

2019 MIPCOM REVIEW

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Country Focuses 2019

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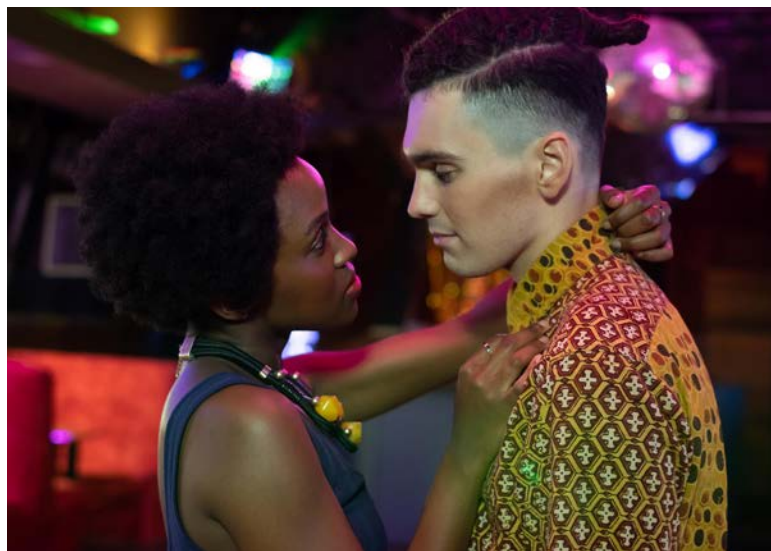


Market drives partnerships across all genres

MIPCOM's pre-eminent position as the global TV industry's number one deal-making market was reinforced this month by a wide range of partnerships across scripted, factual, entertainment and kids. Alongside deals for completed shows, the Cannes market also played host to scores of format and co-pro deals.

AMONG the many high-profile scripted properties on show in Cannes during

MIPCOM was ITV Studios' *Noughts + Crosses*, set in a dangerous, alternate world



ITV Studios' *Noughts + Crosses* has been acquired by M-Net in Africa, Russia's More TV and TVNZ, among others

where racism divides society. Produced by Mammoth Screen, it has been acquired by M-Net in Africa, Russia's More TV and TVNZ among others. ITVS also secured new buyers for its WW2 drama *World On Fire* include Huanxi Premium in China and RTL in Germany.

Also prominent at MIPCOM 2019 was A+E Networks' *Project Blue Book*, now appearing in around 165 countries. New buyers at the market included Viasat World (15+ Pan CEE markets) and RTL (Germany). European studio Studiocanal, meanwhile, sold the North American

rights for Vernon Subutex and Danish comedy drama *Pros and Cons* to Topic, a new North American SVOD platform.

Fremantle's scripted content had a good MIPCOM with SBS Australia acquiring a slate of titles including *Dublin Murders*, *Face to Face*, *Seizure*, *The Last Wave* and *American Gods*. The same firm also licensed its hard-hitting Iraq-based drama *Baghdad Central* to US streamer Hulu. Demand for short-run drama continues to be strong, with DCD Rights' four-parter *The Hunting* acquired by French channel W9. French



BBC Studios sold 800 hours of content to clients across Africa from Kenya to South Africa, including relationship drama *Trigonometry*



DCD Rights' *The Hunting* was acquired by French channel W9, part of French conglomerate Group M6. Pictured are: Groupe M6's Eugenie de Bonnafos (left) and DCD Rights Rick Barker



BBC Studios' Doctor Foster is being remade in India as a Hotstar special

demand for scripted was also underlined by Serieclub's decision to pick up Norwegian comedy Magnus from Hat Trick International (HTI).

Non-English language dramas continue to play a significant role in schedules around the world. Key sellers this week included BaniJay Rights' Nordic crime drama Wisting, picked up by BBC Four in the UK. Sue Deeks, head of BBC programme acquisition

said, "We have no doubt BBC viewers will be engaged by such a likeable lead and a compelling plot full of twists and turns."

Proving that hot shows can originate anywhere, Lagardere Studios acquired worldwide rights for Russian drama Five Minutes Of Silence from commercial broadcaster NTV, while Mediawan picked up eight part sci-fi series Spides from Germany's Palatin Media

for French-language territories. In other drama deals: ORF Enterprises licensed 130 hours of crime drama Tatort to Huawei Video for Italy; Global Screen licensed Swiss drama Buried Truth to RTL's TV Now; Newen Distribution sold cop series Cassandre to broadcasters including NBCU's 13th Street Spain; DRG shipped Doc Martin to ABC Australia; Electric Entertainment partnered ABS-CBN Philippines on Almost Paradise, to be screened on WGNA.

Among other scripted deals, Channel 4 secured the UK linear TV rights to Star Trek: Discovery in a pact with CBS Studios International (CBSSI). As part of the same deal, E4 has also acquired Matt le Blanc's CBS comedy Man with a Plan, which will air for the first time in the UK next year. Elsewhere Beta Film secured new sales for cop series Hudson & Rex, the first English-language adaptation of classic Austrian franchise Kommissar Rex. The series has been picked up by RAI Italy,

and will soon be broadcast on TNT Serie Germany and France TV.

Still on scripted formats, BBC Studios' Doctor Foster is being remade in India as a Hotstar special; TV Asahi's hit drama Dele is being adapted by Korea's CRAV and German VOD platform Joyn is reimagining Australia drama Diary Of An Uber Driver. Turkey's MF Yapim struck a deal with Nippon TV to remake Abandoned for its domestic audience, building on a long-running partnership. Another innovative deal in this sub-sector saw Avlu, the Turkish version of Fremantle's Australian prison drama Wentworth, licensed to Netflix. Jamie Lynn, executive vice-president, head of EMEA distribution, Fremantle, said: "Avlu is a brave, modern series that stood out in the mercilessly competitive Turkish drama market."

