented film channel Dajto. We offer several websites and Apps and run a SVOD platform (Voyo). Markiza started in August 1996 and is a strong and independent voice in Slovak media landscape.

Format rights for shows and reality programs, scripts for adaption of comedy and drama series, all for the main channel Markiza.

Our daily series Otec Kavia (Daddies) is rocking the market with an average share of more than 35% at the 18.00 access slot, it is one of the best performing daily programs ever on the Slovak market. The stories evolve around four daddies who meet first time in the Kindergarten. It is a local adaption of the Telenovela “Senores Papis” from Argentina (Telefe).

With the launch of an HBO Go direct to consumer service in Poland last March, now all 17 countries under the HBO Europe umbrella now offer subscribers a full HBO OTT service.

The HBO service is already a great success across our territories within Europe. With this further expansion, we are making it even easier for series and film lovers to become HBO subscribers. We believe new subscribers will be very satisfied with our unique offering of internationally-acclaimed programming and locally-produced drama and documentaries. We will also continue to increase our investment in local programming across all territories in Europe.

In Poland, HBO Go currently offers Polish language versions of over 800 movies and 200 series. The direct to consumer offering is in addition to the already established HBO channels and services in Europe. HBO Go will continue to be available through local distribution partners with TV, internet or mobile packages.
One of the main reasons for the local feature films production boom is constant growth of state financial support volumes. The overall state support for content production this year is planned to reach about USD 38 million compared to USD 19 million last year and only USD 2 million six years ago.

To understand the situation better, note that in 2011 Ukrainian cinemas released only one locally produced film, in 2015 29 local films were released and in 2018 this number is presumably about 49 (during the first 5 months of this year 21 local films and almanacs were already presented in cinemas).

But more important is the growing interest to Ukrainian films among cinema-goers that results in new box-office records. In 2017 four international co-productions currently being produced with Ukraine included several dozens of films. Among the most anticipated ones are biopic Gareth Jones (Poland, UK, Ukraine) by Agnieszka Holland with James Norton starring; thriller The Last Step (France, Ukraine) by Frédéric Petitjean with Jean Reno starring; adventure fantasy Polina (Ukraine, Belgium, France) by Olias Barco; thriller Nematoma (Lithuania, Ukraine, Latvia) by Ignas Jonynas; drama Luxembourg (Ukraine, Germany, France, Norway) by Myroslav Slaboshpytskyi; action The Big Fight (Ukraine, Germany) and historic adventure Willy-Nilly Hero (Ukraine, Poland) – both by Aleksandr and Vyacheslav Alyoshchkins, etc.

It is important to add that more and more world famous movie stars come to Ukraine to film and star in different projects. For example, Robert Patrick is set to topline the feature drama THE RISING HAWK, which is now in production by Kinorob (FILM.UA Group), while the rest cast includes Poppy Drayton, Tommy Flanagan and other well-known actors.

Ukrainian producers became much more active in search of foreign partners beyond Europe. In 2018 Ukrainian stand was opened at Beijing Film Market for the first time ever. It led to signing the agreements between Ukrainian FILM.UA Group and Chinese filmmakers on two co-productions: adventure romcom Ukrainian Treasure (budget USD 2.5 million) and historic war drama Flaming Eagle budgeted at USD 25 million. For the local releases earned about USD 770,000 each: comedies Dzidzio Contrabass and Servant Of The People 2, war drama Cyborgs: Heroes Never Die and family fantasy The Strongfield. This year Ukrainian-Latvian comedy Swingers earned more than USD 840,000, and feature animation Theolen Princess set a new national box-office record in the entire history of Ukraine, having earned more than USD 1.4 million.

It’s worth mentioning that more and more Ukrainian films are co-produced with foreign partners, mainly with Europeans. At Marché du Film 2018 A woman at War (Island, France, Ukraine) by Benedikt Erlpingson got two prizes in Semaine de la Critique programme and Donbass (Ukraine, Germany, France, Netherland, Romania) by Sergey Loznitsa was awarded for best direction in Un Certain Regard programme.

Several more Ukrainian co-productions already won various awards this year: drama When The Trees Fall (Ukraine, Poland, Macedonia) by Marysia Nikitiuk, war drama Frost (Lithuania, Ukraine, France, Poland) by Sharunas Bartas, thriller The Line (Slovak Republic, Ukraine) by Peter Belhaj, comedy Easy (Italy, Ukraine) by Andrea Magnani, etc.

The list of international co-productions currently being produced with Ukraine includes several dozens of films. Among the most anticipated ones are biopic Gareth Jones (Poland, UK, Ukraine) by Agnieszka Holland with James Norton starring; thriller The Last Step (France, Ukraine) by Frédéric Petitjean with Jean Reno starring; adventure fantasy Polina (Ukraine, Belgium, France) by Olias Barco; thriller Nematoma (Lithuania, Ukraine, Latvia) by Ignas Jonynas; drama Luxembourg (Ukraine, Germany, France, Norway) by Myroslav Slaboshpytskyi, action The Big Fight (Ukraine, Germany) and historic adventure Willy-Nilly Hero (Ukraine, Poland) – both by Aleksandr and Vyacheslav Alyoshchkins, etc.

It is important to add that more and more world famous movie stars come to Ukraine to film and star in different projects. For example, Robert Patrick is set to topline the feature drama THE RISING HAWK, which is now in production by Kinorob (FILM.UA Group), while the rest cast includes Poppy Drayton, Tommy Flanagan and other well-known actors.

Ukrainian producers became much more active in search of foreign partners beyond Europe. In 2018 Ukrainian stand was opened at Beijing Film Market for the first time ever. It led to signing the agreements between Ukrainian FILM.UA Group and Chinese filmmakers on two co-productions: adventure romcom Ukrainian Treasure (budget USD 2.5 million) and historic war drama Flaming Eagle budgeted at USD 25 million. For the
second time Ukrainian national stand will work this September at Toronto Film Market. Bilateral agreements on coproduction with Canada and China are underway.

Ukrainian content continues conquering international markets and is being sold worldwide. In 2016, Ukrainian feature animation *The Dragon Spell* was sold to a dozen of territories. At the same time, *The Stolen Princess* cartoon was licensed to more than 40 territories and continues its international voyage.

Upcoming Ukrainian animation release *Mavka. The Forest Song* (Animagrad) has been already pre-sold to several territories (thus its release is expected only in 2020). Ukrainian epic fantasy *The Stronghold*, produced by Kinorob, sold to China, India, France and French-speaking territories, South Korea, Belarus, Kazakhstan, Moldova, and Kyrgyzstan. Feature comedy *Dzidzio Contrabass* was licensed to China.

As for Ukrainian TV series – hundreds of projects were sold abroad as a ready-made content, mainly to Kazakhstan, Russia, Belarus and Baltic States. Several projects were acquired as formats: detective series *The Sniffer* – to TF1 (France) and NHK (Japan); comedy series *Servant Of The People* – to Fox Studios (USA); one more comedy *The In-Laws* was adapted as format in Estonia and Kazakhstan; multi-episode medical drama *Dr. Baby dust* was adapted in Kazakhstan; youth drama *School* was sold at MIPTV 2018 as a format to three territories. Moreover, Ukrainian drama is recognized by international VOD-giants Netflix and Amazon Prime (dozens of series produced by FILM. UA, Star Media and Kvartal 95 are already available on these platforms).

Local drama production in Ukraine is also on the rise. It was partially caused by ban of large portion of Russia-produced content in mid-2015. From that time the number of original Ukrainian scripted content has tripled. The research conducted by MRM indicates that in 2013 there were 24 premiere series (298 new episodes) of Ukrainian origin in the air of Top-6 Ukrainian broadcasters, while in 2017 – 571 (893 new episodes in total).

‘Global content trends today say that non-English language content gains momentum worldwide. Witnessing the growing success of our media industry both on local and global levels, we’re sure that Ukraine could become powerful player, because its creative potential and level of quality meet high international standards’, remarks Kateryna Udut, Executive Director of MRM, organizer of Kyiv Media Week.

‘We want to tell the world more about us: we are happy to provide Ukrainian and international media community with a unique networking platform Kyiv Media Week. Already the 8th edition of the media forum will host the traditional content market and very intense conference program this September in Kyiv. Over 50 sessions will day by day cover global content trends, including TV and film business, drama co-production and new burning formats development, animated features creation and FAANGS as an inescapable part of our daily life. Substantial part of all events will have a special country focus, unveiling cooperation opportunities. Surely, best practices from around the world will also be a part of the event’, she concludes.

Ukrainian series are gaining momentum at the global marketplace: format of the comedy series *Servant of the People* (Kvartal 95) was sold to Fox Studios (USA).

Animation is a strong genre in Ukraine with the feature animation *The Forest Song* (Animagrad) having earned more than USD 1.4 million in the entire history of Ukraine.
Central and Eastern Europe comprises 22 countries and a population of around 300 million or 120 million TV households, being one of the most diverse in histories, cultures, languages and tastes. Thus, singular countries of this region cannot necessarily be directly compared with one another.

What the CEE countries have in common is their impressive macroeconomic growth and the major transformation and development of their television markets. The economies of most of CEE are set to expand rapidly in the coming years, thus allowing for a number of attractive opportunities for TV channels and networks, producers and program and ad sales houses alike. The demand for content to satisfy viewing needs, whether it be local, domestic or regional or international is resilient.

The reasons for the growing demand in CEE markets remain the growth driver for the CEE media industry. TV and video advertising are set to remain the largest segments in CEE growing from about € 7.7 billion in 2015 to hit and exceed the € 10 billion mark for the first time in the year 2020, representing a growth of more than 30%. The CEGAR beyond 2020 is expected to be at least 5% for the region.

The CEE market distinctions clearly need to be addressed. In Russia the TV ad market is the largest, however it strongly fluctuates; Poland and Czech Republic have the highest TV ad per capita; Romania, Slovenia and Bulgaria have the largest TV market share of all media advertising in CEE, whereas in some instances in periods of very favorable macro-economic conditions, robust private consumption and resulting above average retail sales even TV ad inventory is sold out; and, Czech, Estonia, Slovak (and others) online ad revenues have or are on the verge of overtaking TV ad revenues.

The increasing growth of the CEE countries can be seen in their own national SVOD providers, Netflix and Amazon Prime Video, which will substantially impact the SVOD sector in CEE. Interestingly, the growth of Netflix in CEE is the region in taking place in the environment of a rather mature and saturated pay TV market. Penetration of pay TV in CEE is actually higher than in Western Europe, whereas broadband penetration is lower. Netflix, for example, began localizing content in Poland in 2016 with many of the CEE countries following. According to Digital TV’s recent “Eastern Europe OTT TV & Video Forecast Report”, Netflix will have more than 3 million subscribers in CEE by the year 2022. These figures, however, will exclude subscribers in Russia because regulators introduced a 20% foreign ownership equity limit on platforms with more than 100,000 subscribers. If regulators maintain their current position, then this would eventually force both Netflix and Amazon Prime Video to discontinue their platform services in Russia. Instead, Amazon and Netflix might license their original content to a local Russian platform, similar to the way Netflix did in China with iQIYI.

Also referring to Digital TV’s research and excluding Russia’s 7 million SVOD subscribers by 2022, Netflix is expected to contribute 35% of SVOD subscribers in the remaining 21 countries. Amazon Prime Video a further 12%, making in total nearly 50% of SVOD subscribers, showing the prevalence of both US market penetrators into CEE.

Digital TV furthermore forecasts that there will be nearly 17 million SVOD subscribers in the whole of the CEE region by 2022 making SVOD the largest OTT revenue source totaling € 1.1 billion or 60% of the OTT revenues, fourfold compared with today’s.

OTT TV series and movie revenues will reach nearly € 2 billion by 2022, nearly tripling from 2018 and Russia will account for close to 50% of the region’s OTT revenues, with Poland the second largest of the CEE markets generating a further 20%.

Summarizing, a new paradigm evolved in the sense of TV content openness and acceptance by audiences never seen to date which has made possible a highly dynamic content industry within CEE, as demonstrated by the expected record attendance and buyers’ interest in this month’s NATPE Budapest International. Creativity, output and innovative concepts have virtually erupted in domestic CEE companies and countries within the whole bandwidth of program productions and possibilities.

