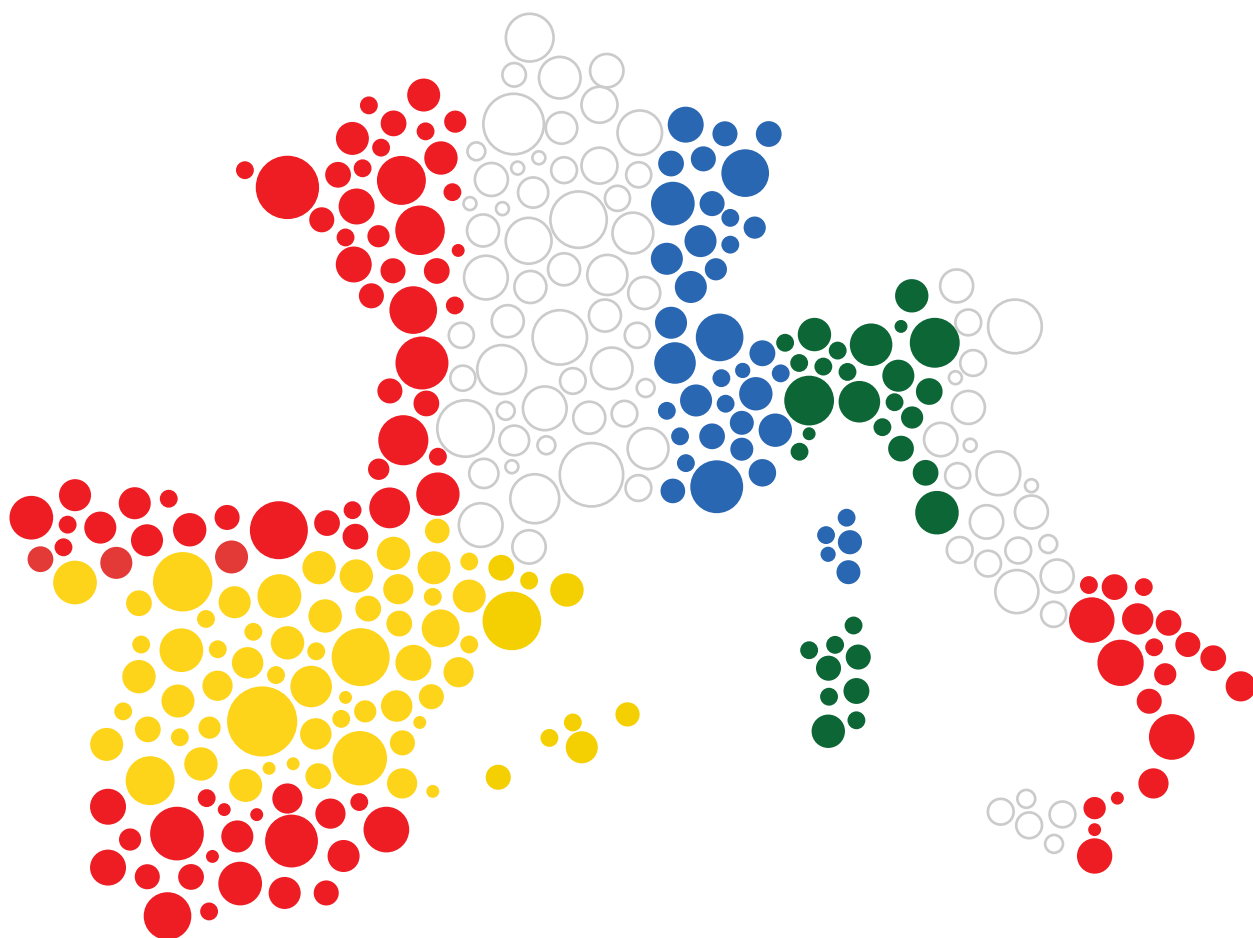


The Broadcast Market Report France - Spain - Italy

October 2017



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Prepared for **Audiovisual Finland**
by **Creatives Loop International Ltd & Co KG**

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1. INTRODUCTION / EXECUTIVE SUMMARY

The story of the broadcast industry in mature markets throughout the world is increasingly less about if or when digital development and Video-on-Demand will transform the marketplace, and more about the impacts and implications of the transformations which have already been unleashed. As has been widely discussed and written about, the global television industry is undergoing a fundamental change, from a linear, advertising-driven model to one based around platform subscriptions and the monetisation of digital video content in all its forms.

Such changes are affecting individual broadcast markets at a mixed pace, but are a factor to some degree in nearly every country. As upstarts like Netflix and Amazon Prime raise the bar in both the quality and quantity of high-end series content available to TV watchers, traditional broadcasters are increasingly forced to follow suit with their own compelling content and digital strategies. Pay TV, meanwhile, long an ancillary player next to the main free-to-air and cable television channels, also continues to draw more interest as providers invest in ambitious drama programs and on-demand offerings. At the same time, entirely new viewer loyalties and revenue streams are being developed through the production and distribution of OTT and user-generated content online.

This report focuses on the changes underway in the broadcast markets of France, Spain, and Italy – with an emphasis on how each country’s television industry is adapting to international trends during the “Golden Age of TV.” The report contains a brief overview of the main facts, figures, trends and key players in each country, but focuses primarily on the practical questions which are most interesting for producers: namely, the “who, what, where, and how” of genre trends, content case studies, emerging strategies, and international co-production, with ideas for how those seeking to collaborate with each market can find a constructive opening.

The report has been researched and prepared by Creatives Loop International, on behalf of Audiovisual Finland. It follows two prior reports on the broadcast industry landscape in Germany, issued in December 2014 and May 2017. Like the previous editions, the main purpose of this report is to highlight the most important developments in each market, while placing specific emphasis on opportunities for Nordic content producers and creators. The final section of the report contains examples of TV shows from the Nordic region which have been aired in the three target markets. At the request of Audiovisual Finland, the report focuses exclusively on trends, case studies, and opportunities for drama and children’s content.

Just two years on from Netflix’s large-scale international rollout, the platform is already used by more than 20 million European subscribers, and has spent over €2 billion to date on European content commissioning and acquisition. Impressive as these numbers are, they still represent just one small slice of the overall viewer market, and a smaller percentage still of the growing scope of investment in European TV. This report attempts to help outline a pathway toward accessing a share of the current opportunities in three of the Continent’s top marketplaces.

2. AN OVERVIEW OF THE BROADCAST LANDSCAPE: FRANCE, SPAIN, ITALY

Market overview & trends

The broadcast markets in France, Spain, and Italy vary widely, but share some important characteristics. All three countries are among Europe’s largest and most internally diverse, a cultural fact reflected in the nature of their respective broadcast industries.

Each market boasts a wide array of channels, often differing by region, where viewers typically have a mixture of local, regional, and national choices available when it comes to what to watch on TV. The market in each country is also fragmented between national and local players, however the legacy of public and monopoly broadcasting is strong and therefore the larger media groups in each country still maintain a wide influence over the broadcast landscape as a whole. This is particularly true in Italy, where two media groups account for more than half of total audience market share.

In all three countries, conventional linear TV remains strong, as evidenced by the continued growth of TV advertising revenues. At 4 hours and 40 minutes per day, Italians watch the third-most television of any country in the world (behind the USA and Japan), while numbers in Spain and France remain robust at 3 hours 54 minutes per day and 3 hours 44 minutes per day, respectively.

By far the biggest commonality across the three markets, however, is the ongoing impact of OTT content and Video-on-Demand, which is as notable for its influence on the established broadcast companies as it is for the emergence of new players in the market. The internationalisation of TV and video content, as well as the decentralisation of content creation via user-driven platforms, has sparked many responses in the market. The first is the continued trend toward high-value drama series content, driven by competition from Netflix and Amazon and accelerated by the ability of viewers to access an ever-increasing array of international titles online. The second major trend is the current wave of investment from established media companies in online platform content and other forms of OTT.

Linear still on top – but the gap is closing

It is worth noting that while the impact of VoD continues to be felt, the majority of TV content in the so-called European “Big 5” (France, Spain, Italy, the United Kingdom, and Germany) is still consumed via linear channels. Out of non-linear consumption, furthermore, the largest share is “time-shifted” content available via the TV catch-up libraries offered today by most commercial broadcasters. This would seem to indicate that

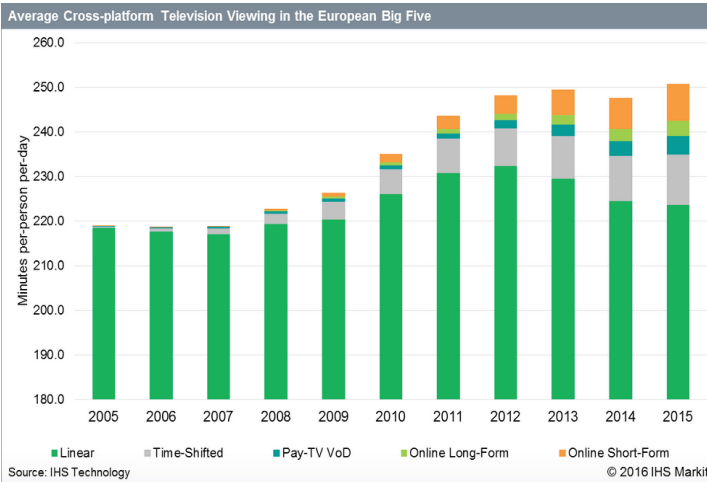


Table 1: Cross-Platform TV viewing in European “Big 5”
Source: IHS Markit

contrary to the predictions of some industry watchers and tech evangelists, traditional TV channels are in no danger of being completely overtaken by upstart SVoD platforms anytime soon. At the same time, however, the ability for users to stream content anywhere and anytime on demand has continued to boost both the quantity and quality of available TV programming, while opening up new opportunities for competition in almost every broadcast market segment.

In each of the target markets, the broadcast industry today can be characterised as a mixture of **international players** (primarily Netflix, YouTube, and Amazon); **local OTT providers**, who offer a mixture of functions and services; **Pay TV channels**, many of whom (like Sky) have been established in the market for a long time and are now transitioning toward OTT and SVoD; and the **traditional broadcasters**, who remain highly relevant but are investing in the new trends as a means of securing their market position. The following pages outline this evolving landscape in detail, with a focus on the key players, country-by-country developments, popular genre trends, emerging strategies, and how international partners can gain traction in the market.

Broadcast snapshot by country

The following offers an introduction into the general broadcast landscape for the target markets: the general market structure, the numbers, the trends, and the key players. This section is intended to provide a high-level overview of each market, so that readers can familiarise themselves before diving into the trends and commonalities which are common across all three countries.



Industry-at-a-glance: France

Television production outline

The modern-day media landscape in France has its cultural roots in the post-World War II era, when the government's desire to build a clean slate following France's occupation during the war years resulted in a leading role for the public sector in French television and radio. Today the French State continues to be actively present in the media via TV (with public broadcaster France Télévisions as a major actor and its president almost directly appointed by the state); the radio (Radio France group has two stations in the top five in terms of audience); the cinema (with a complex system of subsidies handled by the National Cinematographic Centre, or the CNC); and more recently on the Internet (with regulations on cultural products, downloading and property rights known as Hadopi).

As in Germany and the UK, France's public channels are an integral part of TV viewing and production culture. France Télévisions manages two public channels (France 2 and France 3) which are among the top 5 in terms of total viewership, while a third, France 5, comes in at

number 6. Put together, these three public channels account for approximately one-quarter of total French TV viewership.

In addition to its direct ownership of various leading television channels in France, France Télévisions also has an indirect interest in many other channels of interest, notably:

- Gulli (the leading children's channel, where it has a one-third stake); and
- arte, the Franco-German arts and culture joint venture channel owned and managed by special purpose subsidiaries of France Télévisions and German public broadcasters ARD and ZDF.

The other major name in French broadcasting is TF1, one of France's three original television channels. TF1 was owned by the state as part of France's original public television monopoly, before being privatised in 1987.

Other leading private channels include Canal+ and M6, both of which were launched in the 1980s and today are at the centre of large media holding companies with interests throughout the French-speaking world.

In 2009 France abolished most advertising on its public channels, meaning funding for France Télévisions and its various interests comes almost entirely via the French state, through a system of license fees and direct public support, supported by a modest amount of advertising revenue. Like most commercial broadcasters, France's private channels earn the bulk of their money from conventional TV advertising and various forms of paid content.

Key market figures

- ∞ France boasts more than 28 million TV households, putting it roughly on a par with Italy in terms of the total percentage of the population owning a television (95 percent). At 224 minutes per person per day, French viewers watched the third-most TV in Western Europe in 2015, according to a study completed last year by industry watcher IHS Markit.
- ∞ Non-linear viewing time is growing faster than linear, increasing by 17.9 percent over 2015 to 23 minutes and 54 seconds per-person per-day. This, however, still represents just 10 percent of the overall total viewing time in France.
- ∞ Advertising revenues for television in France exceeded €3.4 billion in 2016, and continue to grow modestly. Although the overall market for TV advertising in France remains robust, according to a February report from PwC, the research group SRI, and French media watcher UDECAM, 2016 marked the first time that digital advertising exceeded TV in total media spending. Within the digital category, growth in French ad spending has been mostly driven by display ads and within this, mostly by video advertising, indicating the growing importance of online video to advertising strategies in France generally.

Leading channels

Below is a summary of the leading TV channels in France including their description, ownership group, and market share. As can be seen in the table, French airwaves are dominated by a combination of public channels operated by France Télévisions, and private networks owned by TF1 Group, M6 Group and Canal+ Group:

Table 2: Guide to Main TV Channels France

Pos.	Channel	Group	Audience share 2016	Description
1	TF1	TF1 Group	20.4%	Biggest private TV channel and commercial broadcaster in France, controlled by TF1 Group. Numbers say that it is the most viewed television channel in Europe. The private channel controlled by TF1 Group puts clear emphasis on "light" entertainment programs over more serious content.
2	France 2	France Télévisions	13.4%	Biggest French public national television channel and part of the state-owned <i>France Télévisions</i> group. Being popular for its news programs it offers a large variety of shows, TV series and movies. Its programming includes news, public debate and culture, as well as films and fiction.
3	M6	M6 Group	10.2%	Owned by <i>RTL Group</i> , it is the most profitable private French TV channel and third most watched television network in the French-speaking world. Broadcasting a wider range of series like the popular French series <i>Kaamelott</i> , as well as movies and music programs.
4	France 3	France Télévisions	9.1%	Popular for its regional content with a focus on educational and content devoted to culture, history, art and science.
5	C8	Canal+ Group	3.4%	The private national French TV broadcaster concentrates on contents in the field of fashion, culture and motor sports and screens big sport events like the <i>Euro 2008</i> and <i>UEFA Cup</i> .
6	France 5	France Télévisions	3.4%	Similar to ARTE, France 5 mission is to share knowledge, showing a lot of documentaries and educational content.
7	TMC	TF1 Group	3.0%	As the oldest private channel in Europe <i>Télé Monte Carlo (TMC)</i> shows a variety of programs, including many imports. It also produces many original programming that include cooking shows, talkshows, and "news magazine" programs.
8	W9	M6 Group	2.4%	W9 lays a clear focus on content for young adults.

9	BFM TV	NextRadioTV	2.3%	BFM TV is a 24-hour rolling news and weather channel and the country's most-watched news network with 10 million daily viewers. Criticized for sensationalistic coverage.
10	Canal+	Canal+ Group	1.7%	Canal+ private channel that sticks out with its "news" shows, which take a mocking approach to the nightly news.

Pay TV

In addition to Netflix/SVoD, France also has the most robust Pay TV marketplace of the three countries surveyed, with more than two-thirds of TV households in France connected to some form of Pay TV.

France's Pay TV market tends to be dominated by Internet Protocol TV (IPTV), indicating a high level of streaming and VoD services. This is in contrast to other comparable Western European markets like the UK and Germany where most Pay TV is still delivered by cable or satellite. As seen below, fully 61 percent of France's Pay TV subscriber share comes from IPTV/streaming services. The rest is a combination of terrestrial Pay TV channels with satellite offerings.

Canal+ is the biggest Pay TV name in France, offering an array of channels as well as the SVoD platform CanalPlay. Canal+ has been a major player in global TV series content since the early 2000s and is historically known for carrying a wide range of internationally popular TV shows from the United States.

The other big player in French Pay TV (particularly when it comes to TV series) are the OCS channels, which stand for Orange Cinéma Séries and are a spinoff of Orange TV, the broadband set-top box offering from France's leading telecom company. OCS has an exclusive contract for the French market with HBO, whose shows are broadcast in France on the "OCS City" Pay TV channel and available on-demand via a catch-up service.

Unique trends

- ∞ France is by far the largest Netflix market of the three target countries. According to research firm Strategy Analytics, France is Netflix's 9th largest market worldwide (excluding the USA) and 5th largest in Europe, behind the UK, Germany, Sweden, and the Netherlands. Netflix now boasts 1.5 million subscribers in France, a 33% jump since the end of 2015. In a June 2017 interview, Netflix CEO Reed Hastings announced that Netflix will be ramping up its investment in French originals, with a goal of featuring 40% more French content in 2018. Netflix has already produced two French language original series to date with two more in production.
- ∞ Netflix's decision to invest more heavily in French programming isn't entirely altruistic. France has strict rules intended to promote domestic content, with 40 per cent of material on French radio, TV and movies in theatres required to be of "French origin." Because Netflix's European headquarters are not based in France, it does not

technically have to comply with this rule. However, the voluntary investment could be seen as a way to remain on the good side of French broadcast authorities and indeed of French viewers themselves.

- ∞ France has a relatively dynamic SVOD market, with Amazon Prime Video boasting over 2 million subscribers and CanalPlay, the SVOD platform of private channel Canal+, also taking a significant share alongside Orange and MyTF1VoD.
- ∞ Generally speaking, out of the three markets surveyed France is the most similar to the other major markets in Western Europe. Co-production and other forms of collaboration between France and Germany are relatively common, as well as between France and the UK. This stands in contrast to Spain and Italy, which are more similar to each other than to France and the other Northern European countries.



Industry-at-a-glance: Spain

Television production outline

Broadcasting in Spain has witnessed a significant expansion in recent years with the emergence of new commercial operators and the launch of digital services. The television market in Spain is characterised in part by the immense number of channels available. There are almost 500 local TV channels, approximately 100 regional channels, and more than 230 national channels.

As in most other European countries, public broadcasting remains highly relevant. Televisión Española (TVE) is the Spanish public broadcaster, with seven national channels including “La Uno,” Spain’s first TV channel which remains among the country’s most popular. La Uno broadcasts everything from news reports to documentaries, sporting events, and films as well as Spanish and Latin American TV series. The TVE network and its associated channels are owned and managed by the Corporación de Radio y Televisión Española (Spanish Radio and Television Corporation or RTVE), which oversees all public radio and television in Spain. Since 2010, RTVE has been financed entirely via government subsidies.

Some of Spain’s leading national commercial broadcasters include the likes of Antenna 3, Telecinco, and Cuatro, the latter two of which are owned by Mediaset España, the Spanish arm of the Italian media giant Gruppo Mediaset. Mediaset España is a major player in the Spanish broadcast market, with ownership over 4 of the top 10 channels accounting for approximately 25% of Spanish viewership.

The other major commercial TV stakeholder in Spain is Atresmedia Televisión, which owns 4 more of the top channels including Antenna 3, which is known for airing cinema and drama. Put together, Atresmedia and Mediaset España own channels which make up nearly half of all audience market share.

Other public (TVE) channels of interest include La Dos, which focuses more on cultural programming than La Uno and tends to broadcast more international TV series. La Dos also shows documentaries and European films. Clan, meanwhile, is a children's channel which also offers some programming aimed at teenagers during the evening.

A 2015 report by telecommunications giant Ericsson identified many of the same trends in the Spanish media and television market that are currently being experienced worldwide, particularly:

- The growth in streaming and on-demand viewing, with 50% of Spaniards streaming content at least once per day;
- The resilience of linear television, which is still watched at least once per day by nearly 80% of people and 70% of millennials;
- The impact of binge-watching and mobile viewing, with significant increases since 2011 in the amount of time Spanish viewers spend watching streamed TV series on a weekly basis; and
- Evidence of more people “cutting the cord,” despite the overall popularity of linear TV. 7% of Spanish viewers subscribe to various SVOD/OTT platforms instead of, as opposed to in addition to, paying for conventional broadcast or Pay TV services.

Spain's mainstream TV market is still heavily oriented around home-produced dramas, reality shows (*tele basura*) and long-running "telenovelas" (e.g. soap operas), alongside content from Latin America and the rest of the Spanish-speaking world. Nonetheless, the healthy competition in the market between TVE and the two private broadcasters has driven up the value of Spanish drama in recent years, with the Spanish television sector gaining increasing recognition abroad. At the same time, many international hit series are popular in Spain, and increasingly likely to be available in their original language due to the emergence of digital television.

Key market figures

- ∞ 99 percent of Spanish households own a television, good for 18.4 million TV households overall. Spain is number two in Western Europe behind Italy in the amount of television watched per day, at 234 minutes per person per day.
- ∞ Since 2011, the average time spent on watching streamed long-form content on demand (TV and movies) has increased by 4.2 hours per week, with the bulk of the increase coming from TV series and programs. Overall, non-linear viewing time grew by nearly 25 percent in 2016 but still averages less than 20 minutes per day. Interestingly, the largest portion of growth in non-linear viewing time is from short form content (e.g. YouTube), which averages 9 minutes per person per day. Overall, the percentage of Spanish viewers watching YouTube at least daily has increased from 25 to 44 percent since 2011, while the number who watch YouTube for at least three hours per day has gone from just 3 percent to nearly 1/10 of all viewers.
- ∞ Television advertising in Spain remains steady, growing by 5.5% to €2.12 billion in 2016. Unlike France, Spanish TV ad spending remains above digital ad spending in total figures, however digital is closing the gap. Spending on digital ads rose by 21.5%

to nearly €1.57 billion in 2016, good for nearly 1/3 of all ad spending in Spain. Within the digital category, roughly 10 percent of ad spending went to video while nearly 40 percent went to display ads.

Leading channels

Spanish airwaves, as discussed in the introduction, tend to be dominated by a combination of public channels and by the two private media conglomerates. The table below summarises Spain's leading channels, their market share, and a description of what's on TV in the Spanish market.

Table 4: Guide to Main TV Channels Spain

Pos.	Channel	Group	Audience share 2016	Description
1	Antenna 3	Atresmedia Televisión	13.3%	Most established private TV channel, broadcasting original entertainment programmes, such as <i>Física o Química</i> and <i>Tu cara me suena</i> that gained international success.
2	Telecinco	Mediaset España	13%	<i>Telecinco</i> is a general channel catering for all audiences. It shows popular films, series, entertainment shows, including such series as <i>La que se avecina</i> , <i>Sin tetas no hay paraíso</i> and <i>Aída</i> , as well as the entertainment shows <i>Crónicas Marcianas</i> and <i>Hay una cosa que te quiero decir</i> and the talent show <i>The Voice</i> .
3	La 1	Televisión Española	10.5%	<i>La 1</i> is the flagship television channel of Spanish public broadcaster Radiotelevisión Española (RTVE). Its programming is aimed to a wide range of audiences and includes news (Telediario & Informe Semanal), debate programmes, documentaries, sports and entertainment shows.
4	La Sexta	Atresmedia Televisión	6.4%	The channel's programming is general however, there is an emphasis on humour and entertainment. Known for its large quantity of American and sports programming.
5	Cuatro	Mediaset España	6.4%	A commercial television channel, predominantly addressing a young (male) audience while emphasizing content based on big sport events and (foreign) reality shows. Many series broadcasted come from abroad, like <i>Castle</i> , <i>Criminal Minds</i> and <i>Hawaii Five-O</i> .
6	FDF	Mediaset España	3.2%	The core of FDF is fiction and the major goal is to offer the best TV series for all audiences. 24-hour channel airing syndicated as well as original television series and films.
7	La 2	Televisión	2.6%	Spain's second state-owned TV channel and

		Española		unlike its sister channel <i>TVE1 ("La Uno")</i> not an overly populist channel, but rather famous for a more "intellectual" style of programming (often popular with university students) featuring wildlife and cultural, documentaries, classic films from home and abroad, more "alternative" American TV Series – <i>Will & Grace, Six Feet Under, Veronica Mars</i> etc.
8	Neox	Atresmedia Televisión	2.3%	Geared towards children and a teenage audience, the channel shows children's programming during the morning, and films and series for youngsters during the evening and night. Internationally successful series, such as <i>Family Guy, How I Met Your Mother</i> and <i>Modern Family</i> are shown, complementing <i>Antena 3</i> popular programming.
9	Nova	Mediaset España	2.2%	The channel and its content is aimed at women and the schedule includes programs in fashion and lifestyle like cookery. During the evening films and some series are shown.
10	Divinity	Atresmedia Televisión	2.2%	Like <i>Nova</i> , the private TV channel <i>Divinity</i> targets a female audience, broadcasting programmes that are mainly repeats of series previously shown on the other Mediaset channels like <i>Telecinco</i> .

Pay TV

Spanish Pay TV is booming, exceeding 6 million subscribers in 2016. As in France, the driver for Pay TV in Spain in recent years has been the rapid take-up of IPTV, which has come at the expense of cable and satellite Pay TV services. IPTV now accounts for over half of the Spanish Pay TV marketplace, on the strength of so-called “convergent” options offered by Spain’s telecom companies which combine home internet service with an IPTV set-top box.

In focus: Spain's platform-driven Pay TV environment

Unlike in many other markets where viewers mostly subscribe to individual Pay TV channels “a-la-carte,” in Spain the growth of convergent IPTV offerings has resulted in a slightly different structure taking hold, where the market power rests with the Pay TV providers rather than with the channels themselves. Companies like Telefonica (Movistar+), Vodafone (Vodafone TV), and Orange (Orange TV) each provide subscriptions via their set-top offerings to a menu of channels, many internationally-based, which are not available on normal Spanish TV. In many cases the IPTV offering then doubles as an SVoD platform where viewers can stream the available content on-demand.

The Pay TV platforms, realising their market position, are in turn beginning to invest in their own original content to attract and retain more viewers. Movistar+ for its part is investing €70 million per year in original series, with four planned drama releases before the end of the year. So far Vodafone and Orange have mostly continued to focus on licensing and distributing exclusive TV content, however, rather than creating their own.

Unique trends

- ∞ Advertising and Pay TV have been the primary drivers of growth in Spain's media market as a whole. According to the Spanish government, Spain's audiovisual industry is growing at a rate of 21% per year, buoyed by a 9 percent CAGR in Pay TV. To put the expansion of IPTV in Spain into perspective, it has gone from the least-used Pay TV technology in 2013 to dominating over half of the market in 2017.
- ∞ Spain is still somewhat of an emerging market for SVoD, with catch-up libraries from the free-to-air channels tending to dominate on-demand viewing and Movistar+'s Movistar Go SVoD platform traditionally having captured most of the SVoD market share. The arrival of Netflix, however, has shaken up the market, with HBO, Sky, and Amazon following in its footsteps late last year. 2016 in general saw a near-doubling in the percentage of Spaniards paying for SVoD, from 8 to 15 percent.
- ∞ There is a growing interest on the part of the various broadcasters and SVoD platforms in leveraging Spanish drama content for the Latin American market, and vice versa. While this may be a somewhat predictable strategy on the part of global players like Netflix and Amazon, Movistar+ has also made a point of securing first options for its drama series across Latin America while TVE, the public broadcaster, has recently collaborated with two of Mexico's leading broadcasters on a period drama series about the conquistador Hernán Cortés. In the other direction, the hit Netflix series “Narcos” is among the platform's most-watched programs in Spain.