MIPCOM was a strong market for factual deals, with Keshet International (KI) having a good week. Among the titles on

its slate, Flicker Productions' Prison Girls: Life Inside has been secured by BNN Vara (Netherlands), Nine Network (Australia), Television New Zealand (TVNZ) and A+E Networks (US) while ProSieben (Germany), Foxtel (Australia) and Sky (New Zealand) all picked up Crackit Productions' series Trucking Hell. Keren Shahar, KI's chief operating officer and president of distribution, said: "We've invested in building our factual

finished tape slate in response to increased demand. We're excited to have signed so many deals."

Among other factual deals: producer-distributor Prime Entertainment Group licensed a package of factual content to Polish media group Polsat; Cineflix pre-sold Australian wildlife documentary Inside Taronga Zoo to Nat Geo Wild US and Channel 4's More 4 (UK); UK indie



TV Asahi's hit drama Dele is being adapted by Korea's CRAV

Arrow Media shipped *I, Sniper* to PBS International and Terranova secured a string of deals for its landmark history documentaries to partners including Viasat and TV5 Quebec in Canada.

Still on factual, GRB Studios licensed celebrity-focused programming to broadcasters including NBCU Latin America and MNET South Africa; Corus Studios sold multiple titles, including to Cooking Channel US, A+E Networks and Foxtel Australia; and Dogwoof sold a range of documentaries. Making Waves: The Art Of Cinematic Sound, sold to France, Germany and Japan among others. DocuBay, documentary VOD service, did deals with ARTE Distribution and UK's Scorpion TV — reinforcing the growing importance of specialist streamers.

Several companies have identified high-end factual as a growth market. One is Banijay Rights, which confirmed a co-development agreement with Canadian indie Arcadia Content. The two will co-develop new factual projects. In celebration of Japan being a Country Of Focus at MIPCOM 2019, Blue Ant

International announced four new programming licensing deals and four renewals spread among two of the country's leading platforms — the nation's broadcaster NHK and cable and satellite network FOX Networks Group Japan. "Blue Ant International's premium content aligns perfectly with the beautiful and thought-provoking factual programming our Japanese broadcast partners curate," said Solange Attwood, executive vice-president, Blue Ant International.

Volume deals are not as common in the industry as they used to be, but were still a feature at MIPCOM. BBC Studios licensed 100+ hours of content to Alibaba's Youku in China including animated series Bluey. It also sold 800 hours of content to clients across Africa from Kenya to South Africa; and unveiled a partnership with Nine Network Australia around the BBC Planet franchise.

Content aggregation company and distributor Alchimie acquired 560 hours of sports content for Europe from Australia distributor Switch International. Meanwhile, All3Media International signed its first deal with Pickbox Now, licensing 25 hours of drama to the

SVOD service. Titles sold include Blood, Back To Life, Baptiste, Strangers and Cheat. The same firm signed a broad range of deals in Asia for its drama and factual entertainment programming. This included collaborations with U-Next and Disney in Japan and Catchplay in Taiwan.

As always, entertainment formats were a booming business at MIPCOM, with Talpa Media's The Voice Kids being picked up for adaptation by Nigeria and Japan. Classic formats continue to be in demand, with Endemol Shine Group licensing its iconic Big Brother franchise to Greek broadcaster Skai. Mark Lawrence, executive director EMEA of Endemol Shine International, said: "This comeback deal proves the show is just as relevant today."

Suggesting a Greek market revival, commercial broadcaster Alpha TV licensed a local version of physical game show Catchpoint from ITV Studios Global Entertainment (ITVSGE). The channel ordered a minimum of 150 x 60-minute episodes of the format, which has also been picked up by TV2 in Hungary. Format co-development continues



APC Kids licensed Dinocity to DeA Kids in Italy and YLE in Finland



Turkey's MF Yapim is to remake Nippon TV's Abandoned for its domestic audience. Pictured are: Nippon TV's Shigeko Cindy Chino (left) and MF Yapim's Faruk Bayhan



Documentary VOD service DocuBay made deals with ARTE Distribution and UK's Scorpion TV, reinforcing the growing importance of specialist streamers. Pictured are: ARTE's Isabelle Monteil (left) and Adita Jain of DocuBay



The Illuminated Film Company and Zodiak Kids Studios are co-producing an animated series based on kids book series Look Up!. Pictured are: The Illuminated Film Company's Iain Harvey (left); Benoit Di Sabatino of Zodiak Kids Studio and Nick Harvey of The Illuminated Film Company

to be a major theme. At this market, Endemol Shine Group unveiled Sing Or Spin, a new non-scripted format co-developed by its China division in partnership with leading Chinese producer and broadcaster Hunan TV. Separately, Nippon TV and Red Arrow Studios announced that their co-developed format Block Out is being adapted for VTV in Vietnam and ANTV in Indonesia. Both versions are slated to start airing this November.

Also at MIPCOM, Keshet International and pan-African broadcaster M-Net joined forces to co-produce English-language dating show The Big Five, in conjunction with South African producer Afrokaans. Dating also continues to be a priority for Fremantle, which launched reality-dating format Five Guys A Week. Created for Channel 4 UK, the format secured deals with RTL4 in Holland and TV4 in Sweden.

Kids business was also brisk, with Quintus Media securing a digital distribution agreement with Indian studio Cosmos Maya for three kids' animation series. The deal, which covers digital exploitation rights in the US, includes Eena Meena Deeka, as well as Motu Patlu and Tik Tak Tail.

Among other kids deals: APC Kids licensed Dinocity to DeA Kids in Italy and YLE in Finland; Studio 100 sold 100 hours of content including Heidi and Kosmoo to Hungarian public broadcaster MTVA; Splash Entertainment licensed six series including Chloe's Closet to kids VOD platform Kidoodle; and The Illuminated Film Company and Zodiak Kids Studios announced they are co-producing a 52 x 11 mins animated series based on kids book series Look Up!; South Korean producer HongDangMoo licensed Magic Adventures: The Crystal Of Dark to Italian producer/distributor

Showlab for multiple territories; while Fun Union's BabyRiki was picked up by VIMN's Noggin for LatAm. Underlining the growing importance of AVOD, new platform Yaaas!, aimed at 6- to 11-year-olds, is launching with Aardman content.

