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EDITOR-IN-CHIEF
GEORGI R. CHAKAROV
georgi.chakarov@tvbizz.net

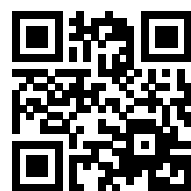
EDITOR
Yako Molhov

DESIGN
Anastas Petkov,
Ivanka Borisova

MARKETING
Stanislav Kimchev
sales@tvbizz.net

CONTRIBUTORS
Yako Molhov
Minko Todorov
Evgenia Atanasova
Aldo Malaj
Diana Mircheva

PUBLISHERS
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www.tvbizz.net



Georgi R. Chakarov
Editor-in-chief

NATPE Means Business



After a turbulent year for the brand, NATPE is back to Budapest with new owners and new ambitions. Undoubtedly, the first test after the forced pause showed that NATPE is one of the most highly valued and popular industry events, especially in Central and Eastern Europe.

This year's Budapest edition will be one of the biggest in terms of attending numbers and agenda. Ahead of the market, more than 650+ delegates and 350+ buyers have been confirmed with over a 100 exhibitors. For the first time, NATPE Budapest will welcome official delegations from Spain, France, UK, Ukraine and the U.S. in partnership with Audiovisual from Spain, IFTA, OUP, Pact and Unifrance. This once again underscores the growing importance of CEE as one of the key regions for the global TV business. The new Co-Pro Connections initiative will also try to help and create new partnerships between regional and international players.

This time, NATPE Budapest will be not only an event where companies can sell their content, but can also find out more about the specifics of the CEE markets. For this purpose, an exclusive report and presentation of market data from the region will be provided by the

consultancy agency weCAN covering 16 CEE countries.

In another first, one of the top executives in the region will deliver a keynote from the NATPE stage, stressing on the importance to recognize and put the international spotlight on the winning business strategies being created in the CEE region. The speech of CEO Pavel Stanchev comes at a time when his TV2 Media Group is enjoying its best numbers in Hungary and Slovenia and looking to expand into other media markets with potential.

NATPE Budapest is also about long-standing traditions, like the Screenings (where CEE meets the Studios), the format contest PITCH & PLAY LIVE! and the trademark Boat Party, which are also coming back.

In a recent interview for TVBIZZ Magazine, Brunico Communications CEO Russell Goldstein assured that they will continue to build on the NATPE legacy "and help these crucial industry events reach their full potential."

The debut in Budapest will only reaffirm these ambitions and create more prospects for the future. In short, NATPE means business and TVBIZZ Magazine is here to make the market even better.

It's time for business, in Budapest!



■ Jan Souček is CT's new DG

Jan Souček, the head of the Brno studio of CT (Česka televize), was elected as the new General Director of the Czech public broadcaster in the third round of the competition for new head. He received 11 votes from the 15-member Council of CT. Current director Petr Dvořák finished second with four votes. The official change of the head of the Czech pubcaster will take place at the beginning of October. Dvořák led CT for the past 12 years.



■ Over 40% of Poles subscribe to streaming services

According to the Establishment Survey for 2022, 94.7% of households in Poland have a working TV, 70.1% - a computer, and 41% of households use paid VOD services in Poland. A smart TV is present in 50.6% of households, and in 35.8% the TV is connected to the Internet. Cable TV has the biggest reach with 38.5%.



■ Government to allocate funds for the production of Ukrainian series

In 2023, a competition for the production of Ukrainian TV series, which will be financed by the state will be held. The Minister of Culture and Information Policy Oleksandr Tkachenko revealed this during the round table of the "Voices of the Peaceful" Museum of the Rinat Akhmetov Foundation. According to him, such an opportunity "will appear soon".



■ TRT's new streamer launches

TRT launched its standalone streaming service tabii on May 7. The Turkish broadcaster plans to offer content on the platform in 5 different languages: Turkish, Arabic, Urdu, Spanish and English. There are over exclusive 30 projects while TRT's popular productions are also available to stream. The international roll-out will start later this year.



■ PPF increases its stake in ProSiebenSat.1 to 15.04%

PPF Group, owner of CME among others, has raised its stake in German media group ProSiebenSat.1 Media to 15.04% in stock and instruments. PPF is now the second biggest stakeholder in the holding after MFE-MediaForEurope (owned by the Berlusconi family) which earlier increased its stake to 28.87% of the share capital.



■ LRT launches own streaming platform

The new LRT platform LRT EPIKA is intended for everyone who misses legal and easily accessible content in one place. Free quality content, a wide variety of genres and a special selection of movies and series will all be available on the platform which currently offers 900 movies and over 600 TV series episodes. New content will be added each week.



■ Inter Medya signs co-production deal with Caracol

Inter Medya and Caracol jointly announced yesterday their first co-production deal for the new drama series *Leylifer* which will be produced in Turkey by Alim Yapım. This will be a daily drama series of 120 episodes. Kadir Doğulu and Neslihan Atagül will both produce and star in the series.



■ Romanian channels adapt Turkish series

Turkish drama is a hot property in Romania not only as finished product, but also as formats. Two more titles will be adapted in the country for the upcoming TV season. In May, Antena 1 announced it will shoot a remake of Calinos Entertainment's *No 309* following the success of *Lia*, the local version of Global Agency's *Never Let Go*. In June, PRO TV confirmed it is adapting *The Pit* from Inter Medya, while a third season of the Romanian version of Echo Rights' *Insider* is also on the way.



■ Antenna Studios gets a new CEO

Michael Iskas is stepping down from the position of CEO of Antenna Group's Antenna Studios. He will be replaced by Mega's production director Antonis Matsos. Iskas is leaving Antenna Studios after nearly two years at the company. The change came after Antenna launched the new production company Oscar Productions in partnership with Mega.



■ CME increased its profit in 2022

The net profit of the television group CME Media Enterprises, which operates in six countries of Central and Eastern Europe, increased to EUR 136 million in 2022, which is an increase of 13% more than in 2021. The group's total sales increased by 14% year-on-year to EUR 777 million. Last June, the group expanded to include RTL Croatia, which it bought from RTL Group Central & Eastern Europe.



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CME Bets on Streaming

In a series of exclusive interviews for CEETV and TVBIZZ, six senior executives from Central European Media Enterprises (CME) - a leading content creator and broadcaster operating in six Central and Eastern European countries - revealed the company's content, distribution and streaming strategies for the region as well as the latest market trends and developments.

CME operates six television broadcasters in Bulgaria, Croatia, Czech Republic, Romania, Slovakia, and Slovenia, as well as Voyo, its original subscription video on demand platform. CME's 43 TV channels reach a total of 49 million people, with market-leading channels in most of its markets.

TVBIZZ Magazine presents the main highlights from these interviews:



Dušan Švalek, Deputy CEO responsible for Bulgaria, Croatia, Slovakia and Slovenia: CME Will Continue to Invest Heavily in Content

Dušan Švalek noted that “CME has one collective goal and strategy: to continue to be the CEE region's top content producer offering high-quality and high-volume local content for distribution across our linear and digital channels.” In terms of expanding to new territories in the region, the top executives added that “CME will always review an interesting opportunity should it present itself”.

Regarding the CEE ad market, Švalek said that “CME's advertis-

ing YTD revenues are up versus last year. However, we are seeing diverse trends in our markets. In markets such as Slovenia, there has been persistent caution on the side of advertisers since the end of 2022 and that is despite the relatively standard macroeconomic situation. TV advertising demand in Slovakia has shown encouraging market capacity trends and the overall advertiser sentiment in both Bulgaria and Croatia is optimistic, and we are expecting a positive outcome for 2023. The overriding

positive indicator that we are seeing in 2023 is that the annual client contracting in each of our CME markets is above last year's. That leads us to believe the diverse phasing trends we have seen so far will be re-balanced on the full-year basis.”

In terms of content strategy: “unscripted content will assume a progressively significant role in our programming strategies across all platforms. Scripted content, specifically tailored for streaming services, will drive an amplified demand for

astonishing and stranger-than-fiction stories inspired by real events. Such narratives will serve as powerful catalysts for marketing our platforms and products, setting us apart from our competitors. Since the acquisition by PPF in October 2020, CME has invested heavily into new, local scripted and unscripted content and this will continue to grow in the future. Over the last 2.5 years, CME boosted its investments into content by 82%, which consists of increased investment into scripted productions by 72% and by 110% into unscripted investments.”

Švalek, like the rest interviewed executives, noted that “CME is primarily focusing on the growth of our SVOD service as its momentum maximizes our current growth potential. We are evaluating the optimal timing and extent of further diversification of our streaming services portfolio... Voyo is offered in the Czech Republic, Slovakia, Romania, Bulgaria and Slovenia. We are very pleased with the growth to date and have high ambitions for the future. The Czech Republic and Slovakia have recently surpassed the 550.000 subscriptions mark. This is an incredible achievement, especially given the number of subscriptions in October 2020 (when PPF acquired CME) was around 60.000. We are confident we will reach 1 million subs in the Czech Republic and Slovakia by 2026 as originally stated. Our pan-CME achievements are also impressive: We are close to surpassing 1 million subs with excellent results in Slovenia and solid growth in Romania, making it a leading streamer on the local market. CME figures are without RTL Play.”

Talking about NATPE Budapest, CME's deputy CEO commented that “we regard NATPE as a high-quality event and view it as an excellent opportunity to maintain a conversation with the industry's most influential stakeholders. Aligned with our strategy of providing premium content, CME will be exploring the newest international scripted hits that we could add to our SVOD offering. Additionally, we will continue to showcase our content and products to our regional partners, recognizing that our content is specifically designed for the CEE region, making it highly adaptable and appealing.”



Stella Litou, CME Adria CEO: In Croatia We Will Rebrand RTL Play to Voyo

Stella Litou who is responsible for CME's operations in Slovenia and in Croatia commented that the two markets are “heavily regulated with strict rules regarding advertising, content and ownership, measurement. Audiences in both countries are seeking local content, consumed on all platforms. TV usage has the highest reach. On the other hand, content consumption on digital platforms is growing. Therefore, we need one currency measurement. Furthermore, in Croatia

recently a new Law on Electronic Media was introduced with so called Must Offer rule. It means that we as content providers cannot negotiate a fee with platform operators for redistribution of our content. We must make content available but in return we receive a minimal fee defined by law. There is no European example of such rules.

Talking about the results, in Slovenia, Pro Plus is the undisputed leader in the local media market, with excellent results across all outlets - tradi-

tional TV, online portals, and especially SVOD with Voyo. This presents a unique set of challenges. Nurturing the traditional TV business that is still strong but delicate, optimizing our cost structure, and identifying new growth areas. In contrast, we are a strong number two in Croatia with a clear ambition to grow. Our latest results have given us confidence that we are on the right track. We made changes in our primetime schedule that resulted in significant growth in shares and sales.”

Commented on the ad market in the two countries, the CME exec said that “the TV market in Slovenia is the most important. It offers the greatest reach and has the advantageous KPI efficiency clients are looking for. We expect slight growth, and digital will grow too. Our main goal in Slovenia is to remain the first choice for advertisers, with our tailor-made advertising solutions. In Croatia, we also expect YOY slight growth, both in TV and digital. Creative offers give our clients different possibilities. We are and will continue to be trendsetters in both countries.”

In terms of content: Litou noted that “RTL Croatia is having an exceptionally successful spring season. Compared to the same period last year we increased in audience shares in primetime for the group of channels. The main RTL channel drove the growth with the excellent new seasons of *Come Dine with Me*, *Married at*

First Sight and *Farmer Wants a Wife*. In the access primetime slot, we introduced the new season of the gameshow *The Price is Right* which also has great results and is an excellent lead-in to our main news and primetime slot. What’s most important is that we are growing, and our main competitor results are significantly downtrending. RTL has closed the gap in 18-54 by almost 10 percentage points over the last 11 months and we even beat our closest competitor in primetime in March.

In Slovenia, Pro Plus remains the first choice among viewers. Our channels maintain their leading position, with a 45% primetime share, with year-on-year growth. The most watched content on POP TV is the news 24UR with 46% share while local entertainment is also at the highest level. Currently, we air *Home Makeover* (*Work Action*), *MasterChef Slovenia*, and the reality show *Power Couple*. Kanal A offers Svet, a more magazine-like way of presenting news while the most attractive content for our viewers on this channel remains sport with Champions League Europa League and Moto GP.”

As far as the fall season is concerned: “RTL is preparing a mixture of local content. Our new daily fiction is completely developed and produced internally. Newly built sets, the biggest until now, great cast and excellent storyline will give our viewers a new

level of content enjoyment. The reality project *The Biggest Loser* is coming back so is the new season of *Come Dine with Me*. Flashy *Idols* is in preproduction. In Slovenia, one of the most popular realities *The Farm* is returning as is *Got Talent*, which is exceptionally popular. Our plans for fall are broad, diverse and exciting.”

Litou revealed exclusively that the company plans to rebrand its SVOD offering Play into Voyo in Croatia: “in the country, AVOD and SVOD options are currently available under the brand PLAY and PLAY Premium. Our goal is to establish a strong presence in the Croatian streaming market and become one of the leading players in the industry. Our strategy includes investing in VOD, expanding direct-to-consumer business with a new and improved wider range of high-quality content offering and improved user experience. We will rebrand Play to Voyo so we will have one umbrella brand for streaming and bring it to the market with additional features and a wider offer in fall.

In Slovenia today, almost 25% of internet households already use Voyo, more than 160.000 subscribers. We offer more than 15,000 hours of content in Slovenian or with Slovenian subtitles, which can be watched anywhere, anytime. Our users are loyal and regular viewers, with over 90% visiting as weekly.”



Matthias Settele, GD Markíza:

Voyo is Our Key Priority

The GD of CME’s Slovak broadcaster Markíza talking about the TV market in the country said that “TV and online have proven to be the leading media types and this trend has been accelerated by the pandemic and other challenges we face these times. We have negotiated a double-digit price increase for last year and 2023 based on the high demand for TV ads. And if I look at the first months of 2023, volumes are up year on year. Markíza changed almost the entire spring grid and we are happy that with the exception of one program, all formats exceeded our expectations. Our new daily family series *Mama na prenájom* (*Mom for Rent*), our first period romantic series *Dunaj, k vašim službám* (*Dabube, At Your Service*) and our versions of *Dancing with the Stars*, *Kitchen Nightmares* and *Liar* - all of them attracted a huge audience so far. News and magazines have also improved year-on-year.” Revealing the network’s plans for fall, Settele added that “we will continue

with our daily series *Mom for Rent*, our historic family saga *Danube, At Your Service* and reality show *Na nože* (*Kitchen Nightmares*), we will launch one new

studio show and bring back successful reality shows *The Farm* and *Love Island*. *Dragons’ Den* comes to Slovakia as premiere under the local name *Jama levova* (*Lion’s Den*) and we continue with *Výnimočná Nikol* (*Extraordinary Nikol*), our version of the French hit series *HPI: Haut Potentiel Intellectuel*.”

Markíza’s GD also underlined the importance of the streaming service Voyo: “Voyo is our key priority. We have launched new original series and have prolonged our contract with domestic football *Fortuna liga* (*Fortuna League*). For the first time, we have produced an exclusive docu-series about the Slovak football club Spartak Trnava, the next four episodes will be released after the end of this season. Program and marketing investments pay off, we have reached more than half a million paid subscribers across Czechia and Slovakia. Besides that, we have relaunched both key websites Markíza.sk and TVnoviny.sk, and started a TikTok channel. Our YouTube channel offer has meanwhile more than 1.3 million followers, so we are active across all digital media. Soon viewers will see *Vedma*, the first Czecho-Slovak fantasy series, an amazing production with great value. I am proud to work in a company which is that courageous to invest into such high-quality productions. Our work is also about taking high risks. But we love our programs, and that is our strength: Passion for television in each form.”



MasterChef Slovenia



Vedma



Daniel Grunt, CEO of TV Nova:

Voyo Aims to Reach 1 Mln Subscribers in CZ and SK by 2026

In January 2023 Daniel Grunt was appointed the CEO of TV Nova, the leading broadcaster in the Czech Republic and CME's 'crown jewel'. The senior executive, who was previously CME's Chief Digital Officer, commented that "Nova's strategy for keeping our long-term market leadership is to continue investing in quality programming, expanding our digital presence, and innovating our advertising offerings. The COVID pandemic, war in Ukraine, and economic recession have certainly had an impact on everyone, including the Czech TV ad market. However, from the media market perspective the negative impact wasn't visible as expected. During COVID, people in general spent more time at home watching TV so our clients weren't afraid to invest within ad market. TV ads are still considered extremely effective and essential part of media mix." Regarding the spring TV season, Nova's CEO commented that "TV Nova channels have performed very well this spring, thanks to the success of our top-rated programs. TV Nova was the only TV group in the Czech Republic growing as far as share. We have seen strong viewership for our news as for example presidential election "Road to the Castle" which as a great success and included the most watched presidential debate. Overall, TV Nova's presidential election coverage

reached 5.423 million viewers over the age of four. We plan to continue investing in quality content that resonates with our audience. Saturdays belong to knowledge competition *Superlov* (*Beat the Chasers*), which is the most viewed show in Saturday's prime time. Sunday's and Monday's crime series work great as well and *Odznak Vysočina* (*The Highlands Badge*), *Specialisté* (*Specialists*) are the most popular formats in the Czech Republic. We also launched new series *Jedna Rodina* (*One Family*) and *Zlatá labuť* (*Golden Swan*) which have both a very good viewership base and positive feedback on social media. The fall schedule will feature a mix of new and returning programming across our channels. We'll be continuing with successful formats like *Chase* and *The Street* (19th season by the way), and



we're looking forward to *The Nightingale Music Awards*, which we helped revive last year. We're confident that our fall programming will deliver engaging and entertaining content for our viewers." He added that "the content trends in the Czech Republic indicate that viewers are interested the most in local original Czech formats. That's why we build strong line-up with Czech local program throughout all genres such as dramas, comedies, more crime series and true based stories. Reality shows work extremely well, and viewers enjoy not only culinary shows as *MasterChef* but shows as *Survivor* or *Love Island* as well." Regarding CME's streaming strategy and Voyo, Grunt commented that "as Chief Digital Officer at CME, my primary focus is on developing our streaming service. Our digital strategy for Voyo was centered around expanding our subscriber base, improving the user experience, and increasing engagement through original programming and content partnerships. Voyo is the leading local steaming platform bringing the strongest stories to our subscribers. And our target for Voyo by the end... well, you will see but we are very confident that we'll reach our goal of 1 million subs by 2026. Voyo's key pillar is local content. We produce a lot of our own (Voyo Original production and our TV content we provide the viewers in advance), currently, 24 projects of various genre are being filmed and other 22 projects are in pre-production. However, that would not be enough to profile Voyo as the best and biggest place for the best Czech content. Therefore, we have a strong acquisition strategy which includes also some titles from the Czech TV production and also old Czech and Czechoslovak movies, we also support the brand-new ones."



