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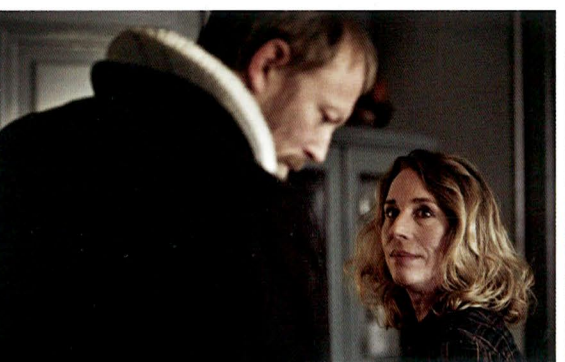
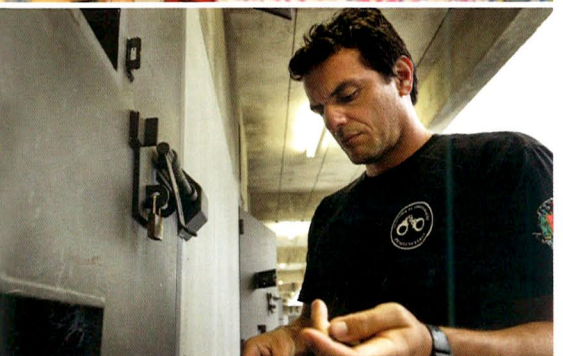
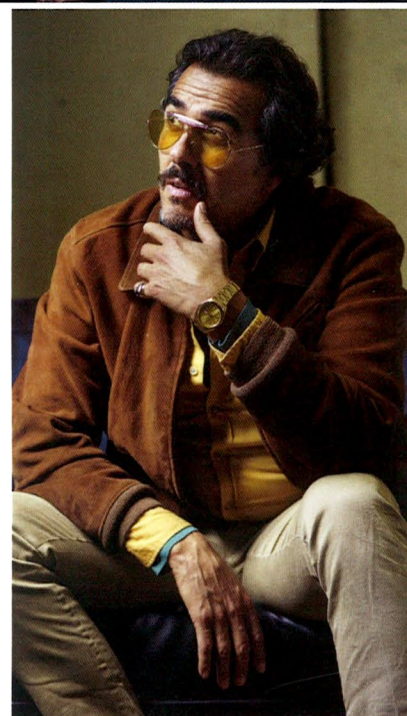
Special Report

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## DRAMA SPECIAL REPORT





## DRAMA TRADE ROUTES



Ay Yapim's *Ezel* was among the top-15 shows in Panama in 2016

The trade routes on the global TV map are being redrawn, with emerging economies challenging the established drama strongholds — the US, the UK and Europe — as suppliers of in-demand hits. Juliana Koranteng reports

**P**REMIUM scripted narratives are increasingly being sourced from and sold to countries that were not on the major sales-and-acquisitions radar a decade ago.

In 2017, you can find Turkish dramas — also known as dizis — being sold for primetime viewing in the Middle East, Asia and, most recently, Latin America. Fans of Korean soaps in Latin America, China and India tweet about the latest twists and turns.





# NEW FACES, NEW PLACES

The stars of Indian TV hits are discovering new fans as far away as Europe and Latin America. Latin America's dubbed Spanish-language telenovelas flicker on screens as far away as Turkey, the Middle East and Africa. And more than a few award-winning TV dramas, from the US to China, can track their origins back to Israel.

In addition to pleasing the African diaspora, Nigeria-originated English-language Nollywood films are now being created as TV series as well — a move that has also opened

up opportunities to reach new foreign audiences.

"Those territories are becoming more and more interesting as they find their own voices and start to tell unique but at the same time universal stories that are appealing to both their own markets, and internationally," says Munich-based Amelie von Kienlin, vice-president of acquisitions and co-productions at Red Arrow International.

Meanwhile, sophisticated, middle-class audi-

ences in more countries are embracing subtitled fiction. Bold broadcast commissioning editors are taking more risks and funding new narrative structures designed to retain viewers' attention, especially among today's hard-to-reach millennials.

And the rise of OTT streaming platforms — Digital TV Research predicts 383 million subscription VOD customers by 2021 worldwide, from 163 million in 2015 — offers exposure opportunities for gripping storytellers, wherever they are.