In addition to its BBC Studios deal, China's Youku unveiled alliances with Genius Brands and Viacom International Media Networks to co-produce animation series. The partnership with VIMN kicks off with a project called Little Ben, based on the legend of master builder Lu Ban, who lived during the Zhou Dynasty.



Prime Entertainment Group licensed a package of factual content to Polish media group Polsat. Pictured are: Polsat's Janek Wroblewski (left) and Prime Entertainment's Alexandra Marguerite

Funding production: “There is no one formula”

Increased quality and diversity in television have been great news for both consumers and content creators. But constantly pushing back the boundaries of production doesn't come cheap.

AS TALENT gets more expensive, locations become more exotic and set designs/CGI increase in complexity, there are inevitable challenges related to budgets.

This isn't immediately evident in the case of the global streamers (Netflix, Amazon, Disney+, HBO Max and Apple), which seem to have bottomless pools of cash to spend on fully-financing original content. But domestic and regional broadcasters and platforms are rarely in a position to fully-finance premium shows. The direct result of this is a rise in the number of international co-productions, an enhanced role for distributors and a growing array of innovative, non-traditional production funding sources (all subjects at MIPCOM's Production

Funding Forum, October 15). Paul Dempsey, president, global distribution for BBC Studios, sums it up neatly when he says that, these days, “Every production comes with a different funding model, there is no one formula. Our MIPCOM launch, The Mallorca Files, is an example of a production that has investment from four different countries with partners that include a streaming service, public service broadcasters and a studio. The soft crime drama was commissioned by the BBC with America's Britbox, Germany's ZDF, France Televisions and BBC Studios all coming on board as partners.”

Dempsey took part in the Production Funding Forum, a one-day event designed to address many of the issues

outlined above. Underlining his point about bespoke funding models, he discussed how — in the case of natural history — a series of landmark deals with the likes of Discovery means “we have fully funded productions well into the coming decade”. By contrast, the company decided to take a significant calculated risk with upcoming fantasy adventure series His Dark Materials, based on a series of novels by Philip Pullman. “Earlier we would have looked at co-productions, at the US and the Chinese markets,” Dempsey said. “This time we underwrote the whole production, thus giving us access to a production of that quality, for two series, with no buyer onboard.”

This is not the norm, however. More typical is the

collaborative model behind The Mallorca Files or cop series Van der Valk, also on show at MIPCOM. Filmed on location in Amsterdam, the series is described as a “co-commission” by German public broadcaster ARD Degeto and UK distributor All3Media International. Produced by the UK's Company Pictures and the Netherlands' NL Film & TV, the 3 x 90-minute production has also been pre-sold to France Televisions (France), ITV (UK) with NPO (NL). The industry's growing reliance on co-production and distribution investment has led to several innovations in TV financing. One is the emergence of Atrium, a “commissioning club” that is managed by Modern Times Group-owned distributor



Switzerland's Silver Reel, a film financier seeking to establish itself in television jumped on board six-part drama *The Luminaries*, starring Eva Green. Other partners on the BBC2 project include Working Title Television and Fremantle (distribution).

DRG. Put simply, Atrium's goal is to create premium drama content for regional OTT players and telcos that aren't able to fully-fund the kind of quality drama that Netflix and Amazon specialise in. Current members of the club include BT (UK), Orange (France), Movistar+ (Spain), and Deutsche Telecom (Germany).

David Clarke, executive vice-president, content, at DRG, also addressed delegates during the Production Funding Forum, as part of the Funding Creativity track. He dived into the changing trends for distributors, explaining that: "Like everybody else, we're behaving much more like a studio. That's about supporting creativity much, earlier, and about getting across development much, much earlier. There are very few shows that leak out of the super-indie studio system. So when they do come out, independent distributors such as DRG have to be ready and willing to support them and invest in them, and convince producers we're the right

home for them."

This newly-expanded role for distributors explains why there is a growing tendency to refer to distributors as "commissioners" — a term traditionally reserved for end-users such as broadcasters. The use of the term "co-commissioner" to describe All3Media International's role on Van Der Valk is a reflection of the fact that distributors these days are often putting more money into individual productions than broadcasters. Dempsey is happy to refer to "self-commissioning" as part of BBC Studios' toolkit while the notion of distributors as "mini-commissioners" is rife among leading boutiques including TCB Media, Cineflix Media and DCD Rights.

Driven by the need to get on board projects at the earliest stage, some studios have formalised their role by launching "funds". TF1-backed Newen Group, for example, has a €50m investment fund that is focused on acquiring English-speaking drama from a London HQ. Keshet International has a

similar fund that has been used to support Blackfella Film's political drama Black B*tch (working title) and Ecosse Films' The Trial Of Christine Keeler (promoted heavily at MIPCOM this week).

Having said all of the above, there are limitations to what co-production and distribution can do to combat the escalating cost of high-end shows.

As a result, there is a growing array of non-traditional financiers migrating to TV, examples including Ingenious, 127 Wall Productions, Anton, Access Industries, Bob & Co and Silver Reel. Anton, headed by CEO Sebastien Raybaud, is well-established as a film-financier. Recently, however, it has been high-profile in TV, setting up a £150m (\$190m) Drama Investment Partnership with BBC Studios and also forging an alliance with Federation Entertainment. Regarding the former, Anton has supported BBC Studios-backed productions including McMafia and His Dark Materials and, in partnership with BBC Studios,



The cast of Van Der Valk at MIPCOM: Luke Allen-Gale (left), Marc Warren, Maimie McCoy and Elliot Barnes-Worrell. The series is described as a "co-commission" by German public broadcaster ARD Degeto and UK distributor All3Media International. Produced by the UK's Company Pictures and the Netherlands' NL Film & TV, and pre-sold to France Televisions, ITV and NPO.



Oliver Berben, executive board member of Munich-based Constantin Film at the Funding Creativity session. "It's important to work together with local producers. Money is important but equally important is the established contacts with the creative world"

is developing and funding a slate of drama and comedy from indie producer Clerkenwell Films (Misfits, The End Of The F***ing World).