Aleksandras Cesnavicius, CEO, Pro TV Romania:

2022 Was a Remarkable Year for Voyo

Commenting on the record ratings in Q1, Cesnavicius said that "Pro TV had the best share since 2014 to date in February. During the entire month, on a national level, over 8.5 million Romanians spent at least 10 hours watching our programs. To name some of their preferences, I would say, *Romania's Got Talent*, *Undercover Boss*, *Las Fierbinti* (a local series) and of course, last but not least, our daily News program. Romanians generally tend to enjoy a mix of local productions and foreign content. They like to watch shows that are entertaining, informative, and have good production value. Additionally, Romanians are known to be passionate about sports, football in particular, and major sporting events tend to draw a large viewership." Regarding Pro TV's plans for the fall TV season, the executive revealed that "every year, we bring novelties for our audience with every grid launch and this fall will be no exception. Considering the highly challenging environment, driven by both competition with the development of other media channels and audience fragmenta-

tion, we're looking for formats that will attract and retain our audience. We are preparing a proposal that combines already established formats such as *Las Fierbinti* and new international formats and we will definitely continue our commitment to investing in strong local fiction."



Las Fierbinti

Pro TV expects a single-digit growth for the local ad market: "the Romanian TV ad market is fully developed, reacting as normal to societal changes. Consumers are evolving, consumption habits are changing and advertisers are therefore adapting their strategies to address their consumers' needs. As for the future, we will most likely observe a single-digit growth in 2023, in line with the expected growth of the GDP, and we foresee the development of consumer consumption."

Cesnavicius noted that "Voyo is a platform that comes with many benefits. Besides the original content, it offers its subscribers the opportunity of viewing our TV shows up to one week ahead. It's also a unique destination for our audience to catch up with their favorite programs in a market in which telecom operators do not broadly offer this type of service."

Reverting to 2022, we can say that it was a remarkable year for Voyo. From a content point of view, the platform tripled both its titles and its subscribers. The users watched over 11 million hours of content on Voyo last year alone. This being said, we like setting the bar high so that there's always room for improvement. Our expectations, therefore, are even higher for 2023. The search for and delivery of good quality content in both TV and streaming platforms is the key element to keeping our audience close to us. We are always looking for new content opportunities.



Ralf Bartoleit, CEO, bTV Media Group Bulgaria: Our Digital Assets Enjoyed Double Digit Growth Again

b bTV Media Group's CEO Ralf Bartoleit noted that "bTV is an exceptional brand with a remarkable history... Throughout the years, bTV has established itself as a preferred brand and a trusted source of news. Our newsroom and reporters are renowned for delivering quality journalism and reliable information. Given my background as a news journalist and foreign correspondent for many years, it is my priority to maintain and strengthen this positioning. I also believe it is crucial for us to be perceived as an entertainment channel and media group that offers even more diversity and excitement."

bTV's top executive also shared that "beside investments in entertainment and news content, bTV Media Group is proud to be the first television and company to introduce "green filming" standards on the Bulgarian market. Three of our most popular TV shows are already certified by the international "albert" standard."

In terms of programming: "with *The Bachelor* we have a great primetime production that has already started to change the image and the perception of bTV into a lighter, more entertaining direction. Unfortunately, *Surviv-*

or was weaker than expected. But besides TV, our digital assets enjoyed double digit growth again. I am especially happy about bTV Plus (catch-up platform). Here my team has made a big effort to implement changes to offer more diverse and different types of content. Besides *The Bachelor* we have in Access-Prime a fantastic show with *Who Wants to Be a Millionaire*. This was a very good introduction by our programming team. Regardless of all challenges in the spring season, I am very happy about my team's agility and flexibility... On top of this, we created a whole new summer program in prime time, I think the first to that extent. Our summer grid will also introduce a new Bulgarian fiction program with the title *Sophia at Home*. I am really excited about all of these shows.

In fall we are bringing the 10th season of *The Voice*, one of the most successful TV shows in Bulgaria. For me personally *The Voice* is a love-brand; we produced these spectacular shows at Sat.1 and ProSieben in Germany, but I also produced *The Voice* with my team in Hungary, when I was responsible for TV2. I am also very excited about *MasterChef* with three new judges and

a new refreshed concept. In my eyes, the casting was fantastic. And I would mention *The Farm*. Yes, it is a known format, but also beloved by the Bulgarian audience and we intend to invest a lot of ideas and passion into *The Farm*."

Regarding bTV's cable channels portfolio, Bartoleit commented that "we had some challenges in the first half of the year but our portfolio of smaller channels is an important pillar for the diversification of our group. We have a lot of ideas in this direction. We made one small step to improve the shares of bTV Lady. I am unable to reveal too many details at this stage, but we are dedicating considerable thought to this matter. And you know from my history when I was in Hungary, we successfully launched Super TV2 at TV2. I love to work on the portfolio."

Talking about Voyo in the country, the bTV top executive said that "among the top five titles offered on Voyo for 2022 are the Bulgarian series *Sunny Beach*, *I'll Be Fine*, *The Farm*, the popular saga *Forbidden Fruit*, and the Romanian hit series *Vlad*. More are added every month, and users can enjoy exclusive content, *Champions League* football, and other special events from the world of sports. The service was launched years ago in Bulgaria, and it is present in 4 more markets in the CEE region –the Czech Republic, Romania, Slovakia, and Slovenia. For the CME group the digital extension of TV channel business is a key factor. So, you can imagine, that we will also have a look at the future of Voyo and by this review the possible business models and options."

bTV is one of the many CEE broadcasters that will be attending this year's NATPE Budapest and Bartoleit stressed that "NATPE is widely recognized as one of the most prestigious events in the entertainment industry and serves as a remarkable networking marketplace. The conference will showcase new trends, innovations, and advancements in content creation and distribution. We are excited to see firsthand the industry's most exceptional content across a wide range of genres, formats, and platforms. I have a great acquisition team, and together with my colleagues we are always open to fresh ideas, seeking out new business opportunities and partners." ■



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United Media: Expanding for the Future

Interview with CEO Aleksandra Subotić

United Media continues to expand its business across the CEE region on various media platforms through new partnerships, acquisition opportunities and the launch of new services with a big focus on digital media and continued investments in content, CEO Aleksandra Subotić tells Yako Molhov in this extensive and exclusive interview for TVBIZZ Magazine.

In less than ten years, United Media has grown to become one of the largest media companies on the European continent through more than 100 media assets, encompassing TV, web portals, radio stations, and print. The company has no intention to "rest" on these laurels, as the chief executive explains. The executive also touched upon topics like the challenging advertising market amid war in Europe and the constantly increasing competition in the streaming segment which requires quick adaptability to the changing habits of the consumers and finding new solutions to reach the target audience with the right message and content. Another strong pillar in United Media's business principles is free and independent press which is manifested in the leading regional news brand N1.

Aleksandra, United Media is the leading media company in South East Europe, currently operating in 8 countries. What are your ambitions? Are you planning to expand your portfolio with more acquisitions or new channels?

At United Media, we are passionate about leading the media services industry not just in Southeast Europe but on a broader scale. When we first launched United Media a decade ago, we started with several cable channels and an advertising agency. Since then, our business has grown to become one of the largest media portfolios in Europe, with more than 100 media assets encompassing TV, web portals, radio stations, and print. We offer comprehensive solutions for every need that arises in the media ecosystem, from production and distribution to advertising. However, we do not intend to rest on our laurels. We continuously explore avenues for expansion, such as potential acquisitions or the launch of new channels. Nevertheless, all decisions are grounded in extensive market analysis and a profound comprehension of our audience.

Right now, I'm thrilled to share that we've come to an agreement with Forbes, the largest global business media brand, to launch five digital editions in Serbia, Croatia, Slove-

nia, Montenegro, and Bosnia and Herzegovina. These new licensed Forbes websites under United Media will serve as a premier platform for discussing some of the most influential leaders, managers, investors, and entrepreneurs from the Adriatic region who are making a significant impact on the world by driving change and transforming business. Being recognized as a partner by such a large and respected company like Forbes is a tremendous honor and privilege for United Media.

The CEE TV market historically has been a very dynamic one, with lots of M&A throughout the years. What are the main challenges and opportunities for the TV and digital market in our region as a whole and for the specific countries you operate in?

One of the key challenges facing the TV and digital markets in our region is the need to keep pace with the rapid evolution of technology and changing consumer behaviors. This requires us to be innovative and forward-thinking in our approach, investing in new technologies and platforms that allow us to reach and engage with our audiences in new and exciting ways. In Bulgaria, for example, we are currently exploring inventive approach to interact and reconnect with the younger generation who are not ac-

tively engaged with traditional media. Our efforts include ground-breaking initiatives aimed at empowering young people to create fascinating TV content.

It is important to emphasize that United Media has strategically prioritized investment in the digital area. In past years, we have consistently challenged conventional limits in terms of optimizing content placement across various digital platforms. This pioneering approach has yielded substantial advantages, as evidenced by our sustained revenue growth. Additionally, we maintain a strong focus on worldwide content distribution on all digital platforms, ensuring its widespread reach and accessibility.

We are also pushing the boundaries by bridging the gap between digital content and traditional television. A prime example of our efforts is the ground-breaking *IDJ Show*, an interactive digital talent show that we pioneered and debuted on TV - a show in which we turned young participants into regional music stars during and not after the end of the competition, leveraging the power of social networks for their promotion. During the first season, the hashtag #IDJShow amassed over 100 million views on TikTok and we are eagerly waiting for the second season in the fall.

THE SWARM

8 x 45'



Furthermore, recognizing the growing influence of platforms like TokTok among the younger audience, we have taken the bold step of launching news production specifically tailored for this platform.

Of course, each of the countries in which we operate has its own unique characteristics, such as different stages of growth and development, values, styles of content consumption, and levels of media freedom. All of these are criteria that we consider while creating development plans in each of those countries.

However, we could say that the universal formula is great content that we provide to a specific audience, and we'll continue to invest in original programming and production capabilities across our markets. This is a critical element of our strategy to remain relevant and competitive in an increasingly crowded media landscape.

Will you continue to “fight” for a Free TV license in Serbia?

Absolutely. We firmly believe that our investment in superior content de-

Aleksandra Subotić

is CEO of United Media. She is a media content expert with 24 years of experience in executive positions in companies from telecommunications and media industry. Under her leadership, United Media became the leading media company in South East Europe with 7 national broadcasters and more than 50 pay TV channels in Bulgaria, Greece, Slovenia, Croatia and rest of former Yugoslavia. Prior to United Media, she held executive positions in cable and satellite companies, and was responsible for content creation, production, sales and marketing strategies, developing sales and establishing the dealership network.



Grand Stars

serves a national frequency in Serbia. Our channels have earned recognition from viewers as high-quality programs.

In the last month, the importance of our media in Serbia has been further confirmed. After two mass murders and among a general atmosphere of sadness, insecurity, and protests against violence, N1 and Nova have assumed the role of a media public service. They have diligently informed the public about the unfolding events while the official public service broadcaster neglected its responsibilities. Thus, N1 and Nova have effectively filled the void and emerged as the trusted channels that fulfill the role of a true media public service, particularly during times of crisis.

Also, Nova has emerged as Serbia's most viewed cable station, rivaling those with national frequencies in terms of audience. This spring, it shattered previous viewership records and claimed the title of being the most-watched commercial television station in Serbia.

Despite possessing an exceptional program and fulfilling all of the requirements outlined by independent authorities, the attainment of a license is not necessarily guaranteed in Serbia. As a media company devoted to independent journalism, we believe that a free and independent press is essential to a healthy democracy, and we are committed to

upholding that principle in everything we do.

Are you planning to expand the N1 news brand in the region?

Our plans for the N1 brand in the region are ambitious, as we aim to continue its growth and expansion. Recently, N1 was granted a national broadcasting license in Bosnia and Herzegovina, and it is one of the top pay TV stations in Serbia and Croatia. In Slovenia, our focus is on developing the N1 digital portal, which has already gained popularity among readers and is rapidly expanding.

Moreover, we are proud to have extended our successful partnership with the world-renowned and prestigious news channel CNN, which is a testament to N1's commitment to independent media and the high quality of journalism we provide.

N1 is a standout model showcasing the evolution of TV news into comprehensive news platforms, driven by the seamless integration of digital extensions. With this approach, N1 exemplifies how traditional television news making has successfully adapted and increased its reach via the integration of digital technologies and online platforms. This way, N1 has effectively tapped into the evolving media landscape, offering a multi-faceted news experience that caters to the preferences and habits of modern people.



MasterChef Croatia

These developments will strengthen N1's position as a leading news platform in the region. We continue to uphold the principles of professional and credible journalism, providing our audience with accurate, reliable, and relevant news and information.

When running a news channel, it is crucial to build trust with viewers. They need to feel confident that they will find the information they are looking for without having to double-check elsewhere. N1 has achieved this trust. Over the past nine years, N1 has become the most reliable source of information for citizens, especially during times of crisis. This trust is the most important aspect of their success.

United Media is part of United Group - the leading multi-play telecoms and media provider in South East Europe. What are the most important synergies between the two companies and how does United Media benefit from being part of a large regional telecom operator? Synergy is the essence of harnessing the combined power of a group working together, surpassing the individ-

ual capabilities of each component. As a member of an expansive international group, both media and telecom companies benefit from staying ahead of the curve, unlocking new business prospects, and boosting overall revenue. Being part of a forward-thinking collective that invests in innovative solutions and fosters business development across various domains is truly advantageous.

United Media's reputation for producing high-quality content and regional experience in other media services (like advertising or digital distribution) makes it a valuable partner to both United Group and other telecom operators with whom it collaborates.

An exceptional example of our synergy is evident in the EON platform, a streaming platform developed within the United Group. Leveraging the popularity of this widely-used video platform, our media company's content reaches a broad and diverse audience, not only in the region but also globally. Notably, original formats like *Grand Stars* (*Zvezde Granda*) have gathered a widespread following, spanning

across continents. Thanks to the EON platform, our channels and content are now accessible to viewers worldwide, regardless of their location. This global reach allows us to connect with our audience wherever they may be.

At the same time, the telco company can offer its subscribers the highest quality media content.

How would you describe the current status of the CEE advertising TV market, post-COVID, amid war in Europe? What is your forecast for the different market?

Challenging! The market has been impacted by the pandemic and the ongoing conflict in Ukraine, which has led to uncertainty and economic instability. The last three years have taught me to be very careful with predictions. Markets will continue to face challenges in the short term, but there is potential for growth in the long term. It is important for TV providers to focus on offering high-quality content that attracts advertisers. Additionally, it is essential to embrace digital channels and find ways to integrate TV advertising with

We understand that creating content that connects with every audience may be difficult, so we don't take a one-size-fits-all approach.

digital channels to offer advertisers a more comprehensive and effective marketing solution. One of the most innovative advertising solutions we develop in-house is the VIDA platform for addressable advertising, which gives us the ability to show different ads to different households while they are watching the same program. In this way, advertisers can send their messages to the target group they are addressing and in the territory in which they operate, which makes the space of television advertising more accessible to a large number of small and medium enterprises.

The spring TV season is almost over. Your Bulgarian TV operation Nova Broadcasting Group reported strong viewership results. What about your other flagship channels in the region and what were your most-popular programs this season?

Yes, Nova Broadcasting Group achieved remarkable results this spring. In March, they reached a record-breaking performance with an average audience share of over 30%. During the parliamentary elections in Bulgaria, Nova dedicated almost 18 hours of programming to the event and they were the top choice among viewers.

Other television stations inside UM achieve excellent performance as well. The most popular entertainment programs are foreign licensed formats such as competition shows *Survivor*, *Dancing with the Stars*, *Got Talent* and *MasterChef* achieved phenomenal ratings in Croatia. Also, we introduced the American reality show *The Biggest Loser* to Serbia for

the very first time and were pleasantly surprised by the enthusiastic response from our viewers. Our original competition show, *Grand Stars*, has continued to be one of the most watched shows for 18 seasons. In addition to our successful entertainment programming, all of our channels are recognized for their credible informative programs, in-depth documentaries that are the result of months of research, stimulating talk shows, and exclusive interviews. Our sports channels broadcast a range of elite competitions across all of our countries, including the Premier League, Euroleague and Euro Cup, Formula 1, Moto GP, and tennis, amongst others.

What about the fall TV season? What shows and series will be returning to your Free TV channels in the region and what new titles and projects can you reveal?

This fall, NOVA will be airing the fifth season of the hit reality show *Desafio Bulgaria*. The show features extreme experiences and multiple challenges that test the physical and mental skills of the participants while also showcasing the beauty of Bulgaria's nature. Each year, it takes place in some of the most remarkable locations along Bulgaria's Black Sea coast. Additionally, NOVA is continuing its long-term strategy of supporting Bulgarian films with a fresh series of high production

standards. Film production is a key strategic priority for our media company in Bulgaria.

Nova TV Croatia will continue with all of its successful formats that have garnered recognition from the public, including *Got Talent* and *MasterChef*. Additionally, they are planning to launch a new daily series. In Serbia, the new TV drama *Time of Death* will premiere, based on Dobrica Cosic's novel of the same name. This series portrays one of the most difficult and devastating episodes in Serbian history, the Great War.

As a company that operates TV channels in several territories do you have a more centralized programming strategy or do you rely entirely on decisions made by the local management? Are there major differences between what viewers like in Serbia, Bulgaria, Croatia; etc? Have you planned more co-productions between your channels in CEE?

As a company that operates TV channels in several territories, we have a decentralized programming strategy that allows us to adapt to local preferences and cultural differences. Our local management teams are responsible for programming decisions, but we do have a shared understanding of what works across different markets. We understand that creating content that connects with every audience



may be difficult, so we don't take a one-size-fits-all approach. We have identified potential co-production opportunities between our channels and *Survivor* is an excellent example of a successful joint project between two countries and two televisions from Serbia and Croatia.

The synergy we have at a personal level and the vast know-how within our corporation are the most significant benefits we have to offer in these types of collaborations.

United Media produces more than 40,000 hours of original content yearly. The CEO of your parent company - United Group - Victoriya Boklag recently commented in an interview that UG has a strong focus on local productions and new forms of content. Can you tell us what is United Media's budget for content production and what type of content you focus on?

As previously mentioned, content creation is a crucial component of our company's growth strategy. We allocate a significant portion of our budget towards producing content. We recognize the value of appealing to local audiences and their interests, which is why we continue to place a major emphasis on producing local content such as TV formats, series and movies.

Moreover, we are keenly aware of the need to cater to the distinctive preferences and consumption habits of younger generations. To that end, we are actively exploring and investing in innovative content forms that resonate with them. A significant aspect of this endeavour lies in our investment in music production and distribution. We understand that music holds immense appeal for young audiences, and we are committed to creating and delivering music that speaks to their sensibilities. By leveraging cutting-edge techniques and collaborations with talented artists, we strive to offer a diverse range of musical experiences that captivate and engage this demographic.

We believe that our investment in creating diverse content not only enhances our reputation as a leading media company but also serves as a key differentiator in a highly competitive market.



Battle



It is important to emphasize that United Media has strategically prioritized investment in the digital area.

Do you produce content specifically for your TV channels and digital media or also for international distribution as an additional source of monetization?

While our content is primarily created for our TV channels and digital media platforms, we also create programming with the intention of selling it internationally. Our goal is to create content that resonates with audiences across borders, and we have been successful in doing so.