Spain and Latin America partner up

“There are many things going for Spanish TV production, including language and actors known on both sides of the Atlantic, that will help it become a bridge to the Latin American market.”

-Fernando López Puig, Drama Director, RTVE

Given this trend, one “backdoor” into the Spanish market for prospective international partners could be by pursuing storylines which weave in a Latin American component.

- ∞ Due to the centralisation of broadcast channels around TVE, Atresmedia, and Mediaset España, combined with the domination of the Pay TV marketplace by the telecom providers, the number of players for high-value drama in Spain’s television landscape is relatively limited. The good news is that within his limited environment, investment in premium drama series is growing. International partners should focus on these key players when it comes to pursuing co-production opportunities.

Industry-at-a-glance: Italy

Television production outline

The broadcast industry in Italy is widely considered to be highly politicized, headlined by RAI, the public broadcaster which is 99% owned by the Ministry of Economy and overseen via a parliamentary committee which has historically tended to appoint directors on the basis of party membership rather than merit. On the commercial side, market leader Mediaset is still controlled by the family of controversial former Italian Prime Minister Silvio Berlusconi, who was convicted of tax fraud in 2013. Together, Mediaset and RAI account for nearly two-thirds of all television market share in Italy.

Like other European markets, RAI is financed through a combination of advertising and license fees. Unlike other European markets, advertising makes up a much greater share of the budget (roughly 1/3). Italy suffers from record levels of avoidance when it comes to its license fee – license fee evasion averages 25-30% in Italy compared with a European average of around 10%.

RAI consists primarily of three free-to-air public stations (RAI Uno, Due, and Tre), as well as a news channel (RAI News). In the past each of the three main channels have been associated with different sides of the Italian political spectrum, due to the nature of RAI’s corporate governance. As a result, RAI’s cohesion has historically been challenged by various internal rivalries. All three of the primary RAI networks officially describe themselves as “generalist” channels, primarily airing a mixture of news, talk shows, reality TV, and syndicated series.

Additional RAI channels which may be of interest for the purposes of this report include RAI 4, which airs TV series and entertainment for young adults, and RAI Yoyo, which focuses on children. Of the main channels, RAI 3 has historically tended to air more foreign language content while RAI 2 also features children's programming.

RAI's main competitor Mediaset launched in the 1980s as a response to RAI's stranglehold on the market and while the television industry was undergoing a significant expansion and privatisation worldwide. Mediaset's three main channels (Canale 5, Rete 4, and Italia 1) are also generalist channels and compete for more or less the same audiences as the three main RAI networks. Rete 4 and Italia 1 tend to have the most international drama series, while Canale 5 is primarily a variety channel encompassing news, homegrown Italian series, reality shows, and other entertainment programming. Other relevant channels include Iris, which aired many of HBO's classic shows during the 2000s, and Top Crime, which specialises in crime-related movies, scripted series, and documentaries.

The other major player in the Italian broadcast market is Sky Italia, part of the Europe-wide Sky television empire. Italy is Sky's biggest market outside of the UK and Ireland, with Sky growing to be Italy's leading Pay TV provider since entering the market in 2003. Sky is currently attempting a push into Spain with its Now TV OTT offering, which is also offered in Germany where it has secured exclusive rights to popular series like "House of Cards."

On the free-to-air side, US-based Discovery Networks is also active in Italy with its Discovery Italia brand of channels. Discovery Italia tends to focus on reality TV and lifestyle programming, and does not appear to be a major player in high-end drama series. It could however be a relevant partner for youth programming, with its Frisbee and K2 channels targeted toward children and teens, respectively.

Key market figures

- ∞ Italians watch the most TV in the world outside of the United States and Japan, at 280 minutes per day, according to IHS Technology. 95% of Italian households own a TV, a total of 24.8 million households overall. Non-linear viewing is on a par with France and Spain, rising to 18 minutes per day in 2016.
- ∞ Italy is a more fertile market for television advertising than either France or Spain, with revenues growing by 5 percent to a total of €3.84 billion in 2016. Interestingly, digital advertising in Italy actually slipped by more than 2 percent last year, with spending on video and display ads totalling just €457 million. Generally speaking, Italy has long been seen as one of Europe's digital laggards, with some of the slowest internet speeds on the Continent before a wave of investment over the past two years which has begun to kick the country's digital landscape into higher gear. A European Commission report in 2015 revealed that just 20 percent of Italians had access to high speed internet, compared with the EU-wide average of 60 percent.
- ∞ Italy's slow digital adoption appears to extend into the SVoD marketplace, which remains relatively immature. Although SVoD subscriptions in Italy reached 2 million in 2016, this still represents just 3 percent of the total population, compared with 15

percent in Spain (where SVoD adoption has also been slow). As Italy works to catch up with its digital peers in Europe, SVoD may be a key growth segment. Surveys show that more than one-third of Italians already access online streaming services and do so from an average of 3 devices, findings which are more closely in line with other developed countries.

Leading channels

TV market share in Italy is heavily oriented around RAI and Mediaset, with Discovery Italia and Cairo Communication also in the Top 10. Cairo and its La7 channel were started by Telecom Italia in 2001 to compete against RAI and Mediaset, before being sold off in 2013.

Table 5: Guide to Main TV Channels Italy

Pos.	Channel	Group	Audience share 2016	Description
1	RAI 1	RAI	15.7%	Italian's number 1, national public service broadcaster <i>RAI 1</i> is a general interest channel, mainly focused on shows, movies and public service.
2	Canale 5	Gruppo Mediaset	15%	<i>Canale 5'</i> successfully manages to compete with rival channel <i>RAI 1</i> , aimed at the mass family audience through all kinds of programmes, from entertainment to drama and news.
3	RAI 3	RAI	6.5%	<i>RAI 3's</i> programming is based on journalism, culture and large space to local topics. It also broadcasts some programmes in French language, albeit only less than three hours a week.
4	RAI 2	RAI	6.2%	Whereas in the eighties <i>RAI 2</i> suffered from the reputation for its political affiliation to the Italian Socialist Party it has shifted its focus toward talk shows, reality television infotainment, cartoons, sports in recent years.
5	Italia 1	Gruppo Mediaset	5.0%	<i>Italia 1</i> is oriented at young people, screening a vast variety of shows and cartoons.
6	Rete 4	Gruppo Mediaset	4.0%	Rete 4 is a private commercial TV channel, addressing an adult audience, offering movies, news and sports. In the 90s it had a purely feminine connotation, laying its focus on telenovelas and soup operas.

7	La7	Cairo Communication	3.4%	Generalist channel focusing on entertainment programs.
8	Real Time	Discovery Networks	2.3%	<i>Real Time</i> is a lifestyle TV channel targeting a female high-class audience of 25- to 44-year-olds. The channel broadcasts both foreign programmes and a few original Italian productions. Most acquired programmes were originally produced for the <i>American TLC</i> or the <i>British Channel 4</i> .
9	DMAX	Discovery Networks	2.2%	<i>DMAX</i> is globally known as a factual-entertainment channel addressing the male audience in Italy with an emphasis on motor sports, lifestyle and crime series.
10	RAI Yoyo	RAI	2.2%	<i>RAI Yoyo's</i> programming consists of shows aimed at very young children, aged 0-8. Besides own content it shows foreign productions in the fields of cartoon, fiction and fairy tales.

Pay TV

Until now Pay TV in Italy has primarily been dominated by Sky Italia, which entered the market in 2003 with a similar satellite-based offering to its flagship service in the UK. Sky Italia offers subscribers a range of “channel packs” available via the My Sky box, which consist of a mix of news, entertainment, cinema, kids, and sports channels.

Sky has been able to capitalise on Italy’s relatively limited free-to-air TV landscape to become the third largest player in the Italian television market behind RAI and Mediaset. Although none of Sky’s individual channels crack the Top 10 in terms of viewers, Sky services as a whole account for 8 percent of total TV market share in Italy.

The other major player in the Italian Pay TV arena is Mediaset, which also offers a variety of enhanced channel selections via its Mediaset Premium service. Both Mediaset Premium and Sky Italia offer on-demand services to their subscribers, as well as subscriptions to their respective OTT/SVoD platforms which can also be purchased separately. The newest Italian Pay TV entrant is Vodafone TV, which is hoping to replicate the success of its IPTV set-top offering in the Spanish market by providing a similar service which combines premium linear TV with on-demand channels and claims to include the content libraries of Sky and Netflix as part of the package.

Sky, for its part, is thought to be using its Now TV online service in order to pivot away from its traditional satellite package in favour of an increasing focus on streaming and OTT, which are seen by the company as the future of Pay TV. Sky will be an interesting player to watch, particularly in Italy and Spain, as it ramps up its original content budget as part of an effort to reach new markets and attract more subscribers to the Now TV platform, which competes directly with Netflix and other similarly-priced options. One advantage of working with Sky as opposed to the other Pay TV operators in Italy is the potential connection to other key

markets (particularly the UK, Spain, and Germany), where Sky is also hoping to attract new subscribers with Now TV.

Unique trends

- ∞ In terms of premium content, Italy tends to be the least mature market of the three surveyed. While some programs such as “The Young Pope” and “Gomorra” have garnered international attention, TV in Italy is “still beset by variety shows and news talk shows that seem more concerned with entertaining than informing viewers,” as a *Guardian* profile of European broadcast cultures recently put it. High-end drama in Italy (both domestic and international) has mostly been the domain of the Pay TV providers, with most of the global drama content on the free-to-air channels tending toward mainstream network series from the US.
- ∞ Like Spain, Italian Pay TV is heavily oriented around integrated “package” offerings rather than individual channels. This means that the number of players is once again relatively limited from a production perspective, but that the players who do exist hold great sway over the market. As more of Italy’s Pay TV landscape moves toward integrated streaming options, expect increasing investments in premium drama series from Mediaset and Sky as both jockey for position against international SVoD competitors, as well as one another.
- ∞ Pay TV in Italy can almost be thought of as its own system-within-a-system, given the vast content and quality disparities between Pay TV and the free-to-air system. With approximately 5 million subscribers, Sky Italia’s customers alone nearly equal the total number of subscribers in Spain’s entire Pay TV marketplace. Given RAI’s institutional challenges, international producers might consider focusing on Pay TV as the best opportunity for collaborating with Italy as a broadcast partner.
- ∞ When it comes to children’s content, the Discovery Networks channels could be an interesting partner as they offer the chance to leverage Italian children’s programming as a means for connecting with other markets. Children’s content could also be a more promising avenue than drama for connecting with RAI and Mediaset.

Key points: TV in France, Spain, Italy

- The traditional broadcast market in all three countries tends to revolve around a small number of key players, one of whom is always the public broadcast network. The French broadcast market tends to be slightly more diverse than in Spain or Italy, where the market is more centralised.
- France is by far the most mature market for Pay TV and SVoD, with 21 million subscribers. France also leads the other two markets in Netflix subscriptions.
- Spanish drama is attracting more international attention, particularly as producers and broadcasters eye the Spanish-speaking diaspora as a means of taking hit series global. Spain's Pay TV and SVoD marketplace is heating up quickly and could be a good place to target for production opportunities.
- Italian Pay TV is probably the best option for pursuing high-value drama projects in Italy. Key players include Sky and Mediaset, the latter of which is also a major player in Spain.
- The French market has the most crossover with other key markets in Europe, particularly Germany and the UK, with frequent co-production opportunities and key players like arte formally active in both countries.

Genre trends and case studies

Drama series

The drama genre in the three target countries shows varying degrees of development and sophistication. France tends to be the market with the highest-quality and most diverse international drama content, while drama in Spain and particularly Italy still tends toward mainstream American network series and a handful of well-known HBO programs. While this is changing given the overall global trend toward high-end TV drama, the market is still behind Northern Europe and the UK.

France is, incidentally, where Nordic drama has found the most traction thus far out of the three markets surveyed. Most of the Nordic series which have aired internationally in the UK and Germany to date have also been shown in France, most recently the Finnish hit series "Bordertown" which is being shown on the CanalPlay SVoD platform.

In Spain and Italy, most of the higher value drama breakthroughs to date have either been domestic or from American-produced Netflix series. The general trend lines, however, help to illustrate what is currently popular on TV and how international producers might leverage opportunities for partnership. Spain especially has been attracting more attention on the drama stage recently, with Netflix acquiring two Spanish network series in June and with a slate of other new Spanish drama shows starting to make headlines internationally.

Key themes

- ∞ **Period drama.** Period drama has shown a good deal of staying power as a genre in Spain, with many of the top Spanish drama series falling at least loosely into this category and multiple international success stories including “Las Chicas del Cable” (Netflix, 2017), “Velvet” (Antena 3, 2014-2016), and “La Catedral del Mar” (Antena 3, 2017), the latter of which was recently picked up by Netflix. Popular French and Italian series falling into this category include “Versailles” (Canal+, 2015), and “Medici” (RAI 1, 2016).
- ∞ **Crime.** Crime as a drama genre is almost as old as TV itself, and it remains a potent theme in all three target markets. The recent hit series “Gomorrah” (Sky Italia, 2014-present), has been one of Italy’s biggest international drama successes, while the Danish-French co-production “Norskov” (TV2/ARTE, 2015) is a good example of Nordic drama success in the French market. In Spain, Mediaset España’s “I Know Who You Are” (Telecinco, 2017) has generated international attention its early going. The recently-commissioned “Hierro” (Movistar+/ARTE, coming in 2018) already has a Berlinale CoPro Series best project award to its name.
- ∞ **Sci-Fi.** There should be no doubts about the mainstream viability of this genre, which can boast several recent successes particularly in France and Spain. In Spain, “Lifeline” (Antena 3, 2016) has been picked up internationally, while France’s “The Returned” (Canal+, 2012) and “Zone Blanche” (France 2, 2017) have earned significant plaudits. “The Department of Time” (RTVE, 2015-present), also acquired recently by Netflix, represents another Spanish success story in the fantasy realm.
- ∞ **History.** Closely tied to the first theme, dramas based on historical events are also gaining steam. “Hernán Cortéz” (RTVE/Telemundo, coming in 2018) will be a Spain-Mexico collaboration chronicling the life of one of Europe’s most famous explorers, while RAI’s “Medici” series looks at life in renaissance-era Italy. Sky Italia’s “1992” (Sky Italia, 2015) is a more recent historical fiction work which takes place during the Italian “Clean Hands” investigation in the early 1990s.
- ∞ **Political Intrigue/Corruption.** Another enduring genre, this may have the greatest diversity of examples within the target markets. Netflix’s successful “Marseille” (Netflix, 2016-present) series in France, Italy’s upcoming “Suburra” (Netflix, 2017), and the French/Spanish/Italian super co-production “The Young Pope” (Sky/HBO/Canal+) are all good examples of this genre.

Case studies

The Young Pope – FR/ES/IT, 10x46-60', Fremantle Media, first aired on Sky Atlantic in 2016



The Young Pope tells the story of pontiff Pius XIII, born as American Lenny Belardo, a complex and conflicted character, so conservative in his choices as to border on obscurantism, yet full of compassion towards the weak and poor. He is a man of great power who is stubbornly resistant to the Vatican courtiers, unconcerned with the implications to his authority. During the series,

Belardo faces losing those closest to him and the constant fear of being abandoned, even by his God.

Original series by Sky, HBO, and Canal+, produced by Wildside (Italy) in coproduction with Haut et Court TV (France) and Mediapro (Spain).

www.fremantlemedia.com/the-young-pope

Las Chicas del Cable (Cable Girls) – ES, 8x50', Netflix/Bambú Producciones, 2017



In the race to dominate local premium drama in Spain, it was Netflix that struck first, releasing its first original drama in Spain, *Las Chicas del Cable* (*Cable Girls*) on April 28, 2017. Produced by Madrid-based Bambú, the series launched to Netflix's 100 million subscribers in 190 countries and deals with four young girls working as switchboard operators at Spain's first nationwide telecoms company in the 1920s.

www.bambuproducciones.com/work/las-chicas-del-cable

Marseille – FR, 8x60', Federation Entertainment for Netflix, 2016



Robert Taro (Gerard Depardieu), charismatic mayor of the city for 25 years, has decided to retire in order to dedicate time to his family. But the coming elections will have him face the man he chose as his heir, Lucas Barres (Benoit Magimel), an ambitious youngster aiming high. Season 2 is currently in production. The series is the first French original for Netflix.

www.fedent.com/marseille

Versailles – FR, 10x52', Capa Drama/Incendo/Zodiak Media Group for Canal+, 2015



Versailles, 1667. 28-year-old King Louis XIV of France and Navarre (George Blagden), in a Machiavellian political move, decides to corral his rebellious nobility by imposing a definitive move of the court from Paris to Versailles, his father's former hunting lodge. Trapped by their king's "invitation", the nobles of Paris gradually come to see the castle as a gilded prison, and soon even the humblest courtiers of the king begin to show

their viciousness.

www.capatv.com/en/portfolio-item/versailles

1992 – IT, 10x50', Wildside/Sky Italia, 2015



Set in Rome, Milan and different Italian cities, the TV series offers a thrilling story following six people whose lives are intertwined with the rapidly changing political landscape in the early 1990s, during which Italy was gripped by the Clean Hands investigation into political corruption. The series will be followed by sequel "1993." The series has been favorably compared to House of Cards, The

Sopranos, and The West Wing.

bit.ly/2wZCjNH

I Know Who You Are – ES, drama, 16x70', Filmax/Telecinco, 2017



A compelling crime drama which sees a family tearing itself apart following the disappearance of a loved one. A man ends up in hospital after a car accident. He does not remember his name, but it is soon discovered he is a famous attorney. To make things worse, the police start to suspect him of having murdered his missing niece.

www.filmmaxinternational.com/film/i-know-who-you-are

Medici – IT/GB, 8x50', Lux Vide/RAI, 2016



The series is set in the 15th-century Florence, and the protagonist is Cosimo the Elder who was elected head of the Florentine Republic in 1434. Cosimo has inherited the Bank of Medici from his father Giovanni, who has been mysteriously poisoned. Through various flashbacks (20 years prior), we are introduced to Florence at the time of Giovanni, and to his relationship with his

sons Cosimo and Lorenzo.

www.luxvide.it/en/medici-masters-of-florence-166.html

Zone Blanche – FR/BE, drama, 8x52', Ego Productions/France 2, 2017



A detective series set in a small town completely hemmed in by an impenetrable, mysterious forest. Major Laurène Weiss is the “sheriff” of this little community; she watches over this simultaneously familiar and strange place. By night and day, she endeavours to crack the mysteries of the town, first of all that of her own kidnapping 20 years earlier.

www.ego-productions.com/zone-blanche

Children’s programmes

In an era of global TV, children’s content around the world stands out for being among the most internationalised genres. Many of the most popular children’s programs in the target markets are imports from the UK and USA, notably the hit “Peppa Pig” series from the UK.

As far as the local markets are concerned, the public broadcasters tend to dominate the children’s TV space in all three countries, but particularly France, where France Télévisions spends more money (€27.2 million annually) than the next three players (TF1, Canal+, and the France Télévisions and Lagarde Entertainment-owned Gulli channel) combined.

Children's content, unsurprisingly, tends to be more conducive to shorter formats and online platforms than almost any other genre. In particular we are seeing an increase in short-form shows being released on YouTube, and a move by established broadcasters to leverage online video sharing for kids. France's TF1 launched a children's SVoD service in 2015, TFOUMax, which is aimed toward kids ages 3-12 and today boasts over 400,000 subscribers.

Broadcasters generally are taking a multi-platform approach toward kids' entertainment, with France Télévisions also posting entire episodes of flagship children's TV shows to YouTube. YouTube itself is focused on developing specific offerings for the children's market, with the YouTube KIDS app (essentially a stripped-down version of YouTube) enabling kids to discover online videos in a safe environment.

Below is a summary of current trends in kids' TV, with an indication of relevant case studies in the target markets.

Key trends

- ∞ **Multi-platform.** As noted above, multi-platform content is the way of the future when it comes to reaching a generation of children who have a greater natural fluency with screens and technology than any in history. Second screen content in particular is becoming more common as a way to expand the reach of popular programs. In Spain, the Argentinian-based teen telenovela "Violetta" recently held its own home-based singing competition ("Violetta: Tu Sueño, Tu Música") which invited fans to send in their own videos of them singing.
- ∞ **Action animation.** Action animation continues to be a key genre, with Lego's "Legends of Chima," Dreamworks' "Dragons: Riders of Berk," and Mattel's "Max Steel" all surging into top spots in the target countries in recent years. One related trend alongside action animation is the increasing rise in toy companies getting involved in TV content production, as a strategy for selling merchandise. At MIPCOM 2016, Mattel's chief content officer Catherine Balsam-Schwaber suggested that the toys and games giant was becoming "less of a toy company and more of a story company," a development which has accelerated throughout the industry.
- ∞ **Brands are powerful.** This continues to be true in terms of internationally popular characters and franchises, such as Lego, Teenage Mutant Ninja Turtles, Power Rangers, and many others. The trend also holds when it comes to popular channels. After local children's channels, the Disney Channel, Nickelodeon, and Boing tend to be near the top of the list for kids' viewing across Europe. In Spain and Italy, Boing is the most popular kids channel while in France, France Télévisions remains on top by a wide margin.
- ∞ **Short-form content takes off.** This goes hand-in-hand with the trend toward multi-platform content, and the movement is only continuing to gain strength. The girls' web series "Spacepop" has posted more than 100 three-minute episodes, with nearly 10 million combined views. Many other titles have emerged from other media platforms, starting life as apps or webseries and afterwards finding a ready-made

audience on the TV screen. One recognisable example is that of “Angry Birds,” which was adapted into a short TV cartoon and instantly became one of the top ranging monthly children’s programs in France.

- ∞ **Animation in France, telenovelas in Spain and Italy.** France is one of the biggest animation hubs in Europe, with the children’s market almost completely dominated by animation. While animation takes up the biggest chunk of the kids’ TV landscape across markets, live action youth telenovelas tend to be more popular in Southern Europe, where Colombian import “Chica Vampiro” became one of Italy’s top-viewed series when it was brought to Europe via the Pay TV network Boing.

Case studies

The Avatars – ES, Comedy/ Teen, 52x23’, Portocabo/Disney Channel Italia, 2013



Three fifteen year olds united by their love for music, dream of becoming rock stars. Unfortunately, they have received hundreds of negatives from record companies, always stating the same reason, they’re too young. But everything changes when JP’s sister proposes to create a virtual band: *The Avatars*. Thanks to the web, the band achieves great popularity in no time. But they mustn’t reveal their identity, which

makes them carry on a double life. A Portocabo/Fly Distribuzione TV/Brave Film/Boomerang TV production. Produced in English for international markets, a good example of the globalization trend.

www.portocabo.com/?page_id=2232

Eddie is a Yeti – IT, Animation, 52 x 3’, Mondo TV/Toon Goggles, 2016



Eddie is just your average yeti, living in the glaciers of Alaska, until he ventures out of his isolated wilderness and stumbles upon the quaint town of Winnetka. Eddie befriends 9 year-old Polly, who helps him out of an elaborate bear trap. After this, they became instant byff’s (“best yeti friends forever”) and go on a series of adventures. Co-produced by Italy’s leading animation studio in collaboration with the Toon Goggles SVoD platform. Demonstrates the growing viability of

SVoD-for-Kids as well as the move toward shorter formats.
www.mondotv.it/scheda-singola-eddie-is-a-yeti-new.html

Paprika – FR, Animation, 26 x 30' or 75 x 7' + 11 x 2', Kids 3-6, Xilam/France 5, 2015



The show's heroes are Olivia and her twin, Stan, who uses a wheelchair. "It's our way of saying that being different doesn't mean that you should be excluded from doing what kids do," said Marc du Pontavice, founder of Xilam, the show's producer. "You quickly forget that he's handicapped, because he's such a daredevil." Disney Junior Latin America has picked up the show after it was initially commissioned by France Televisions and Disney Junior EMEA.

www.xilam.com/portfolio/paprika-2/?lang=en

Los Creadores – AR/ES, Transmedia, 26x24' & 26x12', Imira Entertainment, 2017



Argentinian children's TV series that combines animation and real image, in which two brilliant inventors develop a portal to access virtual worlds, which can only be accessed by those who are passionate about creating. The series offers a simultaneous interaction between TV, web, mobile and social networks through transmedia. Complementarily, the show also has its own social network, Aula365 which allows children to access "Creápolis,"

the virtual world of Los Creadores, to continue creating and connecting with other creators.

The show has been picked up in Spain by public broadcaster RTVE. It is being marketed internationally by Barcelona and Madrid-based Imira Entertainment and is a good example of the move toward multi-platform content.

bit.ly/2zfHWcf

Skylanders Academy – US/FR, Animation, 12x24', TeamTO/Netflix, 2016



Based on a video game, Skylanders Academy is an American/French collaboration produced by TeamTO (France) and Activision Blizzard Studios (USA). The first season debuted on Netflix on October 28, 2016, with a second season slated to debut in late 2017. From a merchandising perspective, Skylanders is already a huge franchise, with over \$3 billion in total sales and 250 million toys sold. It is a great example of the growing integration of

video games, toys, and kids' TV, and an interesting case study in the possibilities of partnership between animation producers and various non-conventional players.

bit.ly/2guRbNT

Peppa Pig – UK, Preschool Animation, 218x5', Various producers and distributors involved



Peppa is a loveable little pig who lives with her family, spending her time on playing games, dressing up, days out and jumping in muddy puddles. Her adventures always end happily with loud snorts of laughter. Peppa Pig is currently available in more than 180 territories, including France, Spain, and Italy where it airs on the public channels in all three countries (in Italy it is also on Disney's local affiliate). An excellent example of the internationalisation of branded

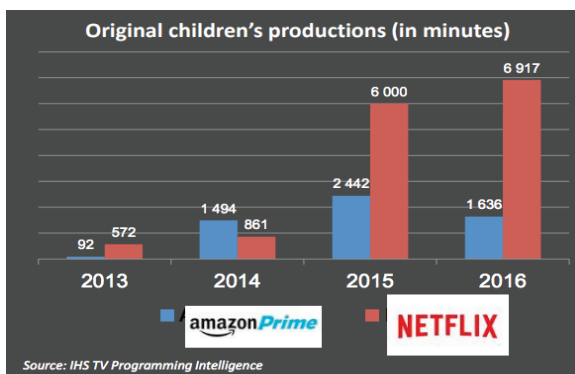
children's TV, where hit series can penetrate to many different markets simultaneously. It also again shows the rise of short-form children's content, as each episode is only 5 minutes in length.

www.rtve.es/infantil/series/peppa-pig

VoD platforms in children's entertainment

As noted throughout the section above, there are a range of SVoD platforms active in kids' entertainment, and this has generally been an area where broadcasters are more open to experimentation. As far as the major players, original children's production has been a major strategic imperative for Netflix, as seen below:

YouTube, meanwhile, rolled out the YouTube KIDS app in 2015, a dedicated offering for children. The app allows children to browse videos in a safe environment, but also providing a range of opportunities for content creators to reach young audiences.



Kids' videos are among the most watched in YouTube history. "Masha and the Bear," a Russian animated series, has been viewed more than 2.3 billion times. From a merchandising perspective, toy demonstrations and "plastic egg videos," where adults pull various toys out of a plastic egg, are also extremely popular. In addition to surprises being fun, many of the videos are basically toy commercials. This video (youtu.be/I8vzbluvhoo) of a person pressing sparkly Play-Doh onto Disney princess figurines has been viewed 550 million times.)