The CEE markets should certainly not be underestimated. Researchers anticipate a continued healthy economic expansion. This growth will boost both content and advertising spend across the whole region making it very attractive, also compared with other partially saturated world markets. As CEE market players continue to innovate, television is expected to thrive in viewer participation and hence in revenues and opportunities.
Georgia: format franchises take the scene

Georgia is a small, but dynamic television market with three media groups operating, one public and two privates. Prensario interviews them for this special report, about the current programming trends, top shows and media evolution.

Leading broadcaster is Imedi TV, a privately owned TV station launched on March, 2003, as part of Georgian Media Production Group, which also owns two other networks: GDS TV and Maestro TV. Imedi TV’s average share for April-May was 25-30%, according to TNS Global Kantar Media. Currently, the company employs over 700 hundred professionals and is the largest broadcaster in Georgia. ‘When it was founded, it became the first independent TV station in the country, which quickly climbed to the top of the most watched channels due to its programming diversity and innovative local shows. We strictly adhered to the international media standards and were the first station that confronted serious piracy issues in the country by licensing its entire content and forming a long term productive cooperation with many leading international TV and distribution companies’, describes Natia Tchelidze, head of acquisitions.

There was a time in 2007 that the network was a part of News Corp. It was the year when the station was raided by the government forces and temporarily shut down for its fair and critical coverage of the political situation in the country.

About the market, Tchelidze explains: ‘Despite being a considerably small market, Georgian television boasts an impressive selection of top entertainment format franchises. Over the span of the last seven years, these shows have garnered the largest audience share. Our prime-time is led by two talk shows that are a hybrid blend of politics and social issues - Face to Face on Tuesdays at 10pm and Imedi’s week on Sundays at 8pm followed by entertainment talk shows Prime Show and Another angle leading 10pm slot on Wednesdays and Thursdays, respectively’, remarks Tchelidze.

Imedi TV’s main programming pillars in its current schedule are entertainment formats, drama series, local factual talk shows and a local series. ‘Domestic drama production is, of course, in high demand and a number one priority for the company. Since the day it was launched, the channel’s goal has been to encourage high quality domestic production and up to this date, it has managed to produce over 20 domestic series in genres like action, mystery, drama, comedy, and sitcoms’, she adds.

‘One of the trademarks has been an overwhelming popular sitcom, In city center, first launched in 2007 and counting 16 seasons of unsurpassed ratings success so far. Last season a local drama Big Break was introduced to TV viewers that garnered a huge audience share. Our prime-time is led by two talk shows that are a hybrid blend of politics and social issues - Face to Face on Tuesdays at 10pm and Imedi’s week on Sundays at 8pm followed by entertainment talk shows Prime Show and Another angle leading 10pm slot on Wednesdays and Thursdays, respectively’, remarks Tchelidze.

Late night show on Thursdays and a local...
Georgia: format franchises take the scene

Game show on Saturday with a variety of off prime and access prime time programs such as Cooking battle, Morning and daily show, which are ‘hugely popular’. Approximately 60% of Imedi’s schedule is acquired content - series, mini-series, feature films, animation features and series, formats, etc. (aired daily, both in off prime and prime time) and 40% local programs.

The executive points out ‘2013 marked the year of the Turkish drama invasion. As in many European countries, Turkish drama filled in traditional Latin American telenovela time slots. Telewevelas had enjoyed a great success and guaranteed high ratings for ten long years before Turkish dramas entered our market and replaced them’.

Another country with a great drama catalog to offer is Italy. Tschelidze: ‘Italian series and mini-series have long been our favorites. Some of the titles we have aired are Mediaset’s Intelligence, Blood Ties, Ultimo 3 and Ultimo: the Hawk’s eye, and now we are broadcasting A Matter of respect with the audience share of 32%. Last season was marked with a success of a Spanish drama El Príncipe, from Mediaset España, and a couple of Korean programs that recorded surprisingly good results’.

The second largest broadcaster in Georgia is Rustavi2. Founded in 1994, it is one of the most popular and successful channels, currently reaching 85% of Georgia’s population nationwide. It provides a diverse range of top quality licensed programming from up-to-the-minute daily news and political talk shows to Georgian audiences.

Rustavi 2’s programs are consistently top rating throughout the country. It is also a trend-setter becoming the first to use digital hardware, to go on satellite and to conduct live foreign transmissions, while it improves the quality of broadcasting. It was also the first to become an associate member of the European Broadcasting Union. On the content side, it has first embraced the concept of interactive TV and brought the first political talk shows to Georgian audiences.

The new season’s strategy was the audience expansion to attract new target groups and maintain the existing ones. ‘For this purpose, we have founded modern formats, where the priorities of the Public Broadcaster are successfully combined with entertainment formats’, highlights Tinatin Berdzenishvili, director of Media and Communications. ‘Our goal was to get interested and attract the age categories that are the most passive TV viewers and generally watching TV is less considered in their lifestyle. Such categories are 10-15 and 16-24 age groups that prefer the Internet, social networks. Coordinated work of all platforms and interesting formats of the new projects got the specific results, and in the 2018 TV season, the First Channel audience grew, and it was mainly affected on low age groups. 10-15 age category ratings have increased by 21%; 16-24 age categories have increased by 18%. Ratings of 16-24 age categories have increased by 17%’, she adds.

These varied programs offer brings a range of alternative choices for its diverse pool of TV viewers and radio listeners. Among the top shows are Mooshee, key news program in a new format; Bookshelf, a literary show for younger generation viewers; Rununu, an intriguing musical mega-show for 8-13 year-olds; Are You Smarter Than VI Grader?, the local version from MGM’s format; and Smart Logic, a quiz-based entertainment show.

Georgian Public Broadcaster (GPB) acquires only premium class movies and TV series documentaries and fiction. Kids animations and transmissions of international events. Preferences of the audience: mostly sport, cognitive, documentary, movie, drama and kids.

Berdzenishvili concludes: ‘Public broadcaster is now functioning in a competitive environment, where we confront the scandalous and “noisy” production of commercial televisions with the high quality programs prepared by the public broadcaster’s principles. In the programming schedule it is considered program preferences, needs and requirements of the target audience. All of these are formulated by a systematic study of TV audience, through the constant monitoring of the TV market’.
HBO Latin America: global stories

It has been 14 after HBO Latin America produced its very first original drama series, 'Epitafios', and now, the company owns a catalogue of +20 drama series of different genres that Xavier Aristimuño as VP, Licensing, is presenting for global players, both linear and digital.

Aristimuño: ‘We represent series, documentalists and specials of all genres, which stand out for their daring themes and for taking risks, no matter the genre or story’. Some of these shows include the thriller Sr. Avila and the drama El Nezgo, both with 4 seasons confirmed for this year, while El Jardín De Bronce is another hot series: the show broke audience records on its first season and counts with the participation of the Oscar nominee Norma Aleandro.

We are also working on a very attractive Group of projects in Latin America. They range from adaptations of global stories that have been very successful, to high-cost productions based on important historical events. They include talent of the highest caliber, who tell high quality stories, which will attract international distributors and new audiences in the rest of the world’, emphasizes the executive.

‘More than 15 of our local productions have reached more than 100 countries globally, mainly through HBO platforms around the world. That’s because we tell universal stories with which all audiences can relate. Our Latin American productions are no exception, and have been very well accepted by audiences around the world, being recognized with more than 100 nominations and more than 60 awards, including an International Emmy in 2017 for the third season of Sr. Avila’, he completes.

Pol-ka: more disruptive

Pol-ka Producciones (Argentina), one of the most recognized content developers in Latin America, is evolving with the industry. The company recently launched its new series El Lobista, coproduced with eoffline, Turner Latin America and Cablevisión/Flow as part of a new strategy that seeks to generate high budget series with multiple windows.

Like previous projects (La Fragilidad de los Cuerpos, El Maestro), this new production premieres with the same model: first in open TV and the next day in TNT for the whole region, and then for the OTT Flow clients. ‘It is a winning model, and we are very happy with the results. The plan includes making two series a year in a decade: El Lobista is the first of 2018, and we are already delineating the second’, describes Manuel Martí, head of development and international business.

Another interesting project for the region is Simona (120x’60), a kids and teens series broadcasted on eoffline: ‘It is a disruptive project since it’s a teen series in prime time and it works very well in audience. Over 150 episodes were aired and will continue for a few more months. More amazing are the digital results: in its YouTube channel it is seen by 1.5 million people every day’, adds the executive.

Also, are the 59x60’ series like El Puntero, Tratame Bien or Para Vivir Santos, all with 3 seasons and very requested both as finished shows and format, mainly in Europe.

Lastly, the company is developing a new show with FNG Latin America named by Adrián Suar, director of Pol-ka: it will be 13 episodes in a genre and format that never before had produced and that has its complexities. We like to venture into new things’, completes Martí.

RCN: La Ley del Corazon

RCN TV is one of the leading television and production companies in Colombia with a track history of acclaimed series and soap operas that over the years has licensed to over 120 countries worldwide. ‘Years of experience in the creation and production of television make us experts in soap operas and series of all kinds: classic melodrama, musical, biopics, thrillers, humorous soap operas and all the different tendencies that exist in the world today, therefore our commitment is to offer our clients a portfolio with quality productions, high impact and successful in their genre’, describes María Lucía Hernández, director of international sales.

This year the company has directed all its potential to make available to the international market a solid portfolio comprised of the best and most impressive productions with the highest values of production and universal stories such as La Ley del Corazon (131x60’), based on real criminal or family cases, sold to Honduras, USA, Ecuador, Mexico as format, Puerto Rico, Panama, Costa Rica, Chile (format), Spain and Andorra, Bolivia, El Salvador and Pay TV in Latin America. The second season is considered the biggest bet of the company and it will be launched during the second semester. ‘At this season, our lawyers will face a crisis that they never imagined: bankruptcy’.

Lastly, the executive recommends for the region Zamba (90x60’), a biopic based on the life and dreams of Beto Pérez, Zamba’s creator. ‘It’s a story of the conquest of dreams, of believing and trusting in talent’, completes Hernández.
Caracol: content that transcends

CEE has become a key region for Caracol International (Colombia) during the last years thanks, and Paloma García, international sales executive, arrives to NATPE Budapest with the objective to keep promoting the Latin content with strong players.

In CEE, we have very important clients for the company, such as Pols TV in Poland, TV21 Hungary, Nova Bulgaria, and the Greek pubcaster ERT, among several others, where titles like La Escuela Blanca and La Revolución de Oro, very well received. For this reason, one of our goals is to strengthen our presence in markets like NATPE”, says García.

Even when the executive emphasizes that “being in CEE represents a great challenge because it deals with very demanding and sophisticated markets with a consolidated production of fiction and entertainment formats”, she is confident that there’re many opportunities for the Colombian productions, which transcend the classic soap operas. “Soap operas were broadcasted at the time in the region, but, nowadays, our company proposes new contents, such as great series of fiction and entertainment formats, from which we market both the finished product and the format of scripts’, she remarks.

A good example is the Greek version of El Desafío, Nomads, which has a great success in Europe. Locally, the format is celebrating its 15th anniversary at Caracol.

“WE want to make viable in these territories our level of quality in production, production design, locations, budgets, etc., and become part of their programming grids. It is not easy, but we are achieving it”, she completes.

TV Azteca: setting precedents

After a big reorganization in 2017 focused both in strengthening its original production and its international presence, TV Azteca (Mexico) arrives to NATPE Budapest with a fresh slate with strong brands.

The Latin product has evolved enormously in the last 10 years. We represent strong brands with a high level of production. We continue to have classic, modern and iconic telenovelas that have set a precedent in Mexico, Latin America and the entire world but we also offer a wide range of genres including formats, factual, lifestyle, movies and drama”, states Melissa Pillow, sales representative for Europe.

And the success of the company in Latin America is well reflected in Europe as well, with a good track record. Some examples include the sale of Los Temerarios in Mexico, Entre correr y vivir, La Traición, Dronaje Profundo, Sexo Amor y Cochonadon to an OTT platform in Germany, Cocinamios in Russia, Leo Rey and Santo amor in UK, and Siempre Te Va Acapulco in Hungary, Latvia, Lithuania and Poland.