Like Anton, Switzerland's Silver Reel is a film financier seeking to establish itself in television. A couple of years ago it launched a €50m TV drama production fund. Speaking to the Guardian newspaper at the time, Claudia Bluemhuber managing partner of Silver Reel TV, said the UK was a particular focus of attention thanks to the weak pound, attractive tax rebates and the country's strong creative talent pool. Soon after, Silver Reel TV jumped on board The Luminaries, a six-part drama based on the acclaimed novel by Eleanor Catton. Other partners on the BBC2 project include Working Title Television and Fremantle (distribution).

During the Forum, Bluemhuber discussed Silver Reel's journey from film into television. "We actually tried to get into television some years ago as a financier, and it was a very closed market at the time... but this market has completely changed." Explaining how the company likes to work, she added: "We

like to be involved at all stages, from development, from an idea. If there is an idea and not much more, either it has to have a really great IP, or there has to be some outstanding talent attached... We always look for some element that's elevating the project." She said some projects originally been optioned as a film can become TV shows.

Not to be overlooked when completing the production finance jigsaw is the role of ad agency networks, which have been developing alternatives to spot ads. Dentsu, via its Storylab subsidiary, is involved the distribution of series like Ninja Warriors and Game Of Clones, while WPP's Motion Content Group is a partner on Love Island and The Circle. Speaking to the MIPCOM News, Red Arrow Studios International (RASI) executive vice-president commercial strategy Carlo Dusi added that it is also important not to overlook public funds: "For instance, one of our dramas, Vienna Blood, from Endor Productions and MR Film, combines UK tax credits with subsidies from the Austrian TV Fund, Vienna Film Fund and Austrian Culture Fund,

alongside the co-commission commitment from ORF and ZDF, and investment from RASI."

Another key pillar in production financing is the banking sector. Barclays, for example, has an SVOD Financing Fund designed to help UK producers get Netflix and Amazon shows into production. By allowing companies to borrow over a longer period of time than is usual, it helps them manage their cashflow, freeing up funds for development in future projects. Series to have used the Fund, which is effectively a bespoke loan arrangement, include Drama Republic's BBC/Netflix scripted co-pro Black Earth Rising, Lime Pictures' Netflix series Free Rein and Silvergate Media's Octonauts.

Speaking during the Production Funding Forum, Lorraine Ruckstuhl, head of media at Barclays, talked about how Barclays gets involved. "As far as we're concerned, drama, animation, live-action, unscripted are all of interest. We're happy to get involved in any project as long as it's at the stage where there's an investor involved in it, and where you're trying to

bridge that gap between being commissioned, and making the project."

The funding issues raised above are an issue for content creators around the world. Taka Hayakawa, vice-president at Fuji Television, offered a perspective from Japan, including Fuji TV's investment in mobile developer Niantic, the creator of the game Pokémon Go. The companies have collaborated on an animated project. "A very good example of our strategy for investment: we invested in the company, and we tried to make collaboration," he said. Another project, soccer drama The Window, started life as a casual meeting at MIPCOM three years ago with an executive from ZDF.

Oliver Berben, executive board member of Munich-based Constantin Film said foreign companies are entering the German market because they see an opportunity there. Addressing Funding Creativity delegates, he said the key to international rollouts and cross-border collaborations was to not "copy and paste a production model". Contacts and creativity, he stressed, are as important as the pursuit of money. "It's

important to work together with local producers. You need to have excellent contacts to your creative elements all over. Money is an important step but equally important is the established

contacts with the creative world." Coming out with some commercial rights is also a priority, he added: "If you create something you need to be a part of it," he concluded.



Taka Hayakawa, vice-president at Fuji Television, spoke of Fuji TV's investment in mobile developer Niantic, the creator of the game Pokemon Go, and another co-production, soccer drama The Window, with Germany's ZDF

Kids TV: 'healthier than it's ever been'

The kids content business is thriving, The kids don't care what platform it appears on, the streamers are hedging their bets, but the kids content business is thriving

"For today's kids, the rite of passage isn't getting a TV, it's getting their first smartphone." Adam Woodgate of kids research agency, Dubit, succinctly summed up the challenges — and the opportunities — facing the industry when he delivered his findings about the viewing habits of six- to 10-year-olds to MIPJunior delegates.

Tech native, and increasingly spoilt for choice in terms of content, kids have unprecedented options before them, and they are becoming more and more platform agnostic.

Nevertheless, linear viewing still dominates, Woodgate said, despite a fall in the amount

of time it commands, and the fact that YouTube content is increasingly shifting to the TV screen.

Also on the rise is the number of generalist shows — not specifically made for kids — being watched. "They're getting more adventurous and migrating to content that makes them feel grown-up, but not too edgy," Woodgate added.

According to Genevieve Dexter of Serious Lunch Distribution and Eye Present Productions at the MIPJunior Keynote Superpanel, the proliferation of streaming services had created a "bonanza", for kids producers. That was echoed by fellow panelist Josh Scherba

of WildBrain who hailed the advent of more resources, and more opportunities for making more content. "I think the industry is healthier than it's ever been," he said.

But there were doubts about how committed the streamers were, and concern that they might be reluctant to recommission a property after the initial series order. "It's yet to be proven that they're in for the long term in kids," Dexter said.

Andy Heyward of Genius Brands International voiced concern about a "fragmented and cannibalised" market where it was hard for one service to garner big audiences. That, he warned, had implications for

Aardman's Wallace And Gromit: Cracking Contraptions, on its way to VOD360's Yaaas!



Adam Woodgate of kids research agency, Dubit: kids are "migrating to content that makes them feel grown-up, but not too edgy"



DC Super Hero Girls creator Lauren Faust: "We make sure it's cool, cute and comedic but our girls have flaws and mess up"



Frank Falcone, president of Toronto-based producer-distributor Guru Studio was in Cannes to premiere pre-school show *Pikwik Pack*. “It models a different kind of leadership for children”



Singapore's August Media Holdings' CEO and founder Moy Saha was in Cannes with plans for *Sky Blue Academy*, a football-themed show linked to the English Premier League



ZDF's *Heirs Of The Night*, a MIPJunior World Premiere TV Screening

brand recognition, licensing and merchandising.