YouTube KIDS lets children tap into a whole internet's worth of plastic eggs and perceived power. They get to choose what they watch. Kids love being in charge, even in superficial ways. Content producers and toy companies, meanwhile, are happy to have another platform for engagement.

Online platforms & cross media content

The internet plays a major role in the broadcast markets of the target countries, with IPTV dominating the Pay TV landscape in France and Spain and SVoD expanding rapidly in each of the three markets.

Perhaps nowhere is the influence of the internet more evident, however, than in the growing prevalence of YouTube, Dailymotion, and other online video platforms as a credible source of content, viewers, and advertising revenues. Spain's most popular YouTube channel, elrubiusOMG, has nearly 25 million subscribers and has been viewed more than 5 billion times. To put these numbers into perspective, Netflix is now the second-most prevalent SVoD option in Spain and still has less than 550,000 Spanish subscribers. According to the social media analytics tracker SocialBlade, the elrubiusOMG channel earns up to €440,000 in a given month.

YouTube is particularly big in Spain, where each of the Top 10 YouTube channels has more subscribers than the #1 most subscribed channel in Germany, which has twice Spain's population. Each of Spain's top three YouTube channels also have more subscribers than the top channels in either France or Italy, which too have larger populations.

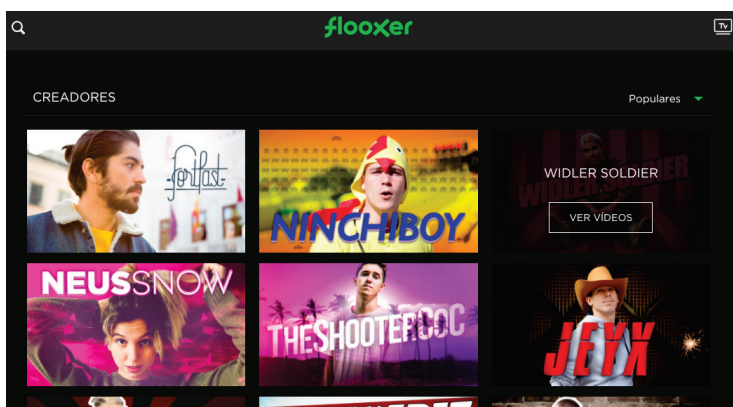
This section explores the general blurring of the lines between online content and traditional broadcaster strategies, focusing on emerging opportunities in the marketplace and on what key players in the market are doing to adapt and take advantage. While the emergence of YouTube is only one piece of the OTT puzzle, the expansion – and growing monetization – of the platform stands as a bright line indicator of the ways in which digital transformation has changed how viewers interact with video content. Although this shift is still mostly limited to younger audiences, the most notable impact going forward may be on the nature and form of consumer video content itself.

OTT in the target countries: Trends and overview

Broadly speaking, the world of “Over-The-Top” (OTT) content incorporates any and all media delivered via the internet without the involvement of a traditional intermediary (such as broadcast TV or radio). This encompasses SVoD, which is explored in more detail in the Video-on-Demand section later in the report, but it also refers to the vast landscape of internet content available for free and primarily created outside the bounds of traditional broadcast production. It is on this latter aspect of OTT that we focus here – particularly the short-form, decentralised, primarily advertising-funded (as opposed to subscription-based) video content which has been popularised by the likes of YouTube and is now being leveraged across an increasing array of additional platforms, with many traditional broadcast players in the mix.

One area where broadcasters have quietly become more active is in so-called Multi-Channel Networks (MCNs), which function as de-facto managers for creators on YouTube and other digital content platforms by taking an interest in the creator's channel in exchange for support with licensing and advertising, among other activities focused on monetizing the channel's content.

2013 to 2016 saw a flurry of acquisitions of MCNs by leading broadcasters and Pay TV players across Europe. As discussed in our previous report on the German market, Germany's top two commercial broadcasters are both majority owners of MCNs – ProSiebenSat.1 is a 70 percent owner of Studio71, which represents more than 1,200 online creator channels, while RTL Group has a direct majority stake in BroadbandTV as well as an indirect stake in the Berlin-based Divimove MCN agency through its ownership of Fremantle Media. In France, Canal+ owns 60 percent of Studio Bagel, a YouTube-based studio focused on internet sketch comedy, while public broadcaster France Télévisions set up its MCN francetv agency specifically to manage and distribute content on YouTube, Dailymotion, and other online platforms. In 2015 MCN francetv secured the rights to distribute a range of popular children's titles from the Belgium-based producer Studio 100 Group for free online. Spain's Atresmedia, meanwhile, has launched its own free online video platform Flooxer, which distributes videos from independent creators in a similar fashion to an MCN but via a dedicated video service. Atresmedia also uses Flooxer to promote its own content as well as clips from the linear programming on its two main networks (Antena 3 and La Sexta). Flooxer also has a YouTube channel but the YouTube clips are primarily intended to drive traffic back to the Flooxer website.



Flooxer Creator Dashboard (Atresmedia, www.flooxer.com/creadores/)

Of the three markets surveyed, Italy's leading broadcasters have been the slowest to embrace online video sharing, with no major investments in MCNs/independent creators and a relatively light footprint even on each broadcaster's own branded YouTube channels. This is particularly interesting considering Sky's online presence in the UK, which is much more advanced than that of its Sky Italia counterpart. While YouTube and other online video platforms remain important in Italy, there seems to be less evidence that the traditional broadcasters have sought to leverage the potential of these platforms in the way existing players have in other key European markets.

By the numbers: YouTube in the Target Markets

SPAIN			
<i>Channel</i>	<i>#Subs</i>	<i>Genre</i>	<i>MCN?</i>
elrubiusOMG	24,981,973	Entertainment and Gaming	Mixicom
VEGETTA777	18,674,379	Gaming	Mixicom
TheWillyrex	12,189,203	Gaming	Mixicom
iTownGamePlay	8,681,239	Gaming	BroadbandTV
Willyrex	8,403,328	Gaming	Mixicom
aLexBY11	6,953,287	Gaming	Mixicom
luzugames	6,949,723	Gaming	Maker Studios
Toys and Funny Kids Surprise Eggs	6,936,150	Entertainment and Children's	n/a
ExpCaseros	6,748,891	How-to	Mixicom
El Rincón De Giorgio	6,740,866	Entertainment	Studio71
FRANCE			
<i>Channel</i>	<i>#Subs</i>	<i>Genre</i>	<i>MCN?</i>
Cyprien	11,060,256	Comedy	Mixicom
NORMAN FAIT DES VIDÉOS	9,365,636	Comedy	Mixicom
SQUEEZIE	8,454,146	Comedy	Mixicom
Rémi GAILLARD	6,316,903	Comedy	n/a
CyprienGaming	4,432,531	Gaming	Mixicom
TheSoundYouNeed	4,171,967	Music	AEI
Mister V	3,960,344	Comedy	EndemolBeyondFR
Le Rire Jaune	3,821,733	Comedy	n/a
MaitreGimsVEVO	3,632,320	Music	vevo
Natoo	3,527,439	Comedy	Mixicom
ITALY			
<i>Channel</i>	<i>#Subs</i>	<i>Genre</i>	<i>MCN?</i>
Marzia	7,080,950	People/Lifestyle	Maker Studios
Doc Tops	5,473,179	Entertainment	n/a
→ FavjiTV	3,856,932	Gaming	Maker Studios
iPantellas	2,810,172	Entertainment	Maker Studios
St3pNy	2,630,955	Gaming	id0iPcHVVMh4ASTXBUYkOA
pulcinopiotv	2,497,388	Music	Believe Distribution Services
ilvostrocaroDexter	2,297,230	Music	Maker Studios
Anima	2,024,651	Gaming	id0iPcHVVMh4ASTXBUYkOA
Warner Music Italy	1,983,439	Music	n/a
SurrealPower	1,947,748	Gaming	id0iPcHVVMh4ASTXBUYkOA

As demonstrated by the subscriber numbers above, YouTube and other video sharing platforms will continue to be a critical part of the media picture as more content moves online and as younger generations become more influential. The emergence of YouTube stars and their popular channels has changed the way that younger audiences in particular consume video for entertainment, while opening up a new frontier in broadcasting as brands, content providers, and advertisers seek to reach those audiences.

Nearly all of the leading YouTube channels in the target countries are already managed by third parties (the MCNs), many of whom are beginning to consider new ways of monetizing their creative material. While advertising will continue to be a factor, more and more of the MCNs, as well as YouTube itself (via YouTube Red) are looking at ways to leverage the popularity of YouTube content creators into original scripted material.

While we may be in a “golden age of television” as it relates to traditional, serialised content, it is also true that the vast majority of videos produced and consumed on the internet are a) short-form; and b) made by regular people. This is the essence of the move by traditional broadcast players into the management of content creator networks across YouTube and other sharing platforms – it is an investment into what the broadcasters see as a key part of their commercial future.

With AVoD revenues across Europe forecast to continue exceeding those from SVoD through 2020, we are likely to see a further emphasis on short-form video sharing going forward, both as a compliment to longer-form series content and as a standalone strategy to capitalise on other segments of the market.

Viewpoint: YouTube’s Growing Mainstream Value

“YouTube stands out in the online video landscape in terms of its sheer volume of consumption, with 90 million videos and 2.05 trillion views on the platform in 2015. While broadcasters who are acquiring YouTube multichannel networks are attracted to these numbers, they do not seek to convert this consumption into advertising dollars alone. Increasingly, they see YouTube as a pool for young, on-screen talent with a proven track record of attracting audiences. Innovative broadcasters groom this talent and move YouTube stars up the funnel to host dedicated shows on linear TV, particularly in comedy and lifestyle, in a bid to rejuvenate its appeal.”

-Daniel Knapp, Director of Advertising Research, IHS Technology

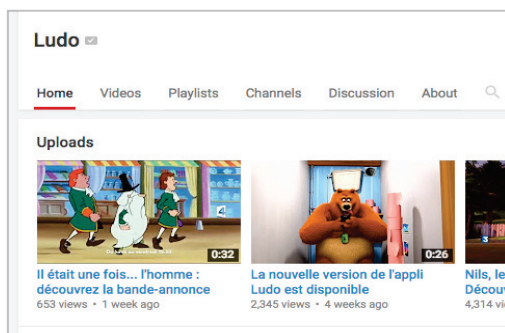
The case studies below are intended to offer some initial insight into what a handful of key broadcast players in the target markets are doing in this space, and what it might mean for prospective international production partners.

OTT case studies

∞ **France Télévisions takes its children's content online**

French public broadcaster France Télévisions makes nearly all of its children's content available online via YouTube, using own-branded channels (the two primary channels are called Ludo and Zouzous).

The current offering across the two broadcaster-owned YouTube channels includes some 1,500 videos representing more than 230 hours of kids programming. Ludo and Zouzous also aggregate relevant content from the broader multi-channel network managed by France Télévisions. This represents a clear example of broadcasters leveraging free video sharing platforms as a means of remaining competitive with a key audience. Thus far it has paid off: the channels together generate close to 2 million views per month.



bit.ly/2yeGRTD

∞ **AwesomenessTV goes global**

One the better examples of YouTube's disruptive impact turning mainstream is that of California-based AwesomenessTV, a YouTube channel founded by a pair of former American teen movie celebrities in 2012 which reached 1 billion views in less than 2 months. The channel, which focuses primarily on teen's and children's content, grew quickly into an MCN managing over 70,000 YouTube creators, and was bought out within a year by DreamWorks Animation for \$33 million. Today the company is jointly owned by DreamWorks and Verizon Hearst Media Partners, an alliance between one of America's oldest publishers and its most ubiquitous telecom provider.



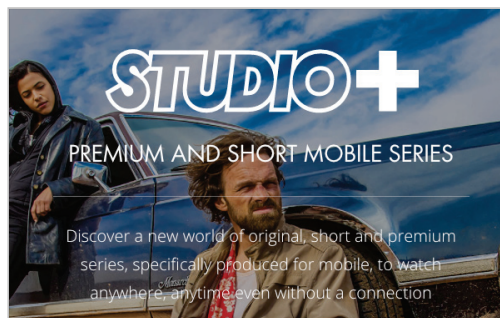
bit.ly/21d5dqe

Last year, the Dutch production company Endemol Shine Group reached a deal to roll out local versions of AwesomenessTV in five international markets including France and Spain. Although Awesomeness FR and Awesomeness ES are still gaining traction after one year, the French and Spanish channels each boast more than 150,000 subscribers along with a combined 40 million views.

Most importantly from a production perspective, the entry of AwesomenessTV into the European market creates another key player with deep pockets who is actively seeking to invest in original youth content targeted toward digital platforms.

∞ **Vivendi bets on short-form content**

In late 2016 Vivendi, the parent company of Canal+ in France and a minority owner of Italy's Mediaset, made waves when it rolled out Studio+, a production label and video service focused on producing premium short-form content for mobile viewing.



www.studio.plus

The service, which is being debuted in partnership with major telecom providers across Latin America, attempts to leverage the growing number of viewers for whom the smartphone is the first screen. With Studio+, Vivendi is hoping to fill what it sees as a gap in the market for premium series content targeted toward short format and mobile device viewing. The standard series format will be 10 episodes each of 10 minutes in length, with a new series released each week on the platform and shorter gaps between seasons.

Vivendi's short-form content push

"Smartphones are the number one device for consuming content. We have a great opportunity to create high-quality, mobile-ready entertainment largely not available today on the market and that is more compelling and attractive to new audiences."

-Dominique Delport, Chairman, Vivendi

Through the launch of its platform, Vivendi is betting on the idea that the entire process of creating and consuming high-end video will continue to be accelerated by mobile technology. That this investment has been initiated by a major media and broadcast holding company, as opposed to a disruptive startup, is particularly notable. Vivendi is currently rolling out Studio+ gradually around the world, but has stated that France and Italy will be its key markets in Europe in the early going.

∞ **YouTube as a compliment to linear TV**

While the use of catch-up libraries available via IPTV boxes, SVoD platforms, and broadcaster websites has been established for some time, more broadcasters are now also looking to YouTube to reinforce traditional content offerings. In addition to showing trailers, promotional videos, and posting catch-up segments on their official YouTube channels, leading broadcasters in both France (France Télévisions, TF1, Canal+) and Spain (RTVE and Atresmedia) are also investing in additional original content on YouTube aimed at supplementing the full-length TV programming available on their linear networks.



www.youtube.com/user/rtve/videos

The growth of original content on broadcaster YouTube channels confirms that, while multi-figure investments in MCNs may generate headlines, there is also significant room at a more basic level for broadcasters to leverage free video sharing without needing to buy up existing social media empires. While such efforts may not appear as innovative or cutting-edge as Vivendi's bid to build out an entirely new short-form content service, they demonstrate that there are many possible uses of free video platforms which international partners should consider when approaching broadcasters in the target countries.

With YouTube and other platforms playing an increasingly significant role for broadcasters when it comes to advertising revenues, talent acquisition, and other potential revenue streams, it would not be a surprise to also see the platform continue growing in importance as a sort of "testing ground" for new content that broadcasters can roll out first online before committing to a series-length production. From an international market entry perspective, approaching broadcasters with an online "teaser" proposition lowers the risk from the broadcaster's point of view and could be a backdoor into trialling new content that might otherwise face higher barriers.

One exception to the rule here is Italy, where none of the broadcasters are using their YouTube channels for original content and the overall presence on YouTube and other video sharing platforms seems to be more limited. Additionally, across all three markets the public and free-to-air commercial broadcasters tend to have a more active YouTube presence than the Pay TV channels, who may be more concerned about cannibalizing their subscription service with too much free content.

Emerging strategies

Certainly, the OTT approaches and case studies outlined in the previous section can all be seen as “emerging strategies” for capitalising on one aspect of the changing broadcast market in Europe. Short-form is the next frontier in high-end content, as well as an increasingly important companion to series-length programming. Even the homemade gaming videos and informal stream-of-consciousness video blogs (vlogs) popularised by YouTube and other social media celebrities are starting to become relevant from a broadcaster perspective, as sources of talent, ideas, and new revenue streams.

The growing impact of short-form OTT is important not only because it’s now fully on the radar of traditional broadcasters, but because it is also leading to the creation of new players in the market for scripted, series-length formats. We reported on Facebook’s entry into the original content market in our earlier German broadcast study, a project which is now fully moving forward, having just launched in the US in August (more on this below). YouTube Red, meanwhile, is also moving to further establish itself in the world of original SVoD production, having just committed to a spin-off series of the classic “Karate Kid” franchise.

Altogether, there is something of a positive feedback loop beginning to emerge in the market, where the success of SVoD, OTT, and on-demand formats have pushed traditional broadcasters to increase their investment in these domains, which has spurred new players to try their luck, which is further increasing investment on all sides as competition grows and everyone tries to keep up. Today anyone with a large enough user base and access to a content platform can act as a producer and de-facto broadcaster, which is one reason why the Multi-Channel Networks on YouTube are now also beginning to focus increasingly on leveraging their market position to become more like traditional production studios. Just as the market for high-end scripted series has become more competitive, boosting production values and creating unprecedented amounts of premium series content, the parallel development of massive user bases on online video sharing platforms has given the big players in this space a reason to believe that they too can be successful with other formats.

With more players investing more money in more content than ever before, it is important to be aware of the possibilities for collaboration and partnership that may exist outside of the scope of the “traditional” broadcast system. At the same time, it is useful to understand how the more established players in the market are responding to new pressures. The case studies below examine both sides of this equation, with a focus on where current emerging strategies might soon yield new production opportunities.

Case studies

∞ **MCNs move into show running**

YouTube's Multi-Channel Networks, one of the more visible commercial consequences of the revolution in free user-created content, are becoming increasingly aware of their full-scale media potential. More and more MCNs, recognising the limitations of their creator networks as sources for branding and advertising dollars alone, are turning to a studio model in an attempt to leverage their talent and audiences for more traditional film and TV production.

MCNs: The Newest Producers

"The MCN is not our entire business. It's how we identify, develop, grow, partner with and monetize creative talent. How we apply that is where it gets interesting."

-George Strompolos, Founder and CEO, Fullscreen Media

AwesomenessTV, profiled in the previous section, has already produced TV shows for Netflix and for the US-based streaming service Go90, as well as a 20-episode sketch comedy series for the American children's network Nickelodeon and a successful feature-length movie via its "Awesomeness Films" division. Fullscreen Media, known for being among the biggest MCNs, has built its own SVoD app while also selling series and film content to Netflix and YouTube Red. Defy Media has a programming slate which includes more than 75 shows, a 100 percent increase in less than two years. Studio71, meanwhile, recently raised 53 million euros which it will reportedly use to fund more high-quality shows and movies developed in partnership with its creator network.

The emergence of MCNs-as-producers creates an additional stream of potential partners when it comes to international co-production. Canal+ in France has been a major buyer of TV content from MCNs, which can use their established position to develop good relationships with broadcasters and SVoD platforms across multiple markets. When it comes to finding less conventional production partners within the target countries, the list of leading MCNs could be a good place to begin.

∞ **YouTube Red tries to establish a foothold**

In late 2015 YouTube announced the creation of YouTube Red, a subscription-supported, ad-free service that would also be a hub for original content featuring homegrown YouTube stars.

Although subscriber numbers have so far been underwhelming, YouTube is increasing its content investment in Red, with plans to produce 40 original scripted series by the end of 2017, a boost from 27 in its first full year. Red will also expand the scope of its scripted content, aiming for a mix of "50 percent homegrown YouTube stars and 50 percent programming that isn't endemic to the platform." Part of the motivation for diversifying its content offering is to reach additional demographics who are not committed enough to pay for YouTube content. Of the 250 million views that YouTube Red's original series have generated to date, the vast

majority have been from users under the age of 18. YouTube's much-publicised investment in the "Karate Kid" franchise, as well as additional ad-supported content featuring American celebrities like Kevin Hart, Katy Perry, and Ellen DeGeneres, is seen as an attempt to widen the appeal of Red.

The flip side of the younger skew in YouTube Red's demographic is that it could be an increasingly relevant player when it comes to original children's series. Given the amount of money at Google's disposal and the willingness to spend that money in an attempt to build a credible competitor to Netflix, Amazon, and other SVoD leaders, international producers should keep an eye on the continued development of Red, which Google/YouTube hopes to launch in Europe by the end of 2017.

∞ **Facebook Watch launches in the US**

Earlier this year, Facebook made waves as it became increasingly clear that the social media giant was in the process of incorporating a full-scale video service into its platform. As recently as May 2017, Facebook was hiring for a producer and software engineer focused on original film and TV content, but not saying much else about its ambitions beyond CEO Mark Zuckerberg's declarations that he wants Facebook to evolve into a "video-first" company.

Just three months later, Facebook has unveiled its first move into the TV landscape, with a redesigned Watch tab which will feature a range of television and video content including live sporting events, licensed programming, original scripted series, reality shows, and other material from independent creators using a version of Facebook Live. Facebook has already signed deals with a slew of major media companies including BuzzFeed, Vox, ATTN, and Group Nine Media to produce scripted as well as unscripted series for Watch, while licensing content focused on topics ranging from nature to parenting.

The next big thing?

"We think Watch will be home to a wide range of shows, from reality to comedy to live sports. To help inspire creators and seed the ecosystem, we've also funded some shows that are examples of community-oriented and episodic video series."

-Daniel Danker, Director of Product, Facebook Watch

Although the rollout of Facebook Watch has been limited for the time being to a select group of users in the US, many observers see it as the beginning of a more comprehensive move into TV production, consumption, and distribution. Facebook plans to use its content algorithms and vast amounts of user data to make personalised video recommendations to viewers, while also encouraging real-time reaction over its platform while people watch shows together and interact with hosts.

As Facebook expands its push into the broadcast landscape, it would appear to be targeting both ends of the emerging content picture – simultaneously developing premium series which will compete with the established SVoD platforms, while also

licensing everything from nature shows to live sports and providing a space for organic creator content to rival YouTube and other video sharing websites.

The development of Facebook Watch will be interesting to follow for its own potential growth and evolution, but also to see whether it has an impact in eventually taking market share from existing broadcaster-launched video platforms like Flooxer and Studio+, who in many cases are going after the same audiences in their respective markets. Should Facebook Watch catch on internationally, it would surely result in another round of disruptive internet competition for local broadcast companies around the world.

Nearly one-third of the world's population visits Facebook at least once a month, and so anything the company does can have a correspondingly global impact. Regardless of what the long-term future holds for Facebook Watch, it would appear that the Watch platform will soon represent yet another source of major content investment in key television consumer markets, including Western Europe.

∞ ***Globalisation on the small screen***

In our Germany study, we reported on the growing trend toward European co-production as a means not just of developing interesting, cross-border storylines, but also of financing increasingly expensive drama by bringing partners from different markets to the table. One obvious Nordic expression of this trend is "The Paradise," the YLE-Mediapro collaboration where a series of crimes upends a long-established Finnish community on Spain's Costa del Sol. Another is "Midnight Sun," a thriller where a French police officer must travel to a remote town in Northern Sweden to investigate the murder of a French citizen.

Just as the imperative to develop compelling stories with higher budgets drives more cross-border collaboration on the supply side, the potential to sell high-value TV to increasingly global audiences is also bringing new partners together on the demand side. Co-productions between Europe and Latin America are currently at an all-time high, and while much of the action has been on the film front so far, transatlantic TV production is getting an increasing amount of attention, most recently with the inaugural Conecta Fiction event in Spain this past June, which was dedicated almost entirely to international production and collaboration.

Netflix, unsurprisingly, has been a major player so far in building co-production bridges between Latin America and Europe, with an apparent focus on collaborating with Spanish broadcast companies to develop content it can then offer in Spanish-speaking countries across the Atlantic. Argentina's Underground Producciones and Spain's Boomerang TV Group, meanwhile, unveiled their partnership at Conecta for "El Extranjero," a co-production on a famous Spanish tennis player suspected of murdering a young Argentinian socialite, which adapts many of the typical Nordic Noir motifs to fit within a Spanish/Latin American context.

Europe and LatAm get together

“The benefits of co-production are a clear marker here: pooling financial resources, better chances of entering each other’s markets, risk reduction and more government incentives and subsidies.”

-Emily Wright, KFTV

Far from being confined to the linguistic and cultural linkages between Spain and most of Latin America, recent collaborations in film and TV also include joint efforts between Sweden, Colombia and Denmark; France and Colombia; and a 2014 effort incorporating partners in Germany, Argentina, Colombia, France and Poland. As international producers look to attract the attention of major global players like Netflix and Amazon, while also pitching broadcasters in Spain and producers in other European countries, the emerging Europe-Latin America connection is becoming a not-so-secret weapon in this quest.

∞ Pay TV players expand the push into production

Another trend highlighted in our Germany report which is also relevant to France, Spain, and Italy is the emergence of established Pay TV companies as producers and distributors of premium originals.

Pay TV across all markets has historically been about providing access to premium channels, but this has changed in the Age of Netflix to an increasingly customised focus on producing and licensing premium content a-la-carte. With more competition in the market for subscription-based services, and the emergence of original series as a key part of the SVoD value proposition, Pay TV must adapt to survive, even as it has seen its overall subscriber numbers grow in recent years.

Sky Europe MD on the importance of original series for Pay TV

“As a retention tool, in my view it’s the most powerful weapon we have. That is why for us returning series are so important. Of our 11 dramas this year, I think five of them are returning. That is a sign of the maturity of our investment strategy. If we can get our customers engaged in a series and then keep bringing it back, we build a relationship between the TV show and the customer.”

-Gary Davey, Managing Director Content, Sky Europe

Italy’s Sky Italia, Spain’s Movistar+, and France’s Canal+ (primarily via its production subsidiary Studiocanal) are all making significant investments in original content series as a strategy for attracting more subscribers to their respective platforms, as well as offering a credible SVoD alternative to Netflix and Amazon Prime.

In Sky’s case, the investment is pan-European, with the Pay TV giant planning to spend some €600 million on European originals in 2017. Movistar+, meanwhile, is investing €70 million annually in original content in Spain alone.

For comparison, Netflix has invested €1.5 billion to date in European originals, co-productions, and licensed series, but over a five-year period since 2012. Pay TV may be playing catch-up when it comes to developing high-end original series, but it is starting to bring real money to the table.

With Pay TV providers in a fierce competition with upstart SVoD rivals for subscriptions and viewer loyalties, now is an ideal moment to present the likes of Sky, Movistar, Canal+, and others with unique and compelling content which they can use to differentiate themselves and attract new subscribers. The Pay TVs have the money to spend and the motivation to spend it. They should be on a par with Netflix and the traditional broadcasters as top co-production targets.

Video on Demand (VoD)


It is becoming increasingly archaic to consider Video-on-Demand as an “up-and-coming” trend separate from that of the mainstream broadcast industry itself. Indeed, as we have shown so far throughout the report, VoD has become fundamentally interwoven into the way television is produced, presented, and consumed around the world. Nowhere is this clearer than in the growing interest of traditional broadcasters in leveraging YouTube and short-form content to reach their target audiences.

Our focus here, then, is less about making redundant proclamations regarding the clear market impacts of streaming and on-demand viewing, and more about trying to contextualise where the various forms of VoD fit into the overall broadcast landscape within each target country.

The section below focuses on key VoD figures by country, while attempting to give an overview of the key players in each market and the impact of Netflix and Amazon Prime as both increase their global broadcast presence.