Ay Yapim's Brave And Beautiful

## TALES FROM TURKEY

Turkish scripted series, considered the second biggest export of their kind after US dramas, are thriving. About 80% of the drama catalogue at Istanbul-headquartered Global Agency is Turkish, says Senay Filiztekin Turan, head of drama acquisitions.

With international hits including the romance-themed 1001 Nights, Love And Punishment, Magnificent Century and Endemol Shine Turkey's Broken Pieces, Global Agency has placed dramas in all the major TV markets. Turan says business is soaring in the Middle East, with Dubai, Egypt, Lebanon and Morocco among the biggest buyers of Global Agency dramas. That is because "certain cultural codes are mutual to contemporary Arab societies and Turkish society," she adds. "The

characters in Turkish TV series have plenty in common with Arab audiences. Our culture also bridges western and eastern values." The Middle East is followed in terms of sales success by Central Eastern Europe and Latin America.

Turan credits the family-oriented themes, high production values, strong original scripts, compelling locations and original music for Turkish dramas' popularity in Latin America.

Turkish telenovelas are famously long, delivering between 60 to 400 episodes per season. Although rare, some can be sold for as much as \$400,000 an episode, making them popular with distributors.

Fredrik af Malmberg, managing director of Stockholm-based distribution giant Eccho Rights, says his company benefitted

from recognising early on the huge potential of Turkish dramas outside the English-speaking markets. He cites Ay Yapim's Brave And Beautiful and soap opera Elif (created by Green Yapim). "We've since sold to every country in the world and done multi-million deals very recently," he says. "Sales [of Turkish drama] started in the Middle East, then Eastern Europe and then Pakistan. Today, what works in Turkey will work anywhere in the world."

Malmberg also points to the demand for Turkish drama in Latin America. Among the top-15 shows in Panama in 2016 were Ay Yapim's Ezel and Que Culpa Tiene Fatmagul and MF Yapim's Sila on the TM network, and El Sultan on TVN. In Uruguay, Que Culpa Tiene Fatmagul on Saeta TV Canal 10 was the second biggest drama hit last year.

"Mega network in Chile had been struggling when it decided to try out Turkish drama two-and-a-half years ago. After one year, the network leapt to number-one slot from number five," Malmberg says to illustrate Turkish drama's impact on local viewing habits.

Four of the top-10 dramas in Chile last year were Turkish or an adaptation of a Turkish show, including the original Fatmagul made by Ay Yapim for Mega, which topped the chart with more than 12 million viewers.

Eccho Rights was selling Elif, originally launched on Turkey's Kanal 7 in 2014, to platforms in Paraguay, Hungary, Puerto Rico, Pakistan and Honduras as recently as March this year.

Another coup for Eccho Rights was the sale of Cherry Season, made by Surec Film for Turkey's Fox network, to Italy's Mediaset last year. This made it the first Turkish drama to air on a mainstream Italian network. It gained enough interest to bring the Turkish cast over to Italy for a promotional visit.

The viability of Turkish drama as a global business has also inspired a number of major Western operations to set up shop in the country. Red Arrow Entertainment Group, for example, is opening an office in Turkey via US subsidiary Karga Seven Pictures. Global pro-

The characters in Turkish TV series have plenty in common with Arab audiences. Our culture also bridges western and eastern values

Senay Filiztekin Turan





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Now, instead of quantity, it's quality that has become the filter. What constitutes a premium show isn't about where it comes from, but how it is made

Walter Iuzzolino

duction powerhouse Endemol Shine Group also operates a major unit in Turkey, which made global bestseller *Intersection*, a 13 x 60 mins drama that debuted on Fox Turkey in January 2016. Cathy Payne, chief executive of the group's distribution arm Endemol Shine International, reports that the company sells its original Turkish IP to the Middle East, where "Turkish drama is providing competition to local Arabic content".

For Manuel Miguez, Fox Networks Group's Miami-based executive director of content distribution, Latin America and US Hispanic, selling Turkish soap operas to Latin America makes sense because of their similarity to telenovelas. "Turkish dramas have been able to find a home there," he says. "Latin American networks and programme executives have had it easy integrating those titles, because it is consistent with what they are used to."

season and has been licensed to 15 Latin American countries, pan-regional network Pasiones and the US Hispanic net Telemundo. Other short-run hits placed by Fox in Latin America include *Call Me Bruna*, a 8 x 60 mins series co-produced by Fox Latin America.