Larry Schwarz, CEO of Larry Schwarz and His Band, also had reservations. Addressing an interactive session where small producers discussed working with the streamers, he said he'd detected a commissioning trend in favour of known brands, reboots and big-name talent.

And Djukic Mladen of Bosnia's Aeon Production felt local voices were suffering. “I know the big broadcasters need to promote stories universally, but the essence of diversity is difference,” he said. “One model doesn't fit all.”

One of the newest streamers in the kids arena is Yaaas! from UK TV-entertainment group Video on Demand 365 (VOD365). It was in Cannes hunting for content for six- to 11-year-olds. The company announced it had sealed a content deal with Aardman, the acclaimed UK animation studio famous for global hits like *Wallace And Gromit: Cracking*

Contraptions and *Shawn The Sheep: Moss Bottom Shorts*.

The Aardman shows will be available on both Yaaas! and Ketchup TV, VOD365's other children's network aimed at pre-schoolers.

“Yaaas! will broaden our reach to the six- to 11-year-olds market, creating an opportunity for the existing viewers on Ketchup TV to migrate to the new platform, instead of losing them to other kids services,” Paul Coster, VOD365 CEO/founder, said.

Diversity in its widest sense once again proved a live issue for MIPJunior, where the sector showed itself to be taking seriously the obligation to offer role models which confront entrenched views on gender, race and sexuality and present young viewers with an inclusive vision of their world.

DC Super Hero Girls creator Lauren Faust discussed developing a new generation of female superheroes, and how to break gender stereotypes

and improve the representation of girls in kids' entertainment.

“The typical superhero show is about the good guys and bad guys. We started with teen coming of age stories and put a superhero spin on it, she said” But she insisted that because the heroes were female, it didn't mean the action was muted. “Some of the fights are very strong,” said Faust. “Too often shows for girls are soft and nice, and concerned about their feelings all the time,” Faust said. “Our show has a different tone. We make sure it's cool, cute and comedic but our girls have flaws and mess up.”

Faust pointed out that there was a female sensibility behind the screen too, with a high proportion of women working on the show. “They don't have to guess how girls feel. They know,” she said.

New takes on old tropes were also highlighted by Frank Falcone, president of Toronto-based producer-

distributor Guru Studio. He was in Cannes to premiere pre-school show *Pikwik Pack*. “It models a different kind of leadership for children,” he said. “The typical kids’ hero stands with their hands on their hips and orders people around. But Suki is quiet. She shows kids they can be a leader by supporting others rather than having to be first all the time.” The series launches on Disney Junior next year in the US, India, Korea, Australia and New Zealand, and on Treehouse in Canada.

Pikwik Pack was one of two MIPJunior World Premiere TV Screenings along with *Heirs Of The Night*, brought to Cannes by ZDFE.

Avril Blondelot, head of content insight at the newly launched Global Audience and Content Evolution (Glance) — formerly Eurodata TV

Worldwide — referenced some of the growing number of shows that were embracing diversity in its many forms. “Nickelodeon’s *The Casagrandes* is about a Latin American family with a Down’s Syndrome character,” she said. “And Australian television movie *First Day* — about a trans teen navigating school — is soon to be a TV series.”

And the increasing geographical diversity of the kids market was underlined when Bruce Paisner, president and CEO of The International Academy of Television Arts & Sciences, set out the nominations for the 8th International Emmy Kids Awards. Among the 28 nominations from 15 countries were submissions from India and Nigeria — the first time that the two territories have been nominated in a kids category.

“The geographic spread and

diversity of topics addressed in this year’s nominated programmes attest to the vibrancy and quality of children’s television throughout the world,” Paisner said.

The awards will be presented in Cannes at a gala ceremony at next year’s MIPTV.

Imaginative and groundbreaking new content was on show in all genres. Stand-outs included the interactive *My Dream Jobs*, from Belgium’s Contentinuum, whose characters can be personalised online to feature the faces of viewers and their family members. Singapore’s August Media Holdings was in Cannes with plans for *Sky Blue Academy*, a football-themed show linked to English Premier League defending champions Manchester City, in a rare example of a top-flight club making its IP available to a global children’s show.



Streamer Yaaas! from the UK’s VOD365 sealed a content deal with Aardman at MIPCOM. “Yaaas! will broaden our reach to the six- to 11-year-olds market,” Paul Coster, VOD365 CEO and founder, said



Guru Studio’s *Pikwik Pack* launches on Disney Junior next year in the US, India, Korea, Australia and New Zealand; and on Treehouse in Canada

The battle of the streamers: will there be a winner?

The streaming revolution has transformed the global television industry in a few short years. And at MIPCOM 2019, there was clear evidence that there is more change to come as new services spring up all over the world

Fittingly enough, it was MIPCOM Personality Of The Year Robert Greenblatt who personified the paradigm shift represented by the rise and rise of the streaming services.

Delivering his Media Mastermind Keynote in Cannes, the chairman of WarnerMedia Entertainment and Direct-To-Consumer described how it felt to be on the front line of the new streaming offensive, leading one of the world's media giants into the fray against the upstart players who so efficiently disrupted the broadcasting ecosystem in which had spent much of his long and distinguished career.

Greenblatt, now charged with building HBO Max into a global streaming service to rival Netflix, Amazon, Disney and Apple, among others, declared: “the future is direct to consumer, I’ve no doubt about it”.

He added that linear broadcasting, although it remained good business, would ultimately prove to be “complementary to DTC.”

Describing HBO Max as the biggest challenge of his career, he said he felt he was working at a startup “but one with incredible scale”.

“We get to bring all of the Warner Media assets together

on one platform — the best TV library in the world and the best film library in the world. At the same time, we’re investing in a lot of new shows across drama, comedy, reality and kids.”

