European Magic

Dramas from across Europe are being embraced by new audiences around the world.

By Kristin Brzoznowski

It’s a fine time to be a producer or distributor working in the European drama business. The market for scripted coming from the Continent is in rude health, as there’s a heady mix of U.S. pay-TV players looking to partner on premium content, American broadcast networks eyeing adaptations of non-English-language scripts, local channels embracing the appeal of homegrown fare, and, of course, streaming platforms expanding their ever-growing arsenals of originals. From Scandinavian thrillers, British murder mysteries and Russian period pieces to German miniseries, Spanish fiction and Turkish family dramas—and pretty much everything in between—stories with European roots are traveling now more than ever.

“It’s been booming,” says Nicola Söderlund, managing partner at Eccho Rights, which represents a varied catalog with series from Spain, Turkey, Scandinavia and elsewhere. “One of the reasons is because American series don’t dominate the grids like they used to. A couple of years ago, they were filling prime time for many [international] broadcasters, but they don’t work that way anymore. They needed to be replaced by something. The natural replacement for these series would be European dramas, and that’s what we’re seeing.”

Romain Besl, managing director of Newen, observes, “Ten years ago, of the top ten dramas on the main channels (across Europe), more than half would be American shows. Now, ten out of ten are local dramas. Local dramas are performing much better in their domestic markets, and they are traveling better.”

It used to be mainly stories from the U.K. that traveled, having an advantage of being in the English language, along with fare from smaller countries like the Nordics. “That was because they could not find in their domestic country enough money to finance their dramas, so they needed to talk to international players such as distributors or other channels,” Besl explains. “Until recently, French drama didn’t have to look for other financing since there was soft money and license fees. The channels were very healthy and investing a lot. Over the last three or four years, the traditional players have had more difficulties locally, challenged by the expansion of global players. They are now bringing less money; it’s still substantial, but it’s less. French producers have to look for more money from the international market, mostly from distributors, and for this, they will have to take international needs into account.”

FRENCH CONNECTION

Besl adds that if you combine this with the fact that the movie industry in France, like many other markets, is dealing with financial problems, “you will understand that there can and will be a creative shift toward drama. Many writers, directors, producers and actors are moving into the TV space. So there is access to more talented people who come from an industry that has been successful and creative over the last 50 years. It’s a combination of those two things that is going to improve the perceived quality of French series.”

Russia’s drama-series industry is a relatively young one but it, too, has seen strong gains. “In 2001, only 50 series were produced, but now more than 250 are done yearly,” says Julia Matiasch, the director of Sovtelexport, the distribution arm of Russia Television and Radio. “At least 75 percent of
broadcast content in Russia is locally done, and at least 40 percent of broadcast time is given to series."

She notes that Russian product has been traveling in the international market for more than 15 years but has seen a nice uptick in the last few. This has been spurred along by "new, ambitious production companies" that have now gained solid experience and are "willing to invest in international promotion much more than before."

The country is well-known in the global market for its period dramas. "Russian history, czar dynasties, its imperial and Soviet past—all of this provides rich material for creating major projects on the same level of production as the best international ones like Medici: Masters of Florence, The Tudors and The Crown," says Matiash. "At the same time, our historical dramas stay relevant and appealing to contemporary audiences with their compelling stories, characters and acting, which are traditionally strong in Russia."

Alongside period dramas, global buyers are particularly interested in screen adaptations of Russian classics. "This kind of classical drama is appealing to the broadest audience possible," Matiash says, highlighting the "complicated characters in the most dramatic circumstances, impressive battle scenes; gorgeous and realistic locations, decorations and costumes; and the highest local production budgets."

**TURKISH DELIGHTS**

Turkish tales have been making their way around the globe since 2001, starting with the Balkans, the Middle East and Latin America, thanks to cultural similarities. "In the following years, international demand increased so much that Turkey became the world's second-largest series exporter," says Can Okan, founder and CEO of Inter Medya. "The demand for Turkish series is still very high, with the major TV channels producing an average of 70 new soaps per year, and there is no end in sight."

Okan credits the "high production standards and unique stories" as being drivers of this success. These stories often reflect the balance between old and new. "This makes the content unique and gives it a head start in the international market," he says. "Tradition is still very important in dramas, but modern conditions and thinking are playing an increasingly important role. The conflict between tradition and modernity, past and present, creates an incredibly rich environment for a Turkish romantic drama."

Kerim Emrah Turna, executive director at Kanal D International, says that the vast majority of the scripted series coming from free TV in Turkey can be characterized as family dramas. "Lately, we are producing a lot of action dramas, miniseries and historical dramas," he adds. "We have shown what kind of high quality we can reach."