Fox is also pushing boundaries for Latin American-made shows aimed at both local and international markets. An 11 x 60 mins (plus a two-hour finale) sci-fi thriller called *2091* features a futuristic Hunger Games-style storyline starring telenovela superstars. Already re-commissioned, *2091* was made by Bogota-based Fox Telecolombia.

That new wave of Latin American fever is spreading to major western TV markets, including the UK, where Walter Presents, the popular on-demand streaming platform dedicated to foreign-language dramas, had been championing Nordic Noir. "Now, instead of

quantity, it's quality that has become the filter everyone uses. What constitutes a premium show isn't about where it comes from, but how it's made," says Walter Iuzzolino, co-founder of Walter Presents, which is partly owned by UK commercial public service network Channel 4.

As chief creative officer at Walter Presents' operator Global Series Network, Iuzzolino hopes to lure British viewers to original Latin American shows: "Move over Scandinavia — embrace Latin America! It used to be Scandinavian and French drama. But as much as we love the Calvinistic, repressed Scandinavia protagonists, we also embrace Latin America's visceral, bloody, Catholic-infused, guilt-ridden culture."

Via the Walter Presents partnership, Channel 4 will launch Brazilian dramas *Merciless*, about a serial killer, and *Magnifica 70*, about

## HOT IN LATIN AMERICA

Endemol Shine Group has also tapped into the massive Latin American drama market, which is expanding its telenovela heritage and other TV fiction into areas beyond Spanish-speaking Hispanic US and Europe. Production on the second season for the 13-part music industry-centred dramedy *El Vato* kicked off in January. It was co-produced by Miami-based Endemol Shine Latino and Universo, the NBCUniversal-owned Spanish-language cable network.

A 13-episode run of a Spanish-language scripted series shows how shorter dramas are being introduced into a region more familiar with telenovelas' 100-plus episodes. Another example is Canal+'s eight-part adventure thriller *Ouro*, which has been sold by France-based Newen Distribution to US satellite platform DirecTV for its Spanish-speaking Latin American footprint.

Fox's Miguez believes Latin American creators are being influenced by the shorter-run high-end dramas that do well in the Western markets.

That Is My Life, a remake of a Turkish series produced by Pastel Film, is in its fourth



Endemol Shine Group's *Intersection*



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Fox Telecolombia's 2009

the adult-entertainment business; Chilean drug-smuggling drama *Fugitives*; and Mexico's *Mr Avila*, about an assassin who leads a double life. The latter is "a bit Tarrantino, a bit Pedro Almodovar," Iuzzolino adds. "People who adored Scandinavian drama will love this as well."

Meanwhile, Israel-based Keshet International has formed a partnership with US-based Spanish-language TV operation Telemundo Studios to create the first original Spanish-language scripted series and formats to be marketed internationally under the Keshet International banner.

## HOORAY FOR BOLLYWOOD

The Bollywood legacy has made Star India, the 21st Century Fox-owned subsidiary, a profuse producer of international content. After selling shows to more than 100 countries,

Star India is still on a roll.

"The contemporary approach to our dramas enables them to cross over cultures and engage with audiences worldwide," says Gurjeev Kapoor, Star India's president of international business. "They are not just popular in Asia, Europe and the Middle East, but also in Turkey and Latin America, which are traditionally considered to be markets with extremely strong locally produced content." Last year, Star India saw romance series *Iss Pyaar Ko Kya Naam Doon* (Strange Love), already a hit in 45 markets, become the first Indian drama series to air in Turkey. It proved so popular for Kanal 7 that more than five Indian dramas have since been sold to the country. That feat was repeated in Latin America, where another series, *Saraswatichandra*, became the first Indian drama to air in Chile, Argentina and Panama. Kapoor, whose company also distributes con-

tent via a partnership with Echo Rights, says there is more to conquering new territories than simply making a good sale. "We regularly collaborate with local partners to drive deeper engagement and ensure a holistic brand experiences," he adds. "Our viewers in Turkey, Thailand and Indonesia have been a part of these immersive experiences, which drive a lot of positive conversations across local and social media."

## BEST OF MIDDLE EAST

Arabic-language shows sell mostly to the Arabic-speaking markets, says Endemol Shine International's Payne: "Arabic content is catering to its own."