Our series are well-known already. In addition to the fact that we have won numerous international

awards, including the Audience Award at the Cannes Festival for the *Awake* series, it should be noted that we hosted the semifinal round of judging in the Telenovela category for the 50th International Emmy® Award last year.

What are your most popular titles in terms of international sales and what countries are interested in watching United Media-produced content?

Our catalog is very diverse, we have long-running romantic series that we distribute across CEE, LatAm and Middle East, but also crime and drama series that we sell to USA and elsewhere. In both cases we own the IP so sell ready-mades and formats. As an example, our Croatian family comedies (*No Matter What*, *At the Border*) are adapted in Greece, Slovakia, Hungary, etc. And our award-winning crime dramas (*Awake*, *The Hunt for Salamander*) are sold to USA on Svod, Pay TV+ in CEE and with many more ongoing exciting discussions.

Our content is proven to work outside of our territories as we develop stories with universal values and invest a lot in their production.

United Media will be attending NATPE Budapest. Tell us a little bit more about your acquisition strategy, what kind of content will UM be looking for? Will you also be offering partners your content and what are your highlights?

All of our acquisition teams are attending markets across the world in order to find the best possible finished content. We work with both established studios and independent distributors, as we are buying for 40 channels in our portfolio. We are always on the lookout for a wide variety of content, including TV series, movies, documentaries, and more. We believe that offering a diverse range of content is essential to meeting the needs of our viewers and maintaining our competitive edge in the market.

Over the years, we've established strong relationships with our distribution partners, and we're committed to strengthening those relationships even further, and NATPE is an excellent opportunity to do so.

Many CEE media companies claim international streaming services are not their competitors as they don't offer original local content. What is United Media's strategy in this respect? Do you consider Netflix, Amazon Prime Video competitors and do you have ambitions in the streaming market, in particular?

Of course, they are competition, especially in those parts of the world where viewers have limited paying ability and have to decide whether to subscribe to one of the large global streaming services or utilize one of the local possibilities. This creates a challenging environment for local providers, who have to fight to stay relevant, remain competitive and attract viewers. One strategy is to focus on producing original content that appeals to local audiences. By creating content that reflects the region's unique culture and history, local providers can differentiate themselves from global services and attract customers who are interested in seeing stories from their own communities.

We chose that strategy for our content and are more focused on offering it through EON, a streaming platform built within the United Group and used in all markets. Our key strength lies in providing timely news, engaging talk shows, captivating local series, and entertaining local content. It is crucial for us to sustain the interest of young audiences in our home-grown content, despite the formidable competition posed by global giants in the industry.

As part of our evolving presence on streaming platforms, we will be expanding our VOD catalog in the near future. This strategic direction aims to provide the audience with a broader selection of content, catering to a wide range of tastes and preferences. By enriching our offerings, we aim to enhance the streaming experience and solidify our presence in the digital entertainment landscape.

On the other side, we also have a partnership with the Amazon Prime Video platform, through which we offer some of our most popular series to viewers outside of SEE territory, such as *Black Sun* and *Legacy*. ■

Duo Media Networks and Its Formula for Success

Interview with CEO Jüri Pihel

Duo Media Networks and flagship channel Kanal 2 have just closed a very successful 2022/23 season in Estonia and the Baltics. In this interview with Stanislav Kimchev, CEO Jüri Pihel talks about the company's formula for success, content production and its different strategies for the free TV, Pay TV and digital platforms.

Jüri, Duo Media Networks is the largest and one of the fastest growing media companies in the Baltics. How many channels does your company operate and what are your target audiences?

We are operating altogether 17 channels, it means we have a large variety - from Kanal 2, which is the biggest commercial channel in Estonia, starting with very broad, diverse programming, to really niche channels and everything that is between - thematic channels. Two and a half years ago, we merged two different companies, a company that owned Kanal 2 and a company that owned the international kids channels Kidzone. That's why we still have two different directions.

While programming on the main channel, Kanal 2, is primarily directed at the 18 to 59 age group, then the programming of its sister channels targets different groups, from small children to the elderly. The selection includes Duo 5, a more masculine and documentary-oriented channel, and Duo 4, a softer and more feminine channel. Comedy, crime, and thriller channels are Duo 6 and Duo 3 - showing mainly series, film channels are Filmzone and Filmzone+, while TV channels specifically targeted at children are created according to age preferences - Smartzone, Kidzone TV, and Kidzone Mini. Eesti Kanal brings the best moments and stars of domestic TV history to our viewers.

A wide selection of channels is also available for Russian-speaking viewers. In addition to the main Russian-language channel Kanal

7, there is also the movie channel Kino 7, the entertainment channel with the best series and Hollywood movies Kanal 7+, and Semejka, a TV channel for Russian-speaking children offering fun and educational content.

The flagship of Duo Media Networks is the oldest private television channel in Estonia - Kanal 2. Tell us more about its programming strategy?

The talent on television, on linear television today is same for everybody. How do you keep your loyal viewers, these viewers who are getting older, who have been like 30 years with you, to keep them, to involve them still and to attract new viewing? We have a 2-in-1 strategy. It means we are building the channel schedule until 20.00 in a very traditional way: daily soaps, some international German family viewing series and one hour news magazine at 19.00. It's a news magazine show which means it's really mixed - it starts as news and goes more entertainment and it's quite funny at the end. It's quite an interesting mix and from 20.00 we are going with a little bit more different programming. We have investigative journalism, we have charity programs, and they are meant for very broad audiences, they are quite attractive for new viewers. We are trying really to involve the best producers and best faces. They are quite young, starting from 30 or even less. We have a news anchor on week-ends who is 22. Compared to, for

instance, the public television, the average age is like 15 years younger. So, we are growing, we have grown heavily over the last two and a half years.

What were your most successful programs this TV season and what are your plans for the fall? Will you offer brand new shows to Estonian viewers?

We got an enormous success with two different international formats, both from Fremantle - *The Ultimate Entertainer* and *I Can See Your Voice*. We did both in a very proper way, they are looking glamorous. Both show established our Sunday nights. They are 2.5 hours as live programs and are absolutely amazing.

We have a couple of phenomena and one of them is good-old *Jeopardy!* On Sunday between the news and the shiny floor show *The Ultimate Entertainer* or *I Can See Your Voice*, we air *Jeopardy!* which has been on Estonian screens for about 25 years. We have a young female host, it's quite untraditional and it really involves, rating-wise, 10+ percent on Sunday, the most crowded primetime. I'm absolutely happy and I know that these 'old' formats are coming back in many countries. This is a great example for everybody - use younger hosts, younger players and a little bit brighter colors, and that works.

We also have successful original formats, and probably the most successful this season was *A Heart's Desire*. It's a charity program with very strong journalistic background, well done



research, and we don't collect money from the audience, but we find people who are fulfilling other people's dreams. A perfect format, absolutely amazing results. It's in the top ten every week.

Another successful show is *Full Hour*. This is another investigative journalism program - three stories, 6 to 7 different journalists every week. We have a very strong concept behind it: we are trying to talk to smarter people and to everybody about the difficult topics, but in a very, simple and understandable way. We started last fall, and after 12 episodes, it was voted as the best journalistic program of the year at the Estonian Television and Film Awards.

The same team which is behind *A Heart's Desire* are doing the program called *Let's Turn Flats for Money*. It's a renovation show hosted by an Instagram star, a young lady who's very popular on Instagram as a home renovation, self-taught phenomenon and she is hosting the show together with a very famous TV personality. They renovate for very small money people's flats and the people rent them out.

At 21.00, we have a talkshow called *The Night*, with three hosts that have been voted over last three - four years as most popular TV hosts of the country. Again 30 to 35, young people.

To sum up, we made the channel go bigger each year because we don't lose

our traditional viewers, but we are involving new and grabbing viewers from different channels.

What are the latest trends on the Estonian TV market? What are local viewers watching the most?

It's quite easy to answer and it's not about television at all. Times are turbulent. There are so many different messages, around the relative closeness of the war, uncertainty. This uncertainty is the key influence of the minds of the people. I can't say that people feel insecure in Estonia but something's there. But it's not just last year - we are talking about the last 4 or 5 years as populism has been growing, all the Trumpism was growing. This means that these current programs are doing really well, programs that are talking about the future, about the present, less about the past, but more serious topics and well-made entertainment. It's quite obvious - public television in Estonia does really well with quite simple two-person interviews, a simple talkshow, just because people need more information.

How is the Estonian ad market faring amidst the uncertain economic situation, the war in Ukraine? Do you expect growth for 2023?

It has been surprisingly stable over the last year. Even the COVID years, we felt few months of serious drop, maybe even only a couple of months of serious drop, but it has been stable. In an established economy like we have in the Baltics we haven't seen any drops really, switched between digital and television. TV has the share what we used to have over the last 15 years. It didn't change. We are growing maybe 1% to 4-5% a year as a market and then the share stays safe. So we can plan, we can rely on our plans and budget. There's never enough money to make good television, but we can survive. It's not bad at all.

What is Duo Media Networks' digital strategy? Do you plan to invest more into digital content?

The answer is yes. Every country is a bit different and the Baltic region is that we have some specialties. One of those that stand out are digital plat-

forms like Netflix, Disney+ or Viaplay who are key players here, even Go3 but they are actually mixed, they are not a standalone service. Everybody is talking about them, about HBO, but in reality, the number of paying subscribers is surprisingly small especially in Estonia, but also in Lithuania. We are so well digitalized: everybody has fast connections, everybody has several devices. But the phenomenon is that that local telecom companies started before any of these standalone

services came on the market. They started as content providers. It means that in people's mind, big telcos like Telia or Elisa - they are in people's mind content providers and that's why for standalone services it's so difficult to enter. Let's say that out of these major international players no one has a six-digit number of clients in the Baltics, let's say much less. It means that we are working very closely with telcos on delivering our content digitally.



The Ultimate Entertainer

I can't really tell today, maybe in six months, what we are doing but we have officially and publicly started doing branded services on telcos. It means we have own content that is branded with logos but we don't stream ourselves, it's just today we are in the beginning of the process. We are going to launch some services hopefully next spring. Duo Media is strong because we are trying to execute as many rights we can obtain - one localization, one file and as many clients, as many different platforms as we can involve. That's the only way. It's a really small market and we have four languages. Localization is just expensive if we're talking about it.

Duo Media is attending NATPE Budapest. What kind of content will you be looking for? What about potential co-productions with companies from CEE?

The NATPE Budapest market is different from all of these mega markets. It's smaller, but it's really important. We are attending mainly to meet people. It's about networking, connections, to get ideas to keep eyes open - this is really good.

Last year, I met a few of my friends who introduced me to some other people and conversation went so well that next spring we are launching one big Finnish format because of networking at the market. For example I chatted with Rosario Cosentino from Paramount and she said "I have a solution for you". We are looking not just ideas and formats, but also we are very open for scripts. We talked about *Dear Daddies* (Sres. Papis) and from this chat it happened so that in three months we produced the format.

An important trend on the market is that we are co-producing with telcos, with digital platforms. They have the strong digital offer and we work with them. For example, we launched the first episode of a show on Kanal 2 with some introductory half-hour interviews, made it like an event and it got amazing ratings for the first episode. Then, for six months the other seven episodes will run on a digital platform and come back to to Kanal 2 in the fall. We made it like an event and a brand on the biggest commercial channel with just one episode. ■



Jeopardy!



The Evolution of ITV Studios' Formats on the Screen and Beyond

Interview with Pascal Dalton, Head of Brand Partnerships, Northern EMEA

ITV Studios has been among the leaders in adapting its hit formats for various types of target audiences on TV screens, digital platforms, multimedia services and virtual and real-life experiences. In this exclusive interview with Georgi R. Chakarov, Pascal Dalton, Head of Brand Partnerships, Northern EMEA, digs deep into the process of turning a format into a 360-degree brand and talks about some of ITV Studios' biggest success stories and how the markets evolve in terms of demand for diverse content that can be easily adapted to target various types of audiences and consumers.

Pascal, you have held several different roles with the ITV Studios management structure. What are your current responsibilities and tasks within the group?

I manage and oversee all format sales into Northern EMEA, collaborating with ITV Studios' production companies and with third-party licensees. Within the ITV Studios

As Head of Brand Partnerships for Northern EMEA, **Pascal Dalton** is responsible for managing and overseeing sales of all ITV Studios market-leading formats into the region, collaborating with ITV Studios' production companies and working alongside third-party licensees. Pascal joined ITV Studios in 2017 as Vice President of Global Formats Sales, responsible for the company's global non-scripted and scripted formats strategy before moving into the role of SVP Licensing, managing relationships with internal and external partners. Prior to joining ITV Studios, Pascal was Regional Sales Director, CEE at Endemol Shine Group, overseeing the licensing of scripted, non-scripted formats and ancillary. He was also instrumental in the set up of the highly successful production hub for *The Wall* with Endemol Shine Poland.

family, I join forces with ITV's fully owned production companies (such as ITV Studios Germany) to secure shows like *Make Love, Fake Love* with RTL+ or in the UK for *My Mum, Your Dad* produced by Lifted Entertainment for ITV1 and ITVX. In regards to third parties, we license formats directly to broadcasters and/or producers in territories where we don't have a fully owned production company - for example, *The Voice* with Dok1 in Belgium.

We work closely with the other commercial divisions at ITV Studios in a 360 manner. In other words, we review where we can integrate digital platforms such as YouTube, assess the finished tape opportunities, and review if there are any licensing opportunities to represent the IP and the brand as one. The end goal is to represent the best interests of each format brand, in each local market, and in every deal.

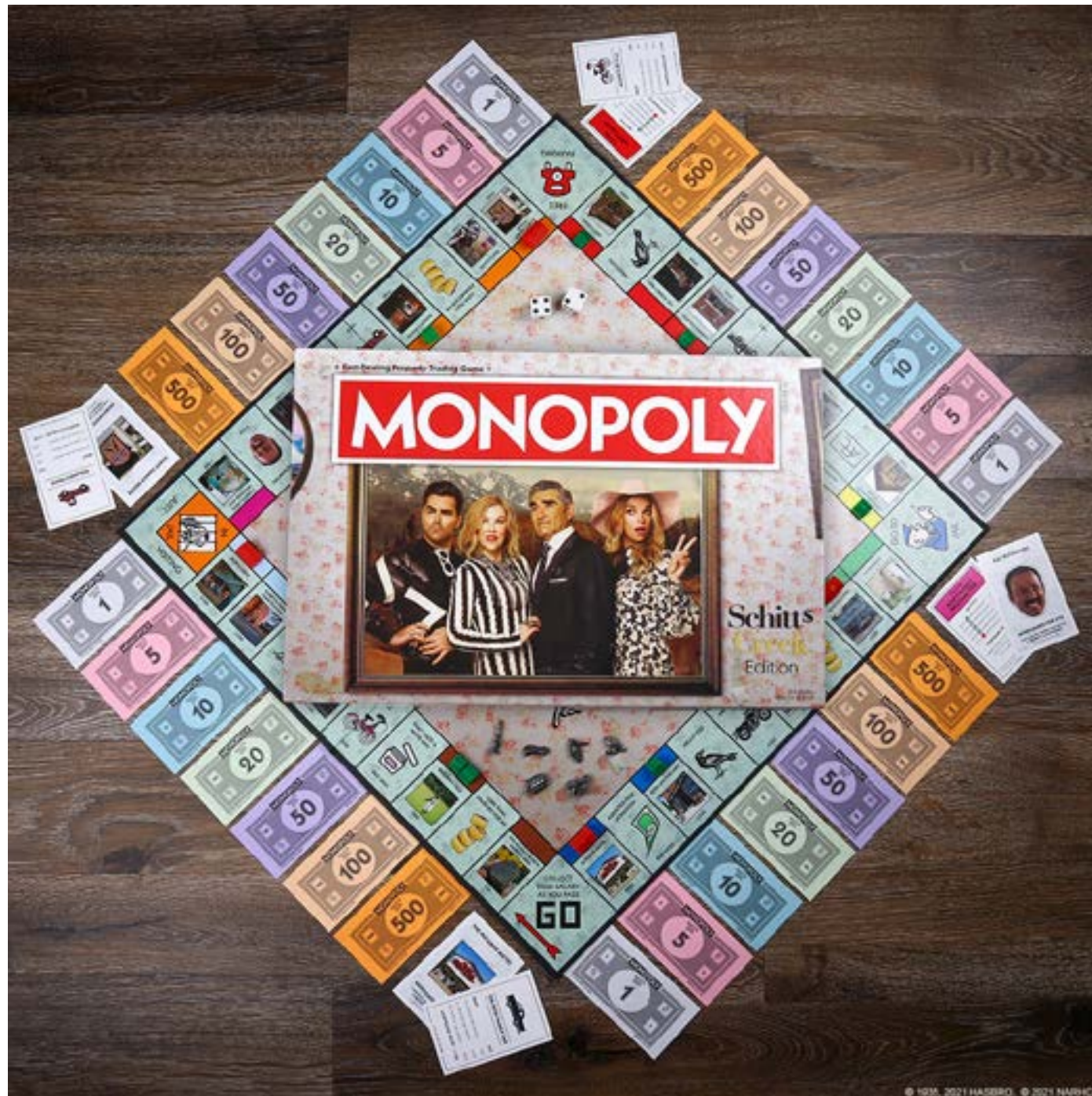
The international format business has developed to the point where shows literally turn into franchises and brands that go well beyond the screens. Could you mention some of ITV Studios' biggest brands and how they have evolved recently to grow your business and that of your clients?

Yes, and that is exactly our vision at ITV Studios. We are very fortunate to have some incredibly successful franchises that have travelled the

world but also lend themselves to spin-offs and go beyond screens. The more obvious ones are *The Voice*, *Love Island*, *Come Dine with Me*, *Hell's Kitchen*, *The Chase*, *I'm A Celebrity...Get Me Out Of Here* and more recently *The Perfect Picture*. Naturally, our formats continue to evolve and develop, into areas beyond the initial TV offering. We've partnered with P&O Cruises where guests can participate in a karaoke adaptation of *The Voice* aptly named 'The Voice of the Oceans'. We've opened Gordon Ramsay's *Hell's Kitchen* restaurants in numerous markets. Later this year we're celebrating its sixth one in Connecticut in the US. With many brands, we're selling consumer products such as the *Love Island* water bottles and cookery items around *Hell's Kitchen*, board games with *Schitt's Creek* and so on.

YouTube continues to be an important strategic component of the promotional and commercial activities of the group. The Voice Global YouTube channel now has 10.4 million subscriptions. The World of *Love Island* YouTube channel, since its conception in 2021, has 145,000 subs which pursues a healthy growth path.

On the ad-funded side, we have formed a close bond with Canon, with *The Perfect Picture* where we have secured investment into various productions. Outside of the original Dutch version on RTL, a Polish



Monopoly/Schitt's Creek

version aired earlier this year on TVN. It's also being recommissioned for a second series with SABC in South Africa and we're very excited to work on a number of other new deals which we'll announce later this year.

In conclusion, part of the creative evolution of these brands is that the IP and the brands themselves are successful commodities, and as you can see, we have been quite busy.