We also offer an indication of which original SVoD series are being produced in the target markets, as well as a sense of which programs are popular, and how the most popular SVoD content compares with its counterparts on linear TV.

Market figures

 Although France's SVoD market has been slower to develop than other Northern European countries, it remains ahead of Spain and Italy in terms of both subscribers and revenues. Overall, nearly half of the country's internet users (49.7%) and 38.7% of the overall population will access VoD services at least once a month, according to the most recent forecast of digital video usage in France by the industry research firm eMarketer. This includes free VoD services like YouTube, which account for the majority of total OTT/VoD usage. According to the same study, France has approximately 10 million SVoD subscribers, representing just over a third of total VoD users.



Notorious historically for its reluctance to pay for TV services, the recent growth of the Spanish Pay TV market has mirrored a similar rise in the number of Spanish SVoD subscribers, which were estimated to be between 12% and 15% of total TV households as of November 2016. Untangling these numbers from the amount of Pay TV subscribers gets a bit difficult, as Spain's number one SVoD service is connected with its number one Pay TV provider (Movistar+). In raw numbers, Netflix doubled its Spanish customer base from Q1 to Q2 2017, and is now the second-leading Pay TV service in the country with some 540,000 total subscribers. Although 85% of Spanish households still do not access paid television services, approximately 40% report accessing free audiovisual content on demand at least once a week, according to Spanish government figures.



Of the three markets surveyed, Italy is the laggard when it comes to both VoD and SVoD penetration, with only a third of Italians accessing online streaming services of any variety and just 2 million SVoD subscriptions in the entire country, which is nearly the size of France in terms of total population. The market, like its counterparts, is growing quickly – having started 2016 at just 700,000 SVoD subscriptions. Italy, however, is near the bottom of the European Union when it comes to digital fluency and this would appear to extend to its online streaming landscape. Netflix is thought to have approximately 280,000 subscribers in Italy.

Key players and leading platforms by country

The SVoD landscape in the target countries tends to follow a formula increasingly common across other markets: an initially crowded landscape of mostly homegrown providers which eventually gets upended by Netflix, Amazon Prime, and other international services, who then consolidate their market share and increasingly become the key players, sharing the market with only the most well-established local competition (which tends in most cases to be affiliated with major Pay TV providers).

It is important to note that all three of these markets remain very much in flux – although Netflix has been active since 2015, Amazon Prime only launched in Spain and Italy in late 2016, with much-anticipated HBO España rolling out in Spain around the same time.

Another key feature of the target markets, particularly when compared with Germany and the UK, is that the prevalence of bundled services and IPTV in the Pay TV landscape makes it somewhat difficult to define who and what exactly should be considered a “true” SVoD platform. Companies like Orange and Vodafone offer a VoD option with their set-top service, and access to a range of premium films and series. For the customer, the experience is essentially the same as having a Netflix account (albeit with different titles), however the

service is coming via Pay TV. Likewise, the Movistar Go service is available for free to all Movistar+ Pay TV subscribers in Spain.

*Table 6: Leading Pay-VoD Platforms by Country**

Country	Leading SVoD providers
France	Amazon Prime, Netflix, CanalPlay, MyTF1VoD, Orange TV
Spain	Movistar Go, Netflix, Yomvi (owned by Movistar), Wuaki, Orange TV, Vodafone TV
Italy	Now TV (Sky Italia), Netflix, Infinity (Mediaset), TIMvision (Telecom Italia)

**Note: Platforms are listed in order based on reported popularity. Exact subscriber/market share numbers have been omitted, as they were not available for all platforms*

For the purposes of analysis, the table above groups Netflix and the various Pay TV-enabled SVoD services together under one umbrella. Given the prevalence of Pay TV-affiliated services in the list, the growing importance of Netflix and Amazon within the SVoD “pure play” category is clear. Additional relevant players include Now TV, which while affiliated with Sky is also being offered as a standalone service across Europe, Wuaki (owned by the Japanese e-commerce giant Rakuten), and France’s MyTF1VoD, which was one of the first VoD platforms offered by a free-to-air broadcaster in Europe but still focuses mostly on film.

Wuaki will be an interesting platform to watch going forward – it plans to rebrand to Rakuten.tv, at the same time as Rakuten is set to begin a four-year title football sponsorship with FC Barcelona. Rakuten reportedly is planning to invest in original content for its platform to compete with Netflix and Amazon, with plans to release its first film by the end of this year. Wuaki is available across Europe but Spain has historically been the platform’s strongest market.

New services entering the market within the past twelve months include HBO España in Spain, Amazon Prime in Spain and Italy, Vodafone TV in Italy, and a yet-to-launch platform in France from public broadcaster France Télévisions which is scheduled to roll out in Fall 2017 and will focus on promoting original French language content. Of the platforms listed, all are now investing in their own series content with the exception of Vodafone and Orange, who tend to focus on licensing titles from the bigger players (Vodafone has a deal with both Netflix and HBO España, while Orange distributes select Canal+ content to its subscribers).

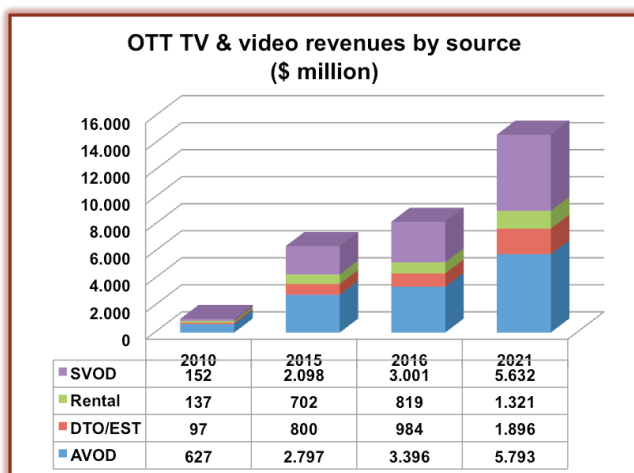
In-focus: Netflix and Amazon battle in France

Despite the recent promising numbers for Netflix in France, some observers still give Amazon Prime the edge. According to Variety, Amazon can count approximately 2 million French subscribers to its Prime Video service, and is considered to have built stronger relationships with local industry figures and institutions like the National Film Board and Unifrance. Although both institutions focus on cinema rather than TV, it is a sign of the ways in which Amazon has thus far worked harder to localise itself in the French market than Netflix, which is seen to be playing catch-up when it comes to building relationships in France.

SVoD, TVoD, AVoD breakdown

Although SVoD subscribers and revenues are growing in each market, advertiser-funded “free-to-air” video streaming continues to account for the biggest share of the Video-on-Demand picture in all three target countries. As discussed above, so-called AVoD users in each of the target markets far exceed the number of people paying for video streaming. This is borne out in revenue figures from across Western Europe, which show AVoD remaining roughly on par with SVoD in terms of total revenues, with that trend projected to continue through 2020. Given the importance of AVoD not just in terms of users but also financially, it should remain on the radar, particularly as short-form content becomes more popular and broadcasters look to other forms of OTT apart from subscription-based services in order to attract new viewers.

Table 7: OTT revenues by source: Western Europe 2010-2020



Source: www.broadbandtvnews.com/2016/07/13/western-european-ott-revenues-to-double

TVoD, while not shown fully above, remains the smallest piece of the VoD puzzle in the target countries (as well as across Europe). In addition to its relatively minor role compared with SVoD and AVoD, it tends to focus more on films than on TV series since it is based around one-off transactions rather than a longer-term subscription. Leading TVoD providers include the likes of Google Play and iTunes/Apple TV, as well as scattered local competition in each market. TVoD platforms don't tend to be investors in original series content.

Relevant VoD programming by country

One commonality of the three target markets is that localised content tends to be an important part of convincing audiences to pay for TV. In France, local content requirements are statutory, at least in principle (although they do not apply to Netflix since it is headquartered elsewhere). In Spain and Italy, although many (dubbed-over) American TV series are popular on the free-to-air channels, one reason which has been given for the slow take-up of international SVoD services is a lack of local material.

More so than in other large markets like Germany, which will not air its first locally-developed Netflix production until later this year, Netflix has made a commitment to local Spanish content as a strategy for gaining more subscribers in Spain. “La Chicas del Cable” (Eng: “Cable Girls”), the aforementioned drama about four young girls working as switchboard operators at Spain’s first nationwide telecoms company in Madrid during the 1920s, was released in April and has been a hit success particularly on social media. “La Catedral del Mar” (“Cathedral of the Sea”), meanwhile, was a co-production between Netflix and leading free-to-air broadcaster Atresmedia, which will be shown on the Antena 3 linear channel before migrating to Netflix following the end of Atresmedia’s negotiated TV window. Netflix is employing a similar strategy with the successful “El Ministerio del Tiempo” (“The Department of Time”) fantasy series, which has aired on RTVE’s flagship La 1 channel since 2015. Following the conclusion of this year’s 13-episode Season 3 on La 1, the show will also become available to Netflix subscribers around the world.

Surely, a big reason for Netflix’s approach in Spain relates to the ability to leverage local Spanish-language content around the Spanish-speaking world. Still, it is a relevant trend which should be noted when it comes to developing content ideas for the Spanish market. Netflix’s strategy has already paid immediate dividends within Spain’s domestic market, with the release period of “Cable Girls” coinciding with the doubling of Netflix’s Spanish subscriber base noted earlier.

Original SVoD content in France, Spain, Italy

When Netflix releases “Suburra,” its first Italian-language original series later this year, it will have successfully produced original local content in all three target countries. In addition to the three shows mentioned above for Spain, “Marseille” and the sci-fi drama “Osmosis” (coming soon) represent Netflix’s key production activities in the French market so far. Like Spain, Netflix has also focused on leveraging successful French TV programs for its global audiences, mainly pulling content from the likes of arte, TF1, and Canal+.

As noted earlier, Sky is also making a big investment in drama, having co-produced “The Young Pope” with Canal+ and HBO, as well as the “1992” series (alongside its recently released sequel “1993”), “Gomorrah,” and “ZeroZeroZero,” a chronicle of the global cocaine trade set to release in 2018.

Amazon Prime, despite its impressive subscriber numbers in France, has yet to produce a

French original, and has only picked up two local French programs to date (TF1's "Crossing Lines" and Canal+'s "The Bureau"). Generally speaking, Amazon appears to be focusing more on European film than TV for the time being, at least in the French market. After launching with great anticipation in Spain last year, both Amazon and HBO España are still feeling out the Spanish market, although each are expected to begin producing original series there soon. Amazon has yet to produce in Italy.

Sky and Movistar+ are where the lines blur a bit between SVoD and Pay TV. Yet with Movistar releasing four original series by the end of 2017 (all of which have sold internationally), it is also becoming a bigger player in original content series intended largely for an on-demand audience.

Overall it is somewhat difficult to assess the current state of affairs in original production by SVoD platforms, since there is so much happening so fast. Amazon Prime Video has not even been in Europe for 12 months, while HBO España remains in its very early stages despite having lofty ambitions. Other platforms which are rumoured to be considering original production, meanwhile, have yet to announce or release anything of significance.

For now, the key players remain Netflix and the Pay TV platforms, who are investing in a wide range of high-quality drama which is airing on the latter's linear channels as well as through video-on-demand. At the end of the day, however, perhaps the most significant takeaway of the current SVoD production environment is the fact that the traditional broadcasters are still producing most of the high-value drama content in their respective markets. By the end of 2017, Netflix still will have released just one series each in France, Spain, and Italy; at the same time, it has licensed a total of eleven shows from these markets, all but one of which were produced and developed by traditional public and free-to-air broadcasters in the respective countries.

While the new international SVoD names in the market might be sexy, it is the response of the legacy broadcasters to their market entry which may create the most promising opportunities for creative new international TV shows and concepts. To counter the "quality offensive" from abroad, these networks are increasing their budgets, ambitions, and willingness to work with global partners in order to source new ideas while bringing additional financing to the table. Of course, international producers should keep an eye on what the likes of Netflix, HBO, Sky, and Amazon are doing. But the traditional broadcast names should not be forgotten just because they still deal mostly in linear TV.

What people are watching

One of the more surprising findings from our German report was that, despite the growing prevalence of Netflix and SVoD in the German market, the Top 10 digital originals (i.e. shows produced by SVoD platforms) were still not anywhere close to being among the Top 10 overall TV shows. The implication being that while the impact of SVoD is undeniable, the most-watched programs in Germany continue to be either mainstream American linear shows or local programs produced by the traditional broadcast networks.

Table 8: Most-watched shows France (May 2017)

TOP 10 DIGITAL ORIGINALS: FRANCE

1	13 Reasons Why	Netflix	7,275,979
2	Orange Is The New Black	Netflix	5,794,790
3	Sense8	Netflix	4,925,399
4	Stranger Things	Netflix	2,079,179
5	Black Mirror	Netflix	1,823,715
6	House Of Cards	Netflix	1,371,229
7	Marvel's Luke Cage	Netflix	1,039,722
8	The Last Kingdom	Netflix	830,237
9	The Crown	Netflix	804,874
10	Narcos	Netflix	797,033

TOP 10 OVERALL TV SHOWS: FRANCE

1	Game Of Thrones	14,549,986
2	13 Reasons Why	7,275,979
3	The Walking Dead	6,767,212
4	Orange Is The New Black	5,794,790
5	Pretty Little Liars	5,679,083
6	Call My Agent!	5,599,629
7	Sense8	4,925,399
8	Prison Break	4,560,410
9	Grey's Anatomy	4,236,579
10	Touche Pas À Mon Poste !	4,202,960

Source: TBI Vision In-Demand Chart France

Interestingly, although France has fewer SVoD subscribers than Germany – both in total number and as a percentage of the overall TV population – Netflix programming tends to be a bigger part of the mainstream TV ratings mix, with two Netflix series among the top 4 overall TV shows. A third, “Sense8,” also appears within the Top 10.

Within the remainder of the chart, “Game of Thrones” is the runaway leader, while the rest of the programs tend to be a mixture of American cable/network series with locally popular French programming. “Call My Agent,” a dramedy series developed by public channel France 2, has been picked up by Netflix for international distribution.

Netflix’s burst in popularity can also be seen in Spain, where “Cable Girls” was already the 8th-most popular overall show in June 2017 just six weeks after being released. Among Netflix programs, “13 Reasons Why” also makes the Top 10 overall shows as well as “The Department of Time,” the La 1 series whose third season Netflix recently acquired.

Table 9: Most-watched shows Spain (June 2017)

TOP 10 DIGITAL ORIGINALS: SPAIN			
1	13 Reasons Why	Netflix	2,510,570
2	Las Chicas Del Cable	Netflix	2,210,729
3	House Of Cards	Netflix	1,988,460
4	Orange Is The New Black	Netflix	1,943,382
5	Sense8	Netflix	1,751,774
6	Black Mirror	Netflix	1,229,190
7	Ingobernable	Netflix	1,154,735
8	Narcos	Netflix	838,182
9	Stranger Things	Netflix	733,513
10	The Last Kingdom	Netflix	481,317

TOP 10 OVERALL TV SHOWS: SPAIN		
1	Pretty Little Liars	5,412,055
2	La Casa De Papel	4,411,980
3	Soy Luna	3,292,727
4	Vikings	2,805,022
5	The Walking Dead	2,775,724
6	Game Of Thrones	2,623,179
7	13 Reasons Why	2,510,570
8	Las Chicas Del Cable	2,210,729
9	El Ministerio Del Tiempo	2,038,337
10	Velvet	2,031,535

Source: TBI Vision In-Demand Chart Spain

The remainder of the Top 10, like France, is a combination of American cable and network shows with popular local programs. Coming in at number 10 is Atresmedia’s successful “Velvet” series (mentioned in the case studies earlier), now in its fifth season. Velvet has been sold internationally to public or free-to-air channels in France (M6), Italy (RAI), Finland

(YLE), Greece, Lithuania, and Slovenia, and has also been acquired by Netflix for distribution in the US and Latin America, among other markets.

Other notable programs in the Top 10 include “La Casa de Papel,” a brand-new series on Atresmedia’s Antena 3 channel about a planned heist at the Royal Mint of Spain, and “Soy Luna,” an Argentine telenovela developed by Disney Channel Latin America, which is targeted toward young adults.

Table 10: Most-watched shows Italy (January 2017)

TOP 10 DIGITAL ORIGINALS: ITALY				TOP 10 OVERALL TV SHOWS: ITALY	
1	<i>Marvel's Luke Cage</i>	Netflix	2,405,723	1	<i>The Young Pope</i>
2	<i>Narcos</i>	Netflix	2,281,667	2	<i>Game Of Thrones</i>
3	<i>Marvel's Daredevil</i>	Netflix	2,058,776	3	<i>Gomorra</i>
4	<i>Stranger Things</i>	Netflix	1,706,575	4	<i>Pretty Little Liars</i>
5	<i>House Of Cards</i>	Netflix	1,589,314	5	<i>Squadra Antimafia: Palermo Oggi</i>
6	<i>Orange Is The New Black</i>	Netflix	1,416,856	6	<i>Grey's Anatomy</i>
7	<i>Black Mirror</i>	Netflix	1,267,153	7	<i>The Walking Dead</i>
8	<i>11.22.63</i>	Hulu	1,165,163	8	<i>Mr. Robot</i>
9	<i>Gilmore Girls</i>	Netflix	1,159,822	9	<i>American Horror Story</i>
10	<i>The Get Down</i>	Netflix	984,749	10	<i>The Big Bang Theory</i>

Source: TBI Vision In-Demand Chart Italy

Sky’s bet on high-end drama appears to be paying off so far in Italy, where “The Young Pope” is the clear leader in terms of overall popularity and “Gomorra” is number three. “Game of Thrones,” which airs on Sky due to its licensing agreement with HBO for Sky’s European markets (UK, Ireland, Germany, Austria, and Italy), is the number two most-popular TV series. Apart from the Sky programs, there is just one other local Italian TV series in Italy’s Top 10, the long-running “Squadra Antimafia” crime drama about the perpetual struggle between state and mafia, which airs on Mediaset’s Canale 5.

The rest of the Italian Top 10 more closely mirrors our findings for Germany, with mainstream imports from the United States mostly dominating the ratings. One interesting series which appears on Italy’s Top 10 list is the American show “Mr Robot,” about a corporate cybersecurity engineer who is recruited by a band of anarchist hackers led by Christian Slater.

“Mr Robot,” which is only available in Mediaset’s premium package, is a good example of the dominance of Pay TV in Italy’s broadcast landscape. Combined with “The Walking Dead” (Fox/Sky), “American Horror Story” (FX/Sky), and the three Sky/HBO series mentioned above, six of the top ten most popular programs in Italy are only available via Pay TV.

What to watch for: Sky and HBO to co-produce?

Another interesting recent piece of news out of Sky's European markets is a new multi-year, \$250 million co-financing deal between Sky and HBO to develop and produce high-end drama. Under the agreement, the two Pay TV networks will launch a joint production venture (HBO Sky Studios), with executives from both companies greenlighting projects. While mostly relevant to Sky's European territory, the deal will also see the new joint venture develop content for HBO's various home markets, as well as for international distribution. Announced in April 2017, the effort represents a step forward in the original content ambitions of both companies in Europe. With HBO seeking to continue building its European presence via HBO España and the general HBO Europe brand, and Sky seeking to develop more content to drive subscribers both to its Pay TV channels and Now TV SVoD platform, the decision to deepen the Sky/HBO partnership seems to make sense on both sides. HBO Sky Studios will reportedly source content from both Europe and the US.

Key facts: Video on Demand

- Free VoD in each of the target countries continues to outpace SVoD by an average of three-to-one, in terms of overall users. SVoD subscriptions, however, are on the rise, primarily led by the rise of Netflix.
- The leading SVoD platforms in the target markets tend to be a combination of international offerings with Pay TV-affiliated VoD services.
- Despite the announcement and/or release of many interesting individual projects, "true originals" produced by SVoD platforms are still relatively limited, as Netflix and especially Amazon focus more on acquiring existing content.
- More players and platforms are announcing forays into original content production, but despite the buzz, one fact should not be forgotten: the existing Pay TV channels and linear broadcasters still invest in the vast majority of on-screen content. Pushed by SVoD competition, their budgets, drama ambitions, and interest in international co-productions are all rising.

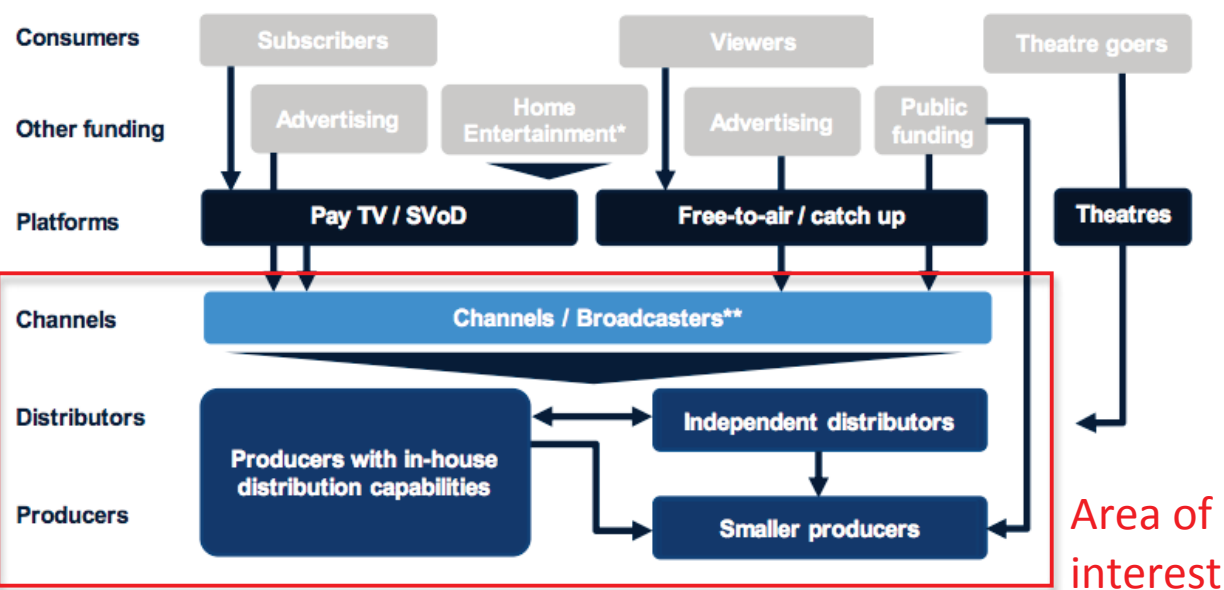
3. CONTENT COMMISSIONING & ACQUISITION STRATEGIES

Acquisitions: Target markets overview

The acquisitions picture in each of the target countries tends to mirror that of other markets in Continental Europe, with producers typically either pitching directly to broadcasters or partnering with distributors in order to handle sales (usually when the producer cannot efficiently approach the broadcast channels themselves). Most of the larger production companies have their own units specialising in sales and distribution.

Below is an illustration of the European film and television content value chain from the economic consultancy Oxera. The image, from a 2016 report on television trends across Europe, is intended as an EU-wide graphic. The overall structure shown here does not differ meaningfully in any of the individual target markets.

Table 11: The European Film and TV Content Value Chain (Oxera)



Note: * Includes physical sales and TVOD. Revenues flow to the relevant rights holder.

** Commissioning broadcasters can interact directly with producers.

Source: O&O and Oxera analysis.

Like in other markets, many of the major broadcasters in France, Spain, and Italy have their own production arms which are responsible for developing content for the broadcaster's various channels. These divisions sit alongside the traditional acquisitions teams, who also source content from independent producers and distributors. In-house sales and distributions teams for the broadcasters are also common as they increasingly look to market successful shows abroad.

Well-known examples of broadcaster-owned production subsidiaries include StudioCanal in France (Canal+), TF1 International (affiliated with TF1), Medusa Film in Italy (Mediaset), and the newly-announced HBO Sky Studios joint venture (Europe-wide). Even where broadcasters do not have a separately-branded production subsidiary, it is becoming more common for broadcast companies to simultaneously act as producers, as in the case of Movistar, which has been involved in film production since 2015 (and is making its well-publicised foray into TV drama) without any formal separate entity. Many times, broadcasters developing their own original content will work in partnership with one or more established producers, sharing the credits. This has been Sky's model for both "Gomorrah" (Sky, Cattelleya, Beta Film) as well as "The Young Pope" (Sky, Wildside, Mediapro, Canal+, HBO).

From the perspective of potential international partners, the key difference between traditional acquisitions teams and broadcaster production subsidiaries like StudioCanal is that the latter tend to have a wider remit, going beyond the scope of the individual broadcasters with which they are affiliated (particularly when it comes to international activities). At the end of the day these are producers and should be approached like any other large production company, regardless of their affiliation.

Of course, working with a broadcaster-affiliated producer is an ideal way to simultaneously get in front of the broadcaster. Otherwise, the key pathways to international market entry typically involve one of three approaches: a) going straight to the acquisitions team for the relevant broadcaster/channel; b) partnering with another local producer in the target country; or c) partnering with a local distributor, who is then responsible for marketing the content rights to the broadcaster.

Within the target countries, most international television collaborations tend to involve a domestic production company in addition to the broadcaster. The picture is a bit more mixed when it comes to acquisitions, where the approach can be more direct.

Acquisitions: What are broadcasters looking for?

Generally, the relevant acquisitions contact within target market broadcast companies will be a **Senior VP/Coordinator/Head of Acquisitions** or their departmental equivalent (e.g. "Head of Drama," "Head of Kids Programming," etc). Sometimes the relevant title might be "Commissioning Editor" or simply "Buyer." In France, **Programming Advisor/Head of Programming** and **Head of Fiction** tend to be more common titles. Canal+ has a dedicated foreign fiction team with its own **Head of Foreign Fiction Acquisitions** supported by a team of foreign fiction buyers.

Director/Head of Acquisitions (or Program Acquisitions) tends to be the most common title in Spain while in Italy **Head of Acquisitions**, **Buyer**, and **Creative Director** are the most frequently used titles.

When it comes to approaching and engaging with acquisitions teams, broadcast buyers in France, Spain, and Italy all tend to abide by the general European "open-door policy" when it comes to content pitches. Every broadcaster and every buyer is different, but in each of the

target markets email is viewed as a perfectly acceptable way to approach buyers for the first time. What we have generally seen is that buyers also prefer to be given some form of “preview” of the content being presented, either in the form of a trailer or detailed script. Where a show has already been met with success in its country of origin, figures on ratings/audience response help. New international programmes which already have the involvement of a domestic broadcaster or another key player (e.g. a leading producer) also tend to get a boost.

The examples below are intended to give an overview of what select buyers in each of the target countries are looking for. As can be seen below, content and outreach preferences vary, but we can at least begin to construct an overall mosaic based on the direct feedback of people who are accustomed to being approached with new television ideas:

Content acquisition case study: ARTE (France)	
Contact	Alexandre Piel Deputy Head of Drama Department International Acquisitions and Coproductions ARTE France a-piel@arteFrance.fr
Editorial strategy	“The editorial line of the drama department could be defined by the intent to understand our contemporary environment and to anticipate the future world we shall be living in -- meaning we deal with the main themes and issues of our current and future society. We also need to reflect the strong values of the channel (democracy, diversity, quality), and combine demanding programs with popularity. We are open to any kind of genres & thematic in relation to the editorial line, and we are rather flexible in terms of format & duration.”
Drama genres sought	Crime / Comedy / Thriller / Horror / Fantasy / Sci-Fi Period Drama / Action
Best way to pitch	Any kind of pitch, from a few pages to a full script, or treatment, or synopsis... It certainly doesn't hurt to present a project that already has the involvement or interest of a domestic broadcaster. In terms of pre-buys or coproduction, we are only looking for projects concerning series or mini-series.