“We sold Vivir a Destinos in Romania and Italy, and Pasión Morena, Cielo Rojo, Vuelve a Querer, to an Italian OTT platform, and our Super Series Desaparicidios and Malcriadas, in Albani”, adds Pillow. The executive also recommends at NATPE a catalogue that include the Indomable por Naturaleza franchise, the drama series Dos Lagos and Nada Personal, the cooking show Cocinamios, and a slate of nostalgic Telenovelas that still work well in the region like Cuando Seas mi, La Hija del Jardinerio, Pasión Morena, Pobre Diabla and Misadra de Mujer.

Dori Media: epic stories and comedy

Dori Media Group recommends at NATPE Budapest a slate of drama and game shows headed by the Argentinean romantic comedy Las Estrellas (120x60’), about five daughters facing a challenge, written in the form of a clause, which they will have to fulfill in order to claim the inheritance he has left for the sisters. The series was already sold to Italy, Spain, Russia, Israel, India, Slovenia, El Salvador, Albania, Kosovo and Middle East GCC.

The New Black (12x30’) is a comedy about a group that lives and study in the most prestigious orthodox yeshiva, without interest in studies without the courage to leave as well, and The Road to Calvary (13x45’) is an epic periodic drama commemorating 100 years October Revolution based on the famous novel of Alexey Tolstoy. Sold to TV Azteca Mexico, Albania, Germany, and a tape to Poland, Dubbo (50x35’) is the story about a 30 year old frustrated and stoned actress who is stuck with a body and appearance of a teenager and hates it; while El Marginal (13x45’) is set three years before season 1, when the Borges brothers get into prison and get involved into a war of power with El Sapo, a bloody prisoner who rules San Onofre.

Lastly are the romantic comedy Cuarto a Crudo (14x60’), locally produced in Chile, Spain, Russia, Poland, Germany and now in production in China and Lithuania; The Best of All, which tests the theory that states that the average of the answers to a question of a large audience will be a more precise evaluation than professional, and the format Power Couple, a format that puts love to the test like you’ve never seen before. The couple’s emotions, humor, tensions and love come into play.
Televiña (Mexico), company well known globally as one of the top telenovela producers, arrives to NATPE Budapest with a slate of new shows headed by Irí in Mirada (312x60”), about a woman who, despite her lack of sight and being obliged to learn to know and enjoy the world in a different way, doesn’t lose the hope of finding the real love.

Mr. declaro culpable (926x60”) follows a prestigious lawyer with a long and successful career while facing one of the most difficult cases when defending a woman who decided to disconnect her terminally ill husband. Whereas in Papa a toda Madre (90x60”) the life of the owner of a toy emporium accustomed to having others solving his problems, will change after he has to take care of a daughter he does not even know.

Lastly, are El vuelo de la Victoria (72x60”), which follows a woman whose dream is to be a professional sprinter, and who will have to overcome many obstacles and make decisions that will mark her destiny for life; Mi marido tiene familia (100x60”), about a couple that lives the best moment of their relationship until they meet the husband’s peculiar family, and La Doble Vida de Estela Carrillo, the story of a woman who to save her life and the of a small girl who passes for her daughter, crosses the Mexican border as undocumented and buys a false identity to be able to remain in the American Union, under the name of Estela Carrillo.

Record TV (Brazil) has managed to stand out in the global scenario; it created a subgenre that almost did not exist, and became a great success on Free TV in Brazil and then took it to international markets, achieving recognition and rating figures difficult to emulate, even in the most demanding territories.

They are the biblical series. The company takes timeless famous stories with high budget and very good capacity for reconstruction of the time, and combines telenovelas with event series, as so much sought today. In times where the Latin novel struggles to win against series from Turkey and other origins, Record lives its best moment in the market.

Delmar Andrade, Head of international sales: “Thanks to the biblical series, Record has been in second place in Brazil for 5 years. The new premiere is Apocalipsis, which generates 14 to 18 points in prime time. In total we have been with the genre for 8 years, in progressive and constant growth. Another of the premieres, Rico A Lavez, Nro 1 on Univision (US Hispanic), a milestone unthinkable some time ago’.

And completes Escalante: “Despite the great impact, we strive to be very selective in the distribution of the product, to ensure that when it is exhibited, it works well, in the schedules and the right audiences. It takes a little longer, but it always moves forward”.

Today the distributor leads ratings on Univision and Univisual in the US Hispanic, on Televisa (Mexico), Caracol (Colombia), Telefe (Argentina). In the world, the arrival goes from Portugal and the Portuguese-speaking counties in Africa -Cabo Verde, Mozambique, Angola, etc., to Poland and Eastern Europe. Now the focus is to gain markets in Western Europe and promote new business alternatives.

Latin Media Corp, Jose Escalante’s 10 year production and distribution company, presents at NATPE Budapest its catalog of diverse international titles that continues expanding with new acquisitions including the huge Latin American phenomenon Evita (80x45”), the story of a little girl that struggles to become a singer. Escalante also recommends the Peruvian titlles Little Woman (80x45”) and My Three Daughters (80x45”), in addition to a wide range of Turkish series including the worldwide success Little Bride (263x45”), about a fourteen-year girl who has huge dreams, stepped as an exchange bride to the residence of a clan leader, and also highlighting Slovaks series like Wild Horses (90x45”), and Zoo (72x45”).

“We are very happy that our dramas and series are working very well on the screens of our customers in America, Asia and Europe”, said Escalante. “Programmers need reliable providers that can nourish their grid with different content with proven success in other territories. Latin Media Corporation has offices not only in US, but also in Malaysia, Korea, and Spain, where it monitors dramas/telenovelas that are being broadcasted in the different regions. This is what gives us the chance to have direct access to successful products, and offer them to our clients”.

“Latin Media Corporation has become an excellent provider of content from different parts of the world, guaranteeing top of the line products of immense quality, high ratings and great love stories”, completes Escalante.
Telenovela is a strong name in the global content market. But now, the Latin dramas have evolved and the region also provides entertainment fresh formats, co-production advantages, production services. Welcome to the new regional scenario.

The Telenovela appeared in three main Latin American markets: Brazil, Cuba and México. The genre was the evolution of the “Radio-novela” and it was born with the “new media”, television, that emerged in the regional markets at the beginning of the fifties and sixties. Initially, these were shows for the main regional markets in the Latin American countries: Brazil, Cuba and Venezuela joined the group. Nowadays, some of the most talented creators, directors and drama producers came from those countries.

The genre rapidly expanded to the many key Latin American broadcasters and also to Europe and other global markets. Telenovela has reigned over 50 years. But in the last 10-15 years the genre needed to change and adapt because of a new global drama competition, consumption habits and platforms. Nowadays, Latin producers and broadcasters are offering a much more sophisticated and diverse drama in the global marketplace.

Global success

Historically, there were some global successes of Latin American Dramas like Los Ricos también Lloran (Telesica Mexico, 1976), sold in 120 countries and dubbed into 25 languages; Topacio (RCTV Venezuela, 1986), with three international adaptations (two in Mexico, one in Brazil); La Extranja Dama (Canal 9 Argentina, 1988), sold in 20 territories from Latin America and Europe; El Rey del Ganado (Globosat TV, Brazil) and the most successful of all times, Yo Soy Betty La Fea (RCN Colombia, 1994), seen in 180 territories and the telenovela with more international adaptations: 24.

In 2007, the genre celebrated 50 years and Televisa (Mexico), an emblematic company in this genre, broadcast Amor sin Maquillaje to celebrate the more than 700 dramas produced since then. The company sold its titles in 70 countries, dubbed in more than 37 languages.

Globo (Brazil) is a record-breaker in terms of exportation with titles such as Avenida Brasil (134 countries), Caminho das Índias y A Vida do Gente, both sold in 118 each and third Do Cor do Pecado and Exceencia Imperial, with 104 each times.

Globo is one of the biggest multinational content producer in Latin America with more than 90% of its FTA grid filled with Globo shows, reaching 100% of the Brazilian homes, this is 100 million people a day. The daily reach of Globo’s programming has an increase of 6%, due to the high success of A Forca do Querer with a daily reach of 48 million people on prime time.

Most recently, O outro lado do Paraiso reached 30 million people. It is considered the fifth largest broadcaster worldwide. And a great example because of its content diversification: from classical love telenovelas to high end drama offered in many formats and lengths (TV movies, series, miniseries, short telenovelas, etc.).

Sizes, themes and players

During a period of time, which can be situated between the end of the ’90s and now, the Telenovela looked for new identities, creating new concepts, bringing new storytellings and subgenres that captivates local and international audiences. It is reasonable, the genre had at that point close to 50 years of existence and become necessary to evolve.

There are many evolving points and a true fact: Latin dramas have become shorter. From 150-200 episodes in the ’90s to 80-100 episodes, and most recently, 60 episodes which has been the “Super Series”. Many regional companies have been awarded the creation of this new type of drama, but two stand from the rest: Disney Media Distribution Latin America and NBCUniversal Telemedio.

These productions have added new elements following the market trends and coinciding with a global market fluctuation that brought new audiences and platforms, new consumption habits, and new drama producers competing in a bigger marketplace.

NBCUniversal/Telemedio (US) has showed since the last years the importance to evolve with the audience. The company took the chance, Telenovelas to the next step, adding action, budget and less but more dynamics episodes, creating the Super Series. Thanks to them, Telemedio managed to recover the first position in the prime time of the US Hispanic after a long period of dominance of its main competitors Univision, and enter into new territories with titles like Iron Lady or The Lord of the Skies.

The new Latin America: series, formats and co-production opportunities

LATIN DRAMAS BIG ADVANTAGES FOR THE GLOBAL MARKET

1) A SIGNIFICANT STORYTELLING TRADITION
2) A WELL-KNOWN TRADEMARK BUILT IN THE MARKET WITHIN THE LAST 60 YEARS
3) A GREAT BALANCE BETWEEN PRICE AND QUALITY
4) A WELL ORGANIZED PRODUCTION AND BUSINESS MODELS
5) A GREAT CAPACITY OF EVOLVING TO NEW SUBGENRES

Latin dramas have evolved and the region also provides entertainment fresh formats, co-production advantages, production services. Welcome to the new regional scenario.

TV Azteca (Mexico) launched in October 2017 Bampire, a content-generator company set for big co-production projects, as symbol of the transformation of the company. From a drama producer (120 episodes) to a creator hub focused on high-impact stories and biopics like María Magdalena (Sony), or Herman Cortes (Onza).

The evaluation of the Telenovela as a global trend, series such as local TV and Global Majestics (TV Azteca, Sony).

Some of the most successful Latin Dramas of all times: Los Ricos también Lloran (Televisa, Telesica Mexico, 1976), La Extranja Dama (Canal 9 Argentina, 1988), and Yo Soy Betty La Fea (RCN Colombia).

Topics and stories also changed. New types of stories were created, adding more action, suspense, and real histories to the classic romantic telenovela. In Argentina, for example, two subgenres spin-offed from traditional Telenovela. On one side at the beginning of the 2000s a new social-telenovela about the conflictive Sev- enties, Military Dictatorship, disappeared persons, etc.: they were a huge success, with titles such as Vicente Telde’s Mon- tserrat, adapted in 8 markets. On the other side, the country specifies in a type of comedy with twists, which has been very successful with series like Lalola, the top rated scripted format from Underground/Dori Media with more than

Otro lado do Paraiso (314 countries), Caminho das Índias y A Vida do Gente, both sold in 118 each and third Do Cor do Pecado and Exceencia Imperial, with 104 each times. Globo is one of the biggest multinational content producer in Latin America with more than 90% of its FTA grid filled with Globo shows, reaching 100% of the Brazilian homes, this is 100 million people a day. The daily reach of Globo’s programming has an increase of 6%, due to the high success of A Forca do Querer with a daily reach of 48 million people on prime time.

Most recently, O outro lado do Paraiso reached 30 million people. It is considered the fifth largest broadcaster worldwide. And a great example because of its content diversification: from classical love telenovelas to high end drama offered in many formats and lengths (TV movies, series, miniseries, short telenovelas, etc.).

Sizes, themes and players

During a period of time, which can be situated between the end of the ’90s and now, the Telenovela looked for new identities, creating new concepts, bringing new storytellings and subgenres that captivates local and international audiences. It is reasonable, the genre had at that point close to 50 years of existence and become necessary to evolve.