How is ITV Studios adapting to the fast changes on the media and

entertainment market? Do you have plans for expansion in AI and the metaverse?

Our brilliant Brand & Licensing team, led by Jurian van der Meer, is responsible for all global commercial activities including sponsorship, brand licensing, consumer products, gaming and live events. The team is exploring how brands can be integrated into the metaverse, how users interact with this content, and how we can create value and enhance the viewer experience within the metaverse environment.

We've launched several projects in the metaverse already with brands such as *Hell's Kitchen*, *The Voice* and *Come Dine with Me*.

With *Hell's Kitchen*, we have partnered with The Sandbox to spice up the metaverse with Gordon Ramsay. Through the partnership, *Hell's Kitchen* restaurant experiences designed with input from Ramsay will be hosted on ITV's LAND in The Sandbox soon. Additionally, limited edition Gordon Ramsay avatars were available, and they sold out before the official sale started.

In November, we integrated *The Voice* pop-up into the Decentraland Music Festival and this was in the top 3 best-visited areas of the festival. A few weeks ago we launched The Voice Studios in Decentraland, where fans from all over the world can unlock new voice experiences through games, competitions, fan rewards, digital items and more in the virtual world.

MultiStory Media (an ITV Studios label) and Metaverse creative agency Metavision, partnered to launch Channel 4's award-winning, globally popular *Come Dine with Me* into the Metaverse (*Come Mine with Me*), with players now able to go head to head to become the ultimate dinner party host in a newly released Minecraft world.

ITV is both global and local, producing in 13 countries across 60+ labels, distributing content all around the world. What is the secret of a strong, successful and long-term partnership in today's

industry overwhelmed with content?

Viewers are faced with more choice than ever before and that's an opportunity to support our clients and move with the times. You have to be prepared to offer compelling arguments to buy one show over another and to have patience. It's ok to be flexible in your deal-making and/or local adaption when necessary. ITV Studios is in this for the long game and clients appreciate that we are going on a journey with them, supporting them where necessary, and helping them reach the audiences that are so hard to predict in this current environment.

We have some exceptionally noisy formats that are able to hold their own in an industry full of choice. *Scared of The Dark* (produced by Multi-story for Channel 4 in the UK) and *I Kissed A Boy* (produced by Two Four for BBC THREE in the UK) both bring plenty of buzz and noise, which are backed up by the results. *I Kissed A Girl*, season two of the TwoFour

format was announced this week. We're working on several global leads as we speak on both of these formats - so watch this space.

Marketing plays a significant and crucial role in content discovery and we will continue to roll out our formats at our market-leading annual showcase at the London Screenings. We present this in a world-class manner that is both engaging and entertaining for our clients where they can deep dive into the content and see what makes them tick. We're extremely proud of this especially as ITV Studios created the seeds of this event almost a decade ago. Equally important is the one-to-one advice, trust, support and opinions that we share with our partners and clients.

Measuring success presents an enormous challenge in today's world when overnights, social media and consolidated numbers don't always tell the whole story. Those numbers are also subject to various degrees of interpretation depending on who is analyzing them. What success



The Voice Entrance

means for one client may be different to another. It's not a surprise, therefore, whilst commissioners continue to have a close look at the numbers they are looking more at the content itself - is it noisy enough to work on VOD, will it maintain a linear audience and how can it be locally adapted? As a company that survives on the success of its brands, we really look at how we market performance and present a story that is honest and factual.

So, there isn't one factor that you can point towards, it's a combination of many ingredients that makes successful distribution and production possible. We're lucky to have incredibly talented people both on the creative and commercial side at ITV Studios as well as smart local producers and forward-thinking broadcast partners. Working together we can deliver the best version of our shows across the globe.

You focus on the Northern EMEA region, which is quite diverse, and

if we zoom in to the CEE countries it gets even more challenging. What trends have you observed on the different markets? One would think that CEE is quite different from the Nordics for example, but is it really that way?

Every television market has its challenges in some way, don't they? In my opinion, that's what makes the region exciting and the job fun. CEE has its own micro-climates and is actually more fragmented than one may expect. Some territories are influenced by the Latin-speaking countries such as Spain and Italy whilst others are more influenced by Benelux, DACH and the Nordic region. You then have further grey areas; some co-productions will work well between Czech and Slovak or the Balkan, but others won't. Then on the client side RTL, United Group and CME are interconnected across various countries but not all, and naturally, they will be reviewing what their channels are buying within their respective groups

and how they efficiently produce. Nordics, or any other region, isn't so different to CEE and that's why you see shows like *My Mum, Your Dad*, *Love Island* and *The Voice* perform so well. What does set these differences apart is how those formats are adapted to suit local needs, but there are similarities too - such as budgets and audience appetites.

Furthermore, it's perhaps easy to assume that formats need to travel to 10 or more countries before they are produced in CEE but it's not quite so clear cut. Yes, we sell stalwarts such as *The Voice*, *The Chase*, *Love Island* and *I'm a Celebrity...Get Me Out of Here!* but it's often the CEE markets that are the first to buy the brewing formats. *Make Love Fake Love* (aka *Ready to Mingle*) sold to Viasat3 in Hungary as the first sale outside of the UK, before appearing on RTL+ in Germany, and we'll shortly announce a brand new CEE territory. *Rat in the Kitchen* was also picked up by Viasat3 in Hungary after its US debut. CEE deserves a lot more attention and recognition for



Love Island

this and by the way, this is not a new phenomenon.

In terms of trends, we are still seeing a need for daily reality, prime-time shiny floor, and daily game/quiz. What has changed over the years is there is more diversification in the needs of buyers as they build their VOD audiences and avoid alienating their linear viewers. It's a fine balance for all commissioners now and will continue to be one.

What are ITV Studios' biggest brands in CEE? What have been some of the latest deals and successful partnerships in the region?

Come Dine with Me Czech on Prima continues its monumental success - we have just gone into production for series 28 which demonstrates the brand's strength. Earlier this year TVN in Poland produced their first version of *CDWM Couples* and we're following up on new leads continuously in CEE.

We're delighted to see that *Love Island* has travelled within CEE to new markets such as Romania and Albania and is being renewed in places like Poland and Czechia.

The Chase and *Beat the Chasers* have been the growing brands, although *The Chase* has been produced for many years in Serbia and Croatia it's only recently that we've secured new deals in Czechia and Bulgaria. Five minutes before *The Chase* comes on air on Nova in Czechia, there is a massive audience migration to Nova from other channels with viewers eager to watch the show. It's established a huge fan base.

We're seeing new deals for the fresher formats such as *My Mum, Your Dad* which will be announced soon, which I am confident will lead

to other territories picking it up in CEE. Alongside, we are consistently working hard to renew the established format brands that continue to be successful across the region - even one specific to the region like *I Love My Country*. We've established a production alliance with Jake Vision in Poland which is proving to be a complimentary partnership.

Is ITV Studios looking to co-develop new original formats with partners from the region?

Yes absolutely, I am currently working on pitching an original format, created by one of our UK labels which has been piloted in the UK. We're looking for a partner that will work with us to co-develop this idea to the next level with a guarantee of commission, where we are prepared to offer a position on the IP.

We've also worked creatively with CEE partners to develop existing IP. In the Bulgarian version of *Hell's Kitchen* for Nova TV, we co-developed the format into an (almost) daily version from a weekly. It airs three times a week across 39 episodes and broke records this spring against the seventh series of *Survivor*. Creative flexibility can really pay off with the right approach.

What type of content is currently in demand? Are there genres which are more fitted for linear broadcasts and such which work best on digital/streaming platforms?

Generally speaking, noisy daily formats seem to be what's peaking interest right now. There is huge competition for eyeballs - more than ever before. Not only on traditional

linear platforms and streamers but also on social media and YouTube.

We launched *Loaded in Paradise* on ITVX in December 2022 which was the only non-scripted commission on the platform. All fifteen episodes were available on ITVX initially and three months later a linear run was broadcast on ITV2 and the show has recently been recommissioned for a second series due to launch in Fall this year.

We need content to appeal to linear viewers and digital/streaming platforms in a symbiotic manner. Linear is still delivering a higher volume of advertising revenues despite some recent declines but you have to also attract a younger audience and create content which appeals across the board. *My Mum, Your Dad* is a single-parent dating format where their teenage kids influence the action. It's a really interesting proposition when it comes to this need as it appeals to audiences both young and old - hence why ITV is putting it on their main linear channel - ITV1 and in France it's launching on TF1. In addition to the US, the show has launched in Sweden and in Australia, where a second season has been commissioned.

You are one of the judges of PITCH & PLAY LIVE!, the pitching competition for original formats from CEE, taking place during NATPE Budapest. What will be the main elements and features you will be looking at when voting for the winning project?

Firstly I would say that a good show can come from anywhere. I may love the concept of an idea but if I can't see its route to market without significant hurdles it's going to be a challenge for me to back it. So, my voting will be determined by three main factors: IDEA - How good is the idea itself? Does it compete in today's market? Does it have a zeitgeist? Is it scalable? Is it original but familiar enough for audiences not to be alienated?; LAUNCH AND PLATFORM - How did it launch? Will it work on linear and VOD? What's the episode run? Is it daily or weekly?; and INTERNATIONAL - Will it travel? Do I see it as a format or could it work as both tape and format?

I'm excited to see the new ideas and wish all entries the best of luck. ■



Make Love, Fake Love

CEE Breakout Hits

We continue the tradition and present some of the biggest new success stories in the CEE region in the 2022-2023 TV season

The Golden Swan

The Golden Swan became the first period drama in the history of TV Nova and also one of the biggest hits of the spring season in the Czech Republic reaching close to 30% share in the commercial demo. The story was also adapted by Markiza in Slovakia for the new series *Danube*, *At Your Service* and became a leader in its primetime slot as well.



Don't Forget the Lyrics

The classic music gameshow was revived by TVP2 in Poland after a 10-year break. The decision proved successful as the format became the most-watched premiere among the new shows in the fall and was immediately renewed for two more seasons.



Mom for Rent

Slovak Markiza needed a new hit in access in order to win back the slot from JOJ's *Come Dine with Me*, and it found it in the new series *Mom for Rent*, based on Turkish format *My Sweet Lie*, distributed by Eccho Rights. The series reached up to 30% share and handed the leadership in this important time period back to Markiza.



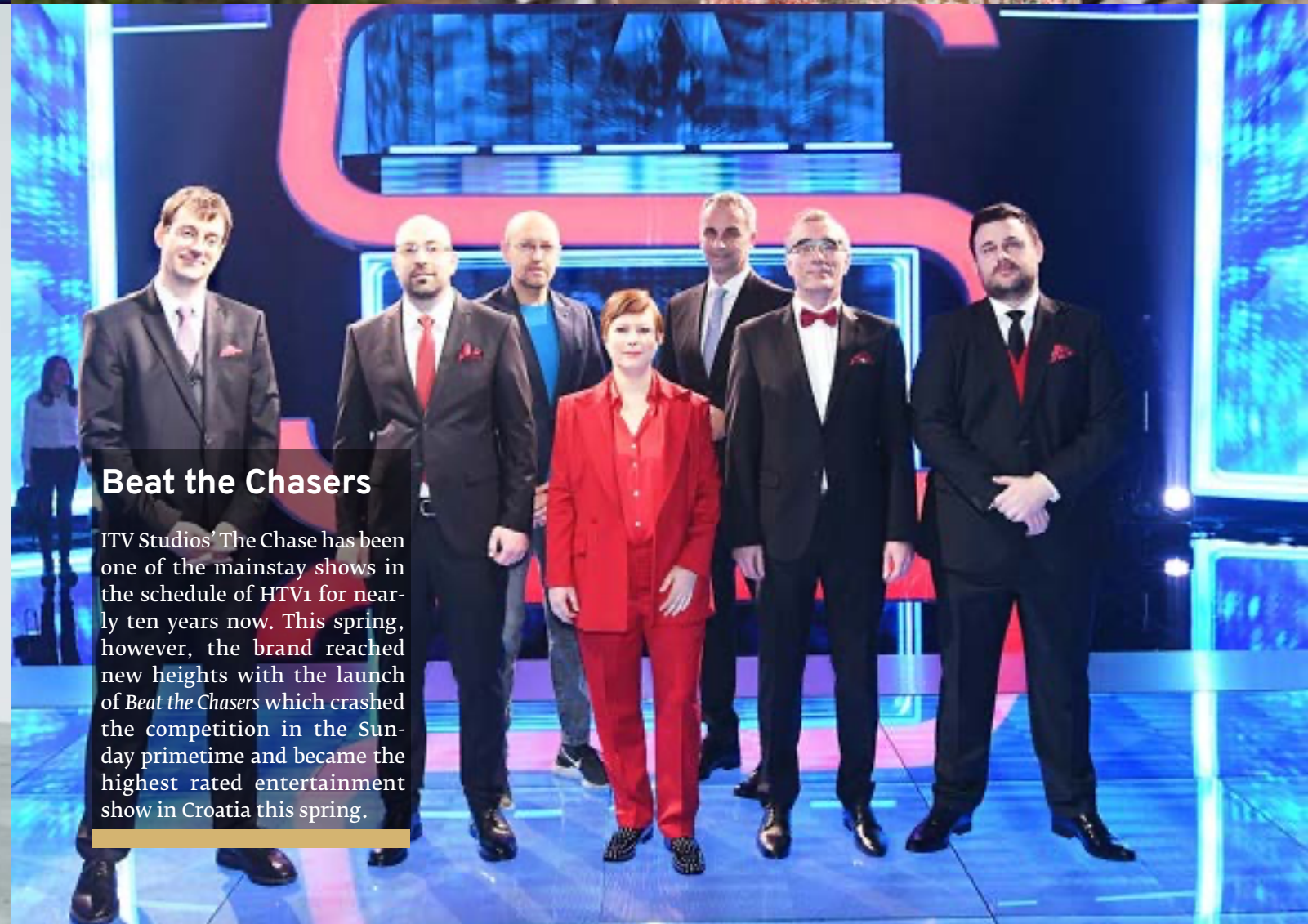
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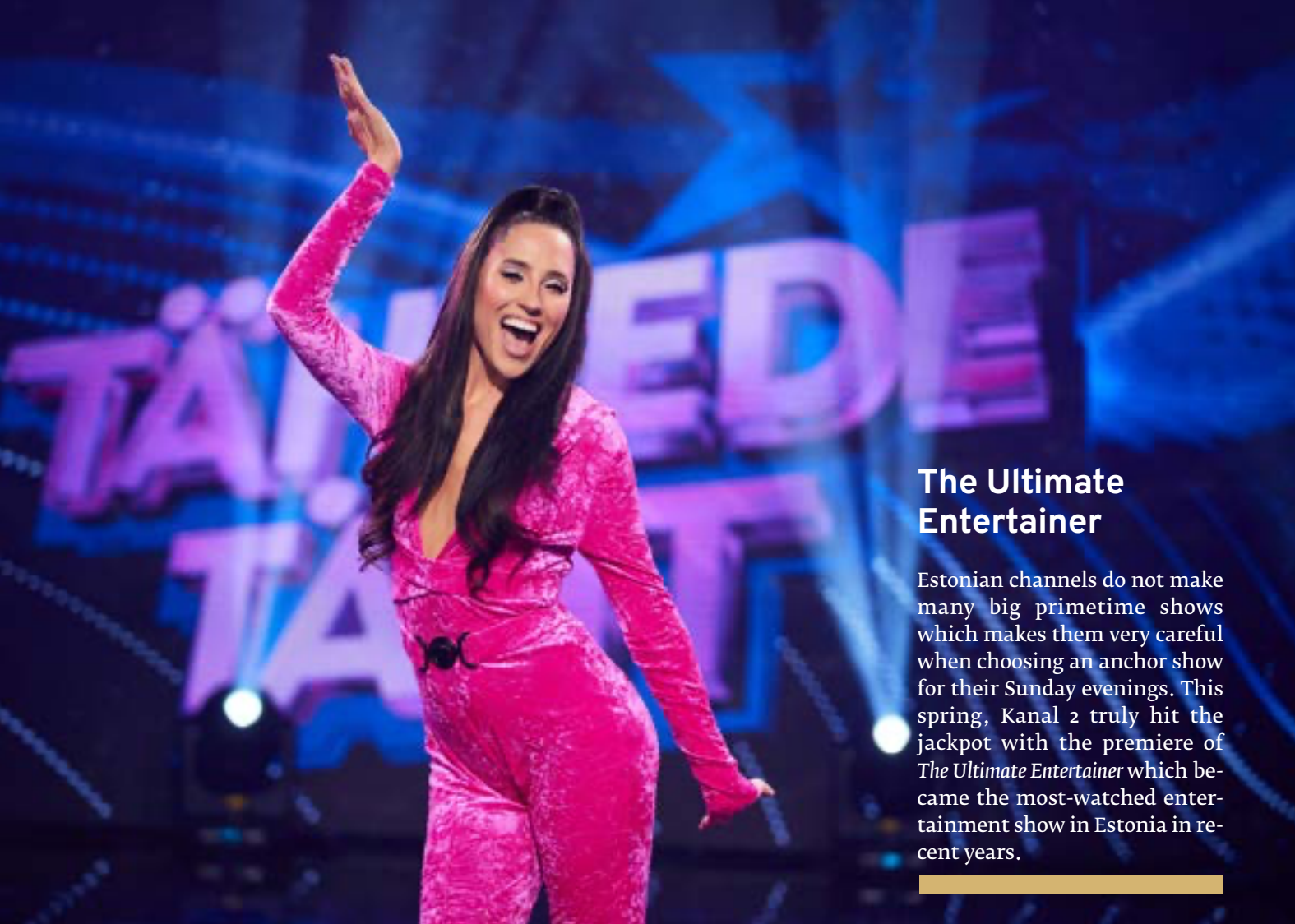
Antena 1's drama series, based on the Turkish format *Never Give Up* which is distributed by Global Agency, successfully competed and often won its slot against PRO TV in the key demos this spring. The excellent results prompted the channel to renew *Lia* well ahead of the season one finale.



Beat the Chasers

ITV Studios' *The Chase* has been one of the mainstay shows in the schedule of HTV1 for nearly ten years now. This spring, however, the brand reached new heights with the launch of *Beat the Chasers* which crashed the competition in the Sunday primetime and became the highest rated entertainment show in Croatia this spring.





The Ultimate Entertainer

Estonian channels do not make many big primetime shows which makes them very careful when choosing an anchor show for their Sunday evenings. This spring, Kanal 2 truly hit the jackpot with the premiere of *The Ultimate Entertainer* which became the most-watched entertainment show in Estonia in recent years.



Let's Make A Deal

Yes, classic gameshows are now the main trend on the Hungarian market thanks to, among others, *Let's Make A Deal*. The show easily won its slot in the target demos on TV2 this spring, and prompted RTL to bet on the gameshow genre for the first time in many years with the commission of *The Price is Right*.



Maestro

Not only Greece but the whole world now (thanks to Netflix) is talking about *Maestro*. The huge success of Mega's Thursday night drama will ultimately mean that even more high-quality series will come out from that market and could turn Greece into an important international player in the coming years.