Launching in Q1 2020, HBO Max will offer 10,000 hours of content, made up of classic shows, including sitcom Friends, and new series. Examples of the latter include Dune: The Sisterhood, an adaptation of Frank Herbert’s sci-fi series, and Love Life, a romantic comedy starring Anna Kendrick. There will also be acquisitions, as a new deal with BBC Studios proves. HBO Max has secured the exclusive streaming rights to

sci-fi series Doctor Who, as well as The Office, Top Gear and Luther.

The franchise-rich offering from Disney+ will include Marvel, Star Wars and the Disney animation classics. It will also feature films and TV shows acquired when it bought 21st Century Fox’s entertainment empire, including all 30 seasons of The Simpsons. There will also be 25 original series in the first year, starting with Star Wars: The Mandalorian.

Tim Mulligan, MIDiA Research’s executive vice-president and research director, told a MIPCOM session that



Chairman of WarnerMedia Entertainment Robert Greenblatt



Media Mastermind Keynote from Amazon’s director of European originals, Georgia Brown, and James Farrell, head of international originals.

the launches of Apple TV+, Disney+, HBO Max and Peacock would, arguably, mark the biggest pivotal moment of the history of media the digital landscape.

“Streaming is now becoming mainstream,” he said, pointing out that, in developed markets, streamers were enjoying 50% penetration.

For the media giants now coming on-stream, he believed market positioning could be the eventual arbiter of success, with HBO Max and NBCUniversal’s Peacock leveraging their impressive ecosystems, Disney putting emphasis on its brands and Apple TV+’s creator focus.

Vincent Teulade, CEO of Pistis Strategy Advisor, appearing at a MIPCOM session examining the effect of new tech on the creative industries said a profound rebalancing act was under way.

“We’re seeing pay TV playing a defensive strategy right now,

while commercial TV is under increasing pressure. SVOD and AVOD might become the new norm for an hour of entertainment.”

Reverberations from the seismic industry-wide shake-up could be felt in every corner of the Palais des Festivals this week. For content-makers it was often a story of transformation and adaptation.

Bibiane Godfroid, president of TF1-owned studio Newen, and her senior executive team used their Media Mastermind Keynote to share ideas on the challenges and opportunities presented by new streaming platforms.

Guillaume Thouret, managing director of Newen production company CAPA, said the streaming companies represented a strong new partner that had enabled the company to diversify its scripted output.

“We made a sci-fi thriller Osmosis for Netflix which I don’t think

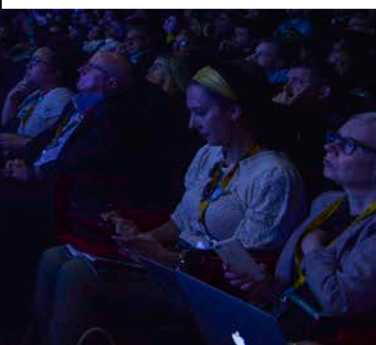
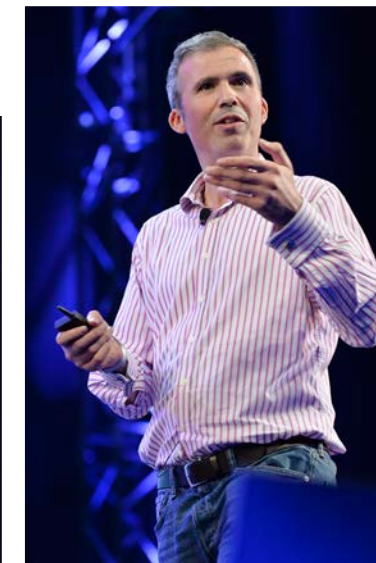
the French broadcasters would have commissioned,” he said.

He acknowledged that working with Netflix meant giving up global rights to shows but said “this is the rule of the game. It is not the only way we want to work, but we are happy with it”.

He was also careful to stress that Netflix has not replaced traditional commissions: “Broadcasters still represent more volume,” he added.

Newen’s managing director Romain Bessi touched on the thorny issue of rights. He admitted that Netflix’s firm position could be frustrating, but argued that the market was shifting as new streamers entered and regulations changed. “I expect we will see a more balanced relation with the platforms in the future,” he said.

Insights into the commissioning strategy of one of streaming’s superpowers came during a Media Mastermind Keynote from



Tim Mulligan of MIDiA Research

Amazon’s director of European originals, Georgia Brown, and James Farrell, head of international originals.

“We don’t aim to be local or global, we just aim to be great,” Farrell said. “And that means looking for the white spaces out

there. By that I mean the types of programming that are not being made.”

Reflecting on the success of its co-production over Fleabag, Brown said Amazon would rather move on and nurture new talent than repeat itself:

“Fleabag’s success at the Emmys was phenomenal, but you won’t find us looking to clone that. We’re much more about engaging with talent and supporting them. But when it comes to the production of a show, we do not have a fixed model. It could be a co-production, or it could be wholly financed by us.”

“Really, what we ultimately want to do is to fully engage our audience by understanding what moves them and keeps them coming back.”

The rise of ad-backed streaming was underlined by the announcement at MIPCOM of further global expansion plans by US-based AVOD service, Tubi. It will debut in the UK next year, and will also launch a children’s service, initially in the US. Tubi Kids will start this month. Tubi founder and CEO Farhad Massoudi used a keynote address to compare the role of an AVOD service to matchmaking between the viewer and a large catalogue of programmes.

It was, after all, how he had started

out. “My first job out of college was writing algorithms for an online dating site,” he said.

“The one thing I learned from that was that going on a bad date is just like being forced to watch a bad movie. You just don’t want to sit there.”

Unlike the big SVOD players with their original-content-first model: “Tubi is a technology-first company, focused on the media ecosystem,” he said. “We don’t compete with Netflix, we complement Netflix. I’m also a fan of originals, but that’s not all of TV.”

And the extraordinary speed at which local streaming services can grow was highlighted in a keynote from ProSiebenSat.1 CEO Max Conze. He said Germany’s largest freemium streaming platform, Joyn, a co-venture with Discovery Networks, had proved a huge hit since its arrival, this summer.