There are many evolving points and a true fact: Latin dramas have become shorter. From 150-200 episodes in the ’90s to 80-100 episodes, and most recently, 60 episodes which has been the “Super Series”. Many regional companies have been awarded the creation of this new type of drama, but two stand from the rest: Disney Media Distribution Latin America and NBCUniversal Telemedios.

These productions have added new elements following the market trends and coinciding with a global market fluctuation that brought new audiences and platforms, new consumption habits, and new drama producers competing in a bigger marketplace.

The new Latin America: series, formats and co-production opportunities

LATIN DRAMAS BIG ADVANTAGES FOR THE GLOBAL MARKET

1) A SIGNIFICANT STORYTELLING TRADITION
2) A WELL-KNOWN TRADEMARK BUILT IN THE MARKET WITHIN THE LAST 60 YEARS
3) A GREAT BALANCE BETWEEN PRICE AND QUALITY
4) A WELL ORGANIZED PRODUCTION AND BUSINESS MODELS
5) A GREAT CAPACITY OF EVOLVING TO NEW SUBGENRES

Latin dramas have evolved and the region also provides entertainment fresh formats, co-production advantages, production services. Welcome to the new regional scenario.

TV Azteca (Mexico) launched in October 2017 Bampire, a content-generator company set for big co-production projects, as symbol of the transformation of the company. From a drama producer (120 episodes) to a creator hub focused on high-impact stories and biopics like María Magdalena (Sony), or Herman Cortes (Onza).

Some of the most successful Latin Dramas of all times: Los Ricos también Lloran (Televisa, Telesica Mexico, 1976), La Extranja Dama (Canal 9 Argentina, 1988), and Yo Soy Betty La Fea (RCN Colombia).
**The new Latin America: series, formats and co-production opportunities**

Colombia, the other big production pole shaped within the 2000, created the “narcotelenovela”, headed by Colombian producers RCN and Caracol. Many key character of the real life were fictionalized, such as Escobar, El Patrón del Mal, or other based on different situations, like El Capo (RCN), El Cartel de los Sapos o Sin Tetas no hay Paraíso (both from Caracol). Sony is a key co-producer in this genre with titles such as Rosario Tijeras (RCN), Teleset, TV Azteca); and most recently, El Rey del Valle (Sony, ClaroVideo). NBCUniversal Telemundo is a big producer of the genre for the US Hispanic, with El Señor de los Cielos (five seasons), Señor Acero (three seasons), among other top titles.

All these productions full of violence and dramatic situations, tell real and conflictive stories from Latin America. After a couple of years in which they were very successful, the majority of the Latin American broadcasters stopped broadcasting them; in some territories from Central America and the Caribbean they were banned or the channels were obligated to emit them after 11pm. Internationally, sometimes it was very difficult to sell them.

A gap between the classical daily romantic telenovelas to these new “narco” or social-themed, series was born. In that space the melodramatic content from Turkey, Korea and other origins started to gain space in the Latin American screens. Local producers were astonished. New competitors appeared from everywhere.

Times Are A-Changed

Undoubtedly, the Telenovela has built a unique brand in the global market. After 60 years selling them all across the world, there are no executive in the industry that do not know about it. And almost no market in the world that has broadcast one of it once.

Dramas are in general the backbones of the majority of FTA channels with 3-4 key slots dedicated to them. No matter if it is...
The new Latin America: series, formats and co-production opportunities

prime, access or day time, the genre has built the way Latin Americans watch television. They represent big advertising incomes for those channels, and also a good product for international distribution.

But of course, the international business is not the same as some years ago. In the last 20 years, new drama producers appear in the marketplace: Turkey, Korea, Israel, Russia, among others. It is said we are going through the “Golden Era” of drama, so competition is stronger and can come from every were. Especially since the launch of the digital titans, back in 2007. Latin America has also evolved in this time: it used to be an insurmountable border for foreign drama. But from the beginning of the 2000, Korean dramas started to be aired in rare time slots in Mexico, Central America and other countries with some success. The sea change occurred when Chilean station decided to air the first-ever Turkish product locally dubbed in Latin America, Las Mil y Una Noches (1001 Nights, Global Agency).

Mega director of contents and international business Juan Ignacio Vicente once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consideration to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (1001 Nights, Fatmagul, Kanal D), instead of the social (rich/poor) controversy’. In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. Pituca sin Lucas, Ambar, Pobre Gallo, Perdona nuestros Pecados, Eres Mi Tesoro and Te doy la Vida, among others, are since last month part of Mega Global.

Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players. Good examples are La Frigolidad de losCueros, El Muerto and El Lobito, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are La Nueva y Una Noches (1001 Nights, Global Agency).

TV Record (Brazil) has found on the biblical series the key to stand on the international market, achieving great success not only in Latin America but also in markets such as Poland, USA, Africa, Portugal and Japan. To Moisés and Josué, the company added titles such as El Risco and Laanzón and Apocalypsis series with a great production value and powerful stories.

Pol-ka Producciones

Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players.

Good examples are La Frigolidad de losCueros, El Muerto and El Lobito, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are La Nueva y Una Noches (1001 Nights, Global Agency).

Mega director of contents and international business Juan Ignacio Vicente once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consideration to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (1001 Nights, Fatmagul, Kanal D), instead of the social (rich/poor) controversy’. In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. Pituca sin Lucas, Ambar, Pobre Gallo, Perdona nuestros Pecados, Eres Mi Tesoro and Te doy la Vida, among others, are since last month part of Mega Global.

Pol-ka Producciones

Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players. Good examples are La Frigolidad de losCueros, El Muerto and El Lobito, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are La Nueva y Una Noches (1001 Nights, Global Agency).

Mega director of contents and international business Juan Ignacio Vicente once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consideration to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (1001 Nights, Fatmagul, Kanal D), instead of the social (rich/poor) controversy’. In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. Pituca sin Lucas, Ambar, Pobre Gallo, Perdona nuestros Pecados, Eres Mi Tesoro and Te doy la Vida, among others, are since last month part of Mega Global.

Pol-ka Producciones

Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players. Good examples are La Frigolidad de losCueros, El Muerto and El Lobito, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are La Nueva y Una Noches (1001 Nights, Global Agency).

Mega director of contents and international business Juan Ignacio Vicente once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consideration to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (1001 Nights, Fatmagul, Kanal D), instead of the social (rich/poor) controversy’. In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. Pituca sin Lucas, Ambar, Pobre Gallo, Perdona nuestros Pecados, Eres Mi Tesoro and Te doy la Vida, among others, are since last month part of Mega Global.

Pol-ka Producciones

Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players. Good examples are La Frigolidad de losCueros, El Muerto and El Lobito, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are La Nueva y Una Noches (1001 Nights, Global Agency).

Mega director of contents and international business Juan Ignacio Vicente once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consideration to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (1001 Nights, Fatmagul, Kanal D), instead of the social (rich/poor) controversy’. In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. Pituca sin Lucas, Ambar, Pobre Gallo, Perdona nuestros Pecados, Eres Mi Tesoro and Te doy la Vida, among others, are since last month part of Mega Global.

Pol-ka Producciones

Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players. Good examples are La Frigolidad de losCueros, El Muerto and El Lobito, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are La Nueva y Una Noches (1001 Nights, Global Agency).

Mega director of contents and international business Juan Ignacio Vicente once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consideration to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (1001 Nights, Fatmagul, Kanal D), instead of the social (rich/poor) controversy’. In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. Pituca sin Lucas, Ambar, Pobre Gallo, Perdona nuestros Pecados, Eres Mi Tesoro and Te doy la Vida, among others, are since last month part of Mega Global.

Pol-ka Producciones

Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players. Good examples are La Frigolidad de losCueros, El Muerto and El Lobito, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are La Nueva y Una Noches (1001 Nights, Global Agency).

Mega director of contents and international business Juan Ignacio Vicente once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consideration to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (1001 Nights, Fatmagul, Kanal D), instead of the social (rich/poor) controversy’. In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. Pituca sin Lucas, Ambar, Pobre Gallo, Perdona nuestros Pecados, Eres Mi Tesoro and Te doy la Vida, among others, are since last month part of Mega Global.

Pol-ka Producciones

Pol-ka Producciones is the leading production company in Argentina and during the last years has been betting on two business models to achieve new audiences: coproductions and alliances with big OTT players. Good examples are La Frigolidad de losCueros, El Muerto and El Lobito, all coproduced with eltrece, Turner Latin America and the MSO Cablevisión Flow. Also, the company keeps developing family series for the prime time including romance and comedy with twists. Among the latest successes are La Nueva y Una Noches (1001 Nights, Global Agency).

Mega director of contents and international business Juan Ignacio Vicente once told PRENSARIO that ‘The Turkish success revealed the shortcoming of the Latin American creators; there’s more consideration to the length of the series that regarding their plots. Turkish product focuses on another aspect of the classical love story; it touches moral and ethic issues (1001 Nights, Fatmagul, Kanal D), instead of the social (rich/poor) controversy’. In the particular case of the Chilean leading broadcaster, the good numbers of the Turkish series allowed to concentrate their efforts on their main objective: to strengthen its drama production to fulfill their prime time slots and to create, after some years, a competitive distribution arm. Pituca sin Lucas, Ambar, Pobre Gallo, Perdona nuestros Pecados, Eres Mi Tesoro and Te doy la Vida, among others, are since last month part of Mega Global.
The new Latin America: series, formats and co-production opportunities

Entertainment, the new distribution arm headed by Esperanza Garay, CEO, partner in this enterprise. After 1001 Nights a huge amount of dramas from that origin, plus Korea, China, Hong Kong, India, The Philippines, and other countries were emitted in the regional screens. What allowed the Turkish content distributors to gain advantage over other nations was that they have always been willing to adapt their manners and strategies to each ongoing situation. Their actors are similar to a Latin-average, rather than Korean and Asian.

This, at a time when the rest of the International producers (a wide range of companies covering from Hollywood to Europe and the leading Latin American India or US series. It also competes with digital dramas, short digital series, or high budget productions from Netflix, Amazon or Hulu, as well as the Hollywood Studios, BBC (UK), ZDF (Germany) or TF1 (France), among others.

In this context, it is important to highlight that the drama competition is no longer in the international space, this is content distribution. It is also in the domestic markets. Because the opening to foreign drama has changed the grids of the top Latin broadcasters, which have broadcast many hours of new types of dramas.

New dramas arising
Other answers to the strong local and international competition in the drama field, can be identified in two new subgenres coming from the Latin America. In Brazil appeared in 2010 the epic/biblical productions from Record TV (Brazil), with huge successes such as La Reina Esther, José de Egipto, Sansan y Dalila, Rey David, Jesús y los 10 Mandamientos, Jesús y la Tierra Prometida y Los Milagros de Jesús, most of them broadcast across Latin America and the US Hispanic, becoming prime time hits in the leading TV channels. They also won some markets in Europe and Asia.
The new Latin America: series, formats and co-production opportunities

TVN Chile is one of the biggest and most traditional players in Chile and Latin America. In late 2016, the company started a restructuring, adding Jaime de Aguirre as executive director, and Alicia Zaldivar Peralta as general manager, and achieved stability after a period of ups and downs, and reconverted its production, both in terms of quality, and narrative and production models. It started to produce thrillers again and bet on more international and dynamic stories like La Colombiana o Un Diabli con Ángel.