One Love

One Love is not only a big audience hit but also the most talked about new drama series in Turkey. The popularity of the show reached new heights in the country after the local media regulator decided to impose the unprecedented "fine" of stopping the broadcasts of the show for five weeks due to "scenes of violence". Ultimately, Show TV won the first court battle and the series returned on air again, trying to regain its leadership in the Friday night slot.

Antenna Entertainment Boosts Original Content Production

Interview with General Manager Gergely Benda

Antenna Entertainment is entering a new stage in its development with a major boost in original content production with the aim to drive growth in the CEE region, as General Manager Gergely Benda tells Yako Molhov in this exclusive interview for TVBIZZ Magazine.

Gergely, Antenna Entertainment, part of Antenna Group, operates various media assets in CEE. What are the territories you are currently present in and how many channels and platforms do you operate in the region?

As part of Antenna Group, Antenna Entertainment is operating in 12 territories in Central and Eastern Europe with 22 pay-TV channels and an on-demand service. In Hungary, this includes VIASAT3, VIASAT6, VIASAT2, VIASAT FILM and AXN, whilst in other countries we offer AXN, AXN Black, AXN White and

AXN Spin, serving around 24 million subscribers regionally.

Is Antenna Entertainment planning an expansion of its portfolio? What is your growth strategy?

We believe in our region and that a properly designed linear portfolio can be successful. We also have the appropriate investor background to achieve this. We are convinced that unique content is what makes a content provider desirable and sets it apart from others. The above represents the cornerstone of our growth strategy. We are convinced that in content consumption market the on-demand services have their place, as well as a linear portfolio with a well-positioned and suitable content selection.

You recently announced a major deal with Paramount for over 2000 hours of content for your AXN and VIASAT channels. What are the highlights of this deal and does

Antenna plan similar deals with other major distributors in the near future?

The Paramount deal clearly provides Antenna Entertainment CEE's channels a great, solid backbone to rely on, particularly in markets such as Poland, Hungary and Romania. Some highlights include widely acclaimed 1st and 2nd run series like *NCIS Hawai'i*, *CSI: Vegas*, *FBI*, *FBI: Most Wanted*, *FBI: International* or *Walker*; strong library series such as *CSI*; hit comedies like *Rules of Engagement*, *The Unicorn* and *King of Queens*, not to mention legendary blockbuster movies such as *War of the Worlds*, *Saving Private Ryan*, *Cast Away* or *Minority Report* and even titles from popular franchises such as the *Mission Impossible*, *Star Trek* or *Kung Fu Panda*.

The licensing deal was a significant milestone for us, but we are already collaborating with other major international studios and regional content hubs. Our aim is to continue delivering captivating, top-quality movies



Troll in the Kitchen

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Gergely Benda

has been General Manager of Antenna Entertainment since 2021. He started his career in the music industry and became the CEO of Universal Music Hungary in 2009. Three years later, he joined HBO as Country Manager for the Hungarian business. In 2016 he continued as VP of Marketing for HBO Europe, overseeing the marketing activities in 12 countries, as well as for the launch of HBO GO. He also spent several years in the fintech field, before returning to television as the new head of Antenna Entertainment.





Mission Impossible Ghost Protocol



Star Trek Beyond



The Unicorn

and series to our viewers and partners across the CEE region.

Antenna Group acquired Sony Pictures Television's channels in CEE in late 2021. What is the situation with Sony-produced and distributed content on your channels now?

We have a strong relationship with Sony Pictures Studios, and we are still receiving a steady flow of Sony content for our channels. But of course we are engaged in fruitful cooperation with other distributor partners. Our goal is to acquire as much high-rating content as possible in this fiercely competitive market.

How do you cooperate with the company owner? What are the synergies between Antenna Group and Antenna Entertainment?

Antenna Entertainment operates independently, but we are part of the Antenna Group, which allows us to leverage synergies between the two companies. Currently, we see the greatest advantage in the area of content acquisitions. However, there are collaborations regularly between Antenna Group and Antenna Entertainment on many fields including but not limited to network operations, ad sales, and CSR communication.

What is your strategy in terms of producing original content in the CEE region?

Compared to last year, we have increased the regional OP budget by 50%. In Hungary, we have a stable foundation for this growth, with continuous production and ongoing development and exploration of new formats suitable for our channels. This upcoming Fall is going to bring the strongest lineup of OP products to the channels in years. We have also switched gear in Romania introducing the second season of *Men of the Law* (*Oamenii Legii*), with more episodes, more action and more entertainment. In other countries, we are exploring opportunities for development and innovation in original productions.

Hungary is your strongest market in the region, and also one of the most competitive. What are your plans for the fall season as an alternative to market leaders TV2 and RTL?

We are preparing a robust lineup of original productions and highly popular acquired content to cater to our viewers distinct preferences and specific entertainment needs that differs from those of market leaders. We strive to meet their expectations at a high level by offering unique genres new to the market or by enhancing existing genres to make them more appealing to our viewers.

Are there markets where you see strong potential for growth and worth focusing more on?

In the regional market Poland holds significant importance as a focal point. A considerable amount of effort was required to achieve initial results, but the performance of the channel has been steadily, consistently, and predictably increasing in the most competitive time slots.

We anticipate good return on our investment in Romania, where our initial experiments proved to be a resounding success. *Men of the Law* (*Oamenii Legii*), based on the internationally recognized format *Police in Action* (Karlsbridge), marked the first step in our long-term strategy to position Antenna Entertainment as one of the key players in the Romanian market for local productions. The fine-tuning of the channels has yielded remarkable results.

The cable TV market in CEE is quite competitive. Do you have different strategies in the different CEE territories when it comes to distribution and monetization?

Yes. There is a significant difference in the portfolio between Hungary and the rest of the region. We follow different planning and monetization principles.

What is your streaming strategy? How many services do you have and what is your content policy for them?

We firmly believe in the collaborative relationship with the operators, and we want to serve their subscribers on the best possible way with our platforms.

Antenna Entertainment's VOD service, called AXN Now, provides its viewers original productions, entire seasons of series and selected movies

from the biggest studios, with an offer that is updated every month. Thanks to our operators, it is available in a number of areas, such as in Hungary, Poland, the Czech Republic and the Adriatic region.

We have a distinct digital/streaming strategy that sets us apart from the traditional approach of providing general content services solely focused on SVOD. Currently, we are diligently working on implementing this strategy.

You will be attending NATPE Budapest. What type of content will

Antenna Entertainment be looking for during the market and will you also be exploring potential co-productions?

With a significant number of linear channels and our VOD service, AXN Now, catering to the CEE region, we will be seeking diverse content ranging from scripted series to feature films, entertainment formats, and lifestyle programs. Additionally, we will explore potential co-productions, as we continually strive to become more relevant to our audience and partners. ■



NCIS Hawaii



Police in Action

A+E Networks Focuses on Expansion in CEE

A+E Networks is one of the biggest factual Pay TV operators in CEE reaching viewers in 17 countries from the region. The potential for growth remains huge as the company is gradually expanding its operations into new markets, while continuing to build on its success in key territories like Poland, Romania and Hungary. Izabella Wiley, SVP and General Manager CEE, tells Stanislav Kimchev more details about A+E's strategy for expansion in the region.

Izabella, since 2017, you have been managing A+E Networks' operations in 17 territories in Central and Eastern Europe. Which are the countries you operate in, and have you planned entering new markets in the near future?

In Central and Eastern Europe (CEE), we have a presence in 17 diverse markets, each varying in scale and depth of our business operations. Currently, our primary focus is on managing and expanding our existing markets, as they already require our full attention and resources. Therefore, we do not have immediate plans to pursue new business opportunities outside of these countries.

Furthermore, I have recently taken on the responsibility of overseeing the German-speaking territories. This means that in addition to our presence in Central and Eastern European countries, I am also involved with managing these non-CEE businesses. Our primary objective remains the growth and expansion of our business within the markets where we are already established.

A+E Networks has about 20 channels and brands - which of them are available in CEE?

Our key brands present in CEE region are HISTORY Channel; HISTORY2 (H2), which is a "brother" channel to HISTORY, and Crime+Investigation, a true crime channel. We also offer digital SVOD brands, namely HISTORY Play and C+I Play. HISTORY Play was first launched

in the CEE region in Hungary, in collaboration with RTL Most+. This month, both digital brands will launch on Amazon Prime Video in Poland.

What are the main challenges for a pan-regional international broadcaster like A+E Networks operating in the region? And what are the specifics of the CEE TV market compared to other regions, for example German-speaking territories which you are also responsible for at A+E?

I appreciate how Central and Eastern Europeans still embrace traditional television viewing, despite the growing popularity of streaming services in other parts of the world. However, our region is not isolated from the global trends, as major streaming platforms are making significant investments and entering our key markets. They bring along high-quality, predominantly scripted content that we are well aware of.

The transition from linear TV to non-linear streaming is noticeably slower here compared to the United States, and one reason could be the difference in pricing. In the US, cable or satellite subscriptions can cost around \$200, while Netflix subscription is priced at \$15. Consequently, people in the US are more inclined to cut their Pay TV subscriptions and opt for more affordable streaming options. In contrast, in CEE, cable and satellite packages offer good value for money, making them an attractive choice, alongside which people also add streaming subscriptions.

Named one of the 50 most influential women in Poland,

Izabella Wiley

is a blue-chip leader in TV in Central Europe. As GM and SVP Poland, Central and Eastern Europe, she drives A+E Networks EMEA's business on the continent. Before joining A+E in May 2013, Izabella was SVP of Viacom International Media Networks. There, she brought the Comedy Central brand to Poland. Izabella is also the ambassador for A+E Networks EMEA's ongoing CSR initiative, End Abuse Against Women.



It's important to acknowledge that our markets face challenges such as sky-high inflation, war in Ukraine creating business uncertainty, and global economic fluctuations impacting advertising investments. These interconnected factors influence not only our business but the entire media ecosystem as well.

Territories from the CEE TV market differ from each other in many aspects: size, viewers' taste, number of players, TV signal reception; etc. Do you have country managers for each territory, what is your strategy when it comes to managing the operations from your central hub in Warsaw?

We don't have dedicated teams for each market. Instead, we assess the scale and opportunity in markets within our region. Poland stands as our largest market, with Romania closely following as the second largest. Karol Bek serves as our Country Manager for Romania. Additionally, we have a thriving business presence in Hungary, where we recently launched a dedicated HISTORY feed. We also maintain strong collaborations with Bulgaria and Serbia, recognizing their immense growth potential. While other CEE markets remain important to us, we rely on accomplished distribution partners in the region who assist us in serving our platform clients.

FAST channels have become very popular internationally, but they are still in their "infancy" in Central and Eastern Europe. What are your plans in this direction?

FAST channels are not as "fast" in Central and Eastern Europe as they are in the US or in the UK. This is mainly due to the availability of affordable cable subscriptions, which offer around 300 channels, or satellite options granting access to 900 channels. With such a wide selection, viewers can always find content tailored to their unique interests. In contrast, Western audiences with expensive cable or satellite subscriptions can enjoy FAST channels for free since they typically operate on AVOD (Advertising Video on Demand) models.



Pawn Stars

Instead of paying for a subscription, viewers in these markets watch ads to access content.

In CEE, the cost of basic cable or satellite TV subscriptions is no more than €10, and in some markets, even less. This represents excellent value for money.

Nevertheless, I am confident that FAST channels will eventually find their way to screens in CEE. Many discussions are currently taking place on how to make FAST channels happen in our region. People here also desire access to the content they love. For example, if someone is a fan of *The Hunt for Baltic Gold*, they would appreciate a dedicated channel playing various seasons of this show and similar content throughout the day.

In Poland you work with Polsat Media for ad sales. What about other territories? How do you choose your local partners and what are your expectations for the CEE ad-market this year and to what extent you rely on ad sales compared to other revenues?

As mentioned earlier, three markets hold significant importance for us due to their large scale: Poland, Romania, and Hungary. In these markets, we have established advertising partnerships with Polsat Media in Poland, Thematic Channels in Romania, and RTL in Hungary. While we are considering ad sales in Bulgaria and Serbia, it is still too early to provide any definitive up-

dates on those fronts. Ad sales play a important role in our business, particularly as the subscription model continues to evolve. We constantly strive to achieve impressive viewership numbers, and I am delighted to share that our efforts have been fruitful. In our core markets, we rank among the top three international Pay TV factual channels.

In some of your territories, you offer locally produced content like Poland and Romania. What is your content strategy for CEE for the upcoming years, will you invest more into local productions and how many hours have you planned?

For over 10 years, we have been making significant investments in Polish productions, building an extensive library of local content. While we are fortunate to have access to compelling content from the US and UK, nothing compares to the appeal of local productions. We prioritize quality over quantity, focusing on well-developed, properly invested shows rather than producing a large number of "cheap and cheerful" programs.

In Poland, our goal is to deliver two series per year for HISTORY Channel and three to four series for Crime+Investigation. One of our major successes on Crime+Investigation Poland is *Once Upon a Crime*,

a local show that has spanned five seasons so far. In Romania, we developed *The Mystery of Dacian Gold* last year, a captivating series exploring the Dacia region, which was the largest ancient reservoir of gold in Europe and how that gold financed a significant portion of the Roman Empire's expansion. We have plans for a new Romanian show scheduled for this fall.

Hungary is the logical and natural next market for us to invest in local productions. We recognize that local shows tend to be favorites among the audience. For instance, *The Hunt for Baltic Gold* nearly doubled the viewership for HISTORY Channel in its slot, and *Polish Killer Women* had the best premiere since 2021. However, it's important to note that our viewers also have a deep appreciation for our flagship US shows such as *Pawn Stars*, *The Curse of Oak Island*, and *Storage Wars*.

Are you looking into co-productions with local partners from CEE?

We are genuinely interested in collaborating with local terrestrial partners, especially considering their extensive libraries of content. By leveraging their vast archives, we can create fresh and captivating programs. Unfortunately, partnering with terrestrial players in the CEE region poses numerous challenges. It is regrettable because HISTORY has the potential to make significant contributions. We are renowned for presenting historical stories to our audiences in a relevant, surprising, and even entertaining manner.

What are your expectations for NATPE Budapest and what will be the highlights of your slate and will you offer CEE-produced content at the market?

We won't be offering locally produced content this year, but it is something to consider for next year. My colleagues from International Content Sales will be present at the market and they will be offering the international catalog of shows. We are interested in what others have to offer for our audiences across the region.. ■



Storage Wars

ERTFLIX Celebrates Three Years as the Leading Greek Streaming Platform

ERTFLIX has enjoyed phenomenal success since its launch three years ago and continues to gain even bigger audiences with a diverse content offer of high-quality local and acquired productions. Konstantinos Bourounis, Deputy Chief Content Officer of ERT, is one of the key people behind the creation and impressive performance of the free Greek public media streamer. In this exclusive interview with Georgi R. Chakarov for TVBIZZ Magazine, he talks about the first days of the platform and how it managed to become one of the strongest brands on the Greek media market.

Konstantinos, ERTFLIX was launched three years ago and has been setting new records ever since. Tell us more about the first days of the platform and how it managed to evolve into Greece’s most popular streaming service?

On the grounds of the ERT Hybrid platform which again was a tech initiative from ERT’s Technical Division, on the Greek AV market which had been on air for a couple of years, the ERT Administration felt the need to upgrade the service to a more solid, modern and user friendly OTT platform that would be similar in terms of user experience as other well-known international OTT services. An in-house team developed the first layout and UI that was launched first as a Red Button service. Soon enough ertflix.gr was launched online and then all other apps for Smart TVs and Mobile devices were delivered step by step. The premiere of ERTFLIX was back in April 2020 and that was in fact during the COVID lockdown. That helped for sure to spread ERTFLIX as the audience was consuming video content vastly through all kinds of platforms. On the other hand, besides the perfect timing from the tech division, the content division developed an well-curated catalog for ERTFLIX creating certain categories and genre rows that helped the audience navigate easily inside the impressive library of ERT’s own shows and acquired content.

The launch of ERTFLIX came as a surprise for the whole Greek media market which is dominated by commercial media. Were you surprised

by the initial numbers? What drove the quick success of the platform in its first months?

We have to keep in mind that Greek audience is limited to 10 million people and the Greek language is very specific. That in itself is a barrier for commercial media to invest and form a business model that has a profitable turnout. Those type of media require a year end profit while on the other hand the Public Media as ERT’s purpose is to find ways to deliver its content to as many people as possible and by all means. Linear and digital. And on that public service direction ERTFLIX has been a free video on demand model since day one. And that’s why a clone of ERTFLIX with fine tuned content is already available globally for Greek people with the extra option of English subtitles.

During the first 10 days, ERTFLIX generated over half a million visits which rose to more than 6 million by the end of the year 2020. At this point, ERTFLIX had already become the most-popular streamer in Greece. What was your strategy to keep the interest of the users and increase it in the long term?

Keeping in mind the coincidental opportunity that ERTFLIX was launched during the first COVID lockdown the main thing that empowered stickiness to the service was tech stability and content curation. ERT’s mix of program is built on in-house productions (series, shows, news shows, sports, kids programs, etc.) and acquired content (series, movies, documentaries, kids programs, etc). All these are

spread to 4 linear channels (ERT1, 2, 3, ERTNEWS). On ERTFLIX you have the opportunity to find all these videos in a constant curated environment. That makes it not only easy to choose a show but gives our audience feel that is a vivid and “caring” service on their needs.

Are you surprised that commercial media have still not been able to create a platform that can deliver such numbers? How do you explain this?

Making the decision of launching a platform is a multifactor strategy. What is the objective for any media organization is quite different. Profit is a key factor of course and the pricing policy cannot easily be designed when international platforms are already in the territory for quite a while holding an impressive merit of Greek users. On that basis, commercial media are trully justified to work consciously on that area. But as I said, this is a multifactor decision. It certainly has to do with marketing and positioning of the media. I mean before developing a platform the main question is “why does my company need this?”. If there is a strategic decision to invest in original content in the upcoming years? Or if sports is a direction you want to follow? Or if it’s going to work complementary to my linear TV?

What type of content is most popular on ERTFLIX?

During the past 3 years ERT produced more than 20 series for its linear program. That hasn’t happened for almost a decade and itself was a very positive impact. Those series are the



Konstantinos Bourounis is the Deputy Chief Content Officer of Greek pubcaster ERT and a part of the core team of ERTFLIX. He holds a Master’s degree in Physics from the National Kapodistrian University of Athens and has over 20 years of experience in top management positions in media – print and electronic – with focus on youth audiences. He was previously Head of Youth and Digital Content at ERT. For several years, he was Program Director, Commercial Director and Marketing Director at Mad Group (Mad TV, Mad Radio), as well as Head Production Designer for major TV and 360° events and shows (Mad Music Awards, Arion Awards, Madwalk, etc). Early in his career he was Editor In Chief for Music Magazines (Pop Corn, Virgin Megastore Magazine). He is also a founding member of European think tank todiktio.eu.

chart toppers on ERTFLIX as well. An impressive data is that miniseries are very popular to binge watch but even daily drama series meet up almost the same numbers for users that like ERTFLIX as a catch up service. To mention some, *The Fire Bracelet* (8X55') about Greek Jews of Thessaloniki on early1900 and the devastated facts till holocaust or *Cartes Postales from Greece* (12X45) based on a Victoria Hislop's book taking place in contemporary Crete with astonishing locations and riveting independent stories about romance and fate. Also the kids program, international series and movies, both Greek and International are always among the first picks.