“We have four million-plus app downloads,” he said. “We launched a little over 100 days ago!”



Bibiane Godfroid, president of TF1-owned studio Newen



ProSiebenSat.1 CEO Max Conze



Tubi founder and CEO Farhad Massoudi

Technology fires market growth

The evolution of the global content industry has always been driven by new technology. And as MIPCOM 2019 demonstrated, that process is getting faster and faster

From the cathode ray tube that powered the first televisions to the online advances that triggered the streaming explosion, tech has always determined what we watch on our screens and how and when we watch it.

At MIPCOM 2019, it was clear that 4K and 8K content is heading for the mass market as a series of showcases demonstrated that ultra-high-definition production is moving into all genres.

Delegates got a glimpse of things to come when Japanese public broadcaster NHK screened its 8K adaptation of Nobel Prize-winning author Kazuo Ishiguro's *An Artist*

Of The Floating World.

The screening of this high-end drama was extremely significant. So far, most of NHK's 8K offering has been nature and performing arts content. *An Artist Of The Floating World* demonstrated that 8K is also relevant to scripted TV. "Drama was the last type of content we tackled with 8K," said Yukinori Kida, NHK's executive director in charge of broadcasting. "It took some time to apply the technology to a story. You have to think about depth of the image and other considerations."

While 4K remains the industry's current cutting-

edge standard, Kida urged content creators to explore the possibilities of 8K. "It will inspire them," he said, "and that will give new momentum to broadcasters."

Next year's Tokyo Olympics and Paralympics is one of the main drivers of 8K. NHK is aiming to have the new technology firmly in place in time for the Games. At present, only NHK is broadcasting in 8K "but once 5G technology is widely available, it will become much easier to receive 8K content," Kida said.

Meanwhile, the momentum toward 4K production was in evidence in deals and screenings across MIPCOM.

Yukinori Kida, NHK's executive director in charge of broadcasting: "It took some time to apply the technology to a story. You have to think about depth of the image and other considerations"



Broadcaster NHK screened its 8K adaptation of Nobel Prize-winning author Kazuo Ishiguro's *An Artist Of The Floating World* at MIPCOM, starring Ken Watanabe

Korea's JTBC and Buzz Media announced they were embarking on an ambitious 4K wildlife co-production, *Wonders Of The Korean Peninsula*, while attendees at the BBC Studios: Busy In 4K session were given a preview of *Seven Worlds, One Planet*, the latest landmark series fronted by David Attenborough.

The high-tech project involved a core team of 30 in Bristol in the UK co-ordinating 1,500 people — filming units, scientists, boat teams — worldwide amassing around a million gigabytes of data. "Our default now is to acquire footage at between 7K and 8K," said Gavin Boyland, head of development at BBC Studios. "This is for both editorial and technological reasons: much natural-history filming happens from afar, with long lenses, and filming at higher resolutions allows directors to crop into

the picture and still output 4K.

Boyland added that, for *Seven Worlds*, much of the look had been driven by new smaller and quieter drones carrying high-resolution cameras.

Insight TV, the Netherlands-based 4K UHD broadcaster and producer of adventure and action sports lifestyle programming announced it was expanding its content production and sales operations to the US. Insight TV Studios will develop and produce original content for broadcasters and digital platforms, as well as looking for co-production partners and brands to help finance series and live television event programming.

"Having produced over 550 hours of content, Insight TV has established itself as a leading producer of 4K UHD

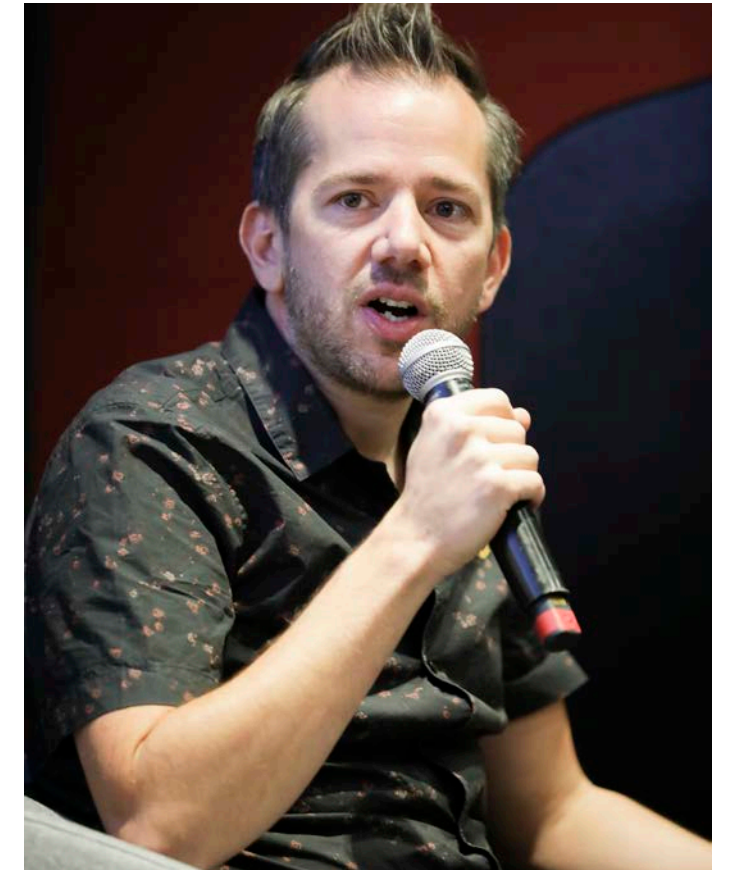
content," said Rian Bester, CEO, Insight TV. "Now, we are expanding our production services to also create original programming for third-party media platforms in the US targeted at millennial and Gen-Z audiences."

"Over the past couple of years, we have seen the market for high-quality content for millennial audiences accelerate," added Natalie Boot, Insight's head of media sales.