America TV (Peru) has recently joined the group of Latin American countries that produce quality dramatic content, with international projection. It highlights its strategic alliances with Telefe/Viacom for the co-production of El Regreso de Lucas (The Return of Lucas), and the classic telenovela Magdalena, distributed internationally by Tondemo Argentina for that market (eftece), Colomba (RCN)-Ecuador (Teleamazonas), US Hispanic (Univision) and Brazil (Rede TV); A corcaim Abierto (Grey’s Anatomy) in Colombia (RCN); Secretos de Familia (Brothers and Sisters) in Mexico (TV Azteca); and Los Años Dorados (The Golden Girls) for the US Hispanic (Telemdun). A pantegregional version of Amazing Race has been developed with Turner, too. Turner has made strong efforts in the last years seating key deals in Latin America, with special focus in Argentina. First, it signed an alliance with dftece and Telefe to broadcast on TNT their prime

Following that success, TV Azteca (Mexico) has coproduced Maria Magdalena with Sony. Other players are interested in investing more in this kind of productions, which are not religious-based: they take a moment in the Bible history and narrate different stories that surround that event. The other big evolution point in the Latin Dramas history were the biopics, like Has-


<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Romania</td>
<td>188</td>
<td>187</td>
<td>186</td>
</tr>
<tr>
<td>Spain</td>
<td>130</td>
<td>130</td>
<td>130</td>
</tr>
<tr>
<td>Poland</td>
<td>68</td>
<td>68</td>
<td>68</td>
</tr>
<tr>
<td>Hungary</td>
<td>103</td>
<td>103</td>
<td>103</td>
</tr>
<tr>
<td>Portugal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Worldpay (Includes 426 productions from US, Colombia, Brazil, Mexico, Argentina, Chile and Peru aired in one or two of the 22 European markets considered)

Turner Latin America celebrates its 25th anniversary in the region but during the last years, the company has been betting on the investment of more regional productions through strategic alliances with local players in Mexico, Argentina, Brazil and Chile, among other countries. Now, the company pushes stories like Mars & Mike (Chile), Un Gato Para El Exclusivo (Argentina) and O Desmartinador (Brazil) to the international scenario.
The new Latin America: series, formats and co-production opportunities

Time dramas simultaneously: Signos (in which it was the co-producer) and Historia de un Clan (Underground). Second, it keeps producing originals exclusively for its platforms and channels (Picofonar, Nafja Supes). And third, it closed last year a strategic deal with Pol-ka, etelco and Flow-Cablevision consisting on the creation and production of two dramas a year. La fragilidad de los Cuerpos and El Maestro (2017), and the new one El Lobi sta. With Viacom Telefe, it has produced two seasons of Un Gallo para Esculapio (Uruguay).

HBO Latin America has given a big step last year: it has built its unique distribution arm separated from HBO Global. It is headed by Frank Smith, EVP, Distribution and Media Development, and commanded by Xavier Arístimuño, VP Licensing, to sell the original dramas produced in the region since 2004, when appeared Epifania with Pol-ka in Argentina. Many more came after: four seasons of O Negros (Brazil), Sr. Ais (Mexico), Profugos (Chile), El Hipnotizador (Uruguay). They are 20 projects in total summing up 350 hours. That content has worldwide rights and multiplatform. HBO Latin American productions received 86 nominations worldwide with 48 awards, and 13 Emmy International nominations.

Future

For many years, Latin America has been ahead in fiction with the Telenovelas: daily series focused on love and passion. Nowadays, with a bigger global competition, the region adapted its drama productions to the local and international markets needs. It is a strong pole of both fiction and entertainment, which combines the goods of the past —fresh ideas, hot stories, good costs— with great new advantages: top production projects and services, genre variety, business twists, co-productions, 360 ventures. No matter the huge competition, the “trends waves” or economical fluctuations, the Latin creations in both, scripted and non-scripted, are consolidated in the global arena. International players have understood that the region is not anymore an “Only-Telenovela”, but a full range of audiovisual content provider. Over this 60 years of dramas, Latin America has added new condiments to its productions transforming them in high-budgeted serials that can compete with any other type of drama that is produced worldwide. And not only that, it is a unique and diverse partner offering fantastic opportunities to co-develop, co-finance or co-produce any kind of content for TV or any other platforms, as well as offering production services for the global market in a good balance of price-quality. Different from its origins, but with the same essence, what has kept the genre updated and in constant evolution.

Regional players continue rethinking new strategies towards the international market, and good concepts have been created. For instance, NATPE implemented in 2017 at Miami the very first “Panel ¡En Español!” with key executives from the region and in Spanish, which continued this year, both moderated by Prensario.

Now, the organization is putting strong emphasis in the region for Budapest, with a panel taking place on Wednesday at 12pm, also co-organized and moderated by Prensario. It is also under discussion an academic presence for MIPCOM, as well as strategic actions as a showcase during ATF, in December, with focus in the Asia Pacific region.

Unlike Turkey, Korea or India, Latin America is a region with many different countries, stories, talents, costs. And even it shares a same piece of land and, in some cases, language, the discussion and organization of the actions is much more challenging. With a strong reason in the horizon, these territories will gain again relevance in the worldwide marketplace.
The Instituto Nacional de Cine y Artes Audiovisuales (National Cinema and Audiovisual Arts Institute, INCAA) has launched a new incentive to encourage international co-productions between broadcasters, networks or international digital platforms and Argentine producers. For this, a contest is being opened for international companies that, in partnership with local producers, can be interested in financing series and projects to be produced, totally or partially, in Argentina, to be exhibited in other countries of the world.

**Contest’s basis**

To participate in this contest, the local companies must have legal status and produced and aired at least a series of thirteen or more episodes plus/or a fiction, feature film, animation or docufiction.

The projects must be fiction series, docufiction, documentary or animation and the producers must be associated to a broadcaster or network or digital platform of international distribution that participates in the financing of the series and guarantees the exhibition of the same.

The INCAA will allocate to this contest an annual fund of sixty million Argentine pesos, equivalent to approximately three million US dollars. Each winner of the contest will receive as a reward up to 30% of the amount to be executed in Argentina. The prize for a winning project will not exceed ARS 6,000,000, around USD 300,000. Each winning initiative of the different competitions organized annually by the INCAA, with the participation of the winners of the same, will be responsible for selecting projects in regular meetings of a jury composed of professionals from the audiovisual industry.

Agreements have also been made and continue to be signed with different government entities of several European and Latin American countries to promote audiovisual production in the central part, aiming at the producers with some experience, of medium level’ like those that are being promoted internationally in the central part, aiming at the producers with some experience, and promotion to the production of Web series, with competitions open to creators with no background in matter, at the bottom of the pyramid.

The promotion process is comprehensive, comprising a training stage so that the filmmakers, beyond the artistic quality of the contents they have created, can be able to present them to the buyers of programming and international screens interested in their project.

The actions in these markets include screenings that present the existing technical facilities in the country, the landscapes of all kinds and the existence of qualified talent to guarantee results of first level of quality.

**Going abroad**

This initiative and those related simultaneously with other competitions open to Argentine creations of productions for television and Web, are complemented with the international strategy of promoting these contents in various international markets, having already been done at NATPE 2018 in Miami and continued in Conecta FICTION in Spain, MIPCOM in Cannes, and Ventana Sur, next November. The call and international market takes place annually in Buenos Aires, and counts with outstanding participation of figures and executives of the industry of the different countries of America and Europe.

INCAA: the Argentine audiovisual industry meets the world

The INCAA will allocate an annual fund to this contest of USD 6,000,000.

**SHARE OF INVESTMENT, PER TYPE OF CONTEST**

- **THE INCAA WILL ALLOCATE AN ANNUAL FUND TO THIS CONTEST OF USD 6,000,000.**
- **EACH PARTICIPATING PROJECT MUST MAKE A MINIMUM INVESTMENT IN ARGENTINA OF USD 260,000.**
- **EACH WINNER WILL RECEIVE AS A REWARD UP TO 30% OF THE AMOUNT TO BE EXECUTED IN ARGENTINA WITH A CAP OF USD 300,000.**
- **MINIMUM AMOUNT AWARD USD 130,400.**
- **MAXIMUM AMOUNT AWARD USD 248,000.**
- **30% OF THE TOTAL AMOUNT OF THE INVESTMENT IN ARGENTINA IS DESTINED TO SALARIES AND SOCIAL CHARGES OF TECHNICAL AND ARTISTIC TEAMS RESIDENT IN THE COUNTRY.**

The promotion process is comprehensive, comprising a training stage so that the filmmakers, beyond the artistic quality of the contents they have created, can be able to present them to the buyers of programming and international screens interested in their project.

The actions in these markets include screenings that present the existing technical facilities in the country, the landscapes of all kinds and the existence of qualified talent to guarantee results of first level of quality.

**Going abroad**

This initiative and those related simultaneously with other competitions open to Argentine creations of productions for television and Web, are complemented with the international strategy of promoting these contents in various international markets, having already been done at NATPE 2018 in Miami and continued in Conecta FICTION in Spain, MIPCOM in Cannes, and Ventana Sur, next November. The call and international market takes place annually in Buenos Aires, and counts with outstanding participation of figures and executives of the industry of the different countries of America and Europe.

**THE pyramidal**

According to the strategic definition that is guiding the

INCAA on its management, a pyramid related to the costs of development and production can be established: different types of content production for television and the Web, with the ‘high end’ realizations in the vertes, productions and co-productions ‘of medium level’ like those that are being promoted internationally in the central part, aiming at the producers with some experience, and promotion to the production of Web series, with competitions open to creators with no background in matter, at the bottom of the pyramid.

The promotion process is comprehensive, comprising a training stage so that the filmmakers, beyond the artistic quality of the contents they have created, can be able to present them to the buyers of programming and international screens interested in their project.

To this, a mentoring program is carried out throughout the development and production process, with the winners of the various local competitions at the federal level being called for this year, being able to offer a pitch in English language during Ventana Sur, next November. The call and international market takes place annually in Buenos Aires, and counts with outstanding participation of figures and executives of the industry of the different countries of America and Europe.
Conecta Fiction evolves and grows

Conecta Fiction, the global hub for co-production organized to bridge Europe and the Americas, takes place on June 18-21 at Ciudad de las Artes, Santiago de Compostela, Spain. More than 500 participants are expected, showing a growth of 25% compared to the first edition last year.

In only one year, this meeting has made enough noise to attract the attention of the global content business. This 2018 edition is seeing much more international and European presence, while the Latin Americans remain being the same key executives from last year.

Conecta Fiction joins the efforts of many Spanish organization, such as the Axencia Galega das Industrias Culturais (Agadic) from the Xunta de Galicia, ICEX Spain Export and Investment, SGAE Foundation, and it is produced by Inside Content.

Its growth cannot only be measured in numbers. There is much more to show at Conecta Fiction: there are five different pitching sessions and a creativity contest to boost the co-production and talent market; two countries under “Focus On: Colombia and Germany”, and series projections such as Bad Banks (Letterbox Filmproduktion/Federation Entertainment) or La Ley Del Corazón (RCN) and La Ley Secreta (Caracol), among many more.

Both countries that are the main protagonists on Wednesday 20th with a program that includes an overview of the production, programming and talent of each of them. In addition, a meeting of each of these delegations is scheduled with producers of the Galego Audiovisual Cluster.

At the opening gala, TVE, proving its support once again for the event, premieres a chapter of a forthcoming series: Limbo, and Telemundo International Studios offers an exclusive screening of its first premium series El Recluso, which features the production design of Oscar-winner Biritte Broch (Amores Perros, Babel) and photographic direction of Jaime Reynoso (Aquí en la Tierra, Bloodline). It is produced by Inna Payan, who won the International Amnesty Award of the Berlin Film Festival 2017 with La Libertad Del Diablo.

Outside the conference area and wrapping up the activities agenda, “La Caja de Ficción” (The Fiction Box) continues to be the place for professional meetings and one-to-one negotiation. In order to guarantee all participants, the opportunity to make contacts, the event website includes under this same name an online matchmaking platform specially designed to request and close meetings between participants and manage their agenda during Conecta Fiction according to the interests specific to each professional.

Conecta Fiction’s main aim is to promote and encourage creation, development, production, and co-production of fiction series. To do so, it offers an extensive program of activities that will facilitate networking and will once again connect the fiction industry for television from both sides of the Atlantic.

With 500 professionals from 17 countries in Europe, USA and Latin America, the event is attended by producers, OTTs, investors, creative minds, distributors, scriptwriters, agents representing talent, and more.

Heart’s Decree returns with new characters, more intense cases, love and dramatic stories.

BY FABRICIO FERRARA
Conecta Fiction evolves and grows

than 35 international television channels. In addition, the main Spanish TV groups are in Santiago de Compostela: RTVE, Atresmedia Mediaset, Movistar, as well as the collaboration of Televisión de Galicia and Grupo Secuoya.

Geraldine Gonard, director of Conecta Fiction, summarizes the main goal for the second edition of the international gathering: “Our first edition was very useful for its participants, offering a networking opportunity between producers and talent and we know that it really worked. Our priority for this edition is to maximize Conecta’s usefulness as a contact platform between Europe and America.”