How often do you add new titles to your offer? How big is the catalog now and what is the balance between Greek and foreign content?
A recent report found out that ERTFLIX hosts more than 5000 video titles. We have new content launches daily when it comes to own shows or series and weekly for other types of content. The strategy is not to feed the platform regularly based on quantity with new content but to curate those 5000 video

titles regarding recurrency of interest based on certain type of factors. Seasonality, current issues, ongoing festivals, local publicity, special rows on directors, artists, etc. Regularly, we introduce new movie and series titles.

This TV season has also brought new records to ERTFLIX. Can you mention some numbers and the shows that generated the biggest interest?
An impressive average of 9,000.000 monthly views is the record that ERTFLIX achieves as we speak. It always peaks on weekends and has an impressive viewership online. Stability of service as well as constant curation of top categories (Everybody's Watching, New Arrivals, Last Chance, etc) keep our audience active and interested. Greek drama series are really popular for obvious reasons as well as contemporary Greek movies. The promo through social media on a daily basis in a more fun and personal tonality also boosts the awareness of ERTFLIX content adding up to its popularity.

What are your plans for the 2023-24 season? Will spending on ERTFLIX

increase and what projects do you have in the works?

The ERTFLIX budget is a part of the fixed total budget of ERT through public financing. That means that any budget allocation needs to be done in ways that won't affect other ERT media. On the other hand, ERTFLIX is a success story for ERT and keeps growing in popularity and usage. So at the end of day the answer is positive regarding not only acquisitions but mainly the opportunity to have some local productions exclusively for ERTFLIX that later on would be available on linear TV as well. Drama miniseries seems to be the ideal genre for that.

What types of devices generated the biggest traffic for you?
This may come as a surprise for a Public Media FVOD service but the division is 6/4 in favor of mobile, tablet, PC (online) rather than Connected TV. This is a real opportunity for ERT's audience to reach youngsters who obviously use a lot more those devices since TV audience age for Public Services linear channels are in general shifted upwards.



The Fire Bracelet



Cartes Postales from Greece

Given the ongoing international FAST revolution, is ERT planning to expand the services of ERTFLIX with such offers?
There have been thoughts to host such channels and there is a great opportunity with ERT's archive which has now kicked off the full upgrade and digitalization of its content. ERT has been for decades a standalone TV service on the Greek market and has aired programs of unique value both artistic as well as popular. At the moment, there are sports channels exclusively on ERTFLIX, ERT SPORTS1 and 2 and occasionally during big sports events we launch ERT SPORTS 3.

How important are the partnerships with other platforms and providers for the success of ERTFLIX?
Returning to the core intention of ERT as a public media organization it is always our will to offer ERTFLIX through other platforms in Greece as an add on to our linear channels that are already there so it already happens with COSMOTV, Nova and Vodafone TV OTT platforms.

You have also rolled out ERTFLIX into several markets outside of Greece. What are your plans in this direction?
ERTFLIX International is already happening. We have developed a clone of ERTFLIX with a different layout of categories to host our content out of the country. It is curated separately regarding the needs and demands of Greek people around the world and mainly consists of local program in Greek language. We offer the service with Greek and English subtitles for the second generation ex patriots.

We know that ERT is not satisfied with the current measurements in Greece which do not take into account the online viewership. What is the progress on the market in this respect?
Since September 2022, Nielsen has been monitoring catch up viewership (TSV) which was really needed, since more and more people are watching linear TV at their convenience.

Time shifted viewership ratings though can only be considered as an indicative metric for a platform for 2 basic reasons: First, they do not depict full content consumption as it relates to linear channels only and it goes back only for 7 days. Secondly, they only depict viewership of content consumed on big screens and not content consumed on other devices/screens that audiences use nowadays to watch content. As mentioned above, 6 out of 10 watch Ertflix in other devices than TV. That leaves a big gap on estimating reach and viewership and that's why ERTFLIX has acquired an outsourced online measurement tool that brings detailed data and insight on the table on viewing behavior / viewership. The metrics combine streaming as well as on-demand viewing data, all devices without time limitations and this enables us to have the full knowledge of day to day progress and not just for 7 days. This analysis results in double viewership for our drama series for example, compared to linear (Nielsen). ■

Ukrainian Media Market Recovers Gradually Despite War

Russia's full-scale invasion in Ukraine has impacted economies on a world scale. The European markets felt significant pressure in 2022 due to the soaring inflation which in some countries like Estonia reached up to 30%. In Ukraine, that factor was restrained to peaks of 26.6% until December 2022 and has been declining since, dropping to 17.9% in April in annual terms.

After a good start in the first two months of 2022, the Ukrainian ad market came to a complete stop between late February and May, and companies started to regularly allocate money for advertising only in the fall. Thus, in 2022 the market reached only 37% of the volumes for 2021. Since the start of 2023, advertising activity has been more pronounced, with the digital segment attracting almost two times more money than the other segments, and some agencies expect that about half of the money that was lost last year will be recovered by the market already this year.

Georgi R. Chakarov and Svitlana Kalinina, Managing Partner at Kwendi Media Audit, discussed in detail the events that took place last year in Ukraine and the prospects for 2023 and beyond.

Svitlana, Kwendi is a regional leader in media investment analysis and media audit in Eastern Europe and Central Asia. Could you tell us more about your activities in the region and especially in Ukraine?

Kwendi Media Audit was founded in Kyiv, Ukraine in 2006 as an independent media advisory. Since then we've been providing unbiased, data-driven expertise on different types of media investment.

During 17 years of continuous growth we have had more than 100 clients. Many of them have been working with us for more than 10 years and not only in Ukraine. Together with our clients we have expanded our scope, covering major Central Asian and Eastern European markets.

The Kwendi TV Data Pool in Ukraine represents c.40% of the total TV Market inventory (only actual ratings and fulfilled budgets are included in the database). We also have sufficient TV pools in other markets where we operate. We service our direct clients, as well as top international media audit networks, including Ebiquity and ECI. We started a strategic partnership with Stars Poland in 2022.

But mostly, I am proud of our team – 15 specialists, all senior staff with successful track record in media and marketing, core team working with us for more than ten years.

What was the initial effect of the Russian invasion in Ukraine?

At first, it was a shock for all of us. It was hard to believe that this was indeed happening in real life. The war has ruined the normal life of each and everyone in our country. Of course, the physical safety of our people and helping our defenders has always remained our main priority up till today.

All advertising in any kind of media was stopped. The main TV channels joined forces to provide the “News Marathon” – a united channel to deliver vital, fact-checked, up-to-date information from one trustworthy source to Ukrainian people. TV advertising was completely stopped for 3 months at least.

What do the figures for the full year 2022 show? Which segments were hurt the most by the war?

The whole media market fell several times. Offline media were hurt the most with national TV advertising disappearing altogether until the end of May. The digital market suffered less than other media – due to targeting possibilities and low barriers to entry, it rebounded quicker than others.

Last year saw a major change on the TV market with the closure of Media Group Ukraine. What has been the effect of this on the market in general and on the other big media groups, in particular?

This event had almost no impact on the advertising market. Channel Ukraina was part of the ad-free “News Marathon” at the moment the decision to close it was taken.

The Ukrainian TV market has always been extremely competitive. Other big media groups SLM and 1+1 provide enough TV channels for any task for varied target audiences.

Official figures show that some channels saw their revenue decrease by 3-5 times last year. Do you expect that more channels will be forced to shut due to financial problems?

During all previous crises, TV channels were not shut down despite dramatic decreases in ad revenues. This is not just a business, but also mostly a political decision by its media owners.

There are already signs of recovery on the ad market. Which segments are growing the most right now and how has the advertising pie changed?

In the end of May 2022, when the direct threat to the Ukrainian capital Kyiv was reduced, the sales houses restarted advertising sales on channels outside of the “News Marathon” (the main TV channels, engaged in it remain ad-free up to this day). The TV measurement did not operate, and sales were made “spot by spot”. The advertising volume was restoring steadily, and by October 2022 there even was a moment when the sold-out slots were almost at 100%.

It was a time of optimistic forecasts before the systematic bombing of big cities and periodic blackouts started. Then came the hard winter with a threat of a complete blackout across the whole of Ukraine.

The pharmaceutical category consti-

Svitlana Kalinina

is one of the founders and the Managing Partner of Kwendi Media Audit, an independent media consultancy company founded in Kyiv in 2006. Svitlana has 30+ years of experience on the Ukrainian media market, including media-side and agency-side. Kwendi Media Audit currently covers the Central Asian and Eastern European markets. Kwendi is also a partner for the leading international media audit consultancies, such as Ebiquity and ECI, and strategic partner of Eastern European network Stars.



tuted the biggest share of the advertising ‘pie’ at around 70%. The next big categories to come back were telecom and retail. In 2023 the TV measurements were restored, and the number of advertisers has been increasing with every month. However, the comeback of Big FMCG is quite gradual and cautious. These advertisers are looking for brand-new ways of communication strategies.

The key point is that the media market will never return to the pre-war situation, it must be renewed and restructured. The market players must join forces and deliver quality service in order to speed up the return of advertisers.

Were the recently launched channels by SLM and 1+1 able to attract the interest of advertisers?

Primary SLM and 1+1-owned TV channels are still engaged in the ad-free “News Marathon”. The owners launched substitute TV channels with commercial content and ad inventory. The main reason for this launch is the recovery of the advertising market. Definitely advertisers include these TV channel in their TV budgets.

It is clear that without a proper audience measurement system the TV market will not be able to function normally. What is the current situation with peplemeters research in Ukraine? Is the currently provided audience data reliable?

The TV Panel was stopped in March 2022. In January 2023 it was turned on again, enabling ratings-based ad sales. The restored TV panel is now covering a smaller number of households in less regions and functions properly only for wider audiences, allowing less fragmentation and segmentation than before.

According to the “new panel”, certain channels lost a lot of viewers, while others either kept or increased them. However, there have been a few changes in the schedule and aired content and OTT viewing data shows a quite different picture. How do you explain this?

After February 24, 2022, Ukraine has undergone dramatic changes – in terms of population size, place of residence, size of household, and of course, media consumption and type of TV signal reception. These changes are also different for different regions. The new panel itself didn't bring dramatic changes to TV channels configuration except the “News Marathon”. Also the key change the new panel showed is significant growth of Other TV viewership, which includes OTT, VOD, YouTube, etc. This trend was present before but now it has dramatically accelerated.

What changes do you expect to see on the market in order to make it more competitive and profitable? Is

Digital the future for Ukraine?

The digital future is now in Ukraine. For example, 80% of Ukrainians prefer to receive news from the Telegram channels. But Digital is not an enemy of TV. A lot of TV content is spread via digital channels. A lot of advertisers would happily buy not just linear TV, but also online advertising in digitally distributed TV content. The main advantages of digital are its targeting possibilities, flexibility, and lower barrier to entry.

What changes could be expected on the media market? Will Ukraine be able to attract the interest of foreign investors? What is your best-case scenario?

Ukraine wins and receives security guarantees. Ukrainian people come back home. The Ukrainian economy is healing, restoring, and re-growing. Foreign and domestic investment flows in. More international companies and brands are coming to Ukraine, and the best Ukrainian brands are becoming known and popular abroad. Ukrainian people live in their own land, in safety and prosperity. The Ukrainian advertising and media market is rising, and media channels' ad revenues enabling free and independent operations of these channels.

Glory to Ukraine, and Glory to all Nations, who have bravely and selflessly supported Ukraine! Glory to the Heroes! ■



Daria Leygonie-Fialko

is a media manager, producer and founder of SPACE Production, co-founder the Organization of Ukrainian Producers (OUP). SPACE Production, co-founded with Kateryna Laskari, has been the absolute leader in the number of hours of series content produced for Ukrainian television (including the war period) for the past four years.

Daria Leygonie-Fialko is a member of the International Academy of Television Arts and Sciences (the International Emmy® Award) and the EPC (European Producers Club).

we shot together with the German company BROADVIEW for ARTE. It was an interesting experience, as Ukrainian and European markets are very different, with different audiences. Our main mission was to make the European viewer hear about our pain, and to do this we studied their cultural peculiarities, being aware that the European viewer has a different level of immersion into the problem and a completely different attitude towards it. We wanted to tell our story not just to tell it, but to make it heard. We even made different versions of the film for Ukrainian and European audiences. First, we showed the film in France and Germany, and a little later in Ukraine. When we finished editing the film for Europe, we realized that for our domestic market we needed completely different accents and decided to make corrections in the film version for the Ukrainian audience. The film turned out well in the end - that's the main thing.

What are your plans for your second year of operations?

In the first year, we produced a large number of films. Under stress, we accumulated strength and rushed to work. The second year of the war will be the most difficult. God forbid for a third year, as we hope everything would end with a quick victory for us. We are now faced with the task

of developing projects that will not be based on reactive response: something happens - we shoot it immediately (for example, we shot our film *Blackout. Christmas*). Now we're going to focus on taking a broader view of events as they happen. To add more analysis, a historical perspective, to tell people's stories in more detail. For example, such a film was our documentary *Against All Odds*, which analysed the early days of the war and the reasons for the failure of the blitzkrieg. But it took almost a year to make this film, because it's a hard, painstaking job. The world is tired of war, they don't read the news as much anymore, and they watch documentaries worse. We understand that, but we will keep going. I think the next phase for OUP will be to build more on feature projects. We are now thinking about which stories are already ethically right to tell, and which can only be filmed after a long time, so as not to hurt the people affected by these events.

You produce both documentaries and fiction. What are the main stories and themes that you will focus on in your upcoming projects?

We, as SPACE Production, have restored the production of series projects in Ukraine, and this is also a very important stage. Now I realize that we did a crazy thing when we brought

OUP: The War Is Not Over, So We Continue

Interview with Daria Leygonie-Fialko

A little over a year ago, The Organization of Ukrainian Producers (OUP) was created with the goal to tell the stories of Ukraine as it fights against the full-scale invasion of Russia and all the consequences of the biggest war the world has seen since WWII. The second goal: to support the Ukrainian film and TV industry, was also accomplished as Daria Leygonie-Fialko, co-founder of OUP, tells Georgi R. Chakarov in this exclusive interview.

Daria also talked about the work of her production company SPACE Production which managed to resume production in Ukraine in the toughest winter months and is currently developing several projects for the local market, alongside a number of co-productions with international partners.

Daria, it has been one year since we last spoke. What were the highlights in the first year of OUP's activities?

Was it a successful year for OUP?

It has been a very productive year. We made nine documentaries and one feature film. Our films were seen by millions of viewers in more than 30 countries, which means that our mission to tell the world about the Russian military aggression was accomplished. Our second goal was to support the Ukrainian film and TV industry and give people jobs. We recruited over 300 people to work on the films.

We shot the first films with our own money, parts of the profit were reinvested. We also spent the whole year looking for co-production partners. For instance, the film *Art in War*



The founders of the OUP

people out to shoot two multi-episode projects in December 2022. It was the height of the Russian attacks on the Ukrainian energy system. I mean, we went into our pavilions during the blackout and started shooting... It must have been despair, however, we succeeded. We managed to get it all out and we shot 40 episodes of *The Trace* and 60 episodes of *The Blind*. Only 3 or 4 times did we cancel shifts because of a blackout or a major missile attack. The whole team had a great desire to work and live on, so we waited out the air raids in basements and kept filming.

SPACE Production is also developing a new detective series called C.O.D.E., which we would like to start filming this summer. "Would like to" - because it's impossible to plan something in Ukraine more than two weeks in advance. But we can see that people really need to watch something, to move to a parallel reality where there is no war. *The Trace* and *The Blind* were filmed in the same format as before February 2022, there is no war in them. But separately, for example, we developed *The Bomb Squad*. The title speaks for itself, this series will be all about war. It's a short series for prime time. We are

not shooting it yet, but we are actively working on it. Apart from that, there is one project which we are presenting at NATPE with our partners from Britain. It is an artistic series that will show a foreigner's view of what is happening in Ukraine. This project is very important to us; it is not only about the war, but also about the revaluation of one's own life, an existential statement about how two completely different worlds - the UK and Ukraine - come together and how war becomes a catalyst for certain changes within a person.

SPACE Production is currently working on projects with three countries - UK, France and Italy. Several more are at the negotiation stage. We do not strive for the quantity of projects. When choosing the projects we have to be true to the mission of SPACE Production: Make Ukrainian identity bloom. Europeans have a lot to discover how the histories of Europe and Ukraine are intertwined, and how many amazing and fascinating stories lurk in our shared past.

For the Ukrainian market, we are also developing several miniseries.

OUP is working on several documentaries, including a film about



Art in War

Ukrainian cultural heritage, which is now being destroyed by the Russian army, about medics at war, about Russian propaganda, etc.

OUP's documentaries have enjoyed critical acclaim and strong international interest. Could you mention some of the countries and platforms that have bought content from you?

Our films were originally designed for a wide audience. We have therefore not focused on festivals but on television. Igor Storchak, co-founder of OUP, signed a contract with the distribution company Autentic Distribution thanks to which our films were seen in dozens of countries, like the Baltic States, Poland, Japan, Georgia, Deutschland, Spain, Sweden, Switzerland, Portugal, Norway, Ireland, United Kingdom and many more. OUP films were aired by broadcasters like TVR, TVP, NHK, Rustavi 2, ERR, DW, RTP, NRK, RTE, RUV, PBS, etc.

OUP is attending CEE's most-established TV market NATPE Budapest. What are your expectations

for the event? What opportunities will you be looking for during the market?

The main purpose of our participation is to hold a panel discussion entitled "Co-Pro Challenge - Local Stories, Global Appeal". We are going to tell and show that Ukrainian film industry can produce high-quality content even at war. We will also talk about our international cases, which we have worked with partners in the UK, Estonia and Germany.

We also expect to attract new partners and plan to close some of our deals, in particular the sale of the TV series *Water Police*. This project is unique not only in Ukraine. Our film crew was so enthusiastic, they filmed some incredible stunts on the water and under water. We found the body of water in Ukraine with the most beautiful bottom - Malinskyi quarry. The production designer created a stunning pavilion, where everything was equipped like on a real ship. Most importantly, it's a fascinating detective story. We finished the series in February 2022 and its Ukrainian premiere was cut short by the war. The series was shown in

its entirety in May 2023 on STB and it became an absolute hit, occupying the top spots in the ratingcharts. The series has already been bought by several Baltic countries, Latin America, etc.

How are you adapting to the new conditions on the Ukrainian market? Are you starting to see an increase in demand for new content from the leading TV players?

An increase in demand - that sounds strong. There are not many leading Ukrainian players now, one holding closed down last year, the budgets are smaller, and the hours are smaller. But there is demand. Now, mostly content that is familiar to the viewer is being produced, brands that are recognizable, and new series are being quietly launched. If you look realistically, the situation is not the best, but there is demand, and that is the main thing. Plus, international funds support production, which helps a lot.