Take up of 4K and 8K is only one example of the way digital tech innovation is transforming the TV business. Streaming was also a major topic at MIPCOM, with Netflix, Amazon Prime Video and Hulu set to be joined by some serious new contenders in the form of Disney+, Apple TV+, HBO Max, mobile-first service Quibi, Joyn and BritBox.



Insight TV's head of media sales, Natalie Boot: "Over the past couple of years, we have seen the market for high-quality content for millennial audiences accelerate"



"Our default now is to acquire footage at between 7K and 8K," said Gavin Boyland, head of development at BBC Studios. "Much natural-history filming happens from afar, and filming at higher resolutions allows directors to crop into the picture and still output 4K."



Media Mastermind Keynoter Kay Madati, global vice-president and head of content partnerships, Twitter: "Our users are not passengers in the content journey on Twitter. They are the drivers"

As more direct-to-consumer ventures enter the market, the greater the demand will be for tech that encourages viewers to stay loyal and improves quality and performance. These include ultra-fast 5G mobile networks, AI and next-level data analytics to measure not only audience size, but also how viewers are interacting digitally with content.

Speaking to the MIPCOM Preview magazine, Dinesh Gopinath, head of products and data strategy at Kantar Analytics, pointed out that streaming platforms will need AI to keep their operations and distribution as efficient as possible. "These platforms have to determine the value of the catalogue of content, TV shows and movies they need," he says. "Usually, it would be a question of what to license next and how much to pay for that content. So they would want to evaluate what fraction of each subscriber's viewing time is likely to be devoted to a show. With AI, they can look at each consumer's profile and historical behaviour and be more intelligent about

how much they are prepared to pay for a title."

AI could also be used to enable these over-the-top (OTT) streaming services to improve the search-and-recommendation tools available to their customers. "If you have a large catalogue with hundreds of thousands of TV shows and films then, with AI, you have an opportunity to recommend and personalise content," Gopinath added. Streaming tech has also enhanced the possibilities of multi-screen experiences for viewers, who now expect to do more than just tweet about a show on their smartphones while watching it on a bigger screen. Dagmar Mae, co-founder and sales lead at Estonia-based Votemo, said: "OTT platforms could benefit from the habit of multi-screening by making it work for their content, from children's shows, where interaction enables you to add an extra learning layer, to thrillers, where the decision on how the show continues or ends is based on the audience's vote."

In addition to AI, the launch of high-speed 5G

telecommunications is another significant development on the tech horizon. Soon, networks will enable users to download a video in 10 seconds that would normally take almost five minutes using today's 4G smartphones. And not only does 5G's bandwidth mean it can deliver huge files, such as VR videos, more easily, but interactivity is also easier to incorporate into 5G-powered content. The transmission of live events reaches viewers in real time, as opposed to the several seconds' delay we experience today. This could mean internet-delivered streaming services are in a strong position to benefit more from 5G compared to their broadcast-TV counterparts.

Comcast's UK-based subsidiary Sky, the satellite-TV network, recently announced plans to offer a 5G telecoms service via its Sky Mobile subsidiary later this year. "Beyond price, it's becoming harder for telcos to differentiate on connectivity alone," said Paolo Pescatore, tech, media and telco analyst and founder of London-based PP Foresight. "Sky, armed with its innovative

mobile features and breadth of content, is very well placed to compete head on. As everything becomes connected, ramping up the fibre broadband and 5G will make it easier to reach people anytime, anywhere. Because with everything being connected, 5G will transform the way we consume video entertainment.”

Not surprisingly, social media was another hot tech-inspired topic at MIPCOM. ITV Studios Global Entertainment managing director Ruth Berry, for example, talked about the role of social in driving global hit format Love Island. In a similar vein, the Twitter keynote at MIPCOM brought together diverse voices from the world of content making, broadcast and online to explore how the platform is changing TV. Kay Madati, global vice-president and head of content partnerships, Twitter, called on programme makers and broadcasters to “extend your audience-reach strategies into a multi-platform world, and make money.”

Madati said: “We want to bring your premium content onto our platform. Our users are not passengers in the content journey on Twitter. They are

the drivers.” He noted that “Twitter works with over 950 partners on a global basis marrying premium content with our platform”, and underlined the brand’s “great value proposition for content makers”. Citing viral events surrounding Game Of Thrones, Madati explained how HBO worked directly with Twitter, supplying exclusive content “that allowed us to be an extension of the linear television experience”.

Paul Rehrig, general manager, Eurosport Digital, discussed strategies for bringing highlights and commentary to Twitter, before unveiling an exclusive deal for the Tokyo 2020 Olympics. “Eurosport will publish highlights exclusive to Twitter throughout the Games, to extend key moments into the conversations taking place about the Games,” he said.

Advances in tech have also opened up the world of esports, an area that content creators and broadcasters are keen to participate in. This area was also on the agenda at MIPCOM in a session entitled: Why Brands Are More And More Investing In Esports, moderated by Barrick Prince, founder of Enigmedia. By 2021, it’s predicted that there will be around half a billion

people watching Esports on a regular basis. “It’s a no-brainer right now. We have an ecosystem that is growing by two digits every year,” Samy Ouerfelli, head of new business at Freaks 4U Gaming, said. “Esports is already filling stadiums at an international level and it is also starting to be attractive at the very-grassroots level.”

Consulting company Sociograph was also at MIPCOM to showcase its expertise in marketing science and analysis. The company, which has offices in Spain and Mexico, tests the effectiveness of a new project by combining neurotechnologies – including facial coding, skin measurement sensors and eye-tracking – with traditional questionnaires and focus groups. “Understanding our consumers is more important than ever as the new generation plays a more important role in the media sector. They are more aware than ever before of what they want and how they want it,” said Daniel Ramos, Sociograph’s international marketing director, said. Major companies including Warner Bros., AMC Networks, RTVE and Mediaset have used this ground-breaking approach.



The Why Brands Are More And More Investing In Esports panel at MIPCOM: Dmitriy Karpenko, WePlay! Esports (left); Samy Ouerfelli, Freaks 4U Gaming; Romain Cousi, Webedia; and Barrick Prince, Enigmedia