‘To achieve this, we are creating and implementing activities that improve the culture of co-production and foster a unique and intensely productive work environment. This is the formula with which we want to identify ourselves and with which we want to help companies improve results’, she completes.

The event opening is on the evening of June 18 at the Auditorio Abanca located in the historic center of Santiago de Compostela, with the presence of representatives of the promoters and collaborators of the event. During this Opening Gala and after the official presentation of the second edition of Conecta Fiction, a chapter of Limbo, the web mini-series from TVE’s PLAYZ platform, is being shown to the audience. It is a co-production between Argentina and Spain, the series features performances by Ingrid García Jonsson, Eloy Azorín and Désirée Salomón.

Program Highlights

The world of co-production of fiction series is analyzed in depth by leading international speakers through panels and case studies. On Tuesday 19th, a part of the program is reserved for pitching projects, and on Wednesday 20th, the outlook of the audiovisual industry of Colombia and Germany, the countries to which the Focus On section is dedicated, is being addressed.

Among the confirmed panelists of the second edition of Conecta Fiction are Francisco Cordero, founder and CEO of BTF Medias; Alberto Fernández Torres, Subdirector of Transmedia Content of the TVE Playa platform; Eduard Bauer, director of Secuoya Nexus (Grupo Secuoya); Deidre Mc Churraghlin, Head of Acquisitions; TG4 (Ireland); Peter Nederwamm, Managing Director of NADCOM, and María Inezpui, VP of Strategic Businesses & Channels of RCN Televisión (Colombia).

Top broadcasters from Europe and Latin America: José Navarro, international content, RTP Portugal; Ana Gutiérrez Urguido, general director, strategic development and sales, Televisión de Galicia; Jesús Oitavén, secretary general of the consejería de Cultura de la Junta de Galicia, Julian Irigoyen, from C3S, Samuel Benavides from Betafim (Chile); Malik Bhardwaj, from RTVE (Spain); among other organizers at last year’s welcome party in Santiago de Compostela.

Conecta Fiction has opened a new era for the content business by offering a unique space to discuss traditional and new business formulas for the ever-changing global market.

At Conecta Fiction Europe meets The Americas and viceversa. It is expected much new European attendance in this edition.

Some of the highlighted panels are focused on presenting a ‘Case Study’ of the series Vivir Sin Permiso, produced by Mediatube Spain, represented in Santiago de Compostela by its executive producer Aitor Gallardo; Nuar, produced by Portico and Movistar (Spain) plus Atlántico Productions and Arte, both from France; and the co-production El Sabor de las Maravillas, by Galician producer of CTV and Televisión de Galicia for whom Comares is an international distributor; and are presenting the new international partner of the series at Conecta Fiction.

Another strategic panel is the one dedicated to the adaptation in different territories of the series Shaw, led by Marianne Furness, executive producer of NRK, Christian Gockel, EVP international sales & acquisitions of Betafilms; Nathalie Biancolli, director of Acquisitions and Co-productions of TFI (France), and Francisco Rubén Araujo, Head of Original Content of Movistar.

A new section under the format of “Meet Them” shows three company presentations: Sociograph Neuromarketing, which holds a live demonstration on neuroscience; and the analysis of audiovisual content; Weekend Studio, a Spanish production company that is embarking on its international journey; and the presentation of the new Mexican fund for...
Conecta Fiction evolves and grows

Conecta Fiction is a market for audiovisual financing and co-production, focusing on the production and development of series. It is a platform for the growth of the audiovisual sector in Latin America and Europe, connecting producers, investors, and talent from around the world.

In this year's edition, Conecta Fiction featured sessions with executive producers and broadcasters from HBO Latin America, Disney Latin America, Univision Story House (US), and Telemundo International Studios. The market is committed to discovering and supporting authors, writers, producers, and talent, with a focus on co-production and co-development partnerships in Europe.

Audiovisual financing

The market is supported by VCS Capital, a French private equity fund that invests in the audiovisual sector. The market also featured two Masterclass sessions, with showrunners and executive producers from Globomedia-Mediapro (Spain) and Caracol Televisión (Colombia) as speakers.

Pitching Sessions

Conecta Fiction hosted five pitching sessions in different formats, including Pitch Copro Series, Pitch SGAE, Pitch Digiseries, and Pitch Clip. These sessions aim to discover and support authors, writers, producers, and talent within the universe of TV series.

Branded Content Context

The market also featured a Branded Content Context, which selects projects for international co-producers and offers development agreements and €3000 for the development of the project and the winner or winners.

Conecta Fiction Fest

The festival is organized on June 22 at the Abanca and Main Theaters of the city of Santiago de Compostela, with a monograph dedicated to the Movistar+ series, in order to connect Santiago’s audience with the international event. A festival of fiction series has been the preferred formula. This first edition is exclusively dedicated to the Movistar+ series and, in addition to screenings, it offers two workshops dedicated to special effects in the La Peste series and to the transmedia universe of the La Zona and La Peste series.

“La Agencia de Guionistas”

Orgullosos de representar a los creadores de muchos Éxitos en América!

Grande Pa / Amigos son los Amigos / Alma de Hierro
RICARDO RODRIGUEZ

Educando a Nina / Soy mis Vida / Son Amores
ERNESTO KOROVSKY

El hijo de la Novia / Pájaros de Papel / Edila
FERNANDO CASTETS

Mujeres Asesinas / Se Presume Inocente
LILIANA ESCLAR - MARISA GRINSTEIN

La Candidata / Ladrones de Corazones / Primicias
LEO BECHINI - TAYO TABERNISSE

Fronteras / Tramas / Sóptimos Bastón de Dios
JORGE NISCO - RAMIRO SAN HONORIO

Luzes / Lucky Loser
CARLOS ESPINOZA FURNISS

La Magia de Lola / Adorables Farsantes
LILIANA BÉNARD - MARCELA MARCOLIN

La Banda del Golden Rocket / Los Machos / Montaña Rusa
SERGIO VAINMAN - JORGE MAESTRO
With near 1,500 global buyers and Natpe’s contribution to the organization of the independent days, the LA Screenings completed its 2018 edition with positive results and fresh tips for the industry. By one hand, the market saw 30% more people than usual, including more important buyers from Latin America, better presence of U.S. domestics and an assortment of European and Asian buyers, specially from countries like Croatia, Moldova, The Netherlands, India, China, Japan, Kenya, and South Africa.

21st Century Fox, CBS, NBCUniversal, Warner, Sony and Disney provided major screenings, plus Lionsgate and eOne, which called the attention with a screening of The Rookie. According to buyers, volume and quality of product were similar from last year. The studios looked forcombining the U.S. network traditional demands of one hour dramas —focused on doctors, lawyers, cops, etc.— with plot twists to make fresh product. At the same time, they produce more for premium Pay TV and OTT platforms, generating complex and niche product, which makes free TV players difficult to program a good portion of the offering.

In terms of content, two German broadcasters —ProSiebenSat.1 and ZDF— have chosen F1B from CBS because it is one of the ‘procedural’ dramas very demanded on free TV, but not easy to find these years. While the other big German group, RTL, has stressed Disney’s Tinkerbell, co-produced with them, BBC and France2, as a good proof of the new ‘cross-region production era’.

Channel Zero from Canada agreed with many Latin American buyers —Viacom/Telefe Argentina, ENG, RCN Colombia— to remark good emotional stories as NBCUniversal’s New Amsterdam and CBS’s A Million Little Things, going back to the basics. Many European and Asian buyers —France, UK, Japan, Finland, The Philippines— mentioned as a trend the vampire series, as there were many in town from different studios.

Especially, we checked a multi-buyer wave stressing Fox’s What we do in the shadows, a half hour comedy with vampires, mentioned as one of the most original and inventive series of the whole screenings. From Sony it was chosen Deadly Class, which meets Harry Potter with Funky Fiction around a young killers’ academy. And about Warner buyers commented well Whiskey Cavalier, very fresh combining spies with comedy. Most of the buyers like plot twists and claim for ‘out of the box’ content, but attending mainstream audiences at the same time.

The multiple screen era? Facing Netflix, Amazon and new Apple, players as HBO, Fox Networks Group, Turner, Viacom, as main traditional broadcasters as TF1 France, ProSiebenSat.1 Germany, etc., are developing quite similar global strategies nowadays: to leave behind the ‘TV channel’ concepts to turn into strong brands which surf through all screens and platforms. They are ‘content machines’ that cover the live circle of the product —production, distribution, broadcast— with quite controlled environments, and vary partners and business models according to every project. The main focus is to handle original and local product, to make difference and bring business from media chaos.

Other major products mentioned by buyers? From Fox, Proven Innocent, about lawyers, and The Passage, about vampires, but both with human twists. From NBCUniversal, also The enemy within, a spy thriller, The in between, about a woman that can talk with dead people. From Warner, God friended me, about a non religious person who receives a friendship request from God, and Manifest, supernatural series Lost a-like. From Disney, Station 19, about firemen, which is good for global audiences. And about Sony, buyers stressed also the comedy Schooled, spin-off of The Goldbergs.

More trends noticed in LA? • Netflix started to search for factual and non scripted content in Spain for Iberia and Latin America, in charge of Rob Smith’s team in The Netherlands. Amazon and Apple are following their steps. • The Big European broadcasters are searching the next big talent show; but in the meanwhile they bet for classic formats • Big Production companies from the US are planning to move their businesses to other territories through local partners but skipping global distributors.
NBCUniversal: classics with twists

NBCUniversal Distribution (USA) celebrates its Screening on Tuesday 26th, at 1pm, where the company will release the new NBCUniversal: classics with twists stresses by the international buyers during the last LA Screenings, along (13x60’) is a fast-paced, spy-hunting thriller well

Jillian and Tom, who have each brought secrets into their marriage. And

action-packed reboot of one of TV’s most iconic series.

Magnum P.I. (13x60’) is an

Abby’ s

Telemundo

communicate with the dead, helping them with their unresolved problems,

New Amsterdam, medical serie

Based on the “creepypasta” short story “Hidden Door” by Charlotte

www.thekitchen.tv

EXHiBitorS

The Inbetween

Channel Zero: The Dream Door

OUR NEWEST LOCATION

BUDAPEST!

www.thekitchen.tv
gabor@thekitchen.tv • +36 1 209 3859 • Beregszász út 101, Budapest, 1118, Hungary

WATCH YOUR LANGUAGE AROUND THE WORLD

Miami • Venezuela • France • Italy • Germany • Spain • Morocco • Turkey • Moldova • Russia

HUNGARY

DUBUIG // SUBTITLING // MEDIA SERVICES

RMViSTAR expands its international footprint

RMViSTAR (USA), distribution company led by RoseMarie Vega, consoli-
dates its position as a global company: Its crime-series La Chica que Limpia (aka The Cleaning Lady) has been pre-selected by the International Emmy Awards to com-

ete in the Drama Series Category and its format is in negotiation with major studios for an English language version and another for Spanish language for LatinAm. The series also drew interest for around the world and is under consideration in Spain, Germany, India and Filipiines as format for development.

Describes Vega: “We are more and even more in each market with better exposure and have partnered with other independent distri-

butors to expand our reach—high quality programming. As a Boutique distributor, we hand-pick content that serves best our cli-

ents with our extended offer of large collection of mystery, romantic

comedy, crime and foreign mov-

ies, as well a new line of kids pro-

gramming besides our life-style series and documentaries”.

“At NATPE Budapest, we are looking forward to establishing stronger relationship with regional players in Central & East Europe, Middle-East and Africa with our lead program La Chica que Limpia. It’s a crime-series whose log line is “even the spotless place can hide something dirty”, about a single mother forced to clean crime scenes for a crime organization, available as finished series or as format. We also present Eden a drama saga that takes place at the iconic Eden resort in Argentina bought by the Eichhorn brothers in 1912 and served as haven for Nazis and their supporters until the end of WWII”.

ORF: Fast Forward

ORF-Enterprise, the commercial subsidiary of ORF, the leading Austrian broadcasters, arrives with a slate of documentaries and series with proven success in the region. According to Alexandra Hopf, sales manager, there are two reasons for that success. By one side, the similar cultural environment with the CEE region, and by the other, that “the sales of fiction content rise after some years of stagnation in the market”.