And Echo Rights' Malmberg cites figures from international research firm Ipsos, which show the share of Western drama on TV in Arabic-speaking countries plummeted by an

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Gurjeev Kapoor



We have seen a growing appetite for Korean dramas in North America, both with the major digital platforms and multicultural broadcasters

Aliy Brown

average of 55% between 2010 and 2016. During the same period, the share of Arab content jumped about 40%.

However, it is Israel that is spearheading international recognition of its home-grown talent. Keshet International's taut Hebrew-language political thriller *Prisoners Of War* debuted in 2010 on Israel's Channel 2 and immediately demonstrated how far a well-crafted local story can travel. It was picked up and adapted by Fox 21 Television Studios into *Homeland*, the multiple award-winning English-language blockbuster series. Finished and formatted editions of *Prisoners Of War* have now been sold to 20-plus countries.

Moreover, a number of other Keshet formats have found homes abroad, including *The A Word* in the UK and Greece; *Loaded* in the UK, with Chinese and Mexican versions in the pipeline; *Traffic Light* in Russia; and *The Baker And The Beauty* in the Netherlands and Russia.

"Due to *Homeland*'s success and the

growth in OTT platforms, the appetite for non-English-speaking series is growing — and Israeli drama is high on the list," says Keren Shahar, Keshet International's chief operating officer and president of distribution. "Our industry has changed over the years and so have the commissioners. We have seen a more open-minded approach in the industry itself to bring stories that are not coming from the usual English-speaking suspects, and viewers have become more educated about their options."

## OUT OF AFRICA

Once considered as travelling nowhere, made-in-Africa stories by African producers have started their own sales voyage across the globe. It kicked off some five years ago with Nigeria-originated movies from Nollywood being distributed to the English-speaking African diaspora via niche streaming platforms such as iROKOtv.com.

Jason Njoku, CEO of parent company Iroko,

says diversifying the movie repertoire to include original quality TV drama, such as *Husbands Of Lagos* and *Single Ladies*, has broadened his company's international audience: "Through our sister company, Rok Studios, we have since produced and co-produced around 150 movies. Where we've really made a considerable impact is with our TV series. To date, we've produced 13 series, with many more in the pipeline."

In addition to its fans in Western territories, Iroko is growing iROKOtv's business across both its home market and the African continent's satellite TV channels and mobile apps.

"Our content is also becoming more popular within Nigeria, especially as it is more accessible than ever before," he adds.

Adding TV series has also broadened the network's appeal overseas, with iROKOtv gaining more viewers in French-speaking Africa, as well as the Pacific Ocean territories of French Polynesia, Micronesia and Melanesia. Cathy Payne says that Endemol Shine has



Filming iROKOtv.com's *Husbands Of Lagos*



created scripted content, mostly daily soap operas, for Africa. "Our African dramas are sold to multi-territory broadcasters such M-Net or [South African broadcaster] SABC," she adds. "And there are big networks like Econet Media's Kwese TV that are attached to mobile operators, which is leading to the growth of VOD platforms."

## MADE IN KOREAN

In addition to its massive following domestically and in its neighbouring Asian markets, South Korean scripted entertainment is now

being carried further afield, says Aliy Brown, director of distribution at Canada-based 108 Media.

"We have seen a growing appetite for Korean dramas in North America, both with the major digital platforms and multicultural broadcasters throughout Canada and the US," she says. "We also foresee that Korean daytime dramas will start to increase in popularity in Latin America and be adapted as telenovelas, as they are quite similar in style."

Eccho Rights represents the international sales of drama from Korea's CJ Group, while Keshet International has the worldwide dis-

tribution rights, excluding China, Hong Kong and Macau, to youth-focused You Will Love Me. The 16 x 60 mins romantic comedy premiered in 2015 on Hyundai Media's Drama H and Trendy TV channels.

Endemol Shine's Payne points out that Korean drama is popular in China and Japan. And Fox's Manuel Miguez adds that, in recent years, there has been a rise in the popularity of Korean telenovelas in Latin America. "They have found a space in Argentina, Colombia and Chile, where they are dubbed," he says.



- 1 - Endemol Shine's Cathy Payne
- 2 - Eccho Rights' Fredrik af Malmborg
- 3 - Keshet International's Keren Shahar
- 4 - Walter Presents' Walter Iuzzolino
- 5 - Iroko's Jason Njoku
- 6 - Star India's Gurjeet Kapoor
- 7 - Global Agency's Senay Filiztekin Turan