Content acquisition case study: Movistar+ (Spain)	
Contact	Julian Rodriguez Montero Content Acquisition Director, Film and Series Movistar+ julian.rodriguezmontero@telefonica.com
Editorial strategy	“Movistar TV is working on providing its customers with a premium entertainment experience, both Linear and Nonlinear. Today, series are on top and audiences are demanding them -- not only new ones, but also previous seasons. Most of the movies produced by studios are sequels, prequels or remakes, leaving a lot of talented people with no outlet to exploit their capacities. So they move to the series field, and that's why we are seeing so many amazing shows everywhere. Our priority is to strengthen our series offer, covering all genres and all targets in Latin America and Spain.”
Drama genres sought	Crime / Comedy / Thriller / Horror / Fantasy / Sci-Fi / Period Drama / Action
Best way to pitch	Email

Content acquisition case study: Telecom Italia (Italy)	
Contact	Luca Oteri Acquisition & Content Manager Telecom Italia luca.oteri@telecomitalia.it
Editorial strategy	“We look for any Dramas with Italian soundtracks available. We’re interested in both Library Series (all the seasons available for the territory) and New Series to be premiered on our SVOD Service (namely TIMVision).”
Drama genres sought	Crime / Comedy / Sci-Fi / Period Drama / Action
Best way to pitch	By email, listing all the availabilities for the territory (Italy) and a link to 1/2 episodes preview and/or any relevant material

The landscape of broadcasters and buyers is vast, and surely the other relevant broadcasters in the target markets will have their own systems and preferences for sourcing international content. Still, the examples at least can give an idea of what buyers are generally looking for, while demonstrating that they are receptive to being directly approached with ideas for new material. The case studies also demonstrate the breadth of drama sub-genres that broadcasters are commissioning, provided the series is well-made and has sound prospects.

Contact details for select drama and children's buyers within all of the key broadcast companies can be found in the Appendix. Key industry markets for meeting and networking with TV series buyers are also listed later in this section.

Content and airing trends

Public Sector Media (PSM) still the leading original content investor in Europe

Another relevant finding from our German market report to highlight again here is the continued role of public sector media as Europe's dominant investor in new television content. According to a recent report by the Media Intelligence Unit of the European Broadcasting Union (May 2017), Public Sector Media (PSM) remain the largest investors in European audiovisual content, spending €18.2 billion a year. What's more, over 83% of PSM programming expenditure was devoted to original productions (in-house, commissioned or co-productions) in 2015, **meaning PSM organisations spent over €15 billion directly on content creation.** By comparison, Netflix and Amazon respectively spent approximately €3 billion (USD\$3.3 bn) and €1.5 billion (USD\$1.7 bn) on original content in 2015 *worldwide*. Although the SVoD leaders continue to shake up the market, it is worth noting the significant role that public broadcasting still plays in Europe when it comes to getting content produced. This is borne out by the numbers cited earlier with respect to the amount of TV programming which Netflix and Amazon have actually produced in Europe, versus the amount they have simply acquired. Of the 11 shows Netflix has licensed from France, Spain, and Italy, 7 were produced originally by public broadcasters. Even "Suburra," widely promoted as the first Italian Netflix original, is being co-financed by RAI.

With sprawling and deep-pocketed public networks in all three target markets, each of whom invest in a wide array of content and have multiple spinoff channels and international partnerships, producers should remember that public media many times can be just as promising a partner as the shiny new names on the block. While it is understandable to see the ambitious projects of Netflix, Sky, and Movistar+ and want to collaborate, public broadcasters in France, Spain, and Italy continue to be well-funded and have an incentive to increase their own drama ambitions as competition increases.

RAI and France Télévisions to collaborate, in defensive manoeuvre against SVoD rivals

Reinforcing the points made above, RAI and France Télévisions announced in June that they have joined forces to co-produce a wide range of high-end English-language content for global distribution – including TV dramas, documentaries, animation series and entertainment formats – in a strategic pact meant to counter the growing force of American streaming services in Europe.

Certainly, this can be seen as an attempt by the public broadcasters to protect their market share, but the deal is also being presented as one of cultural defense and solidarity. “These players from the U.S., such as Netflix and Amazon, are very powerful, and they all have stories to tell that are not our own,” said France Télévisions MD Xavier Couture regarding the deal. “But Europe is the most powerful cultural region in the world. We can counter them together.”

The fact that RAI and France Télévisions will collaborate on English language content is notable, as it illustrates the globalisation of television business models and the growing importance of being able to market successful series abroad. It also demonstrates that European broadcasters are more focused than ever on making premium series which can resonate outside of their home markets.

Content for the new joint effort will be developed through existing structures, namely an ongoing collaboration between the production departments of the two broadcasters.

How do VoD providers acquire content?

Whereas in the early years of VoD, original content and licensing budgets tended to be lower, Netflix’s global expansion and Amazon’s growing investment in Amazon Prime Video are pushing these numbers higher. Interestingly, as both platforms grow, each are investing more in original content in order to offset the high cost of licensing fees, which is being driven up by competition between the various SVoD platforms. Netflix in 2016 announced its ambition for **half of the platform’s content to be original productions** “over the next few years”; as of late 2016, Netflix reported being “one-third to halfway” down the road toward reaching this goal.

At-a-Glance: The approach of Netflix and Amazon to European production

Between 2012 and February 2017, Netflix committed more than €1.5 billion (USD\$1.75 bn) to past and future European original productions and co-productions, as well as licensed TV series, films, documentaries, kids shows, and stand-up specials, representing more than 90 original productions. Netflix is known for taking a hands-off role after investing in a production, leaving casting and creative decisions to the directors.

Amazon, meanwhile, is trying to strike a balance between globally-appealing programs and shows which are intended to appeal to audiences in a given country. In a recent

MIPTV interview, Roy Price, VP of Amazon Studios, explained the company's content strategy as it seeks to expand its presence around the world:

"We are collaborating with creators all over the globe to deliver series and movies that we think customers will love," said Price. "We think there are globally-relevant shows and movies that customers worldwide will love – The Grand Tour, The Man in the High Castle and Transparent are great examples of shows that customers across the globe have told us they want. We also believe that not every country is the same and some territories care more about a localized service or local content than others. Our approach will vary."

With both international SVoD market leaders continuing to seek international market share, each are placing a focus on content that will appeal to local audiences and appear to be giving creative talent a long leash in developing that content. Buying decisions across Europe for the two SVoD giants tend to be made from their respective European headquarters in Amsterdam (Netflix) and London (Amazon).

Overall, the acquisitions process for the SVoD providers is not meaningfully different from general broadcast industry norms. Netflix, for its part, recently concluded a flurry of new European acquisitions at Spain's Conecta Fiction industry market event, much like the many traditional broadcasters who also attended the gathering. Other independent VoD platforms in the target countries, like Wuaki/Rakuten (Spain) and Dailymotion, which is popular in France, also tend to acquire content via relatively typical means, namely industry markets like MIPCOM/MIPTV and through direct approaches from producers and distributors.

Key industry markets

As any international producer will no doubt be aware, industry markets are a major source of television acquisitions deals and are tightly woven into the fabric of how TV is developed and distributed around the world. Major events like MIPCOM have been around for years, targeting all types of media. On the film side, film festivals have long played an important role not only as a place for new creative content to be seen and discovered, but also for the business side of film – namely its financing, acquisition, and distribution – to take place.

In recent years, the rise of TV drama has coincided with a flurry of new television-focused industry market events, attempting to bring more of the film festival experience to the TV side of the media business. Below is an overview of key European industry market events with a television component, some of which are longstanding (such as Berlinale or MIPCOM), and some of which are just beginning to emerge.

Table 12: European industry market events incorporating TV

Event	Location	Date	Description
Serienale	Berlin	January	Annual festival for exhibition and buying of TV series, based in Berlin. Relatively new event started in 2016.
Berlinale	Berlin	February	Industry-leading film festival taking place each February, headlined by European Film and Berlinale Co-Production Marketplaces.
MIPTV	Cannes	April	The world's largest TV and digital content market. TV-focused spinoff of MIPCOM, which focuses on all entertainment content and takes places every year in October.
Series Mania	Paris	April	Another major series marketplace, taking place every Spring in Paris.
Série Series	Fontainebleau	June	New event billing itself as "the meeting place for European series and their creators, designed by those who make them."
International Animation Film Market (MIFA)	June	Annecy	The animation industry's foremost showcase for co-producing, purchasing, selling, financing and distributing animation content for all broadcasting platforms.

Conecta Fiction	Santiago de Compostela	June	Brand new TV co-production and networking event aimed at connecting the European, Latin American and the U.S. Hispanic markets.
Medientage	Munich	October	Running since 1987, highlights trends, practical solutions and technical innovations in the fields of broadcast, online and multimedia, mobile media, publishing and production.
MIPCOM & MIPJunior	Cannes	October	The world's biggest entertainment content market. 2016 saw 14,000 total participants, nearly 4,702 registered companies, 1,967 exhibiting companies, and 4,825 buyers taking part.

Of the events on the above list, three (Serienale, Série Series, and Conecta Fiction) have been started in the last two years, highlighting the growing visibility of TV drama and the growing importance of industry gatherings for making international connections.

For children's content, MIPJunior (and to a lesser extent MIFA) tend to be the best opportunity for industry networking and getting in front of content buyers.

Sources of finance/funding

Public TV production finance by country

As in other markets, many of the production (and international co-production) incentives available for audiovisual activities in the target countries tend to be targeted toward the film industry. Increasingly, this is changing with the growing importance of television drama, however there are still some programs in all three markets which are exclusively intended for feature film production.

With this being said, a slew of production incentives either include television production or are in some cases exclusively targeted toward TV. France in particular has a program to support international TV co-productions, however it is full of framework requirements with which producers should familiarise themselves.

Below is an outline of the various public support schemes available **on the national level** in all three target countries. Where applicable, we have also noted the availability of incentives on the regional level, however as these are too many to cover in detail, producers should conduct additional research and outreach as necessary.

France

National public support for audiovisual production in France is distributed through an entity called Film France, which is under the federal *Centre national du cinéma et de l'image animée* (National Film and Animated Image Centre, abbreviated as "CNC"). The patchwork of incentives can be a bit confusing, but there are essentially two programs which are relevant from an international perspective:

∞ Tax Rebate for International Productions (TRIP)

The main public vehicle for supporting international audiovisual activity in France, the value of this incentive was recently raised in January 2016, and it has been credited with attracting a growing number of film and TV projects. Support is available to projects which shoot at least 5 days in France, and which are also able to pass a "cultural test," which assesses European cultural elements in the story as well as French and European locations, characters, sources, landmarks, creators, crew and French technical hubs.

The amount allocated comprises 30% of the film expenditures incurred in France, and caps at €30 million per project. The foreign producer needs to contract a French company to handle the shoot in France or/and the making of the animation/VFX shots via a production service agreement. At the end of the French's company fiscal year, the production services company claims the rebate. The money is paid by the tax authorities, and received 6 to 18 months after the last expenditure.

Minimum spend is either €250,000 or 50% of the total budget to be spent in France. To qualify, projects must be a “fiction film” however this incorporates a wide variety of formats including live action or animation, feature film, TV, web, VR, short film, TV special, single or several episodes of a series, or a whole season.

∞ **General support for international co-productions under the French system**

In addition to the TRIP program in France, international co-productions can also qualify for domestic French television incentives if they meet a series of criteria, namely:

- The lead producer must be European.
- A minimum of 30% of the budget has to be spent on French soil.
- 30% of the investment (minimum) must come from France, of which 25% from a TV channel is requested.

Here is where the system gets a bit tricky, as projects will either be considered for TRIP or domestic incentives, but cannot receive both forms of funding at the same time. Generally speaking, domestic incentives will be more relevant for co-productions where the French party is playing a bigger role. Under this format, international projects are essentially considered “French” productions if there is a French broadcaster involved and if the project contributes to the various cultural and linguistic standards required of the broadcaster’s overall programming. The CNC supports a wide range of productions and formats, and is also beginning to invest an increasing amount of resources in the types of high-value international collaborations highlighted throughout this report, including “Versailles” as well as the Swedish-French collaboration “Midnight Sun.” For such projects, language tends to be less of an issue particularly when several partners are being brought to the table.

One final point worth noting is that historically, there has been a much greater role for international partners in animation projects than in other formats. For live action drama series, foreign entities contribute just 3% of the total budget on average, with local broadcasters making up 70% and exerting a commensurate influence over content. For animation, conversely, 25% of financing on average is international.

∞ **Regional commissions**

In addition to the national incentives, France also has 41 regional film commissions which can provide free assistance in the following areas: locations and pre-scouting; the search for crew, cast and extras (casting facilities are available in most film offices); administrative procedures including assistance in obtaining filming permits; logistical information (vehicle rental, lodging, etc.); production office facilities; and documentation and relations with the press and local authorities.

Support at the regional level tends to vary, however the CNC advises that the “cultural value of the project is generally the biggest concern of the funds.” Most investments help to finance French-language (or majority French-language) productions.

The best way to learn more about regional incentives is to reach out to the relevant commissions, which can be accessed via the hyperlink above.

For a full overview of available incentives in France, CNC has published a detailed and informative guide: www.filmfrance.net/telechargement/IncentivesGuide2017.pdf

Spain

Spain offers a 15% federal tax credit for international productions, while the Spanish Canary Islands and the Navarre region offer a tax rebate of up to 35%. The incentive is capped at €2.5m per-production on the mainland and €4.5m on the Canaries.

Federal subsidies

The information made available by the Institute of Cinematography and Audiovisual Arts (ICAA), which distributes audiovisual incentives in Spain, is not quite as detailed as in France, however the general requirements for federal co-production financing include the following:

- The project is able to obtain approval from the majority co-producer’s country.
- The Spanish incentive must be at least 10% and not greater than 25% of the project’s budget.
- Co-production must help promote the cultural diversity of the co-producing countries.
- Participation of the co-producing countries should range between 20% and 80% of the film’s budget or, for multi-party co-productions, the smallest participation must be at least 10% and the greatest 70% of the budget, as a maximum.

While it is unclear from the information provided by ICAA whether TV productions are eligible for Spanish federal production subsidies, all audiovisual productions can access the tax incentives noted above. The expenses that qualify for tax relief must be creative personnel costs and expenses arising from the use of Spanish suppliers.

Regional support

Like France, Spain has a patchwork of regional film commissions and incentive programs available. Key regions for film production incentives include Navarre, the Canary Islands, Andalusia, the Basque Country, and Catalonia.

As mentioned above, Navarre and the Canary Islands offer a 35% tax rebate while Andalusia mirrors the national tax rebate of 15%. The Basque subsidies mostly

support projects centred around Bilbao, while there are no formal incentives in Catalonia however it is common for productions to take advantage of an 18-20% individual tax rebate for audiovisual productions funded by Spanish taxpayers.

As in France, regional programs and structures vary so the best way to learn more is to reach out to the regional agencies directly. A comprehensive list can be found here: www.shootinginspain.info/index.php/en/spain-film-commission-uk.html

International producers are further advised to reach out to ICAA to determine whether TV co-productions can also access additional direct subsidies beyond federal tax incentives, as this is currently unclear.

Italy

Italy offers a 25% tax credit as a formal filming incentive and crucially each production company involved with a specific shoot can claim up to €10m back on their investment - the figure was increased from €5m in 2014.

∞ **Two key federal incentives**

Within the federal support scheme, there are essentially two major incentives:

- A 25% tax credit granted to Italian production companies that produce TV or film on commission from foreign production entities on Italian soil.
- An additional audiovisual tax credit for independent TV and web producers of Italian works and co-productions.

The first tax credit grants up to 25% of the cost of production of the single work up to a maximum of €10 million for each tax period, and is granted in relation to production costs made on Italian territory, which cannot exceed 60% of the budget of the total project. As best as we can understand it, the second tax credit supports works of Italian nationality (involving minimum content shot or expenses incurred in Italy), productions in the Italian language, and/or those of cultural interest. Reimbursements are lower (15%), however there is no cap on the amount which can be claimed as long as the money is spent in Italy. Crucially, the second incentive does not appear require a formal Italian partner as long as the minimum criteria are met.

Similar to France, the choice for international partners then is between working with an Italian “tax-resident” producer in order to take advantage of the first incentive, or getting the production “qualified” as Italian (based on minimum spend and cultural value), which has a lower reimbursement but allows for more of the total budget to be eligible for tax relief.

∞ **Regional programs**

Italy also has a landscape of regional film funds which is more consolidated than either France or Spain and provide a wide array of incentives. There are only 12

regional commissions in Italy, in contrast to the more-than-three-dozen in both France and Spain, with a range of funding opportunities (and requirements). While the ultimate goal of these funds is to back Italian projects, there is scope for foreign producers to secure funds for productions that tick the right boxes.

A listing of each commission and its funding scheme is given in the Appendix. More information is also available at: www.filminginitaly.com/regional_funds

Like Spain, the information provided on Italy’s various funding schemes is somewhat confusing (and not entirely in English!), so producers are advised to contact the relevant funding bodies for further information.

Public funding summary:

- All three countries possess a mix of national and regional incentive schemes, making local outreach important.
- France has the clearest guidelines and appears to be the most approachable in terms of partnership.
- Spain is the most open to claiming tax benefits as a foreign entity.
- In Italy, it can be more advantageous to qualify a production as “Italian” rather than claiming the international benefit.

Key national funding stakeholders in the target markets:

	Governing Authorities	Funding Bodies
France	Centre national du cinéma et de l'image animée (CNC)	Film France
Spain	Ministry of Education, Culture, and Sport	Institute of Cinematography and Audiovisual Arts (ICAA)
Italy	Ministry of Cultural Heritage and Tourism and Cinema Directorate General	Italian Film Commission

Private finance

In addition to the landscape of public funders, there are also private funds available in the target countries who provide gap financing for audiovisual projects, and who are investing increasingly in TV series. One example would be France’s so-called SOFICAs (“Film and

Audiovisual Industry Financing Societies”), which are investment funds who raise private money devoted exclusively to the financing of film and TV production. Such companies are overseen by the CNC and earn tax advantages on their investments. They must be approved on a yearly basis as part of a regulated system intended to facilitate private investment into the French audiovisual industry alongside the various public support schemes.

Further reading: List of SOFICAs approved in 2016 for investments in 2017 bit.ly/2xxVbal

There is also Paris-based Natixis Coficine, Europe’s biggest film lender, which partnered with Spain’s Audiovisual SGR (“Guarantee Society for the Audiovisual Sector”) in 2015 to create a €20 million credit facility for film and TV projects in Spain. Natixis Coficine could be a good private partner in all three markets, as it currently invests approximately €200 million per year in film and TV drama outside of France. Another French fund, Cofiloisirs, is backed by BNP Paribas and the Dutch bank ABN Amro and invests in a range of formats including animations and cross-media in addition to standard investments in film and TV drama. Cofiloisirs has a total loan volume of €500 million, provides cash flow financing throughout the content development process (development, pre-production, production, acquisition), and has been supporting international co-productions for over two decades.

At the European level, the European Commission and European Investment Fund (EIF) in 2016 launched a €121 million loan guarantee program intended to help small and medium-sized film companies gain access to film credit. At the moment, there do not appear to be any mainstream banks in the target countries (such as Commerzbank in Germany or Barclays in the UK) with dedicated audiovisual funds, however smaller private equity firms are always a potential source of funding for one-off deals, especially where public funding or guarantee scheme are involved such as those outlined above.

Other finance sources

Inbound financing: Finland’s new cash rebate

One tool of which Finnish producers may or may not already be aware is the new 25% cash rebate for TV and film production within Finland, applicable for feature films, fiction series, documentary films, and animations. For productions that meet the criteria, 25% of the expenses from money spent on local goods, services and salaries within the production work implemented in Finland will be accepted for the rebate. The incentive, which came into effect in January 2017, has already made 10 awards worth a total of €3.5 million, with a further nine applications worth €2.3 million in process. The budget for the incentive is currently capped at €10 million although the early success has already led advocates to suggest it be doubled in the near future. The cash rebate is administered by TEKES/Finnish Funding Agency for Innovation.

Acquisitions trends: Drama and Children's

Drama

The international success and recognition of Nordic Noir is undeniable, but there is also a growing diversity in the shows coming out of the Nordic region, going beyond crime stories and touching on other subjects including family, politics, and narratives about the future.

This is true of television as a whole, where content buyers are taking increasingly bold steps with drama, and showing a willingness to experiment with a wide range of genres and stories that are well-made and explore relevant topics. It is reflected in the shows being acquired from the Nordic region as well as co-produced, notably in France, which has displayed the most eagerness to work with Nordic countries historically. ARTE in particular has commissioned a wide range of Nordic TV since 2012 and is increasing its co-production presence as well.

Throughout the television world, one defining characteristic of drama at the moment is an “anything goes” mindset where the sheer amount of producers and broadcasters coming to the table to invest in content has created an openness and demand for any idea that is well thought-out and well-produced and where the creators can make a credible case for its chances of success in the target marketplace.

Spanish perspective: Ran Tellem, Head of Int'l Content Development, Mediapro

“If we thought (drama) is an American phenomena, with a touch of English excellence and a twist of Nordic noir, my insight is that this is expanding all over the globe. The depth and innovation is now moving to Latin America, the rest of Europe, and more. We will find ourselves following Finnish, Argentinean, Italian, Spanish, Israeli stories as much as American and British.”

Source: Inside the Creative Circle, MIPTV 2017

To the extent that a few common threads can be gleaned from the current situation in drama, we have combined some of our own observations with those from a special report for the most recent MIPTV gathering in Cannes, listing some characteristic elements of shows which are finding success on the global stage:

- ∞ **“Local Setting, Global Relevance.”** Locally-rooted narratives which aspire to tell a universally-relevant story. Examples of success stories in the target countries:
 - “Occupied” (Norway), the political thriller co-produced by ARTE, where Norway is occupied by Russia as part of a dispute over energy.
 - “Suburra” (Italy), the coming Italian political drama produced by Netflix with support from RAI. In Ancient Rome, the Suburra was a district where politicians, the church, and the underworld met to carry out deals. Undoubtedly, this intersection of power still plays out today, with the show chronicling this gritty side of the Eternal City.

- ∞ ***“Twists on Crime.”*** New crime stories outside of the typical thriller/murder mystery format. Case study examples:
 - “Gomorra” (Italy), which has been compared favorably to all-time hit favorites like “The Wire” for its depictions of the connections between street-level crime and its ties to the ‘respectable’ worlds of politics, business, and media. Gomorra was developed by Sky Italia and has sold to over 130 countries.
 - “Norskov” (Denmark) is a good example of a show which uses some familiar Nordic Noir devices (a small remote town, a detective story...), but at the same time goes a level deeper in exploring the complex web of connections between drugs, crime, and the hidden complexities of a small town. At the center is a detective trying to do the right thing but finding himself torn between personal and professional commitments.

- ∞ ***“Sci-Future.”*** An increasingly relevant genre born from contemporary conversations about technology, robots, and our collective future. Perhaps best exemplified by Netflix’s successful appropriation of the “Black Mirror” series from Channel 4 in the UK, a Nordic expression of this trend can be seen in the French/Danish co-production “Unpunished,” which is set in the near-future and offers a foreshadowing of the consequences caused by the merging of human minds with technology. Other similar examples from recent years include the discontinued “Real Humans” series from Sweden, which was also picked up for the French market. France appears to be a particularly fertile market for Sci-Fi as a whole, with other success stories including “Les Revenants” (The Returned) as well as “Zone Blanche,” which was mentioned earlier.

- ∞ ***“Religious and Family Dramas.”*** The most obvious recent example out of the Nordics would be “Ride Upon the Storm,” the positively-received Danish series which is a co-production with ARTE in France and follows a family of Danish priests and their worldly as well as spiritual conflicts. The show has earned plaudits for its writing and acting, and is proof that even less-‘dramatic’ topics can find an audience when a story is compelling and well put together. Family stories often cross over with other sub-genres, as exemplified by a couple of high profile examples:
 - Movistar+’s new “Giants” series, which merges family and crime, narrating the conflicts and internal struggles of a family of drug dealers in Madrid.
 - While not technically a family drama, “The Young Pope” is a good example of the family drama merging with politics and palace intrigue, as the series follows the inner world of a precocious new pontiff and the personal relationships he must balance as he ascends to the top of the Catholic Church hierarchy.

- ∞ ***“Historical Storytelling.”*** As noted in the *Genre Trends* section earlier, period drams continue to draw interest, exemplified by shows like “Cable Girls” (Spain), “Medici” (Italy), and “Versailles” (France). The format appears to be particularly popular in Spain. Other examples include:
 - “La Catedral del Mar,” set in 14th century Barcelona, which follows a young social justice activist campaigning on behalf of the downtrodden and facing the wrath of entrenched nobles.

- Another new show in Movistar+'s original content rollout, "The Plague" is set in the city of Seville in the 16th century, in the midst of a terrible bubonic plague, and follows Mateo, a heretic that must solve a number of satanic crimes.
- "The Time in Between," produced by Boomerang TV for Atresmedia's Antena 3, which tells the story of Sira, a dressmaker who leaves Madrid before the outbreak of the Spanish Civil War to follow the man she loves to Tangier, where she unwittingly becomes involved in an espionage scheme.

∞ **"Political Intrigue."** Political intrigue also continues to be a popular theme, often merging with period storytelling and family drama as with "Versailles," "Medici," and "The Young Pope." Some other examples in the political intrigue category include:

- Netflix's "Marseille," also mentioned earlier, which despite mixed reviews is being re-commissioned for a second season.
- "1992," about the Clean Hands corruption investigations which rocked Italy in the early 1990s. The success of the first run has spawned a sequel, "1993."
- "Borgen," although somewhat dated, was one of the first shows to make it big out of Scandinavia, and continues to be held up as a standard for Nordic success.
- Political intrigue also tends to cross over well with crime, as in the case of "Gomorrah" and "Suburra," both produced by Rome-based Cattleya. Given Italy's historical struggles with power and corruption across various public institutions, stories exploring the interplay between mafia, politics, and society seem to play well with Italian audiences.

∞ **"Romance."** This theme seems to be most applicable to Spain, where the historical prevalence of soapy telenovelas seems to have nurtured an enduring appetite for a good romance story. The most visible example is probably Atresmedia's "Velvet," considered something of a gold standard for romantic Spanish dramas. The main storyline of the show is the love story of Alberto, heir of Galerías Velvet, one of the most prestigious fashion stores in the Spain of the late 1950s, and Ana, who works as a seamstress there. Movistar+ is currently producing a sequel, "Velvet Collection," after the original ended last year.

∞ **"Everywhere Noir."** One trend discussed at MIPTV earlier this year was the spread of Nordic Noir-style storytelling to regions outside of its home base in Finland and Scandinavia. "I Know Who You Are," mentioned earlier in the *Genre Trends* case studies, is being touted as an example of 'Spanish Noir,' while "The Paradise" brings actual Nordic Noir to the Mediterranean coast, in a crime story where Finnish and Spanish law enforcement authorities must collaborate to solve a series of mysterious crimes which rattle the large Finnish community in Fuengirola on the Costa del Sol. "El Extranjero," the coming Spanish-Argentinian co-production about a Spanish tennis star suspected of murdering an Argentinian socialite, is also being touted as having many familiar aspects of Nordic Noir. Although there are now examples of French Noir ("The Frozen Dead") and even Dutch Noir ("Stuck"), the theme looks to be especially resonant with Spanish-speaking audiences.