“We sold a documentary package to BRT (Croatia) and we have deals with TFP (Poland), RCS-RDS (Romania) and United Media Group (Russia) that will be concluded in the near future. Furthermore Hungarian Project Management purchased 50 episodes of Fast Forward and 10 episodes of Sábados – Women on the Edge. The hit series will be broadcasted on TV4, Story4, Galaxis e Filmis Prima TV (Czech Republic) acquired seasons 4-11 of the long running crime series R-Files and will broadcast it later this year”, she adds.

On the scripted side for this season, she recommends the crime series Fast Forward (40x45’), about a divorced single mother and a successful investigator at Vienna’s criminal investigation department, and the coming series Mi Familia Perfecta – Women on the Edge (30x48’).

On the documentary side, one of the core of the company, it stands Fall of the Habsburgs (52’), centered on the dynasty that has ruled large parts of Europe and the world for 650 years; Untamed Albania (52’), about a country dominated by high peaks and crystal-clear water, home to a cast range of wildlife; and WildCaribbean – Rhythms of Life, a three part series about spectacular action in paradise, volcanic eruptions and Caribbean coral coasts and islands.

ORF-Europe, the commercial subsidiary of ORF, the leading Austrian broadcasters, arrives with a slate of documentaries and series with proven success in the region. According to Alexandra Hopf, sales manager, there are two reasons for that success. By one side, the similar cultural environment with the CEE region, and by the other, that “the sales of fiction content rise after some years of stagnation in the market”.

“We sold a documentary package to BRT (Croatia) and we have deals with TFP (Poland), RCS-RDS (Romania) and United Media Group (Russia) that will be concluded in the near future. Furthermore Hungarian Project Management purchased 50 episodes of Fast Forward and 10 episodes of Sábados – Women on the Edge. The hit series will be broadcasted on TV4, Story4, Galaxis e Filmis Prima TV (Czech Republic) acquired seasons 4-11 of the long running crime series R-Files and will broadcast it later this year”, she adds.

On the scripted side for this season, she recommends the crime series Fast Forward (40x45’), about a divorced single mother and a successful investigator at Vienna’s criminal investigation department, and the coming series Mi Familia Perfecta – Women on the Edge (30x48’).

On the documentary side, one of the core of the company, it stands Fall of the Habsburgs (52’), centered on the dynasty that has ruled large parts of Europe and the world for 650 years; Untamed Albania (52’), about a country dominated by high peaks and crystal-clear water, home to a cast range of wildlife; and WildCaribbean – Rhythms of Life, a three part series about spectacular action in paradise, volcanic eruptions and Caribbean coral coasts and islands.

Telefe: stories to fall in love

Telefe/Vacuum arrives to NATPE Budapest after the appointment of Rhina Antonelli as Sales and Coproduction Director for Europe and Africa, and with the objective to keep promoting the company as one of the biggest content generators of Latin products, with global appeal.

The executive arrived to NATPE American after 12 years at DORI Media Group (Israel/Argentina), where under her last position she was responsible for content sales for the territories of Europe, Mexico, US Hispanic, Argentina and Nordic. Previously, she also worked in the Content Distribution area of Claxson. Among the main titles that the executive and Rosario Conicenti, content sales manager, are presenting at NATPE is the new comedy series 100 Days to fall in Love (80x60’), where after 18 years of marriage and trying to improve their relationships, two friends decide to propose their husbands a deal: they are to take a break from their married lives for 100 days during which they can do as they please as long as they follow 10 strict rules. And Porto dos Fundos’ new series, Borges Importadoras Lida (80x60’), which tells the story of four employees who find they have been cheated by the former boss’ proposed partnership, and that in reality the company is bankrupt and sunk in debt.

Produced by The Majic Eye Telefilm, Sambro de America (13x60’) is a biopic that gives a deep look at the life of one of the most renowned Argentine singer-songwriter, not only in the country but in the continent: Roberto Sánchez, known as Sambro, while Viki RPM (60x60’) gives a new and amusing twist to the story of Romans and Juliet.

TV programs

La Chica que Limpia was picked by a Hollywood studio for a US adaptation.

II Days to fall in Love (telefe)
SPI: global expansion and eGaming

SPI International Filmbox is a global media company that operates 35+ television channels in more than 50 countries on six continents. The SPI channel portfolio includes thematic and movie channels like Filmbox, Filmbox Art House (launched in March on A1com, Finland), FunBox UHD, DocuBox, FightBox, FashionBox, FastFunBox, Gametoon and MaxFilmBox.

In addition to its channels, SPI is the major shareholder of Kino Polska S.A. in Poland which also operates two DTT channels: Stopklatka TV and Zoom TV. ‘We have been pioneering innovative new concepts and technologies to deliver a content library which now numbers over 6K titles worldwide’, says Berk Uziyel, director, and emphasises: ‘While Pay TV still plays a major role across Europe, content consumption from digital platforms is growing fast. We are also following the new trends with UHD and eGaming’.

For this reason, the company also introduced two digital products: Filmbox Live, which operates from own applications and servers, and Filmbox On Demand a platform that creates branded digital corners, already available via Vodafone Mobile TV service in Turkey.

In terms of contents, SPI Filmbox premium channels continue to broadcast premium movies series such as The Young Pope and La La Land in CEE, while thematic channels feature extensive hours of own content (10% of original production vs. 90% from third parties). ‘We have produced global live fighting events along with local series in Poland and we are starting to produce our very own eSports events, which will be featured in our gaming channel Gametoon’, remarks Uziyel.

On the distribution side, SPI International has been a one of the top suppliers of theatrical films and TV programming for over 25 years, thanks to a solid alliances with major license suppliers provide like Focus Features, The Weinstein Company, Summit Entertainment, Studio Canal, Pathé, Lakeshore Entertainment, Wild Bunch, Beta Film, and FremantleMedia, among others. ‘We offer over 6,000 movies and TV series for television networks in key territories across Central and Eastern Europe, adding compelling content, with strong recognition and high demand to our partners’, says the executive.

‘SPI started its journey from CEE. While the company operated successful local movie channels, it started to release its products in different parts of the world. Distribution of its global products has increased drastically in the past 5 years with the introduction of global channels. Today SPI has two important goals: expanding the territories where its channels are distributed and increasing the number of households the channels reach. While mastering traditional broadcasting business, SPI has become an innovative challenger from its introduction of new products, such as UHD and digital products’, completes Uziyel.

Global Screen: undercover stories

Global Screen (Germany), international sales & distribution company for theatrical films, TV programs and formats, arrives in Budapest with a catalogue that ranges from TV fiction, series and documentary to theatrical movies that stand for successful exploitation on TV, video and online around the globe.

Heading the slate for this season is Stroszcape – The Untold Stories (26x24’), a contemporary animated series based on the world famous Arabian Nights stories, that embarks on a whole new epic adventure.

In Zombielands (26x15’) four young friends with supernatural characteristics have a series of strange adventures in the fictitious town of Bekkebakken, where conformity is a virtue. While Dementia (10x45’) follows a young journalist from Spain that goes undercover in a Mexican psychiatric hospital where her grandmother died under mysterious circumstances, risking her own life to find out the truth. Other highlights are Charito (6x48’), a six-part miniseries that portrays the world’s most famous hospital in Berlin as a microcosmic reflection of late 19th century Wilhelmine society; The Weissensee Saga (24x48’), a sweeping and gripping family saga of conflicting loyalties, love, hope, faith and betrayal set behind the Berlin Wall; and Rivals Forever – The Sneaker Battle (2x90’ or 4x45’), set in the 1920s and about the competition of two brothers: Adi and Rudi Dassler, creators of Adidas and Puma.
**DHX Media: the power of brands**

DHX Media (Canada) has become one of the world’s leading independent kids content company thanks to strong brands such as **Voltron**, **Cowboy Bebop**, **Voltron**, **Trifle**, **Gumball, Inspector Gadget** and more, understanding the importance of connecting with kids with familiar “faces.”

Following this strategy, **Sophie “Kid” Prigent**, territory manager, highlights at NATPE Budapest **Buffy Pokey** (22x26’), series based on the famous toys that follows a 11-year-old Polly Pocket that shrinks to four inches tall and discovers a world of unlimited adventures where the smallest person can make the biggest difference.

Aimed at kids 6 to 11, as well as their parents who grew up loving the video games, the new **Mega Man (52x1’)** animated series features new technologies and robots, as well as the introduction of **Mega Man’s alter-ego, Aki Light**. Aki is a normal, upbeat, schoolboy robot who has nano- tech technology that allows him to transform into the mega powered super hero Mega Man! With his Mega Bum arm and cannon and iconic helmet, Mega Man defends Silicon City from all dangers.

Other top titles that Prigent recommends are **Monster Machine** (22x22’), the ultimate action-packed, sci-fi action adventure game show starring the greatest Massive Monster Superstars in the universe versus three real kid heroes; **The Zoo (30x1’)**, kids’ series produced by the core technology that allows him to transform into the mega powered super hero Mega Man! With his Mega Bum arm cannon and iconic helmet, Mega Man defends Silicon City from all dangers.

**Kanal D: stomping in the CEE**

**Kanal D International** (Turkey) arrives at NATPE Budapest with some hot news: the company will become an exclusive partner of **Antenna International**, with the exclusive rights to the 3rd season of **Narcos** (20x1’), already broadcast in the U.S., and the 4th season of **Lover’s League** (60x1’), which is already broadcast on Netflix.

Regarding the importance of the region, as for many Turkish players, the **CEE & CIS territories are key:** ‘We work closely with Croatia, Serbia, Montenegro, Romania, Greece, Slovenia, Slovakia. Recently, we closed a volume deal with Nova TV from Croatia, they will be airing **Flames of Desire** very soon following 2 other titles later, while **Domino TV** in Slovakia will have **Family Secrets** during summer programming.’

The company also entered on **POP TV’s** upcoming program grid in Q3 with their recent title **Price of Passion** in Slovenia. As for CEE, the highlights have been the increase of presence in Ukraine with **Tales of Innocence**, airing on **4+1** and in Kazakhstan with **Boriken**, airing on **Qazqstan TV**.

‘We are aiming high penetration in every country in CEE & CIS and also to work with the biggest TV stations to reach bigger TV audience in the markets.’

The channel is looking for high penetration **in every country in CEE & CIS and also to work with the biggest TV stations to reach bigger TV audience in the markets**. The company also entered on **POP TV’s** upcoming program grid in Q3 with their recent title **Price of Passion** in Slovenia. As for CEE, the highlights have been the increase of presence in Ukraine with **Tales of Innocence**, airing on **4+1** and in Kazakhstan with **Boriken**, airing on **Qazqstan TV**.

With this inauguration, the dubbing house continues to consolidate its growth. The company already has an office in Bucharest and clients in different territories. ‘With competitive prices, customer support and quality of services, we position ourselves as one of the most important studios in the competitive dubbing market,’ says Haimendes.

‘Participation in markets that occur throughout the year is a very effective way to establish new contacts and find the clients with whom we are working. We are still in the vanguard with Turkish productions, reaching all Turkish distributors, and we also close 2017 with the signing of a contract with **Lionsgate and Durrah** as “Preferred Vendors”, she adds, and completes: ‘By 2018 the company continues to expand its activities, and adding new languages to its portfolio. Being close to the customer, knowing their needs and demands is key to delivering good quality and maintaining a good business relationship’.
ABS-CBN: fantasy and action

ABS-CBN Corporation remains to be the Philippines’ top producer of television dramas after its primetime series Brothers and Bagani topped the list of most watched programs in the country in May, according to multinational audience measurement provider Kantar Media.

The channel also drew more viewers nationwide compared to other TV networks in the same month, hitting an average audience share of 45% versus GMA’s 32%. One of the hits is the action drama Brothers, which registered an average national TV rating of 40.7% and follows the story of two brothers who re-examine old relationships and get a second chance. In addition, the fantasy drama is also a consistent trending topic on social media and even made it to the top three list of most talked about Philippine dramas according to Twitter’s entertainment index for the first quarter of 2018.

Other ABS-CBN-produced programs on the top ten most watched list include the local adaptation of Your Face Sounds Familiar Kids (32.1%), drama anthology Remembering (28.7%), primetime newscast TV Patrol (28.1%), fantasy anthology Wansapanataym (24.4%), and situational comedy Home Sweetie Home (21.8%).