What is your relationship with the Ukrainian streaming companies which proved very resilient to the

war. Are you planning any projects with them or other digital platforms?

Before the war we had very big plans with Ukrainian platforms, in particular MEGOGO and Oll.tv, now there are no projects, but we are in touch. On MEGOGO now, for example, you can see all of OUP's documentaries.

No one can say when the war will be over, but still how do you see the future of OUP once Ukraine returns to peace? Do you expect an increase in investments on the content market in particular?

I am absolutely sure that money will come to Ukrainian economy, including content. I think OUP will change into an Association format. Perhaps we'll expand the circle of members, discuss the necessary impact within the industry, some initiatives, projects, i.e. more work with the industry than co-production. Or we could continue to cooperate on some local projects. But when we summed up the year's work on the anniversary of the war, we had the slogan: The War Is Not Over, So We Continue. We created the OUP for a specific purpose and it is still very relevant. So it is too early to talk about the future of OUP.

It is no secret that Ukrainian producers generated most of their profit by making content for the Russian audience. Which markets do you see as potentially replacing such a big client in the long run as the Ukrainian industry struggles to recover?

I am convinced that Ukrainian industry and content should become a new Israel, I believe in our creative boom. We have been through a lot of psychological turmoil, and it is obvious that this will find its way into new and exciting projects. For this there has to be educational programs for creators - we're just discussing their creation. As for the market that will replace Russia... Ukraine has already moved towards Europe and made its choice. It should become a part of a co-production pool with European countries. Now co-production is a fast developing trend. There will be no such thing as one market replacing Russia. We do not need that. ■



Water Police

OGM Universe brings two fresh hits to NATPE Budapest

As one of Turkey's newest distribution companies, OGM Universe will make its debut at NATPE Budapest this June. Ekin Koyuncu, Global Distribution & Partnership Director at OGM Pictures, tells TVBIZZ Magazine about the company's first steps on the international TV market and the growing catalog of Turkish hits which are already catching the eye of buyers around the globe. The new hits, *Stickman* and *Miracle of Love*, are the stars of OGM Universe's debut in Budapest.

Ekin, OGM Pictures was founded in 2019 and quickly became one of Turkey's most successful production companies. OGM Universe was then set up to sell the latest hits from OGM. Tell us more about the company and its success story?

OGM UNIVERSE is a very new company, as we launched in October 2022. During these eight months we worked on the brand, on the recognition of both OGM Pictures and OGM UNIVERSE, because prior to launching OGM UNIVERSE, there were very hit titles produced by OGM Pictures such as *Red Room*, *The Innocents*,

Chrysalis, *My Home My Destiny*, which were known worldwide, and with this recognition it made our job much easier when introducing our new venture. We are working hard on explaining the clients what we produced in the past and what we're going to produce in the future; with a zero-failure rate and by dominating the highest percentage of the viewership in Turkey, showing the clients what's coming up, what OGM is all about.

The Turkish content segment is very competitive. What is your distribution strategy and goals?

The distribution strategy is, of course, to reach as many countries as possible. Right now, OGM UNIVERSE's catalog we have two primetime titles, *Stickman* and *Miracle of Love*, and we have a daily drama called *Broken Destiny* that we co-produced with Stellar Yapım, who are experts at producing daily dramas. So far, we are pleased with our licensings with these three titles, and our strategy is to create diversity in our catalog with new titles, with different genres and try to be appealing for both linear and non-linear platforms. Right now, our most requested title is *Stickman* and *Broken Destiny*. Soon, I will be informing about *Stickman*'s second season, and our daily drama has now ended, but especially in CEE and Latin America, there is great demand for this daily drama because now there are more daily slots available in the world for Turkish drama.

How many projects do you have in the pipeline?

As you know, we have an exclusive production deal with Star TV, one of the leading TV stations in Turkey. The channel is now ranking in the top three. We have three more dramas in our pipeline. The first one will premiere at the beginning of September and then hopefully two more in October and November. But since we are responsible for their seven night primetime, the library will grow fast until the third quarter of 2024. We will be offering around 6 to 7 titles. Soon we will be announcing our new titles. **What will be your highlights for NATPE Budapest?**

We are bringing *Stickman*, *Miracle of Love* and *Broken Destiny* to *Natpe Budapest*. Even though *Miracle of Love* will be ending this season, we are getting great interest from the buyers, it's a very dramatic,

very strong kind of fiction, very new in terms of genre for Turkey. It was the first time in Turkey that such a thing was tried on Free TV, about a 130-year-old man who's not aging and who is not dying out of aging. It was a bit difficult for the audience to accept this reality. But again, with these trials, with the new trials of genre, we will expand our creativity in Turkish production. Therefore, you will see more examples of these kind of projects from OGM Pictures.

What are some of the trends that you have observed on the Turkish market recently?

The psychological drama trend began with OGM pictures, and it broke records. *The Innocents*, *Red Room*, might not be as popular in terms of international reach as *Golden Boy* or *Chrysalis*, but it's very important that we feed our creativity and not limit ourselves with the regular melodramas. In addition to our linear productions, on the streaming part we see darker, edgier productions. In addition, fiction with self-improvement, feel-good and real-life stories.

How important is the "international factor" when producing series in Turkey which are then meant to travel to the rest of the world? Do you take into account the preferences of viewers "from abroad"? It's very, very important. Nowadays, it gained even more importance than before, because right now, as you know, we are, after the US, Turkey is the second country in drama export globally. Therefore, for the producers, the channels, the distributors, international success and licensing gained a huge importance.



Birkan Sokullu and Ebru Şahin in *Miracle of Love*

It's in our agenda, that while picking the titles for the new season, we are also considering the taste of the international audience.

Of course, our DNA, the Turkish production DNA is all about melodrama. It's all about these strong love triangles, beautiful setups, a great production quality, strong casting and acting which is well liked all over the world.

What type of drama are international buyers looking to acquire at the moment?

The preference for TV genres varies across different territories. For instance, historical and costume dramas tend to perform exceptionally well in some territories, while romantic comedies are popular in some other specific parts of the world. However, if we were to generalize, melodramas emerge as the highlight in most parts of the world. Turkish productions have a distinct DNA that encompasses

rich storytelling, excellent production quality, compelling performances, and breathtaking landscapes. When all these factors align, the content becomes familiar and intriguing for over 100 countries.

Turkey has been struggling with extremely high inflation at the recent earthquake disaster. How has this affected the series production market?

It affected everything in Turkey. Right now, the dollar rate to the Turkish lira is almost 24. Of course, this is going to affect the production budgets and the advertisement market, especially on the channel side. There will be some financial problems with payments, with market attendance, with advertising budgets. Everything will be affected. So, with our sales we will try to balance this issue, but it's going to be a huge problem as it is right now and we will feel it in the very near future.

As another business opportunity, are you looking to expand your business through international co-productions, for example?

Yes, of course. Each market, in addition to licensing our ready-made productions, we look for opportunities to expand our relationship in Spain, in Latin America, in Central and Eastern Europe, with strong partners and platforms. We would love to co-produce or produce and also include those international titles in our library. It can be vice versa. We can find stories from abroad and adapt them here, or we can adapt our own stories on the local markets. We are looking for these kinds of opportunities. ■



Miracle of Love



INSPIRING UNIVERSE

OGM
UNIVERSE

STARRING
EBRU ŞAHİN
BİRKAN SOKULLU

Miracle of Love

DIRECTED BY
HİLAL SARAL

OGM
PICTURES



STARRING
ELÇİN SANGU
ENGİN ALTAN DÜZYATAN

STICKMAN

DIRECTED BY
ÇAĞRI VİLA LOSTUVALI



Calinos Grows Its Business in CEE with Fresh Finished and Format Deals

Asli Serim, Head of International Sales, Calinos Entertainment, tells TVBIZZ Magazine about their recent deals in the CEE region, new additions to the catalog for NATPE Budapest, and the plans for the upcoming 25th anniversary of one of the oldest Turkish distribution companies.

Asli, Calinos Entertainment is celebrating its 25th birthday next year. During that time you have sold more than 112,000 hours of content to more than 105 countries. What have been your latest deals in the CEE region?

Calinos Entertainment's mission is to spread joy to global audiences, to make them "enjoy the drama" by enhancing the presence of Calinos dramas on all the platforms, in every country, with the newest content. Following this mission Calinos enwidens its catalog with content created by international producers in addition to Turkish dramas.

Recently, we have licensed *Farah* to Romania, *Cherry Season* and *No:309* as finished content to Czechia, the format of *No:309* to Romania and the Polish movie *Squarred Love* to Hungary. In addition to these, our negotiations continue with several countries in the region for *Farah*.

Which are your "strongest" markets and are you looking into expanding into new territories?

Calinos' phenomenon dramas continue to enjoy the audiences in 5 continents and we can say that they are popular than ever. The business with the CEE region has always been good for Turkish drama distribution and it continues the same way, at the moment. In the CEE region we are working with every country. Romania, Bulgaria and North Macedonia are the countries where the Turkish drama has strong presence in CEE. We are at our best stage in terms of ready-made dramas. In addition to this, we have been working on format sales and evaluating co-production options since the beginning of 2020's.

In formats and co-productions, Calinos has doubled its catalog in two years. We will be reaching 45 scripts out of the original 25 today. In 2021; Ruxandra Ion and Dream Film

Production produced *Adela*, the Romanian adaptation of *That's My Life/ O Hayat Benim* for Antena 1. The remake was a huge success and turned into a phenomenon in the region. This year, they've started producing the remake of *No:309* as *Room 609*. Next year, *That's My Life* will also get an African remake. *Adela*, *Room 609* and the African remake of *That's My Life* will also be distributed by Calinos Entertainment.

Next year, on our 25th anniversary, we are going to co-produce the new version of our first globally sold drama, founding strip, *Wild Heart* with Sinegraf. Also, we have been working on two formats from Korea, *Penthouse* and *Lies After Lies*, to be produced next year, too.

What are the highlights of your NATPE Budapest slate this year?

The Turkish drama star for the Fall/ Winter season is *Farah* which successfully finalized its 1st season at the end of May in Turkey and the global star is from Canada - *Indefensible (Indéfendable)*, a hit Canadian crime drama. The third drama that will be presented first to global buyers at NATPE Budapest 2023 is *EGO*, a Pastel Film production, an unconventional drama with a great storyline.

Produced by O3 Medya, *Farah* is a strong story, supporting woman empowerment. Starring Demet Ozdemir and Engin Akyurek, *Farah* is the story of an Iranian woman, who had to run away from her country and is struggling to live in Istanbul, working as a cleaning lady in order to maintain the treatment of her son, but finds herself in the middle of the mafia-police war. *Farah* will continue to meet with its audience on FOX in Turkey with its second season in September.

The global star of Calinos Entertainment's international catalog is from Canada. *Indefensible* is a hit



Canadian crime drama which stands out with its unique approach and has 2 successful seasons on Canada's TVA. Produced by Pixcom in collaboration with Quebecor Content, *Indefensible* is plunging the audience into the world of Cabinet Lapointe-Macdonald and its criminal defense team. A realistic universe built of human dramas, from the smallest to the largest, all imbued with the same emotion: the fear of being condemned. The second season

of the crime hit is in production and the channel has already approved the third season.

EGO is a chain of dramas starting with an "indecent proposal" done by a beautiful, rich, young but an unfortunate woman. Produced by Pastel Film, starring Melisa Asli Pamuk and Alperen Durmaz, the drama is the adaptation of the Korean drama *Temptation*.

What have been the biggest challenges for the Turkish TV industry

in recent years?

COVID and the earthquake were the toughest challenges. The production industry in Turkey has survived the first one smoothly. As you can remember, two years ago, all the productions stopped for months because of COVID but Turkish productions have never totally stopped. After a brief pause of about two weeks, the sets started shooting. But the earthquake has hit the whole country very hard. This terrible catastrophe deeply affected the productions, as it has affected all other industries. The country was in national mourning for a week and the channels didn't broadcast anything but news from the region for weeks. Shooting was paused for more than two weeks and the talents got together to make donation campaigns even physically attend the rescue missions in the areas affected by the earthquake. The "winter" part of the Fall/ Winter 2023 season was a little bit delayed but not lost.

Tell us about the latest trends on the Turkish TV market and especially in drama production - what are the most popular themes explored in them?

At the moment there are two types of shooting technics or habits in Turkey: "Telenovela" style and "European Style". Until the streaming platforms the global buyers and audiences met with "Telenovela Style Turkish Content". But with the development of streaming platforms, the global audience got to know the "European Style Turkish Productions". In total, all of these series reflect the power and potential of our production industry.

Turkish drama continue to be very popular around the world. To what do you attribute their longevity in terms of international demand?

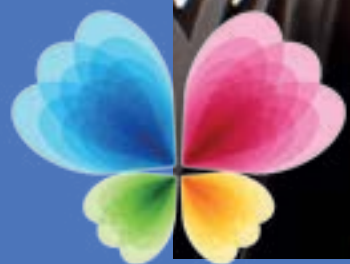
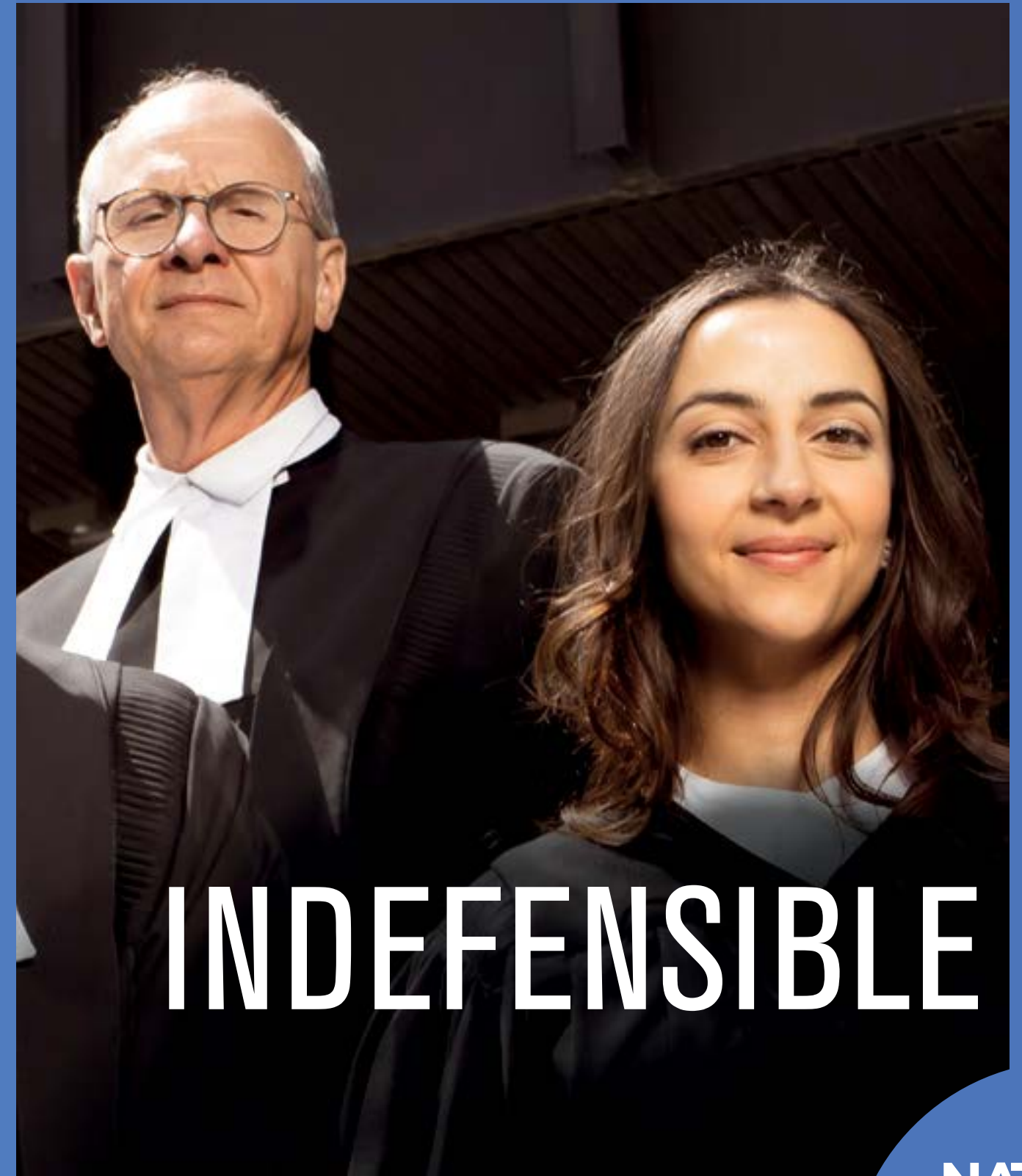
The classical Turkish drama works as good as it works anywhere around the world because it is based on "LOVE". Love between men and women, love of a mother, love of a father, inaccessible love, forbidden love, broken love... Love, tears, betrayal, family ties, powerful families... This is a long-lasting list; why does it work? The answer is simple: because "Turkish drama" is the life itself. ■



Farah

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INTERCONTINENTAL HOTEL

Interest for Polish Content Is Constantly Increasing

Interview with Aleksandra Kazmieruk, Head of International Sales of Films and TV Series, TVP

TVP is back to NATPE Budapest with a slate of new titles in various genres which were added to its catalog this spring. As Aleksandra Kazmieruk, Head of International Sales of Films and TV Series, TVP, tells TVBIZZ Magazine, the interest for Polish content is constantly increasing and even though CEE remains the biggest market for TVP, there is great potential for growth in territories like Spain, North and Latin America.

Aleksandra, TVP has an extensive catalog of ready-made shows and formats. Please, tell us more about the genres of content you are offering to international clients and how many hours of content TVP produces and sells each year?

TVP indeed has a huge catalog where one can find almost all genres and formats. TVP is the biggest Polish producer and naturally to satisfy the local needs of TVP's channels - main and thematic ones - we create a lot

of content. After a thorough selection, many titles find their place in the international catalog. These are theatrical and TV movies, TV series, documentaries of various topics - history, current affairs, social issues, or culture - and last but not least kids programming. Every year, TVP, like any other public broadcaster, produces an enormous amount of content. It is difficult to quote an exact number of hours because we would have to include all the productions created by 16 regional chan-

nels, news, and studio recordings. Therefore, I will concentrate here on the number of hours which we add to our international catalog annually, it is a minimum of 60-70 hours of valuable and engaging content.

If it comes to the hours sold by International Sales Department, again before I provide the number, I would like to share some details of our everyday activity. Apart from the sale of ready-made programs and formats abroad, we also export all the elements of the audiovisual works such as footage from our vast, 70-year-old archives, language versions, or trademarks. We conduct theatrical distribution outside of Poland and help organize commercial and non-commercial screenings all over the world. The scope and scale of our licensing activity is much bigger than it might look at first sight and we are, in fact, the biggest Polish content sales agency. And if you still want to hear the number of hours of ready-made programs sold then I would say that depending on the year it is from 100 to 250 hours annually.