As evidenced by this last trend, even as the demand for international drama continues to drive more experimentation and creativity, the enduring appetite for crime-related series

should not be discounted. Many of the formats detailed above touch on the aspect of crime and suspense in some form or another, which bodes well for more creative adaptations of Nordic Noir and even for entirely new but related categories of Nordic drama as a whole.

One area where Nordic content may find itself in a good position is the sci-fi/future theme, given the dark storytelling mastered by existing hit shows from the Nordics, the technological advancement of Nordic societies, and the moral dilemmas that often run as a strong undercurrent to the established Nordic Noir genre. It will be interesting to follow the success of “Unpunished” as an indicator of whether there might be further potential to be exploited in this topic.

Italian audiences could be fertile ground for thoughtful and creative storytelling about computers and the future, given the success of American hacking and cybersecurity drama “Mr Robot” in Italy. Another good place for producers to start in terms of storytelling could be to explore some of the existing cultural linkages between Finland and the target markets, as “The Paradise” has done in Spain.

When it comes to drama, however, one thing is certain and that is that there are no hard and fast rules. Drama budgets, ambitions, and the number of players are at an all-time high, leaving the door open for a variety of creative possibilities.

Children’s content

As noted earlier, the market for children’s content shows signs of already being more internationalised than drama. At the same time however it is also more stratified.

First, the globalisation of kids’ TV is more likely than drama to be driven by existing character brands and franchises, given the possibilities for merchandising and the general blurring of lines between toy companies and children’s content producers. Simultaneously, other popular shows tend to be unique to each market. For a new show or concept just beginning to internationalise, children’s producers must prove there is likely to be strong marketability and/or merchandising potential in order to generate any serious interest.

Unfortunately there are no high-profile examples at the moment of successful co-production or acquisition of Nordic children’s programs in any of the target markets. Nonetheless, here are some of the current trends in kids’ TV as discussed at last year’s MIPJunior event, and which we have gleaned from our own research:

🔗 **Nature and Learning.** “Children are curious: they want to find out about their world,” said Avril Blondelot, International Research Manager for EurodataTV, as part of a MIPJunior panel on children’s acquisitions trends. She cited “Octonauts” (UK), “Nelly and Nora” (Ireland), “Siyaya” (South Africa), “Mashiny Skazki” (Russia), “Mandoos” (UAE), the previously-mentioned “Los Creadores” (Argentina), and the Dutch science show “Superbrein” as examples of internationally-successful programs which focus on education through excitement and adventure.

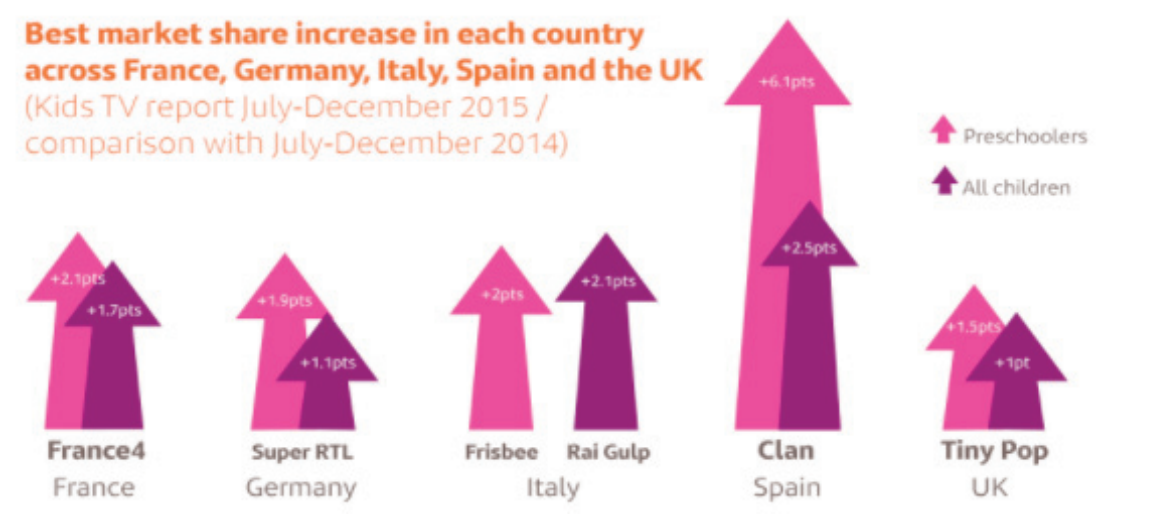
- ∞ **Solving Mysteries.** Mystery stories have been a part of children's TV and literature for generations, a fact which continues to be unchanged. Shows like "Noddy Toyland Detective" (UK), "Ege and Gaga" (Turkey), and "Läsmysteriet" – the latter developed by the educational arm of Sweden's public broadcaster – are all examples of popular programs where characters and kids solve mysteries together.
- ∞ **Superheroes.** Another age-old favorite, some new superhero-driven shows include the likes of "PJ Masks" (UK/France), "Miraculous Ladybug" (France), and "Niko and Sword of Light," an Amazon original.
- ∞ **New takes on popular throwbacks.** Related in some ways to the previous trend is a movement to revive and/or reimagine some classic children's storybook characters including Aladdin (in the UK's live-action "Jamillah and Aladdin" fantasy series), Cinderella (in "Regal Academy," from Italy), and Snow White (in "Seven and Me," an Italian-French co-pro). The latter combines live action and CGI in "the first hybrid animated series," according to AB International, the French half of the production team. In Spain, meanwhile, RTVE's Clan channel is collaborating with Discovery Kids in Latin America on a remake of the 1970s Spanish cartoon "Cleo & Coquin," where two friends tackle small conflicts and everyday problems through play.
- ∞ **Toys on TV.** We have alluded previously to this trend as it relates to the growing presence of toy companies in the world of children's production. Where popular TV show characters have traditionally led to opportunities for merchandising, some popular toy brands are now seeking to move in the opposite direction. Netflix's "Skylanders Academy" is a high-profile example, as is "Paw Patrol," a Canadian series which was developed by Toronto-based Spin Master Entertainment, which started life as a toy company. Paw Patrol has found success in both France (Nickelodeon/Nick Jr) and Spain (RTVE/Clan), as well as a handful of other European markets.
- ∞ **Real-life issues.** A final trend has to do with exploring real-life issues that kids may face through educational programs and good storytelling. A good example, also noted earlier, is "Paprika," the short form France Télévisions superhero show where one of the two heroes uses a wheelchair.

As demonstrated by the number of different countries represented above, there are a wide range of opportunities for quality children's content to break through, but the market remains competitive. France and Spain have strong animation cultures, and France especially has an impressive amount of homegrown animation producers as well as a major investor in France Télévisions.

International children's producers seeking to crack the target markets might consider starting with short-form offerings targeted toward YouTube, Dailymotion, and other video sharing platforms, in order to build an audience for new shows and characters. When it comes to traditional acquisitions and co-production models, the leading investors in children's content in each country tend to be the public broadcasters, followed by Netflix and Amazon. Interestingly, despite the rise in online children's content and international kids

channels like Nickelodeon and Disney, in all three target markets local public channels have registered the largest market share increase during recent years.

Table 13: Market share increase in European Big 5, kids' TV channels



Source: Eurodata TV

As with drama, when it comes to children's TV the only rule increasingly is that there are no rules, and that good storytelling tends to find an audience. Although children's TV, with more international brands and stronger domestic competition, may make for a more difficult export landscape, there are clear opportunities for quality to break through where producers remain committed to the cause. One possible strategy for market entry and recognition could be to partner with local producers in the target markets on existing projects where the Finnish party could add international value. Another could be to approach broadcasters and have an open conversation about which types of new global content they may be looking for.

Regardless of the exact methodology, the key principles revolve around solid production, compelling stories, and meeting broadcasters and content platforms where they are in order to cater to demand. With these general foundations, as well as an enduring commitment to innovation and international collaboration, the goal of producing successful children's content for the target markets should be within reach.

Buyer Insights: Tara Sorensen, Head of Kids' Programming, Amazon Studios
"We are medium-agnostic, which is to say we will do live-action, we will do animation, we will do CG, we will do hybrid, we will do puppet. Right now we are looking to fill the pipeline in animation... but otherwise we are open to anything unique that hasn't been done before."
Source: What do Channels and Platforms Want, MIPJunior 2016

Merchandising and licence deals

Merchandising overview

A prosperous television brand opens doors for merchandising business opportunities – this is of course also true for all three markets. Genres like children's or music entertainment are at the forefront of merchandising, with commercial broadcasters typically taking more advantage than the public-service providers.

The following merchandising areas are usually covered:

- Home Entertainment
- Publishing
- Toys & Games
- Stationery
- Food & Promotion
- Textiles & Accessories

Children's merchandising in the target markets:

- ∞ Toys and publishing products play the most important role in character licensing. Second are textile products, home entertainment and (promotional) events - although this differs from broadcaster to broadcaster.
- ∞ Current trends: merchandising from interactive games, "merchandising in reverse" where successful toys drive new content, not the other way around.

Case studies:

Probably the best current case study in terms of the current direction in merchandising is that of Skylanders Academy, which boasts more than \$3 billion USD in total toy sales and is now an international hit TV show. On the content side, Netflix is already producing a third season and the show is available in 39 countries, including France, Spain, and Italy.

Licensing overview

Deal structure for licensing varies widely even within markets, making it difficult to have a clear response as to what is "typical." Every licensing deal is different, depending first upon the broadcaster and rights' holder (producer or distributor), but ultimately on the content itself, specifically its critical reception, forecasted demand, "hype"-factor and/or existing success internationally, and any other factors which the broadcaster or content platform may deem important.

One fact we can generalise is that as drama becomes both more popular and more expensive, international broadcasters and SVoD platforms are finding ways to work together in order to finance joint productions by negotiating innovative rights deals. A few "types" of such deals have become particularly common:

1. Exclusivity windows for one party followed by an extended run for the other. In essence, one party agrees to forgo the long term rights in exchange for the first run while the other banks on a program's long term success and allows the first party to reap the initial rewards. This was the model used by Atresmedia and Netflix recently when they negotiated deals for "La Catedral del Mar" and "El Ministerio de Tiempo," with the former airing each program initially before Netflix picks them up after a designated time period. The same model has been agreed for "Suburra" between Netflix and Italian public broadcaster RAI, who will air the series after it premieres globally on Netflix.
2. Sharing broadcast rights with an SVoD platform. This is related to the previous model but typically involves the platform and broadcaster taking the rights at the same time. Although there are no flagship examples in the target markets, Amazon Prime Video has such a deal with ARTE over "Occupied," covering the UK.
3. The newest licensing model in the market is that of Atrium TV – a collaborative of 1 broadcaster per territory (known as the "Commissioning Club"), which gets an exclusive 'first look' licensing deal for a series and allows series to get funded quicker, as all of the territories are lined up and ready to go. This model was started by DRG (Digital Rights Group, a UK-based Distributor) and is an innovative way of both funding TV drama and dividing the territory rights simply. It remains new, but will be interesting to watch as more broadcasters potentially jump on board.

Unique challenges: France, Spain, Italy

France

- ∞ **Content quotas.** Although this rule isn't directly relevant to international producers, the government quotas on French language production and European cultural content (to which broadcasters are subject) can act as a drag on their ability to be flexible. Fortunately, for European productions the rules are simpler. Obviously, any program or true co-production incorporating a French storyline (e.g. "Midnight Sun") wouldn't be subject to quotas.

Spain

- ∞ **Lack of track record.** A "unique" challenge which also applies to Italy, it cannot be denied (as we will illustrate in the Nordic Case Studies later on) that the vast majority of Nordic TV success stories so far have come in the French market, and that the track record for content from the Nordics (let alone Finland itself) in Spain and Italy is relatively thin. This will hopefully change with "The Paradise" and as Spanish drama continues to develop. For now, however, much of the new international developments in Spanish drama have been focused on the Spanish-speaking world, looking across the Atlantic rather than to Northern Europe for global co-production opportunities. While this may change, it could present an obstacle when approaching potential Spanish partners in the early going. To overcome this challenge, it is advised to either start with producers who have already collaborated with the

Nordics (e.g. Mediapro), or consider working with emerging drama investors like Movistar+, who are playing original series catch-up and as a result may potentially be more open to new concepts.

Italy

- ∞ ***Institutional weakness.*** RAI is doing some exciting things when it comes to drama (such as its innovative partnership with France Télévisions), but the organisation is still a bit chaotic. It remains to be seen, meanwhile, whether Mediaset is realistically open to working with new international partners or if the company's own institutional challenges will prevent it from innovating. Sky Italia is probably the most approachable broadcaster in Italy, but for a multitude of reasons (language can also be an obstacle) this is probably going to be the toughest market to crack overall.

4. FINDING CO-PRODUCTION PARTNERS: FRANCE, SPAIN, ITALY

Below is a guide to the various models of co-production available to producers in the target countries.

Co-production business models

∞ Official co-production

A 'true' co-production is one where two or more parties are responsible for each aspect of the project, share the producer fees, the equity and the revenues.

∞ Split responsibilities

Split responsibilities agreements help to get around the requirement for many funding agencies (particularly in France and Italy) that the producer is resident in their country. When the project is split, each producer does own 100% of the element that is their responsibility. The project comes together and is marketed and distributed as a single entity but is financed and reported as two. This structure works well for cross platform projects with clearly distinct elements but there are also variations that work for standalone digital media. The two partner companies are each in charge of one of the components, own the rights 100%, produce that component and finance it out of their own territory.

∞ Broadcasters

Producers can directly work with foreign broadcasters. Those are co-productions but the foreign broadcaster is generally not a part owner. Broadcasters can provide in-kind promotion, hosting or community management services in their territory. In France, the landscape looks a bit different, as with sufficient involvement from a broadcaster, projects can essentially qualify as "French" productions and be eligible for the landscape of incentives available to domestic projects in France.

∞ Service arrangements

It may not seem like a co-production but often producers hire a producer in another country to do service work rather than partner with them. This differs from 'split responsibilities' because the service producer has no ongoing revenue share and does the work for a fee only. A service arrangement could act as a way to get to know a potential co-producer before the financially riskier and more difficult 'true' co-production. This model works well for television programs, either co-productions themselves or not, where the digital media extension needs to be distinct for each territory. It is again especially relevant in France and Italy since the respective foreign production tax credits in each country must be run through a local entity. In Spain, this is not typically an issue since all co-productions governed by international treaties are considered national productions.

∞ Non-traditional funders

Documentary projects are in the best position to take advantage of non-traditional funders such as non-governmental organizations (NGOs). While not strictly a co-

production, this business model uses international financing to produce and distribute the project and the model could work for other projects with appropriate subject matter.

∞ Private investors

There are a number of private stakeholders that are investing in television production. Examples tend to be:

- Post-production houses and technology providers.
- Music companies who handle the worldwide music rights administration to companies' audiovisual products – this can be a source of investment/financing for production companies.
- Other private funding e.g. Natixis Coficine, Cofiloisirs, SOFICAs, etc.

Key points: Co-production by country

- Service arrangements will work best in Italy or France, where a local partner is needed to take advantage of international production incentive schemes.
- Direct productions with broadcasters are potentially advantageous in France, where co-productions can be eligible for domestic incentives if the local broadcast company has a big enough role.
- Spain does not require a local entity to claim relevant tax incentives, as long as local suppliers are used.
- For official co-productions, the best route to market is typically to approach local producers with an idea at the beginning of the project.

Key broadcast production centres

∞ France

Like much of French industry, France's main broadcast players are all headquartered in or around Paris. This includes all four of the key broadcasters as well as the main production and distribution companies.

Locations for key French audiovisual companies:

Broadcasters	HQ	Producers	HQ
France Télévisions	Paris	StudioCanal	Paris
TF1	Boulogne-Billancourt	Groupe AB	Saint-Denis
M6 Group	Neuilly-sur-Seine	TF1 International	Boulogne-Billancourt

Canal+	Issy-les-Moulineaux	Balanga TV	Paris
ARTE	Issy-les-Moulineaux	Federation Entertainment	Paris
		Pyramide Int'l	Paris

Given the annual gatherings in Cannes, it remains of course an important part of the overall broadcast landscape in France, however as can be seen above the key players in the industry are overwhelmingly based in Paris.

Popular French filming locations tend to mirror many of the country's well-known destinations: Provence, Paris/Versailles, the northern coast of Brittany, and the southwest region around Bordeaux all tend to attract their share of audiovisual projects. The greatest concentration of regional film commissions are in the southeast (around the Cote d'Azur), southwest, and northeast surrounding Strasbourg.

∞ Spain

Due to regional tax incentives, key filming hubs include the Canary Islands, Navarre (north), Andalusia (southwest), and Biscay (around Bilbao). Like France, however, the key players in the broadcast industry are all heavily clustered. All of the key broadcasters are located around Madrid, as well as nearly every key producer.

The VoD platform Rakuten.tv is in Barcelona, along with Mediapro. Barcelona and the greater Catalan region tend to attract their share of film and TV projects, but the industry tends to do business in Madrid. One exception is the animation industry, which has more Barcelona-based producers.

Santiago de Compostela (Galicia) could be a possible centre to watch going forward, as the Conecta Fiction event continues to grow and attract international audiences.

Locations for key Spanish audiovisual companies:

Broadcasters	HQ	Producers	HQ
RTVE	Pozuelo de Alarcón	Mediapro	Barcelona
Atresmedia	San Sebastián de los Reyes	Endemol Shine Iberia	Madrid
Mediaset España	Madrid	Boomerang TV	Madrid
Movistar+	Madrid	Big Bang Media	Madrid
Rakuten.tv	Barcelona	Magnolia TV	Madrid

		Bambú Producciones	Madrid
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🇮🇹 Italy

In Italy the geographic picture is more mixed, with Milan and Rome both hosting a sizeable media presence. Rome would appear to be the clear winner from an audiovisual perspective, with every major producer headquartered there, however Milan still hosts some key broadcasters, notably Mediaset, Sky, and Discovery Italia.

From a filming perspective Rome also tends to attract its share of projects, joined by Tuscany and by other well-travelled Italian locations (Venice, Naples, Sicily, Lombardy).

As in France as well as Spain, the presence of regional incentives ensures that audiovisual production is relatively spread throughout the country. Rome and Milan, however, are the two key business hubs for the broadcast industry.

Locations for key Italian audiovisual companies:

Broadcasters	HQ	Producers	HQ
RAI	Rome	Cattleya	Rome
Mediaset	Milan	FremantleMedia Italia	Rome
Sky Italia	Milan	Wildside	Rome
Telecom Italia	Rome	Lux Vide	Rome
Discovery Italia	Milan	Palomar	Rome
		Medusa Film	Rome

Key industry stakeholders & useful contacts

In addition to the main co-production business models and broadcast centres noted above, foreign content producers should get acquainted with the overall funding and co-production infrastructure in the target countries.

The landscape is a mix of governing authorities, industry bodies, funding organisations, international agreements, and networking events, along with typical international stakeholders like the Finnish Embassy and Cultural Institute. It is also advised to become acquainted with the names of key producers and distributors, some of which have already been noted above as well as in the case studies throughout this report.

The following overview covers the most important points:

Leading drama producers*

Country	Producer	Website
France	Lagardere Studios	www.lagardere-studios.com/en
	Federation Entertainment	www.fedent.com
	Ego Productions	www.ego-productions.com
	Haut et Court	www.hautetcourt.com
	StudioCanal	www.studiocanal.com
	Zodiak Media Group	www.zodiakmedia.com
	Capa Drama	www.capatv.com/en
	Endemol Fiction	www.endemol.fr
	Newen	www.newencontent.com/en
	GTV Productions	www.geteve.fr/en
Spain	Bambú Producciones	www.bambuproducciones.com
	Filmax International	www.filmaxinternational.com
	Diagonal TV	www.diagonaltv.es
	Big Bang Media	www.bigbangmedia.es
	Mediapro	www.mediapro.es
	Endemol Shine Iberia	www.shineiberia.tv
	Magnolia TV	www.magnoliatv.es
	Boomerang TV	www.grupoboomerangtv.com
Italy	Wildside	www.wildside.it
	Aurora TV	www.banijay.com/company/aurora-tv
	Cattleya	www.cattleya.it
	Fandango	www.fandango.it
	Lux Vide	www.luxvide.it
	Fabula Pictures	www.fabulapictures.com/it
	FremantleMedia Italia	www.fremantlemedia.it
	Palomar	www.palomaronline.com

*Does not include direct broadcasters. Producers are not listed in order.

Children's and animation producers

Country	Producer	Website
France	Xilam	www.xilam.com
	TeamTO	www.teamto.com/en
	Ellipsanime	www.dargaudmedia.com
	Les Armateurs	www.lesarmateurs-lesite.fr/
	Gaumont Animation	www.gaumontanimation.com
	Sparx Animation Studios	www.sparx.com
	OuiDo! Productions	www.ouido-productions.com

	Sav! The World Productions	www.savtheworld.com
Spain	Cornelius Films	www.corneliusfilms.com
	Wuji House	www.wujihouse.com
	Portocabo	www.portocabo.com
	Ánima Kitchent	www.animakitchent.com
	Boomerang TV	www.grupoboomerangtv.com
	Motion Pictures	www.motionpic.com/es
	Zinkia Entertainment	www.zinkia.com
	PeekAboo Animation	www.peekabooanimation.com
Italy	Gruppo Alconi	www.alconi.it
	Rainbow S.r.l	www.rbw.it/en
	Mondo TV	www.mondotv.it
	Maga Animation Studio	www.maga-animation.com

Sales agents & distributors

Country	Producer	Website
France	Groupe AB	www.groupe-ab.fr
	StudioCanal	http://www.studiocanal.com/en
	Diaphana	www.diaphana.fr
	Films Distribution	www.filmsdistribution.com
	Rezo Film International	http://www.rezofilms.com/
	SND Group M6	https://www.sndm6group.com/
	ACE Entertainment	http://www.ace-entertainment.com/
	AMPERSAND	http://www.ampersand.fr/
	FILM&PICTURE	http://www.filmandpicture.com/
	Vivendi Entertainment	http://www.vivendientertainment.com/
Spain	Imagina Int'l Sales	www.imaginasales.tv
	Imira Entertainment	www.imiraentertainment.com
	Somos Distribution	www.somosdistribution.net
	Grupo Televisa	www.televisainternacional.tv
	Filmax International	www.filmaxinternational.com
	Comercial TV	www.comercialtv.com
	Boomerang TV	www.grupoboomerangtv.com
	Onza Distribution	www.onzadistribution.com
Italy	Videoshow	www.d4-videoshow.com
	Dall'Angelo Pictures	www.dallangelopictures.com
	Brave Film	www.bravefilm.com
	Filmexport Group	www.filmexport.com
	Intramovies	www.intramovies.com
	Lilium Distribution	www.liliumdistribution.it
	Variety Communications	www.varietycommunications.it
	DNC Entertainment	http://www.dncentertainment.it/

Production associations and other stakeholders

Governing Authorities	<ul style="list-style-type: none"> ▪ Centre national du cinéma et de l'image animée (CNC) ▪ Ministry of Education, Culture, and Sport ▪ Ministry of Cultural Heritage and Tourism and Cinema Directorate General
Producers Associations	<p>Union Syndicale de la Production Audiovisuelle (USPA) https://www.uspa.fr/</p> <p>Federation of Spanish Audiovisual Producer Associations (FAPAE) http://fapae.es/</p> <p>Associazione Produttori Televisivi - A.P.T. http://www.apr.it/</p>
Federal Funding Bodies	<p>Film France www.filmfrance.net</p> <p>Institute of Cinematography and Audiovisual Arts (ICAA) www.icaa.es</p> <p>Italian Film Commission www.filminginitaly.com</p>
Co-production agreements	<p><u>European Convention on Cinematographic Co-production</u></p> <p><u>EURIMAGES</u></p>
Networking events	<ul style="list-style-type: none"> ▪ MIPTV (Cannes) ▪ Series Mania (Paris) ▪ Série Series (Fontainebleau) ▪ Conecta Fiction (Santiago) ▪ MIPCOM (Cannes) ▪ Medientage Cannes) ▪ MIFA (Annecy)
Embassy contacts	<p><u>Finnish Embassy</u></p> <p>1 Place de Finlande, 75007 Paris, France +33 1 44 18 19 20</p> <p>Paseo de la Castellana, 15, 28046 Madrid, Spain +34 913 19 61 72</p> <p>Via Lisbona, 3, 00198 Roma RM, Italy</p>

	+39 06 852231
Cultural institutions	<p>Finnish Institute in France 60, rue des Écoles 75005 Paris France info@institut-finlandais.fr / +33 1 40518909</p> <p>Finnish Cultural Institute in Madrid c/ Caracas, 23 - bajo E-28010 Madrid Spain info@madrid.fi / +34 91 4444411</p> <p>Institutum Romanum Finlandae Passeggiata del Gianicolo 10 00165 Roma Italia info@irfrome.org / +39 06 68801674</p>

5. NORDIC CONTENT IN THE TARGET MARKETS

Nordic content case studies

As noted earlier in the report, France has so far been the most successful market for Nordic TV out of the three surveyed, with a handful of the case studies from our Germany report also finding an audience in the French market.

Not all of the success stories are “Nordic Noir,” either (particularly in France). Shows like Sweden’s “Real Humans,” Denmark’s “Borgen,” and more recently “Ride Upon the Storm” (also from Denmark) show that there is an appetite for well-written, well-acted, and well-produced Nordic drama even when it ventures into new territory. Nordic Noir, however, still remains potent: “The Paradise,” the first major Spanish-Finnish co-production, transplants traditional Nordic Noir themes to the Spanish coast and will be released later this year.

Below is an outline of relevant acquisitions and co-production case studies relevant to the target markets:

Case studies



Midnight Sun

(SE/FR, Nice Drama/Atlantique Productions, 2016, Canal+, 8 x 60')

Swedish/French co-production about the murder of a French citizen near the Arctic Circle, and ensuing investigation. Produced and marketed as a “Canal+ Original” in

collaboration with Sweden’s public broadcaster in collaboration with the above-named production companies. StudioCanal is handling global distribution. Billed as the first-ever Swedish/French drama co-pro.

“Midnight Sun” bit.ly/2xx9fkX



Bordertown

(FI, Fisher King/Federation Entertainment, 11 x 55', Canal+, 2017)

Probably Finland's hottest international production at the moment, has been picked up by Netflix and is being distributed widely

around the world. Promoted in many markets as a Netflix Original but not in France where it is being aired on Canal+.

"Bordertown" bit.ly/2i3575c



Real Humans (Äkta människor) (SE/DK/FI, Matador Film, 20x60', ARTE, 2012)

Swedish science fiction/drama series set in an alternate near-future version of Sweden where consumer-level humanoid robot workers and servants are widespread.

Danish public broadcaster Danmarks Radio

and YLE collaborated as co-producers. Picked up originally by ARTE for France. Production of a third season was stopped in 2014 due to insufficient funds.

"Real Humans" bit.ly/2wNIMLw



Ride Upon the Storm

(DK/FR, DR Drama, 20x58', ARTE, 2017)

The Krogh family in Denmark has produced a long line of priests. The father has his sights set on the diocese of Copenhagen and the older son,

Christian, is struggling to find fulfillment. Meanwhile, Auguste, his married younger brother, is the pastor of a church in the capital. Each one is trying to find the right path, between religious enlightenment and perdition. True co-production between ARTE and Danmarks Radio, written by Adam Price (co-creator of "Borgen").