In terms of distribution, the company has sold over 40,000 hours worldwide, and highlights for this season the drama Bagani, meanwhile, continues to captivate viewers nationwide with the journey of five heroes in the mythical world of Sansinukob. With an average national TV rating of 32.4% for the month of May, the fantasy drama is also an epic new 4K primetime documentary also from Denmark, looks to end bitter rivalries like nationalists vs. immigrants. Animal activists vs. animal hunters. Homosexuals vs. homophobes, all set in a remote outdoor camp. State of Hate (90’ or 2x48’), a hilarious free-wheeling commiser comedy starring Jacki Weaver and Tim Minchin, that follows the trials and tribulations of five carloads of travellers.

The Danish format Code Love uses the power of big data to crack the code to love. Of all the mysteries in life, love is the most difficult to solve. Despite being more connected than ever before, millions of people are struggling to find ‘the one’ to share their lives with, and no app seems able to find the perfect formula for everlasting love.
Mondo TV: building brands

All3media International (UK) arrives to Budapest to strengthen its presence on a key region for the company. In April, the company announced the incursion in the Nordic drama business, investing in Blinded, its first non-English-language drama project, coming from FLX, the Stockholm-based producer behind Netflix’s first Swedish original QuickSound, while announcing the sale of the scripted series Escape to FTV Prima (Czech Republic), Viasat (Scandinavia and CEE) and YLE (Finland), among others.

At NATPE, the company seeks to reply that success with titles like the new drama Mystery Road (60’), where detective Jay Swan is sent to a remote town in Australia when two young farmworkers go missing from an outback cattle station, and White dragon (60’), a drama where Jonah Mulray’s world is turned upside down when his wife Megan is killed in a car accident on a mountain road outside Hong Kong. However a web of conspiracy deepens as the evidence points to murder.

White Dragon, drama

While in format it stand (60’), where looking at the time critical work of the men and women of Western Australian based Geographe Marine Salvage and Rescue (MSR), the series explores what happens when the Australian landscape collides with home and humanity. While in format it stand 24 hours to Hell and Back (60’), where a legendary chef works around the clock to bring a failing restaurant back from the brink of disaster, and Rest in Shop (60’), about over seven heats and a finale this uplifting, knock-out business challenge, pits small scale artisan food producers against.

MyContent: renewed on its 10th anniversary

INDEX Conferences and Exhibitions, organizers of MyContent, unveiled their groundbreaking plans for its 10th anniversary: for the first time the event will offer a seamless convergence of media, entertainment and technology at one of the most iconic international conference venues in Dubai, Jumeirah Beach Hotel Conference Centre, from December 9th to 10th.

With the evolving nature of technology, pushing the limits of innovation, MyContent challenges the existing norms, embraces disruptive technology and delivers it par excellence, in order to meet the new demands of the industry and looks after the ROI of clients. In addition, all exhibitors can expect guaranteed pre-scheduled meetings and choose their pre-designed exhibit units that are tailor-made to suit the requirements of attending clients in order to boost visitor engagement, collect real time data and offer a more personalized experience to everyone attending the event.

INDEX Holding Group CEO of INDEX Conferences and Exhibitions, organizers of MyContent, unveiled their groundbreaking plans for its 10th anniversary: for the first time the event will offer a seamless convergence of media, entertainment and technology at one of the most iconic international conference venues in Dubai, Jumeirah Beach Hotel Conference Centre, from December 9th to 10th.

INDEX Conferences and Exhibitions, organizers of MyContent, unveiled their groundbreaking plans for its 10th anniversary: for the first time the event will offer a seamless convergence of media, entertainment and technology at one of the most iconic international conference venues in Dubai, Jumeirah Beach Hotel Conference Centre, from December 9th to 10th.
The Kitchen expands to Hungary

One year ago, The Kitchen (USA) introduced The Kitchen EMEA and announced the appointment of Yoram Chertok, as Managing Director of the new venture. In addition to its studios currently operating in Caracas, Venezuela, partners have been added in Germany: Turkey; Russia; Africa; Moldova; Morocco; Italy and Spain.

And last May, the company introduced its newest studio: The Kitchen Hungary, offering full service language services for this unique European dialect, located in Central Eastern Europe. The team is headed by Gabor Somogyi, who headed Nokia Telecommunications in the Middle East, prior to starting in television and broadcast media over a decade ago with RUL-IKO group.

And last May, the company introduced its newest studio: The Kitchen Hungary, offering full service language services for this unique European dialect, located in Central Eastern Europe. The team is headed by Gabor Somogyi, who headed Nokia Telecommunications in the Middle East, prior to starting in television and broadcast media over a decade ago with RUL-IKO group.

Media set Distribution, reinforced

For the first time, Media set Distribution (Italy) will distribute Mediaset’s (Chile) catalogue and, in particular, at NATPE is pitching 4 titles from the Chilean broadcaster, after signing a strategic deal with Esperanza Garay, CEO.

Other big titles that Manuela Caputi, Head of International Sales, is pushing in the market are Wind of Passions (8x80’ or 16x40’), a family saga set in the early 60s: the story of a young Neapolitan in search of her true origins, interwoven with that of the Licata family, southern migrants who live in the slum of Lido Ligure and who want to bring to justice the killer of Vito Licata.

Other hot titles are Love and Hate S2 (111’x45’) which brings together a man who spent his youth in prison and did not learn to love, and a woman who never loved anyone; Don’t Leave Me, which gets an average of 15% during the day and has a good potential for the international market.

ATV: the success of Turkish dramas

ATV Distribution, international sales arm of the leading Turkish channel ATV, arrives to NATPE Budapest with great expectations for its dramas, top on the domestic prime time.

Last year the broadcaster had a great year in Turkey, where finished first with an average audience of 9.87% share during the whole day and 10.36% in the prime time thanks to dramas like Lifeline.

Earlier this year, the channel completed January as a leader among individuals +5 with a 9.6% share in full day; in February it was first again with 11.45% in full day, when its main competitor obtained 8.37%; and in March he was leader with 11.39% share.

And Lifeline is a big part of mentioned success: it reaches 40% of market share locally and reached 1 million of subscribers on digital platforms in its 7th episode. The series tells the story of a little girlfriend and a man, both from the Black Sea region. She was a victim of domestic violence and from the moment she decides to escape from home, nothing will be the same, but she will have the support of this shop that wants to save her from that life.

Its good local performance is complemented by the great reception it had in Cannes with the first episodes on the air. We have confirmed the sale of the series in 4 territories so far’, confirms Ziyad Varol, Licensing and Digital Manager, Acquisition & Sales, Platforms of ATV.

Other hot titles are Love and Sacrifice S2 (22x80’) which brings together a couple who spent their youth in prison and did not learn to love, and a woman who never loved anyone; Don’t Leave Me, which gets an average of 15% during the day and has a good potential for the international market.
Attending Buyers

Central and Eastern Europe

Belbuken, VP of thematic channels, Turkey
Programming director, Balkans, Yadigar Metin Lia, head of programming, Vessela Dimitrova, Fox Networks Group, central & Eastern Europe

Central and Eastern Europe

Valery Fedorovich, CEO, TV-3 (Sweden); Evgeniy Nikishov, general producer, 1-2-3 Production (Germany); Patrick Nebout, MD & executive producer, Dramacorp, co-productions at MiPtv: Leonid Godik, content executive VOD, Beta TV-3 Russia launched its new drama slate and wants to do global development, both from Megalabs head of VOD acquisitions, Yandex, with Marina digital buyers from Russia: Anastasia Khrab and Katalina Slovakova, head of acquisitions, both from RTV (Slovakia), with Jana Malirová, VP of programming acquisitions of TV3 Lithuania, Andy Jan Rudovský, Mediat (Sweden); Elvyra Dunauskaite, VP, acquisitions, Grovedaite, acquisitions executive, both from Media Manager at Prima TV (Czech Republic) Senior format manager, Novy (Ukraine), Peter Shepin, commercial director, Channel 1, and Bill Peck, Star Media from Star Media (Russia) Nataliya Turanska, Anna Tarada, TV Licensing, Disney, Con Inga Kosciuniené, deputy program director, Sia Lattelecom; Meggan Kimberley, Lionsgate, SBB Serbia, and Zeyko Perkunić, director, CEO, Foxvision Serbia Vladimir Gordic, acquisitions, Swedish TV, Antonio Marcelli, acquisitions executive from Media acquisitions

Central and Eastern Europe

Bulgarian National Television: Camelia Doncheva, head of acquisitions, Sviad Shishmanova, director of program Evtv1, and Oleysa Kobus, general director

Danish buyers: Gudrun Korsgaard, business affairs, and Marcella Kampmann, acquisitions, Kasper Studios, Lone Axén Senior producer, program, South African Film & Media, director, Karuki Falka, general manager, and Nicola Gennepopoulou, lead programmer, all from Broadstar TV

Central and Eastern Europe

George Peabody, Broadcaster (GPI): Taradin Brochure, Director of Media & Communications, and Georgi Georgievsky, head of Acquisitions

Karen Pasha, head of acquisitions, Dbe Mirrors head of TV channels, and Janet Noreen, acquisitions executive, all from Kanal, Estonia

Central and Eastern Europe

Alien Polish buyers: Maria Samborska, managing director, István Szalay, acquisitions director, TV Spectrum, and Karolina Zaleska, business development director of TV3 Hungary

Central and Eastern Europe

Bulgarian National Television: Camelia Doncheva, head of acquisitions, Sviad Shishmanova, director of program Evtv1, and Oleysa Kobus, general director

Danish buyers: Gudrun Korsgaard, business affairs, and Marcella Kampmann, acquisitions, Kasper Studios, Lone Axén Senior producer, program, South African Film & Media, director, Karuki Falka, general manager, and Nicola Gennepopoulou, lead programmer, all from Broadstar TV

Central and Eastern Europe

George Peabody, Broadcaster (GPI): Taradin Brochure, Director of Media & Communications, and Georgi Georgievsky, head of Acquisitions

Karen Pasha, head of acquisitions, Dbe Mirrors head of TV channels, and Janet Noreen, acquisitions executive, all from Kanal, Estonia

Central and Eastern Europe

Alien Polish buyers: Maria Samborska, managing director, István Szalay, acquisitions director, TV Spectrum, and Karolina Zaleska, business development director of TV3 Hungary

Central and Eastern Europe

Bulgarian National Television: Camelia Doncheva, head of acquisitions, Sviad Shishmanova, director of program Evtv1, and Oleysa Kobus, general director

Danish buyers: Gudrun Korsgaard, business affairs, and Marcella Kampmann, acquisitions, Kasper Studios, Lone Axén Senior producer, program, South African Film & Media, director, Karuki Falka, general manager, and Nicola Gennepopoulou, lead programmer, all from Broadstar TV

Central and Eastern Europe

George Peabody, Broadcaster (GPI): Taradin Brochure, Director of Media & Communications, and Georgi Georgievsky, head of Acquisitions

Karen Pasha, head of acquisitions, Dbe Mirrors head of TV channels, and Janet Noreen, acquisitions executive, all from Kanal, Estonia

Central and Eastern Europe

Alien Polish buyers: Maria Samborska, managing director, István Szalay, acquisitions director, TV Spectrum, and Karolina Zaleska, business development director of TV3 Hungary

Central and Eastern Europe

Bulgarian National Television: Camelia Doncheva, head of acquisitions, Sviad Shishmanova, director of program Evtv1, and Oleysa Kobus, general director

Danish buyers: Gudrun Korsgaard, business affairs, and Marcella Kampmann, acquisitions, Kasper Studios, Lone Axén Senior producer, program, South African Film & Media, director, Karuki Falka, general manager, and Nicola Gennepopoulou, lead programmer, all from Broadstar TV

Central and Eastern Europe

George Peabody, Broadcaster (GPI): Taradin Brochure, Director of Media & Communications, and Georgi Georgievsky, head of Acquisitions

Karen Pasha, head of acquisitions, Dbe Mirrors head of TV channels, and Janet Noreen, acquisitions executive, all from Kanal, Estonia

Central and Eastern Europe

Alien Polish buyers: Maria Samborska, managing director, István Szalay, acquisitions director, TV Spectrum, and Karolina Zaleska, business development director of TV3 Hungary