TVP formats have been getting recognition and have been traveling to other territories in the past few years, i.e. *Sanatorium of Love* winning the PITCH & PLAY LIVE! award at NATPE Budapest and *I'll Be Fine* being adapted in CEE countries recently. To what do you attribute this success and increased interest in TVP content?

Aleksandra Kazmieruk

is the Head of Worldwide Sales of Films and TV series at Polish Television (TVP), where she has worked for the past 10 years. During this time, she has led the global distribution of TVP content, managed the sales team, and created the international business development strategy. Before joining TVP, Aleksandra held senior positions within the media industry in all rights acquisitions for Poland at Carisma Entertainment Group and high-profile projects management at National Film Archive - Polish Film Agency.

Indeed, we are seeing an increasing interest in content from Poland and the CEE region. It makes me very happy because it turns out that we can break through with our productions to foreign buyers and viewers. Polish television production is in great shape, viewers appreciate us for the high quality of production, interesting topics, and creative approach to their presentation. I think that also our persistence in presenting TVP content at the most important film and TV markets significantly contributed to the wider recognition of the Polish audiovisual industry. We are visible and I see buyers coming back for new titles. In 2023 our best-selling title is the feature film *Filip* by Michał Kwieciński which has already been sold to multiple territories, and not only in the CEE region. For this year's edition of PITCH & PLAY LIVE! we submitted *Camper* - our new reality show. I hope it will be as successful as *Sanatorium of Love*, which by now has already seen 5 seasons.



What have been the latest additions to TVP's catalog?

In the Spring/Summer catalog, our buyers can find great new titles such as our best-seller *Filip* by Michał Kwieciński, *The Perfect Number* by internationally recognized director Krzysztof Zanussi or *Prophet* by Michał Konrad, the new TV series *Moth Hunting* by Michał Rogalski, the historical period drama *The Jagiello-*

nians by Krzysztof Łukaszewicz about the most famous Polish dynasty, or the drama series *Two Eagles House* by Waldemar Krzystek. We also have the new reality show *Camper*, in which five pairs of well-known influencers go on a camper tour through the wilderness in different parts of Poland, and the wonderful travel series *Fall in Love with Poland*. In the documentary section, we



Filip

added around 10 new titles covering history, social, and cultural topics. As you can see, TVP's offer is very diverse and we are observing a high interest in these titles from many countries already.

TVP's President Mateusz Matysz-kowicz announced recently that TVP plans to shoot more original series for its flagship channels TVP1 and TVP2 and plans to replace international acquisitions with local content starting next year. How many more hours does TVP Sales expect to represent from 2024?

TVP is working currently on new original series but TVP has always been creating in-house productions or commissioned TV series for general and thematic channels, and now for VOD. TVP.PL - TVP's streaming platform, which plays a very important role in TVP's channel portfolio. We will have in the year 2024 at least three new titles - *Matylda*, a costume drama set in XIX century Poland, in which the main motifs are love, emancipation, and the fight for rights and honor; *Niepewność* (working title: Uncertainty) about the life of our poet young Adam Mickiewicz and *Dewajtis*, an adaptation of one of

the most famous books from positivism times. Hence, if we add the following seasons of the productions from 2022 or 2023 we might have in 2024 50-60 hours of TV series production.

What are your best-selling titles in CEE? Are you negotiating similar deals like the one for *I'll Be Fine*?

Last year our best-selling title was the documentary *Zelensky - Servant of the People* by Barbara Włodarczyk. Because of the war in Ukraine, this film reached the highest interest not only in CEE but in other regions as well. Besides that, the buyers loved the feature film *March 1968* by Krzysztof Lang, the triptych about Poles saving Jewish people *Hitler's Aunt, Brothers*, and *Musicians*, the war drama series *Wartime Girls*, the family saga *Our Century* and the costume period drama *The Crown of the Kings*. We can't forget about the classics of Polish cinematography - the films by Andrzej Wajda and Krzysztof Kieślowski are our evergreens. They are being licensed for more than 20 years now, and the broadcasters or distributors desire to acquire these gems of cinematography all the time. The beginning of 2023 showed that *Filip* will be our best-seller in the upcoming 24 months.

What about the rest of the world, which are your most-important markets?

Without a doubt, the CEE region has always been our best market. We share the culture and history and it seems we communicate audiovisually in a similar way, if I may put it this way. However, our appetite to spread TVP's content does not end in CEE. We see with satisfaction that such markets as Spain, Latin America, or North America appreciate our content more and more. This appreciation is reflected in the numbers and we will be able to share great news soon about two major deals in Spain and the Americas.

Does TVP also sell co-productions with broadcasters/producers from other countries and do you plan to add more such titles?

For now, it is true we are focusing only on titles we financed or co-financed, however, this approach might change soon. We are constantly growing and I think we are ready to be a sales agent for "outside of TVP" productions. I hope that in a year, I will be able to share more information about it. But today, I can only say that we are analyzing all the projects which are submitted to our sales department and if we find titles that suit our line-up we definitely won't let them go.

Recently GoQuest announced that it has acquired two crime series from TVP - *Erinyes* and *Crusade*. Please, tell us more about this deal and do you have any other similar agreements with other distributors?

We are very happy we started this cooperation with GoQuest. Their team fell in love with these series as much as we did. We appreciate a lot how GoQuest work with *Erinyes* and *Crusade* and believe that thanks to this deal these two amazing series will travel even further. We are always open to various models of cooperation if only they might make individual titles successful in foreign markets. For instance, we like working with local distributors from select territories where they can reach all possible buyers and they've got long-term business relations. As I said, each title is treated individually, and we always try to find the best distribution model for it. ■



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Q2 TRENDING STORIES ON TVBIZZ

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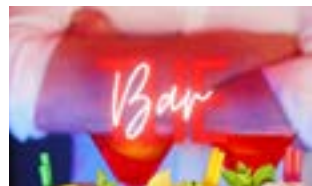
www.tvbizz.net

PROGRAMMING



Channel 4 to 'stage major crime trial' for new social experiment

Channel 4 are set to stage a major crime trial for a brand new social experiment series, aiming to shine a light on the justice system. A casting call shares: "We are staging a major crime trial and are seeking jurors to participate in the trial, and give their verdicts. If you have ever wondered what it would be like to sit on a jury and grapple with a gripping criminal case..." The new series, which has not yet been announced by Channel 4, is due to film in Essex for two weeks this April.



The Bar: new reality show in the works at major streamer

The Bar is looking for experienced and established bar managers to take part in the new series and are open to take part in a brand new challenge. No further details are available.



Johnny de Mol fronts new gameshow

From June 24 Johnny de Mol will be back on Dutch TV screens with the new show *De Kwis met Ballen* (*The Quiz with Balls*). In the new SBS6 game-show, a five-person team competes for a cash prize. The further the participants get, the more money can be earned. But with a wrong answer, the player is then pushed into a swimming pool by a ball. The premiere will mark the return of Johnny after his show HLF8 was cancelled last month.

RATINGS



New Canale 5 show leads the primetime

Piero Chiambretti made his debut as host of Canale 5's new entertainment show *La TV dei 100 e Uno last night*. The new format topped the primetime with 2.197.000 viewers and 16% share. Rai 1 aired *Tutta un'altra vita* which got 2.141.000 but only 12.4% share due to its shorter run. On Rai 2, *Mare Fuori 3* got 1.249.000 viewers and 7.7% share. Rai3's *Chi l'ha Visto?* scored 1.895.000 and 12% share.



The Traitors hits new low

SIC's *The Traitors* has failed to grab the interest of the Portuguese viewers which was confirmed once again by the show's new season low in the ratings registered on Sunday night. In the main primetime, the format had less than 500.000 viewers: 493.800 viewers and 5.2/11.6% share were posted by the opening part followed by *The Mission* with 317.300 and 3.3/9% share, and *The Round Table* - 301.600 and 3.2/12.5% share.



Good start for TVI's new reality

The second episode of *Avastars* attracted 214.000 viewers on Friday, about 90.000 fewer than at the start. The figures are also lower than those of the program *The NIX Factor*, which was banned to a late time after one episode last month, nu.nl writes. However, SBS6 and Talpa have no plans to cancel the show. Meanwhile, RTL4 launched the new season of *The Traitors* which scored 1.028.000 viewers and 19.5% share. NPO1's *Cops Maastricht* was moved to the 21.47 slot due to the World Skating Championship (1.42 million and 27.1% share). The series got 1.269.000 viewers and 28.2% share.

M&A/FINANCIALS



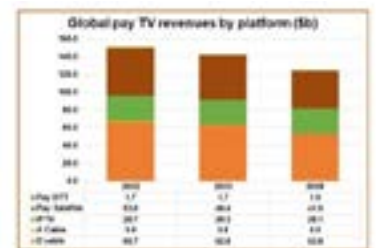
TV 2 profit down with 400 million despite record revenue

Egmont presented its figures for last year and they show that the profit of TV 2 Norway fell with NOK 426 million - from NOK 503 million in 2021 to last year's NOK 77 million as a result of several TV conflicts with the distributors and heavy editorial investments, particularly related to the online venture TV2.no. The turnover for TV 2 increased to NOK 6.61 billion, which is a record for TV 2. This was a growth of a whopping NOK 336 million. Egmont explained this with increased subscription sales for TV 2 Play and the full consolidation of RiksTV. The company also said TV 2 Play is now the biggest Norwegian streamer with 1.2 million clients.



Report: Seven looks to content cuts

Seven West Media is set to make further cost cuts after an advertising downturn. Seven Australia has reportedly identified \$15 million to \$20 million in "new additional temporary cost savings" which will mostly hit content. It isn't clear which programming will be impacted. Those cuts are in addition to the \$20 million flagged at the company's half-year results in February.



Global pay TV revenues to fall by \$26 billion

Global pay TV revenues peaked in 2016 at \$199 billion. Revenues will fall to \$125 billion in 2028 - down from \$151 billion in 2022, according to Digital TV Research. This comes despite the number of pay TV subscribers remaining at just under 1 billion. Pay TV revenues will fall by \$26 billion between 2022 and 2028. Satellite TV revenues will drop by \$12 billion, with digital cable down by \$13 billion. Analog cable will lose a further \$1 billion. IPTV will be flat. Revenues will decline in 71 of the 138 countries between 2022 and 2028.

APPOINTMENTS



Rai CEO resigns

Rai CEO Carlo Fuortes has filed his resignation at the Ministry of Economy and Finances. His letter to the institution reads: "There are no longer the conditions to continue my job as CEO." According to press reports, Fuortes is set to become director of Teatro San Carlo in Naples after Stéphane Lissner was forced to leave due to the voting of a new law which limits the allowed age of theater directors to 70 years. Radio Rai head Roberto Sergio is reportedly the favorite to take over as Rai CEO.



Fremantle Norway merges with Monster, changes CEO

Petter Testmann-Koch is leaving Fremantle Norway after nearly 10 years at the helm of the production company. This will happen as Fremantle is set to merge with Monster. Thus, Monster chief Ingvid Daae will take over the leadership of the company which will continue under the Monster brand. During Testmann-Koch's stint, Fremantle Norway created hits such as *Exit*, *The Traitors* and *The Masked Singer*. Fremantle Norway employs 110 people, including freelancers. 15 of them are permanent employees. No one will lose their job as a result of the merger. In Norway, Fremantle owns *Monster*, *Strix* (incl. *Novemberfilm* and *Rakett*), *One Big Happy Family* and *Miso Film Norway*.



TV 2 announces appointment of two new editors

From June 1, TV 2 Denmark's program department will add two more names to the editorial team, when two of the industry's great talents, Caroline Una Henningsen (pictured) and Mads Elias Højbjerg Ravn, will start at TV 2 as editor for 'Relations and Lifestyle' and as entertainment editor respectively, the broadcaster announced today. Mads Elias comes from a position as head of development at Blu, but has previously been one of the development and production forces behind well-known TV 2 formats such as *Taskmaster* and *LEGO Masters*, produced by Metronome. Caroline Una joins from *Snowman* where she was producer of *Married of First Sight* among others.

DISTRIBUTION



Nippon TV heads to MIP with two new titles

Nippon TV, Japan's leading multiplatform entertainment powerhouse, announced today the company will head to this year's MIPTV with a new scripted format, *Rebooting* (60-minute episodes) and a new unscripted format, *Doki Doki Video* (30-180-minute episodes). The announcement was made today by Mikiko Nishiyama, EVP of International Business Development, Nippon TV.



Coyote announces acquisition of two international formats

This Wednesday, March 29, Coyote Productions proudly announced the acquisition of two international formats: *Back to School* (Mediaset Distribution) and *Tool Club* (Passion Distribution). "Our ambition, through our Coyote subsidiary, is to create original formats that make sense and that drive us forward. But it's also about identifying the most 'feel good' foreign formats for our customers. Because this has been our DNA for many years and in the current context, relaxing and having fun with the family, while learning things at the same time, is what we all need!", said program director Julien Aubour.



Mediawan acquires international format rights to Hungry for Love #MIPTV

Mediawan Rights' unscripted department boards the sultry food dating format *Hungry for Love*, partnering with the co-producers to distribute the series and bring it to a global audience. Co-produced by Tel Aviv-based global film and television studio Sipur, led by CEO Emilio Schenker, and Stampede Ventures, the Los Angeles-based global media company headed by Greg Silverman, the unscripted series was created by Zippi Rozenblum, Head of Formats for Sipur, and produced by Israeli powerhouse HSOC.

ADVERTISING



Belgian televisions to comply with stricter advertising rules from June

The Federation of the Belgian Food Industry (Fevia) has announced on its website new rules concerning the TV advertising of companies and traders in the food sector. Thus, the latter will have to comply with stricter rules in terms of advertising broadcast on TV to children as of June 1. The new restrictions are intended to protect a wider group of children and according to them, the age limit under which companies cannot advertise will be lifted from 12 to 13 years old. Also, 'the rules will apply to all programs where at least 30% of the target audience is made up of children under the age of 13 (compared to the current 35%)'.



Influencer advertising will be treated the same way as traditional media

Influencers, who advertise on the social networks will be subject to the same rules as traditional media, French Minister of Economy Bruno Le Maire informed on Monday. They must be subject to the same rules, which are valid for radio and TV. For example, when you have a placement of alcohol or other products, the legal notices should appear on the websites of influencers, which isn't the case today', he explained. 'We would also like to give a status to these influencers so that they are better protected,' added the Minister, who also wants 'to strengthen mechanisms to ensure that the Internet does not turn into the Wild West'.

MediaPost: It's reach, not ratings, that will determine TV advertising's future

Brian Wieser is worried about TV advertising's future. I don't believe any other prognosticator has been so consistently right (and uniquely provocative) on the current and future state of the TV ad market than Wieser, the long-time industry analyst who led research for IPC's Magna Global, equity shop Pivotal Research and WPP's GroupM during the past 20 years. Wieser is both a good friend and former colleague. I believe he's absolutely on target in *The Death of TV Advertising: A Brief History and Future Expectations*, a newsletter from his new company, Madison and Wall, published earlier in March.

DIGITAL



SIC launches FAST channel on own streamer

SIC Novelas is the name of the FAST channel which will premiere on SIC's own streaming service OPTO this week. As the title suggests, the channel will be airing some of SIC's biggest telenovela hits. Francisco Pedro Balsemão, CEO of Grupo Impresa, noted that this will be the first digital linear TV channel in Portugal.



Only 14% of the French are FAST TV users

After a study carried out last summer on the users of FAST TV (Free Ad Supported Television) in France, iligo has again questioned them in order to find out that only 14% of them have used FAST TV platforms. French users perceive FAST TV rather as a way of discovering new content, i.e. +23 points (83% in February 2023 vs. 60% in July 2022), placing itself in the top position, while more and more users in France consider that FAST TV saves time - one aspect that also improved by 23 points (82% in February 2023 vs. 59% in July 2022). According to iligo, this viewing mode meets the expectations of 71% of them (vs. 56% in 2022).

Danish prodco opens AI division

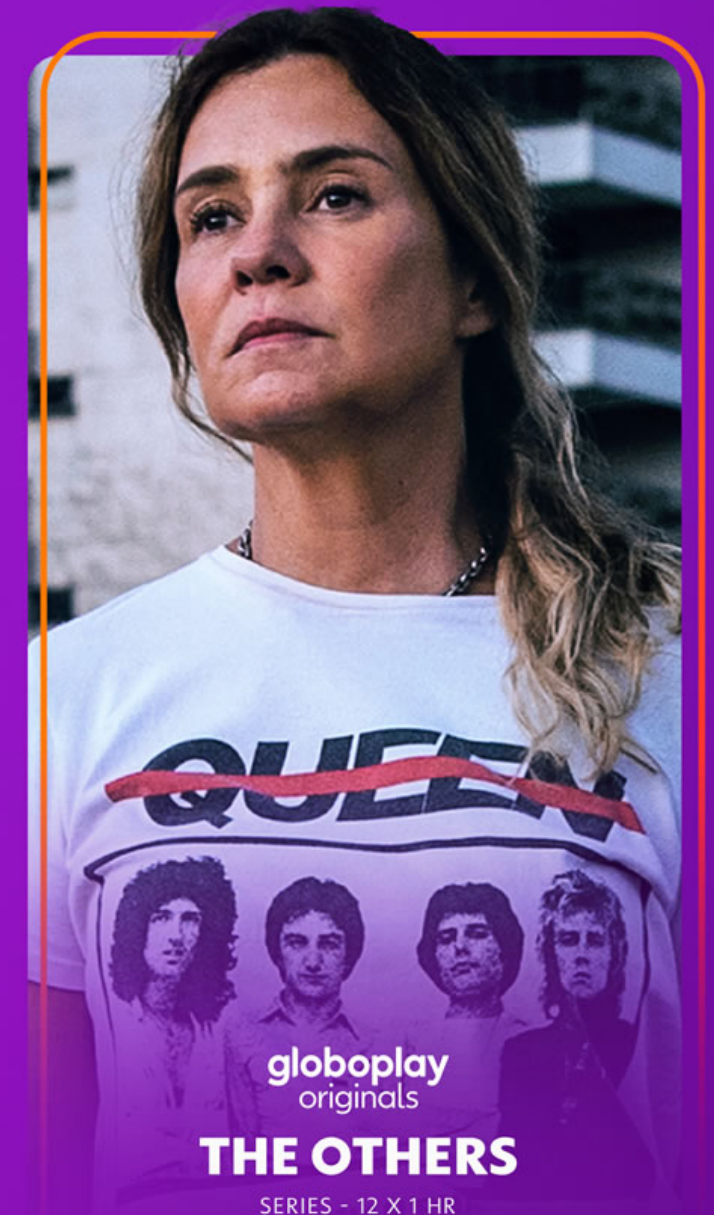
The production company Fern is opening a new department with a focus on artificial intelligence, which will be called Fern.AI, markedsforing.dk reports. The company is betting that by being one of the first to open a department dedicated to artificial intelligence, it can help shape the debate in the field, save money on certain productions and stand out from the competition. "We have no market analysis, but I have no doubt that there will be a great demand for AI-created campaigns. Of course, there are also commercial interests, because AI will certainly be an important player in the future," director and founder Jeppe Kolstrup said. Dimitar Bochukov will serve as Head of AI.



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