"Ride Upon the Storm" bit.ly/2gulSCQ



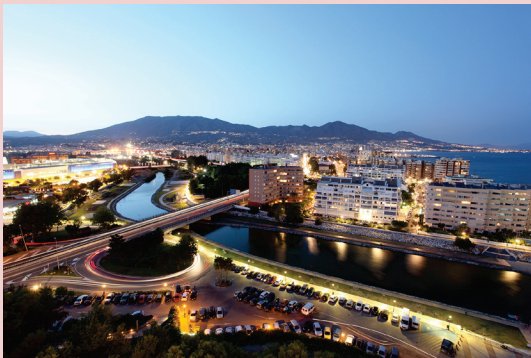
Nymphs

(FI, Fisher King, 12x44', Sky Italia, 2014)

The internationally-successful show Nymphs is now a bit dated as a case study, but it's a good example of a Finnish series which has found a wide audience abroad. The show aired in Italy on Sky Italia, while France and Spain are among 13 countries

where translation rights to a spinoff book series have been successfully sold.

"Nymphs" www.eyewell.se/nymphs/



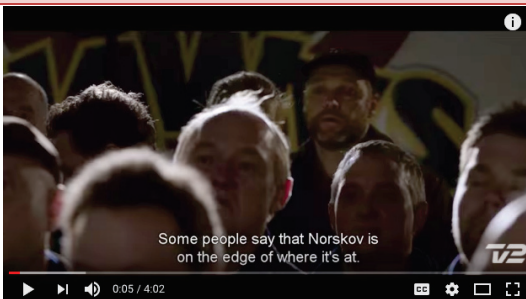
The Paradise

(ES/FI, YLE/Mediapro, 8x50', in pre production)

A thriller set among the Finnish community living in Fuengirola on the Costa del Sol, the largest group of Scandinavians outside Scandinavia. Their peaceful existence is set to be interrupted by a series of crimes which can only be resolved by the

collaboration of Finnish and Spanish police forces. Airing approximately in 2020.

"The Paradise" bit.ly/2yYSoUi



Norskov

(DK, SF Studios/TV2 Denmark, 10x42', ARTE, 2015)

Police investigator Tom Noack returns home to Norskov to clean up the town's drug crime but quickly becomes personally involved. When he happens on the trail of a

major smuggling operation, Tom is torn between his professional and his personal commitments. Acquired by ARTE for the French market.

"Norskov" <http://bit.ly/2yG9Fp6>



Occupied

(NO/SE/FR, TV2 Norge/Yellow Bird, 10x45', ARTE, 2015)

Political thriller where Norway is occupied by Russia on behalf of the European Union, due to the fact that the newly elected environmentally-friendly Norwegian

government has stopped oil and gas production in the North Sea. Co-produced with Sweden's Yellow Bird, with ARTE collaborating as a minor partner.

"Occupied" bit.ly/2aT6r48

Nordic content on Netflix

Below is a summary of Nordic shows which has been picked up by Netflix. Some of Netflix's Nordic programs are not distributed in the target countries, or (as with Bordertown and Canal+) have already been picked up by another broadcaster for the target markets.

At-a-Glance: Netflix's Nordic TV Material

Program	Genre	Country	Model	Distribution
Lilyhammer	Dramedy	Norway	Co-pro	Global
The Bonus Family	Dramedy	Sweden	Acquisition	Global (except Scandinavia)
Bordertown	Crime drama	Finland	Acquisition	United States, Canada, United Kingdom, Ireland, Norway, Sweden, Denmark, Iceland, Eastern Europe, Russia, Netherlands
Nobel	War drama	Norway	Acquisition	United States, Canada, United Kingdom, Ireland, Finland, Belgium, Netherlands, Luxembourg, France, Australia, New Zealand
Réttur (Case)	Crime drama	Iceland	Acquisition	United States, Canada, Denmark, Norway, Sweden, Belgium, The Netherlands, Luxembourg, Australia
Rita	Dramedy	Denmark	Acquisition	Global

Conclusions and advice for Nordic content producers

As we have illustrated in the preceding pages, the global landscape for drama and children's content continues to change rapidly. Certainly this is true in all three target markets, but particularly in Spain and Italy, where high-value international drama is transforming broadcast industries which were once focused mostly on low-budget domestic programs and mainstream American TV.

In France, the rise of global drama has changed the entire international production strategy of free-to-air broadcasters. Whereas such broadcasters once shied away from big-budget drama material which did not either a) fulfill their language and cultural requirements; or b) involve internationally-popular "in-demand" programs from the USA, the broadcasters (and even France's public funding agencies themselves) are now recognising that there is value in international drama and seeking to adjust their strategies accordingly.

France is the market which shows the most potential for Nordic content right now – it is the most "established" market for Nordic drama, and has a public channel in ARTE which has become a reliable buyer of Nordic series and has a built-in connection to Europe's other major continental TV market (Germany) to boot. It is also likely to be the easiest market to work with both institutionally as well as culturally.

Spanish drama has grown its international profile in recent years, and is seeing great interest from Netflix at the moment as the latter looks to leverage Spanish-language programming for other global markets. Within Spain, Movistar+ and Atresmedia are probably the two key investors, but RTVE is also a very strong public broadcaster and has some credible shows to its name. The upcoming performance of "The Paradise" will be a good indicator of the staying power of Nordic drama in Spain – a notable success story could open this market to many more collaborations in the near future.

The best way to enter the Italian market is likely to either be through RAI's new partnership with France Télévisions, or by working with Sky, who are investing record amounts in drama at the moment and are keen to grow their SVoD presence across Europe.

For children's content, unfortunately we cannot point to a clear success story for Nordic material but there are a range of players where producers can begin the conversation and see what is out there as far as possibilities for collaboration. Certainly, this is where the rise of YouTube and OTT promises to be the most relevant.

Overall, the television industries of France, Spain, and Italy are vast, diverse, and like most broadcast cultures, in a state of transition. The best way to move forward is going to mirror the most effective strategies for any industry: finding a unique niche. Finnish producers can build on the sterling reputation of existing Nordic and Finnish content in order to get their foot in the door in these three markets, but the first step is deciding which doors one should attempt to open. It is hoped that this report will be a useful starting point in making this initial leap.

6. APPENDICES

Broadcasters by market

Acquisitions teams by market

Digital and VoD providers by market

Funding contacts by market

Sales and distributors by market

Top producers by market

Steps in finding a co-production partner or a client: Practical tips

Appendix 1: Broadcasters / FRANCE



Key Broadcasters				
Public-service	Affiliation	Programme	Genre/Speciality	Web address
France Televisions	French public national television broadcaster funded by the revenue from television licence fees and commercial advertising (a new law on public broadcasting will gradually phase out commercial advertising)	France 2	secondary channel with the second largest viewing audience	www.france.tv
France Televisions		France 3	Network of regional stations	www.france.tv
France Televisions		France 4	Available only on digital television. It is a channel for young adults n(sports, sitcom, arts, music and entertainment)	www.france.tv
France Televisions		France 5	Focuses on societal issues (health, education, politics..) with talk-shows and culture with documentary films	www.france.tv
France Televisions		1ere	A network of radio and television stations operating in French overseas departments and territories around the world	www.france.tv
France Televisions	partnership between Lagardère Active and France Télévisions	France Info	Non-stop news channel	www.france.tv
France Televisions		Gulli	childrens channel	www.gulli.fr/
France Televisions		Mezzo	devoted to classical music (including opera and ballet), jazz and world music	www.mezzo.tv/
France Televisions		TV5 MONDE	News channel	www.tv5monde.com
France Televisions		Euronews	News channel	www.euronews.com
France Televisions	International: 50% share: public Franco-German TV network, a European channel, that promotes programming in the areas of culture and the arts	Arte	cultural channel, films, music	www.arte.tv

Free to air commercial	Affiliation	Programme	Genre/Speciality	Web address
TF1 Group	The group was formed after TF1 was privatised in 1987. It is controlled with a 43% stake by Bouygues	TF1	generalist, including TV drama	https://www.tf1.fr/
TF1 Group		LCI	all-news TV channel	www.lci.fr/
TF1 Group		TV Breizh	local channel with TF1 reruns	www.tvbreizh.fr/
TF1 Group		Histoire	history channel	www.histoire.fr/
TF1 Group		Ushuaia TV	nature channel	www.ushuaiatv.fr/
TF1 Group	50% stake (50% M6 Group) 50% stake (50% M6 Group)	TMC	Télé Monte Carlo shows a variety of programs, including tv dramas and imports. It also produces many original programming	www.tmc.tv
TF1 Group/M6 Group		TF6	entertainment intended for young adults	www.tf6.tv
TF1 Group/M6 Group		Serie Club	tv series	www.serieclub.fr

Broadcasters / FRANCE



TF1 Group		NT1	generalist, tv series	www.nt1.tv
TF1 Group		HD1	generalist, tv series	https://www.tf1.fr
M6 Group		M6	generalist channel	www.m6.fr
M6 Group		W9	entertainment, music and series	www.w9.fr
M6 Group		6ter	family-oriented. 6ter shows magazines, documentaries, educational programs, along with children programmes, series and movies	www.6ter.fr
NRJ Group	founded as a radio station it is now a mult media group based in Paris	Cherie 25	entertainment, tv series	www.nrj-play.fr/cherie25

Pay TV	Affiliation	Programme	Genre/Speciality	Web address
Canal+ Group	owned and controlled by Vivendi SA	Canal+	French premium cable television channel launched in 1984. The channel broadcasts several kinds of programming, mostly encrypted. Unencrypted programming can be viewed free of charge on Canal+ and on satellite on Canal+ Clair	www.canalplus.fr
Canal+ Group		C8	entertainment, lifestyle, game shows	www.c8.fr
Canal+ Group		Canal+ Series	series	www.canalplus.fr/



Key Broadcasters				
Public-service	Affiliation	Programme	Genre/Speciality	Web address
Rai	national broadcasting company owned by the Ministry of Economy and Finance	Rai 1	generalist	www.rai.it
Rai		Rai 2	generalist	www.rai.it
Rai		Rai 3	generalist	www.rai.it
Rai		Rai 4	TV series, movies and entertainment for young audience	www.rai.it
Rai		Rai 5	cultured-oriented entertainment, documentaries	www.rai.it
Rai		Rai Movie	movies	www.rai.it
Rai		Rai Premium	best RAI's past programs	www.rai.it
Rai		Rai Gulp	cartoons, TV series and entertainment for teens	www.rai.it
Rai		Rai Yoyo	cartoons, TV series and entertainment for kids	www.rai.it
Rai		Rai News 24	all news	www.rai.it
Rai		Rai Storia	documentaries focused on history	www.rai.it
Rai		Rai Sport+ HD	live sports and news in HD	www.rai.it
Rai		Rai Sport+ HD	live sports and news	www.rai.it
Rai		Rai Scuola	educational	www.rai.it

Free to air commercial	Affiliation	Programme	Genre/Speciality	Web address
Mediaset	Italian-based mass media company which is the largest commercial broadcaster in the country. Founded in the 1970s by former Italian prime minister Silvio Berlusconi and still controlled today with a 38.6% stake by his family holding company Fininvest, the group competes primarily against the public broadcaster RAI	Rete 4	generalist	www.mediaset.it/
Mediaset		Canale 5	generalist	www.mediaset.it/
Mediaset		Italia 1	generalist	www.mediaset.it/
Mediaset		Iris	TV series, movies and cultured-oriented programs	www.mediaset.it/
Mediaset		La 5	TV series, movies, entertainment, reality shows, female-oriented channel	www.mediaset.it/
Mediaset		Mediaset Extra	past and current cult shows from Mediaset channels	www.mediaset.it/
Mediaset		Italia 2	TV series, movies, entertainment, reality shows, male-oriented channel	www.mediaset.it/
Mediaset		Top Crime	TV series and movies on the world crime	www.mediaset.it/

Broadcasters / ITALY



Mediaset		TgCom 24	all news	www.mediaset.it/
Cairo Communication	Italian media and publication company based in Milan. The shares of the company float in Borsa Italiana. Urbano Cairo, via UT Communications, UT Belgium Holding, owned 50.101% stake of the company. In turn Cairo Communication owned 59.693% stake of fellow media company RCS Media-Group, which was acquired in 2016.	La 7	generalist	www.cairocommunication.it/
Cairo Communication		La 7d	women infotainment, TV series, movies, light entertainment, La 7 reruns	www.cairocommunication.it/

Pay TV	Affiliation	Programme	Genre/Speciality	Web address
Sky Italia	Sky	TV8	generalist	www.sky.it
Sky Italia		Cielo	generalist	www.sky.it
Sky Italia		Sky TG24	24h all news	www.discoverychannel.it
Discovery Italia		NOVE	generalist	www.discoverychannel.it
Discovery Italia		Real Time	lifestyle	www.discoverychannel.it
Discovery Italia		Giallo	TV series and crime movies	www.discoverychannel.it
Discovery Italia		K2	cartoons, TV series and entertainment for teens	www.discoverychannel.it
Discovery Italia		Frisbee	cartoons, TV series and entertainment for kids	www.discoverychannel.it
Discovery Italia		DMAX	factual entertainment for the male audience	www.discoverychannel.it
Discovery Italia		Focus	documentaries	www.discoverychannel.it
Discovery Italia		Paramount Channel	movies	www.discoverychannel.it
Discovery Italia		VH1	24-hour music	www.discoverychannel.it
Turner Broadcasting System	Turner	Boing	cartoons, TV series and entertainment for teens	www.turner.com/
Turner Broadcasting System	Turner	Cartoonito	cartoons, TV series and entertainment for kids	www.turner.com/
Sony Pictures Television	Sony Pictures Television Inc.	Pop	cartoons, TV series and entertainment for boys and girls	https://www.sonypicturestelevision.com/home.php
Sony Pictures Television	Sony Pictures Television Inc.	Cine Sony	TV series and movies	https://www.sonypicturestelevision.com/home.php

Broadcasters / SPAIN



Key Broadcasters				
Public-service	Affiliation	Programme	Genre/Speciality	Web address
RTVE (Corporacion de Radio y Television Espanola S.A.	government-owned corporation	La 1	generalist channel which mainly broadcasts news reports, news programmes, documentaries, magazine programmes, Spanish and Hispanic America TV series, films (particularly Spanish and American films) and some popular sports competitions. It was Spain's first TV channel and currently third most watched	www.rtve.es
RTVE		La 2	mainly broadcasts cultural programming, North American TV series, documentaries, Spanish and European films, news, reports, debates and musicals	www.rtve.es
RTVE		Clan	childrens channel, but also offers some programming aimed at teenagers during the evening and repeats TVE content from other channels during the early hours	www.rtve.es
RTVE		Tdp (Teledeporte)	broadcasts sporting competitions that cannot be broadcast on La1 and La2 due to lack of interest from the audience	www.rtve.es
RTVE		24h	24 horas is a 24-hour news channel created in 1997. It broadcasts news reports, debates analyses, interviews as well as rolling news. Spains first 24-hour news channel	www.rtve.es
RTVE		La 1 HD	La 1 in high definition	www.rtve.es
RTVE		Teledeporte HD	Teledeporte in high definition	www.rtve.es
RTVE		TVE Internacional	RTVE international television channel. Created in 1989 it broadcasts TVE content worldwide	www.rtve.es
Members of the Federation of Regional Organisations of Radio and Television (Federación de Organismo de Radio y Televisión Autonómicos) (FORTA).				
Empresa Pública de la RTV de Andalucía;		Canal Sur, Canal Sur 2, Canal Sur Andalucía, Canal Sur HD	general content, cultural and tourism	www.canalsur.es
Corporació Catalana de Radio i Televisió		TV3, Super3, Canal33, Canal 3/24, TV3 CAT		www.ccma.cat
Ente Público RTV Madrid		Tele Madrid, La Otra		www.telemadrid.es
Sociedad Publica de Television Extreme-na S.A.U		Canal Extremadura Television		www.canalextramadura.es
Compañía de la RTV de Galicia		TVG, G2, GTV America, GTV Europa		www.crtvg.es
Euskal Irrati Telebista		ETB1, ETB2, ETB3, ETB SAT, Canal Vasco		www.eitb.eus
Ente Público RTV Canaria		TV Canaria		www.rtv.c.es
Ente Público RTV Castilla-La Mancha;		Castilla La Mancha Television		www.cmmedia.es
RTV de la Región de Murcia		7 Region de Murcia		www.7tvregiondemurcia.es

Broadcasters / SPAIN



Ente Público de Comunicación del Principado de Asturias		Televisión de Principado Asturiano TPA7, TPA 8		www.rtpa.es
Ens Públic de RTV de les Illes Balears		IB3, IB3 Catala		www.caib.es
Corporación Aragonesa de Radio y Televisión		Aragon Television		www.aragontelevision.es

Free to air commercial	Affiliation	Programme	Genre/Speciality	Web address
Atresmedia	Significant shareholders include Planeta DeAgostini and RTL Group	Antena 3	general program, comedy and drama series, sitcoms	www.antena3.com/
Atresmedia		laSexta	The channel's programming is generalist, however, there is an emphasis on humour and entertainment. The channel is also known for its large quantity of American and sports programming, and in the last years, it's becoming more and more acknowledged due to the wide covering of political events, such as elections, which include extensive debate through 3 key programmes: Al rojo vivo (Red-hot), El objetivo (The lens) and Salvados (Saved). The political alignment of its news and debate programs is left-wing	www.lasexta.com/
Atresmedia		Neox	the channel shows children's programming during the morning, and films and series for youngsters during the evening and night. The channel is geared towards children and a teenage audience, and international successful series, such as Family Guy, How I Met Your Mother, Two and a Half Men, The Middle and Modern Family	neox.atresmedia.com/
Atresmedia		Nova	The service is aimed at women and the schedule reflects that. Normally during the day, lifestyle programmes like cookery are screened. During the evening films and some series are shown while around midnight, Poker is screened. The network is available on digital terrestrial television (TDT as it's known in Spain) as well as cable and satellite.	nova.atresmedia.com/
Atresmedia		Mega	programming is aimed towards a male audience	mega.atresmedia.com/
Atresmedia		Atreseries	TV series (only in HD)	atreseries.atresmedia.com/
Mediaset Espana	It is currently owned by Mediaset Investimenti (41.22%), PRISA (17.34%) and free-float (39.87%)	Telecinco	commercial television channel with popular films, series, entertainment shows	www.telecinco.es/
Mediaset Espana		Cuatro	commercial channel with rights to football matches	www.cuatro.com/
Mediaset Espana		Factoria de Ficción	a 24-hour channel which airs both syndicated and original television series and films. It is available on free-to-air digital television, and cable television.	www.factoriadefiction.com/
Mediaset Espana		Divinity	programming is aimed to target women	www.divinity.es/



Mediaset Espana		Energy	programming is aimed towards a male audience (sports broadcasts, news documentaries, movies and international foreign fiction series)	www.energytv.es/
Mediaset Espana	joint venture Mediaset Espana and Turner Broadcasting System Europe	Boing	children's television channel	www.boing.es
Mediaset Espana		Be Mad TV	young adult male-oriented programmes (only in HD)	www.bemad.es

Pay TV	Affiliation	Programme	Genre /Speciality	Web address
Movistar +	IPTV service / Telefonica	#0	generalist	ver.movistarplus.es/
Movistar +		Movistar Series	TV Fiction/series	ver.movistarplus.es/
Movistar +		Movistar Series Xtra	TV Fiction/series	ver.movistarplus.es/
Movistar +		Movistar Estrenos	film	ver.movistarplus.es/
Movistar +		Movistar Xtra	film	ver.movistarplus.es/
Movistar +		Movistar Accion	film	ver.movistarplus.es/
Movistar +		Movistar Comedia	film	ver.movistarplus.es/
Movistar +		Movistar DCine	film	ver.movistarplus.es/
Movistar +		Movistar Cine Español	film	ver.movistarplus.es/
FOX (Spain)	FOX Networks Group Espana	FOX	TV fiction/Series	www.foxtv.es
Comedy Central	VIACOM	Comedy Central	TV Fiction/series	www.paramountcomedy.es

Appendix 2: Acquisitions teams / FRANCE



Broadcaster buyers			
Broadcaster	Position	Contact person	Contact details
TF1	Director Acquisitions	Sylvain Andreu	sandreu@tf1.fr
TF1	Programming and acquisitions Director	Fabrice Bailly	fbailly@tf1.fr
TF1	Heads of Acquisition Management	Nathalie Biancolli	nbiancolli@tf1.fr
TF1	Art Director International Acquisitions	Sophie Leveaux	sleveaux@tf1.fr
TF1 International	Acquisitions	Thierry Decourcelle	tdecourcelle@tf1.fr
TV 5	"In charge of acquisition - fiction and documentary"		
France Televisions	Christophe Assezat	christophe.assezat@tv5.org	
France Televisions	Director Acquisitions	Tania Khali	tania.khali@francetv.fr
France 2	Acquisitions TV series	Helene Goujet	helene.goujet@francetv.fr
France 2	Head of fiction	Fanny Rondeau	fanny.rondeau@francetv.fr
France 3	Head of fiction	Anne Holmes	anne.holmes@francetv.fr
France 4	Head of programming France 4	Tiphaine de Ragueneil	Tiphaine.deragueneil@francetv.fr
France 0	Acquisition (France 0)	Benedicte Marchand	benedicte.marchand@francetv.fr
1ere	Programming advisor and acquisition (series)	Patrice Sinteiff	patrice.sinteiff@francetv.fr
Arte France	Deputy Head of Drama Department/Int. Acquisitions and Coproductions	Alexandre Piel	a-piel@arteFrance.fr
Arte France	Acquisitions/Fiction	Virginie Padilla	v-padilla@arteFrance.fr
Arte Geie	Responsible for Fiction Programming, Film and Fiction	Lisa Müller	l-müller@arte-tv.com
M6 Group	Head deputy of acquisitions	Alexandre Moussard	amoussard@m6.fr
M6 Group	Director Acquisitions	Bernard Majani	bmajani@m6.fr
M6 Group	Acquisitions	Laure de Boissard	ldeboissard@m6.fr
M6 Group	Acquisitions	Abigail Joliot	abigail.joliot@m6.fr
NRJ12	Head of acquisitions	Damien Mason	dmasson@nrj.fr
Lagardere	Acquisition coordinator	Naleka Nguessan	naleka.nguessan@lagardere-active.com
Canal Plus	Senior VP International Acquisitions	Aline Marrache-Tesseraud	aline-marrache@canal-plus.com
Canal Plus	Head of foreign fiction acquisitions	Diane Reynald	diane.reynald@canal-plus.com

Acquisitions teams / FRANCE



Canal Plus	Acquisition/Foreign fiction	Chrystel Poncet	chrystel.poncet@canal-plus.com
Canal Plus	Foreign Fiction Acquisitions	Francoise Perrin	francoise.perrin@canal-plus.com
Canal Plus	Head of Acquisitions - Kids Department Canal +	Geraldine Soto	geraldine.soto@canal-plus.com
Serie Club	Acquisitions	Florent Gellie	fgellie@tf6.fr
ORANGE	Orange Content / VP Communication	Sebastien Goales	sebastien.goales@orange.com

Acquisitions teams / ITALY



Broadcaster Buyers			
Broadcaster	Position	Contact person	Contact details
RAI	Rai Tre - Acquisition Executive	Maria Laura Ajmme	
RAI	Tv Content Buyer	Laura Bortolozzi	laura.bortolozzi@rai.it
RAI	Buyer	Giorgio Buscaglia	giorgio.buscaglia@rai.it
RAI	Rai Cinema - TV Rights Acquisitions	Marina Chiaravalle	
Mediaset Distribution RTI Spa	Deputy Head of Acquisitions	Giacomo Poletti	giacomo.poletti@mediaset.it
Mediaset RTI Spa	Business Affairs Fiction	Giovanni Altieri	giovanni.altieri@mediaset.it
Mediaset Distribution RTI Spa	Business Affairs Acquisition Manager	Lucia Carta	lucia.cart@mediaset.it
Mediaset RTI Spa	Acquisition Manager	Imma Petrosino	imma.petrosino@mediaset.it
Freemantlemedia Italy	Director of International Formats	Serena Beneficio	
Sky Italia SRL	Chief Business Affairs & Acquisition	Luisa Borella	luisa.borella@skytv.it
Discovery Italia	Content & Acquisition Manager	Paola Chincoli	
EFFE TV SRL	Head of Content and Communication	Riccardo Chiattelli	riccardo.chiattelli@feltrinelli.it
Turner Broadcasting Italy	Programme & Acquisitions Manager	Alice Fedele	alice.fedele@turner.com
Telecom Italia	Acquisition & Content Manager	Luca Oteri	luca.oteri@telecomitalia.it
Telecom Italia	Head of Content Management	Aldo Romersa	aldo.romersa@telecomitalia.it

Acquisitions teams / SPAIN



Broadcaster Buyers			
Broadcaster	Position	Contact person	Contact details
RTVE	Sales Executive& Business Development	Mila Mayi	mila.mayj@rtve.es
RTVE		Rosalia Alcubilla	rosalia.alcubilla@rtve.es
Movistar+	Acquisitions Director	Julian Rodriguez Montero	julian.rodriguezmontero@telefonica.es
Movistar+	Acquisitions Department	Gonzalo Fernandez Arceu	gonzalo.fernandezarceu@telefonica.es
Movistar+	Acquisitions Department	Domingo Corral	domingo.corral@telefonica.es
Movistar+	Acquisitions Department	Ignacio Fernandez Vega	ignacio.fernandezvega@telefonica.es
Atresmedia	Head of Acquisitions and Sales	Jose Antonio Salso	jsalsoba@atresmediatv.com
Atresmedia	Director of Acquisitions and Sales	Mecedes Gamero	mgamero@atresmediatv.com
Mediaset	Acquisitions Department	Monica Iturriaga	miturriaga@mediaset.es
Mediaset	Acquisitions Department	Marisol Renones	mrenones@mediaset.es
Amazon Spain	Senior Content Acquisition Manager	Castro Manuel Reverte	reverte@amazon.es
CORPORACION RADIO E TELEVISION DE GALICIA, S.A.	Head of Acquisitions	Montse Besada	allea@crtvg.es
EUSKAL TELEBISTA	Head of Programming & Acquisitions	Aritz Galarza	galarza_aritz@eitb.eus
HBO Europe	VP of Programming & Acquisitions	Valentine Lorient	
Viacom Interantional Media Networks	Programming & Acquisitions Senior Director Entertainment Brands Southern & Weste	Goncalo Moura	perezc.gabriela@vimn.com
TV3 Televisio de Catalunya	Head of Programme Acquisitions	Carles Blanch	cblanch.x@ccma.cat