Turna highlights strong sales for Kanal D's dramas in the Americas, Europe, Africa and most parts of Asia. "Broadcasters are aiming to get more traffic, and our content, which is very high quality, is creating a huge amount of viewership that helps the broadcasters to maximize their revenues." Ismail Dursunov, deputy general manager of Calinos Entertainment, points to strong interest from Latin America but notes that new markets are opening up. "After the success Turkish series received in Spain, all attention is now on the rest of the countries in Western Europe. The Far East is also an attractive market for us and we would like to expand our presence there further."

"Turkish dramas are still receiving a huge amount of interest from every part of the world," agrees Aysegul Tuzun, VP of sales and marketing of MISTCO, which represents the TRT library. She says that the stiff competition in the local TV market and the prolific producers it's home to have been key factors in achieving success on the global stage. "There are many high-quality productions in the market, and the biggest reason behind that is the capacity of storytelling, which is a famous Turkish tradition for dozens of years."

Production quality has also been rising in Spain, helping to drive interest on an international level. "There are wonderful

The first-look deal between Netflix and Spain's Atresmedia includes the thriller *Toy Boy,*
showrunners, good stories and good filmmakers,” says María Jesús Pérez, international sales director for RTVE. “After several international hits, it is much easier for Spanish dramas to find new distribution opportunities.”

SPANISH FLAIR
Among those international hits is La Casa de Papel (Money Heist), the Spanish-language heist thriller that became the most-watched non-English series on Netflix ever. Following this success, Atresmedia Televisión landed a deal with Netflix to get a look at new titles produced under the Series Atresmedia label.

José Antonio Salso, head of acquisitions and sales at Atresmedia, says that the company’s scripted series have been sold into 120 countries around the world, highlighting Velvet and Grand Hotel as dramas that have performed particularly well internationally.

“There is a boom of Spanish drama, not only in Spanish-speaking territories but also in the rest of the world,” says Silvia Cotino, head of sales at Mediaset España. “The Spanish content production quality is really high, and in a globalized era, stories are traveling in an unstoppable way. We now have a double challenge: to access new territories and keep up with the needs of our clients.”

Meanwhile, the hallmarks of German dramas are “production value and mainstream appeal,” says Robert Frank, VP of ZDF Enterprises. “The programs from our channel tend to resonate with really broad target audiences when picked up and often outperform comparable English-speaking projects. Germany is very well-known for long-running series and event miniseries as well as TV movies. Many of these programs are being produced with budgets equal to or higher than theatrical production costs, so there is a lot of screen value along with carefully crafted stories with mainstream appeal.”

“We see a growing appetite for local productions, and German drama is definitely striking a chord with this trend,” notes Alexandra Heidrich, head of TV sales and acquisitions at Global Screen.

Many German dramas air in the 2x90-minute format, but for the international market, Global Screen often repackages its event productions as 4x45-minute miniseries. “We have been very successful with this format and have sold Rivals Forever: The Sneaker Battle into more than 20 territories,” says Heidrich.

Spanish series, meanwhile, used to have a length of about 70 minutes per episode. “It was a difficult format for the international market, and we had to reverse various titles to adapt them to our clients’ needs,” says Atresmedia’s Salso.

For its new productions this year, the company will be doing 50-minute episodes. “Following the new Atresmedia strategy to reduce the length of the prime-time slot and the ad breaks, we were the first ones in Spain to change and adapt to the international market. We think it is a key movement that both the audience and clients will like.”

MISSTCO’s Tüzun says that typical episodes in Turkey are around 150 minutes, “but for international broadcasters, we create 45-minute versions for each episode.”

The arrival of local OTT services is also leading to different lengths and formats, she adds. “The emergence of Turkish VOD platforms has opened up a new branch for Turkish dramas that are 60 minutes instead of 150 minutes, and some of these new dramas have become quite successful.”

“Turkish series usually take two and a half hours per episode, filled with romance, family quarrels and drama,” says Inter Medya’s Okan. “These Turkish-length episodes are edited into three episodes of one commercial hour each” for the international market.
Okan, too, notes that the introduction of Turkish digital platforms is shaking things up. "These streaming platforms invest in original series and try out a new way of storytelling. The projects are bolder, edgier and have shorter (running times) compared to classic TV projects. This birth of original digital content is an important event in the Turkish TV landscape. These new series are shorter in length to meet the international standards and are, therefore, easier to consume and sell, especially to the Nordics, Eastern Europe and Asia, where traditional Turkish drama is less popular."

Much like what has happened in the U.S., the voracious appetites of global OTT players have had an enormous impact on the production industry in Europe as a whole. Netflix, for one, invested a reported $1 billion in new content with European roots last year and is expected to produce or co-produce more than 200 projects in the region this year. Amazon, too, is ramping up its European ambitions. And this is poised to intensify, as the European Parliament has approved new regulations for online streaming services, imposing a quota for homegrown productions on the likes of Netflix and Amazon. The guidelines will require that at least 30 percent of content carried on streaming services operating in the EU originates from the region. On-demand platforms are also being asked to contribute to the development of European films and TV series, either by directly investing in content or by contributing to national subsidies.

"The level of commissioning might even be too much," says Eccho Rights’ Söderlund. "I wonder if there is enough talent to produce all these series at a reasonable quality. Given the demand for experienced talent, the prices will go up because of this."

There’s also an impact on the quality of European drama, he says. "The free-TV stations feel the competition from the streamers, and they need to step up their game. So the budgets have increased all over the place, and the quality has increased as well. That has an impact on everything. The gap between what the broadcasters give and and the streamers give and the production budget is bigger than before. That gap is supposedly covered by agents like us, but since there is such a big output, it’s very hard to cover that gap. It’s not a market that’s in balance. There are not even enough eyeballs to view all of this content."

QUALITY CHECK

With everyone competing on a global level nowadays, the demand for higher production values is increasing, and so is the need for having big stars on board a project. "The only way for some of the free-TV stations to compete is to co-produce with other countries," says Söderlund. "Otherwise, they can’t afford the budgets that are required."

A+E Networks recently embarked on its first international scripted co-production, Miss Scarlet and the Duke, in development with Element 8 Entertainment. The series is described as a full-throttle crime drama about the first-ever female detective in 19th-century London.

Richard Tulik-Hart, managing director of international content sales and co-productions, says that A+E Networks has kept a close eye on how the proliferation of streaming platforms has bolstered opportunities for series to gain audiences outside their home territories. "Our feeling is that some shows will work better in the linear space and others better in the SVOD space," he says. "If we see that a show can work and grow on an SVOD platform then we will look to work with them outside the territory of commission. In the case of Miss Scarlet, we felt the show’s longevity was more guaranteed by bringing big free-to-air broadcasters on board in a number of territories while we tried to build up the brand and audience."

Sovtelelexport’s Matiash says that OTT and digital platforms are especially convenient for first-step penetration into markets. "They provide an opportunity to be delivered to new audiences, the ability to get high-quality local dubbing, which can be used for further sales, and perform as a focus group for the local TV channels," she adds. "The

Wounded Love has been a huge hit in Turkey and a strong seller for Kanal D International.
popularity of a title on digital drives interest from other players." Matiash cites an example of the binge-viewing success of *Ekaterina* on Amazon Prime helping lead to three deals with European TV channels within one month.

**NEW HORIZONS**

Russian drama, she says, has traditionally been popular in Eastern Europe, the Balkans and former USSR countries. "The last five years were rather difficult, considering the loss of the very important Ukrainian market for us and new political trends. Nevertheless, our series have shown good results on the main channels in Serbia, the Czech Republic, Bulgaria, Croatia, Bosnia and Herzegovina, Romania, Greece, Cyprus and Poland."

Latin America is also on her list as a promising market. Sovtelexport likewise has its eyes on the MENA region, as well as parts of Asia.

For Spanish dramas, meanwhile, there has been plenty of good business in the Americas, "mostly due to our cultural and language affinity," says RTVE's Pérez. "In the last few years, we have seen increasing interest for our dramas in the Middle East and Eastern Europe."

MISTCO's Tuzun lists Latin America and the Balkans as popular markets for Turkish fare. "Regarding new opportunities, we have started doing business with Russia and CIS countries, and we believe that Africa will become a new market for Turkish dramas as well," she adds.

"Latin America is still a huge market for Turkish series," agrees Inter Medya's Okan. "You will find at least one Turkish series airing on almost every channel there. A new market is Spain, which has the advantage of enabling us to export our series to other regions in Europe. *Black Money Love* was sold to Atriansmedia and *Endless Love* to Mediaset [España]. These two series attracted millions of viewers, increasing the channels' average shares."

Kanal D's Turna echoes that Spain is currently a hot market for Turkish titles, with the company notching up a number of recent deals. "As it is a Western European country, this is an important milestone for us," he says. "This shows that we will also be able to break some walls in core Western European countries like France, Germany and the U.K., and then, hopefully, English-speaking U.S. and Canada."

Turna is eyeing new opportunities in East Asian markets. "We think that our storytelling is very similar, and so are the subjects and core values," he says.

**REMAKE FEVER**

Eccho Rights' Söderlund mentions that while sales of finished European dramas have been thriving, the market for scripted formats is increasing right along with it. "There's an enormous demand for new shows because of all the streamers that have come in and are commissioning. I don't think there are enough talent and ideas to cover that demand. So what do you do? You look at existing series that are successes and make an adaptation."

"The interesting thing is that European drama can travel either as a format or as a tape," says Newen's Bessi. "European countries have good stories, talent, soft money and important local players, and [digital] platforms are bringing more resources. Local players will always be the main partners for local drama, by far, but global platforms will facilitate its international expansion."