Appendix 3: Digital and VoD providers / FRANCE



Top VoD Providers						
Company	Affiliation	Business model	Website	Contact	Position	Email
Netflix	Netflix	VoD	www.netflix.com	Stacey Silvermann	Director Content Acquisitions	ssilvermann@netflix.com
				Emily Briggs	VOD & Online Buyer	ebriggs@netflix.com
Amazon Prime Instant Video	Amazon US	Subscription VoD	www.amazon.fr	Isabelle Bertrand	Principal Content Acquisition	bertrand@amazon.fr
YouTube/Google Play	Google	AVoD/free VoD, TVoD (Google Play), SVoD (YouTube Red)	www.youtube.com	Lisa Rousseau	Head of Transactional Partnerships, EMEA, Google Play and YouTube	lisarousseau@google.com
				Neil Price	Strategic Partner Manager, Google Play Movies & TV	neilp@youtube.com
				Gregory Dray	Director, Kids/Family & Learning, EMEA YouTube	gdray@youtube.com
Facebook/Instagram	Facebook	VoD/emerging	www.facebook.com, www.instagram.com	Daniel Danker	Product Director	danieldanker@fb.com
ORANGE TV	Orange	ADSL television access service and a video on demand service	www.orange.com	Sebastien Goales	ORANGE Content / VP Communication	sebastien.goales@orange.com
Microsoft	Microsoft	VoD/emerging	www.microsoft.com	Tony Cuadras	VOD and Online Buyer	tony.cuadras@microsoft.com

Digital and VoD providers / ITALY



Top VoD Providers						
Company	Affiliation	Business model	Website	Contact	Position	Email
Netflix	Netflix		www.netflix.com	Stacey Silvermann	Director, Global Content Acquisitions	ssilvermann@netflix.com
Amazon Italia Services SRL	Amazon US	Subscription VoD	https://www.amazon.it/	Viktoria Wasilewski	Senior Content Acquisition Manager	wasilewski@amazon.de
Mediaset Infinity	Mediaset	VoD	www.infinitytv.it	Marco Costa	CEO	mcosta@mediaset.it
YouTube/Google Play	Google	AVoD/free VoD, TVoD (Google Play), SVoD (YouTube Red)	www.youtube.com	Lisa Rousseau	Head of Transactional Partnerships, EMEA, Google Play and YouTube	lisarousseau@google.com
				Neil Price	Strategic Partner Manager, Google Play Movies & TV	neilp@youtube.com
				Gregory Dray	Director, Kids/Family & Learning, EMEA YouTube	gdray@youtube.com
				Andrea David Rizzi	YouTube Strategic Partnership Manager	
Facebook/Instagram	Facebook	VoD/emerging	www.facebook.com , www.instagram.com	Daniel Danker	Product Director	danieldanker@fb.com
Sky Italia	Sky	VoD	www.skytv.it	Luisa Borella	Senior Director Business Affairs& Acquisition	luisa.borella@skytv.it
				Antonella Dominici	Director PPV & VOD	antonella.dominici@skytv.it

Digital and VoD providers / SPAIN



Top VoD Providers						
Company	Affiliation	Business model	Website	Contact	Position	Email
Netflix	Netflix Int.	Subscription VoD	www.netflix.com/es/	Stacey Silvermann	VOD & Online Buyer	ssilvermann@netflix.com
Amazon UE SARM, Spain	Amazon US	Subscription VoD	www.amazon.es/gp/prime	Castro Manuel Reverte	Senior Content Acquisition Manager	reverte@amazon.es
Atres Player Atres Player Videoclub	Atresmedia Corporacion	free on demand	www.atresplayer.com	Jose Antonio Salso	Head of Acquisitions and Sales	jsalsoba@atresmediatv.com
	Atresmedia Corporacion	transactional video	www.atresplayer.com			
YouTube/Google Play	Google	AVoD/free VoD, TVoD (Google Play), SVoD (YouTube Red)	www.youtube.com	Lisa Rousseau	Head of Transactional Partnerships, EMEA, Google Play and YouTube	lisarousseau@google.com
				Neil Price	Strategic Partner Manager, Google Play Movies & TV	neilp@youtube.com
				Gregory Dray	Director, Kids/Family & Learning, EMEA YouTube	gdray@youtube.com
Facebook/Instagram	Facebook	VoD/emerging	www.facebook.com, www.instagram.com	Daniel Danker	Product Director	danieldanker@fb.com

Appendix 4: Funding contacts / FRANCE



Country-wide Funding Bodies						
Funding Body	Annual Budget	TV funding	Details	Web site	Contact Person	Contact
TRIP: Tax Rebate for International Productions	max 30.000.000 per project		The TRIP supports non-French projects that are completely or partly made in France. To be eligible, projects must pass a cultural test, which assesses European cultural elements in the story as well as French and European locations, characters, sources, landmarks, creators, crew and French technical hubs. For live action, there's a minimum of 5 days of shoot here necessary. For animated productions and VFX-intensive projects, there is a dedicated cultural test, acknowledging the specificities of the genre.	www.cnc.fr/web/en/tax-rebate	Magali Jammet	magali.jammet@cnc.fr
Aide aux cinémas du monde (Co-production support)	6.000.000€ (2015)	Aide aux cinémas du monde is the fund, managed by the CNC and the Institut français. This is a selective fund, and is granted as a subsidy either before or after completion of a project. It is granted to foreign feature-length film projects that are seeking support from French co-producers.	The film must be a co-production between a production company established in France and one that is not, it must be directed by a non-French (or exceptionally French) director.The language in which it is filmed may be the official or commonly-used language(s) of the foreign country of which the director is a national; or of the territory where the film is shot.	www.cnc.fr/web/en/aide-aux-cinemas-du-monde	Magalie Armand Chef de département	magalie.armand@cnc.fr
PROCIREP	approx. 12.000€ per project	funding available for members of the PROCIREP		www.procirep.fr	Elvira Kaurin-Lacour	elvira_kaurin@procirep.fr

Regional Funding Bodies						
Funding Body	Annual Budget	TV funding	Details	Web site	Contact Person	Contact
Ile-de France Region	200.000€ max per project		selective support for the production, requirement: 50% from the shooting and 50% expenditures in the region	www.iledefrance.fr/aides-regionales-appels-projets/fond-soutien-cinema-audiovisuel	Melanie Thomann-Fox	melanie.thomann-fox@iledefrance.fr
Rhones Alpes Region	180.000€ max per project		selective support for the production, audiovisual project		Catherine Puthod	puthod@rhonAlpes.fr
PiCTANOVO (regional support, north of France)	150.000€		selective support for the production, spending obligation in the region		Emmanuelle Demolder	edemolder@pictanovo.com

Funding contacts / FRANCE



Regional Funding Bodies						
Funding Body	Annual Budget	TV funding	Details	Web site	Contact Person	Contact
Grand Est Region			selective support for the production, audiovisual project, new development supports for French-German and crossborder coproductions	www.alsacecham-pagneardennelorraine.fr	Muriel Famy	muriel.famy@region-alsace.eu
PACA Region	max 200.000€ for a series		selective support for the production, requirement: 50% from the shooting and 50% spending obligation in the region	www.regionpaca.fr	Florian Cabane	florian.cabane@regionpaca.fr
Normandie Region	max 200.000€ for a series		selective support for the production, requirement: 50% from the shooting and spending obligation in the region	www.poleimagehn.com	Nuria Rodriguez	cine.av@poleimagehn.com
Regional Council of Brittany	max 200.000€ for a series		selective support for the production, requirement: 50% from the shooting and spending obligation in the region	www.bretagne.bzh	Guillaume Esterlingot	guillaume.esterlingot@region-bretagne.fr
Regional Council Pays de la Loire	max 130.000€		selective support for the production, requirement: 30% from the shooting and spending obligation in the region	www.culture.paysdelaloire.fr	Guilaine Hass	guylaine.hass@paysdelaloire.fr
Centre Region	max 200.000€ for a series		selective support for the production, requirement: 50% from the shooting and spending obligations in the region, open for young production companies	www.cidlic.fr	Jean-Guillaume Caplain	jean-guillaume.caplain@cidlic.fr

Funding contacts / ITALY



Country-wide Funding Bodies						
Funding Body	Annual Budget	TV funding	Details	Web site	Contact Person	Contact
Ministry of Cultural Heritage and Activities and Tourism Directorate-General Cinema	115 000 000 €	TV drama, documentary, animation, web product	audiovisual tax credit for independent TV and Web producers: Italian works and co-productions	www.cinema.beniculturali.it		dg-c.urp@beniculturali.it
Ministry of Cultural Heritage and Activities and Tourism Directorate-General Cinema	115 000 000 €	TV drama, documentary, animation, web product	A 25% tax credit is granted to Italian executive production companies that produce films or part of films on commissions from foreign production companies on Italian soil	www.cinema.beniculturali.it		dg-c.urp@beniculturali.it

Funding Bodies of the Provinces						
Funding Body	Annual Budget	TV funding	Details	Web site	Contact Person	Contact
BLS Film Fund	5 000 000 €	Feature length films, Screenplay, TV drama, Documentary	The Autonomous Province of Bolzano allocates funds to cover production and pre-production costs for film & TV productions, regardless of the nationality of the production company presenting the application	www.trentinofilmcommission.it	Christiana Wertz Head of Film & Commission	service@bls.info
Apulia Film Fund	1 400 000 €	Feature length films, Short films, TV drama, Documentary, Web product	In collaboration with the Apulia Film Commission, the funds are issued to audiovisual production companies that film in the Puglia Region	www.apuliafilmcommission.it	Silvio Maselli CEO	email@apuliafilmcommission.it
Emilia Romana: Audiovisual Fund	760 000 €	Feature length films, Short films, TV drama, Documentary, Web product	Set up in 2015, the Audiovisual Fund supports the production of film and audiovisual works, of which at least 30% is produced on regional soil	cinema.emiliaromagnacreativa.it/en/	Anna Sbarai Communication	asbarrai@regione.emilia-romagna.it
Friuli Venezia Giulia: FVG Audiovisual Fund	800 000 €	Feature length films, Short films, TV drama, Documentary, Web product, Animation	The Fund's main objective is to provide backing for local companies that operate in the audiovisual production sector, as well as providing training opportunities for professional resources involved. By offering up Tender offers, the Regional Administration, through the Fund, grants funds to independent production companies located in Friuli Venezia Giulia	www.audiovisivofvg.it/bandi/?lang=en	Paolo Vidali Director	pao@audiovisivofvg.it

Funding contacts / ITALY



Region Fund for Film and Audiovisual Production - Lazio	15 000 000 €	Feature length films, Short films, TV drama, Documentary, Web product, Animation	Funding is granted for film and audiovisual works that have been approved as a cultural product and are entirely or partially produced on Lazio Region soil	www.lazioeuropa.it/bandi/sovvenzioni_alla_produzione_di_opere_cinematografiche_e_audiovisive_italiane_europee_e_straniere-331/	Cristina Priarone General Manager FILM COMMISSION ROMA & LAZIO	info@romalaziofilmcommission.it
TV Drama and full feature Films Incentives - Piedmont Region	1 000 000 €	Feature films and TV drama	The economic contribution backing a full feature film for movie house release or a TV drama is calculated based on the territorial trickle down effect bearing in mind the number of weeks of filming, number of technicians and overall expenses incurred by the production company in the region.	www.fctpt.it	Stefano Della Casa President	info@fctpt.it
Sardinia Regional Fund	2 000 000 €	Feature film, short film, TV drama, documentary, animation	The Fund supports the development, production, distribution and promotion of films endowed with regional interest. Additional funds are provided for hospitality and there is also a City of Cagliari production fund.	www.regione.sardegna.it	Nevina Satta CEO	filmcommission@regione.sardegna.it
Trentino Film Fund	1 200 000 €	Feature film, short film, TV drama, documentary, animation	The fund has been set up to support the production and distribution of film, television and documentary works filmed in Trentino	www.trentinofilmcommission.it	Laura Zumiani Production Manager	filmcommission@provincia.tn.it
Toscana Film Commission Incoming Fund	Contribution ceiling: 40.000€	Feature film, short film, TV drama, documentary, animation	A financial instrument managed by the TFC designated to reduce the costs incurred for the use of services within the Tuscan region (accommodation, local technician fees, catering, etc..)	www.toscanafilmcommission.it	Stefania Ippoliti Manager of Audiovisual and Cinema Activities	staff@toscanafilmcommission.it
Valle D'Aosta Film Fund	600 000 €	Feature film, TV drama	The fund promotes and enhances the cultural heritage of the region by supporting the production of films, audiovisual and multimedia projects.	www.filmcommission.vda.it	Carlo Chatiran Director	info@filmcommission.vda.it

Funding contacts / SPAIN



Country-wide Funding Bodies				
Funding Body	Type of funding/ rebate	TV funding	Details	Web site
Institute of Cinematography and Audiovisual Arts [Instituto de la Cinematografía y de las Artes Audiovisuales] (ICAA)	Percentage deduction: 20%	"1. Expenses for creative staff (tax residence in Spain or in another European Union Member State) limited to €100,000 per person.	The money spent in Spanish territory amount must be at least 1 million euros. May not exceed 3 million euros per production carried out. The amount of this deduction, together with the other aid received by the taxpayer, may not exceed 50% of the cost of the production	www.mecd.gob.es/cultura-mecd/en/areas-cultura/cine/el-icaa.html
				Guadalupe Melgosa Fernández Deputy Director of Promotion and International Affairs coordinacion@spainfilm-commission.org

Funding Bodies of the Federal States				
Funding Body	Type of funding/ rebate	TV funding	Details	Web site
Gran Canaria Film Commission	40% tax rebate	"1. Expenses for creative staff (tax residence in Spain or in another European Union Member State) limited to €100,000 per person.	The money spent in Spanish territory amount must be at least 1 million euros. The amount deducted may not be greater than 4.5 million euros for costs incurred in the Canary Islands. Producers (Line Service) with tax domicile in the Canary Islands. The amount of this deduction, together with the other aid received by the taxpayer, may not exceed 50% of the cost of the production	www.grancanariafilm.com/en/ Nuria Guinnot Coordinator grancanariafilm@spegc.org
Navarre	35% tax rebate	"1. Expenses for creative staff (tax residence in Spain or in another European Union Member State) limited to €100,000 per person. 2. Expenses relating to technical industries and other suppliers.	A minimum of at least one week's filming in Navarre. Application of deduction without quota limit. The case of a service company with fiscal residence in the region of Navarre, delivering services international producers. The amount of this deduction, together with the other aid received by the taxpayer, may not exceed 50% of the cost of the production.	www.navarrafilm.com/ Koldo Lasa Aristu filmcommission@navarra.es

Appendix 5: Sales and distribution / FRANCE



Sales and Distribution companies France	
Company	Web address
Groupe AB	www.groupe-ab.fr
StudioCanal	www.studiocanal.com/en
Diaphana	www.diaphana.fr
Films Distribution	www.filmsdistribution.com
MK2 Films	mk2films.com/en
Onoma	en.unifrance.org/directories/company/325825/onoma
Pyramide International	www.pyramidefilms.com
Rezo Film International	www.rezofilms.com
SND Group M6	www.sndm6group.com
TF1 International	www.tf1international.com
ACE Entertainment	www.ace-entertainment.com
AMPERSAND	www.ampersand.fr
BALANGA	www.balanga.tv
FILM& PICTURE	www.filmandpicture.com
FRANCE TELEVISIONS DISTRIBUTION	francetvdistribution.com
Vivendi Entertainment	www.vivendientertainment.com
About Premium Content	www.aboutpremiumcontent.com
All Rights Entertainment SAS	www.allrightsentertainment.com
CINEXPORT	www.cinexport-paris.com
EUROPACORP	www.europacorp.com
KABO International	www.kabofamily-international.com
NDRL	www.ndrl.fr/
Wild Bunch TV	wildbunch.eu/

Sales and distribution / ITALY



Sales and Distribution companies Italy		Web address
Company		
Videoshow	Qualified documentary, films, series, animation, children programs, and formats catalogues of prestigious international productions	www.d4-videoshow.com
Dall'Angelo Pictures	theatrical, home video and TV media, collaboration with leading American and European production companies (BBC, HBO, Lakeshore, Lionsgate and others)	www.dallangelopictures.com
Brave Film	theatrical, free and pay tv rights	www.bravefilm.com
Filmexport Group	more than 600 titles from all genres of the Italian cinema	www.filmexport.com
Intramovies	international film distributor of quality movies from all over the world	www.intramovies.com
Lilium Distribution	leading independent distribution company of television and theatrical programming focusing in particular on the distribution, acquisition and pre-buys of tv programmes	www.liliumdistribution.it
Monica Carpi TV Distribution	independent tv distribution company representing TV networks, producers and distributors from five continents	studio@yole.it
Variety Communications	theatrical, home video and TV rights distributor with a library offering over 1000 titles	www.varietycommunications.it
DNC Entertainment	Distributor of home entertainment, tv and theatrical rights	www.dncentertainment.it
Medusa Film (Mediaset)	major film distribution company, which produces and distributes Italian and foreign films in Italy, throughout the life-cycle of the product: from cinema releases to the sale of television rights in all their various forms	www.medusa.it

Sales and distribution / Spain



Sales and Distribution companies Spain	
Company	Web address
Imagina International Sales	www.mediapro.es/eng/rights_man.php
RTVE Sales Team	www.rtve.es/commercial/about-us/programmes-sales-team
Cesca Films, SLU	www.cescafilms.com
Divisa Home Video & TV	www.divisared.es
Filmax International	www.filmaxinternational.com
Indigenius	www.indigenius.es
PROI	www.proicomunicacion.com
ATRESMEDIA CORPORACION DE MEDIOS DE COMUNICACION S.A	www.atresmedia.com
BRANDS & RIGHTS 360 SL	www.br360.tv
COMERCIAL TV	www.comercialtv.com
ENJOY BRAND LICENSING	www.enjoybrandlicensing.com
EXPRESSIVE MEDIA PROJECTS	www.expressive.es/home-en
MONDO TV Iberoamerica SA	www.mondotviberoamerica.com
Motion Pictures Entertainment, SL	www.motionpic.com
PAYCOM Multimedia	www.paycom.es/en

Appendix 6: Top producers / FRANCE



Members of USPA (Union Syndicale de la Production Audiovisuelle) specialized in Fiction	
Company	Web address
AB Productions	www.groupe-ab.fr
Adrenaline	www.adrenalineprod.fr
Archipel 33	www.archipel33.fr/site
Aubes Productions	www.telmondis.fr
Auteurs Associes	www.auteursassocies.fr
Banijay Studios France/Zodiak Media	www.banijay.com
Bel Ombre Films	www.belombre.net
C.M.P. Movies	www.lovelytv.fr
CALT Production	www.robinandco.com/calt-production
CINETEVE	www.cineteve.com
DEMD Productions	www.demd-productions.com
Effervescence Fiction	www.effervescenceprod.com
EGO Productions	www.ego-productions.com
Elephant Story	www.elephant-groupe.com/section/fiction
ENDEMOL Fiction	www.endemol.fr
Et la Suite Productions	www.etlasuite.com
Europacorp Television	www.europacorp.com
EVS Productions	www.envoiture-simone.fr/en
Ex Nihilo / Agat Films	www.agatfilmsetcie.com
F Comme Film	www.fcommefilm.fr
Fantastico / Quad Television	www.quad.fr
Federation Entertainment	www.fedent.com
Flach Film Production	www.flachfilm.com
Gaumont Television	gaumonttelevision.com
GMT Productions	www.gmtproductions.fr
Image et Compagnie	www.imageetcompagnie.fr
JLA Productions	www.groupe-jla.com
JPG Films	jpgfilms.com
KABO / NOON	kabofamily.com
KAM&KA	www.kamandka.fr
KWAI	www.kwai.tv
La Boite a Images	www.la-boite-a-images.fr
La Generale de Production	www.lageneraledeproduction.com/index.php
Les Films d'ici	www.lesfilmsdici.fr/fr
Les Poissons Volants	www.poissonsvolants.com
Les Productions Franco American	www.productionsfrancoamerican.fr
Made in PM	www.madeinpm.com
Mademoiselles Films	mademoisellefilms.fr
Makever	makever.com
Money Penny Productions	www.moneypennyprod.fr
Mother Production	www.motherproduction.fr/tv
Multimedia France Production	www.mfptv.fr
Pierre Javaux Productions	www.pierrejavauxproductions.com
Program33	www.program33.com
Rendez Vous Production Serie	www.rdvprod.com
Scarlett Production	www.scarlettprod.fr
Septembre Productions	www.septembre-productions.com
Son et Lumiere	www.sonetlumiere.fr
Storner Prod	www.stornerprod.com
Terence Films	www.terencefilms.com
Tetra Media Fiction	www.tetramedia.fr/tetra-media-fiction-production-de-fiction-series-televees-paris
TF1 Production	www.groupe-tf1.fr
Troisieme Oeil Productions	www.troisiemeoeil.net
VAB	www.groupe-jla.com
Vert M Prod	www.vertmprod.com
YES Productions	www.yes-productions.com
Zadig Productions	www.zadigproductions.fr/category/fictions
Other Producers	
StudioCanal	www.studiocanal.com
Carrere Group	www.carrereregroup.com
Newen	www.newencontent.com

Top producers / ITALY



Members of the Television Producers Association (APT)	
Company	Web address
11 Marzo Film	www.11marzofilm.it
Alexandra Cinematografica	www.alexandrafilm.it
Anthos Produzioni	www.anthosproduzioni.it
Aurora TV	www.ambrabanijay.tv/it/aurora-tv
Bananas	www.bananas.it
Cattleya	www.cattleya.it
Colorado Film Production CFP	www.coloradofilm.it
Compagnia Leone Cinematografica	www.compagnialeone.it
Cristaldi Pictures	www.cristaldifilm.com
Cross Productions	www.crossproductions.it
Fabula Pictures	www.fabulapictures.com
FremantleMedia Italia	www.fremantlemedia.com
GA&A Productions	www.gaea.it
Italian International Film	www.iif-online.it
Kimera Produzioni	www.kimeratv.it
Kobalt Entertainment	www.kobalte.com
Lux Vide	www.luxvide.it
Magnolia	www.magnoliatv.it
Ocean Productions	www.oceanproductions.it
Palomar	www.palomaronline.com
Pandataria Film	www.pandatariafilm.com
PayperMoon Italia	www.paypermoon.com
Pepito Produzioni	www.pepitoproduzioni.com
Pesci Combattenti	www.pescicombattenti.it
Piano B	pianobproduzioni.com
POPCult	www.popcultdocs.com
Publispei	www.publispei.it
Rainbow Entertainment	www.rbw.it
Solaris MEdia	www.solarismedia.it
Sunshine Production	info@sunshineproduction.eu
Sydonia Production	www.sydoniaproduction.it
Taodue	www.taodue.it
Titanus	www.titanus.it
Velafilm	www.velafilm.it
Viola Film	www.violafilm.it
Wildside	www.wildside.it
Other Production Companies	
Albatross Entertainment	www.albatrossfilm.it
Amygdala	www.amygdala.tv
Mediterranea Productions	www.mediterraneaproductions.it
Medusa Film	www.medusa.it/
Indiana Production	www.indianaproduction.com

Top producers / SPAIN



Members of Spanish Producers Association (FAPAE)	
Associations	
Company	Web address
La Asociación Estatal de Cine (a.e.c.)	www.aecine.es
La ASOCIACIÓN DE EMPRESAS DE PRODUCCIÓN AUDIOVISUAL Y PRODUCTORES INDEPENDIENTES DE ANDALUCÍA (AEPAA-APRIA)	www.aepaa-apria.es/asociacion
AGAPI (Association of Independent Audio-Visual Producers)	www.agapi.org/v2/agapi.php
APACAM	www.apacam.com
APROMUR	www.apromur.net
AVAPI (Valencian Association of Independent Production Companies)	www.avapi.org
EPE-APV (Association of Basque Producers)	www.epe-apv.com
Ibaia (Association of Independent Production Companies of the Basque Country)	www.ibaia.org
PAC (Productors Audiovisuals de Catalunya)	www.pac.cat
PATE (Productoras Asociadas de Television de Espana)	pate@fapae.es
PAV Productors Audiovisuals Valencians	www.pav.es
Companies	
Aralan Films, S.L.	web.aralanfilms.com
Atípica Films, S.L.	www.atipicafilms.com
Dream Team Concept, S.L.	www.dreamteamconcept.com
Gariza Produktzioak	www.garizafilms.com
Miramar Media Entertainment, S.L.	www.miramarentertainment.com
Oberon Cinematografica, S.L.	www.oberoncinematografica.com
Quexito Films, S.L.	www.quexito.com
Fourminds Creadora Audiovisual (short films)	www.wearefourminds.com
Fuera de Campo Producciones, S.L. (short films)	www.fueradecampofilms.com
Arraianos Productions (documentaries)	www.arraianospro.com
Crop TV (documentaries)	croptv.es
Zeitun Films (documentaries)	www.zeitunfilms.com
Other producers	
60db	www.60db.es
Bambu Producciones	www.bambuproducciones.com
Big Bang Media	www.bigbangmedia.es
BocaBoca	www.bocaboca.com
Boomerang TV	www.grupoboomerangtv.com
Bren Entertainment	www.bren.es
Cuarzo Producciones	www.cuarzotv.com
Diagonal TV	www.diagonaltv.es
El Terrat	www.elterrat.com
Endemol Shine Iberia	www.endemolshine.de/contact/endemol-weltweit/endemol-spain
Europroducciones	www.europroducciones.com
Explora Films	www.explorafilms.com
Globomedia	www.globomedia.es
HYPNOS Films	www.sensag.com
Imagina Media Audiovisual	www.imagina.tv
Jaleo Films	www.jaleofilms.com
La Fabrica de la Tele	www.lafabricadelatele.com
Magnolia TV	www.magnoliatv.es
Mediapro	www.mediapro.es
Motion Pictures S.A.	www.motionpic.com
Producciones Mandarina	www.mandarina.com
Rodar y Rodar	www.rodaryrodar.com
Sociedad Canaria de Televisión Regional	www.rtv.es
Verte	www.antena3.com
Zinkia Entertainment	www.zinkia.com

Steps in finding a co-production partner or a client: practical tips

- Contact the Finnish supporting authorities:
 - **Audiovisual Finland:** introductions and signposting to IT, ES, FR Screen Agencies
 - **Finnish Embassy in the respective markets:** contact the embassy's trade commissioner
 - **Finnish Cultural Institute in the capital cities of each market:** a wide network of people and organizations in local cultural life and
 - creative industries
- **Travel to markets, festivals and conferences:** Pursuit of international co-production requires travel. Book meetings in an event, make an agenda for them and take care of your contacts afterwards.
- **Develop existing relationships:** Focus on building relationships with previous contacts. Given the time required and cost of building international relationships, a focused approach is likely to generate better results.
- **Speak to the National and Regional Screen Agencies:** There is always a contact point responsible for incoming producers. They can put you into contact with local funding bodies, production companies and will sometimes facilitate introductions to broadcasters.
- **Don't rush the relationship:** Get to know potential partners well before there even is a project to talk about. You need to research what a potential partner has produced and with whom and really get to know their business culture. How do they work and is it a similar style to how you work? Do they share your values? Spend time socially together over multiple markets. It might take years, finding the right project on which to work together. When approaching a buying client, make sure you are talking to the right person about the right offering.
- **Research stakeholders:** Get to know the buyers and funding agencies outlined in the appendix of this report. It is likely that broadcasters and funding agencies will try to match-make between foreign producers and their own producers, often because the local producers cannot afford the travel costs to these international markets.
- **Find the money first:** Research the various funding opportunities, potential funding projects are regularly posted in great detail on the websites provided in the appendix. Then look for potential partners in IT, FR and ES with the advice of the fund. A funding first approach allows the producers to structure the project and the contracts to fit the financing during the development phase rather than trying to artificially change the structure of the deal once it has been agreed to. Do not be deterred by guidelines that do not meet all criteria of the production as few do. Funding agencies may be open to being flexible with the guidelines to maximize their limited funds and increase the potential market for their producers.



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