BRAVE NEW DRAMA

When it comes to barometers for what’s hot in the world of entertainment, there are few better gauges than the annual Comic-Con festival in San Diego. Though the fan event is a leading platform for studios to introduce new movie franchises, in recent years the latest superhero flicks have had to share the stage with a wealth of buzzy TV dramas, reflecting the rising importance of scripted series to the average consumer’s entertainment diet.

Indeed, of the top ten properties that generated the most social-media buzz at Comic-Con this year, six were TV dramas—led by AMC’s massive hit The Walking Dead. Other shows that made waves at Comic-Con included HBO’s Game of Thrones, AMC’s Fear the Walking Dead, Starz’s Ash vs. Evil Dead and FOX’s The X-Files reboot.

What’s also changed is America’s dominance in the global supply of drama. While there’s no denying that U.S. fare continues to deliver big audiences worldwide, the drama business appears to be booming everywhere. And against that backdrop, the battle is on among producers, broadcasters and distributors to land the best projects, wherever they may hail from.

“It is very competitive,” observes Ruth Clarke, the executive VP and director of acquisitions and co-productions at ITV Studios Global Entertainment (ITVS GE). “There is so much fantastic drama, and there are new drama production companies popping up all the time with great ideas, but the number of commissions is limited. It’s really about finding the right projects that will get support from the broadcasters.”

BROADER HORIZONS

As for what it is that broadcasters are seeking out, the answer appears to be, a bit of everything. Buyers and commissioners are more open to experimenting with new ideas, says Henrik Pabst, the managing director of Red Arrow International.

“Everybody needs their returning procedural,” he says, “We have lots of serialized content that is, when it’s not too complex, working on broader channels; otherwise, it’s going on pay TV platforms. There are still slots where you can test out Scandi crime, or that are open to international co-productions that may not be U.S.-driven.”

Liam Keelan, the director of scripted content at BBC Worldwide, backs Pabst’s perspective, noting, “People are choosing much more varied slots than they did a year or 18 months ago.”

As serialized storytelling has found more and more fans across the globe, “it’s almost surprising what will work now,” says Kylie Munnich, the director of drama and comedy at Sky Vision. “The ability to watch on-demand as well as in a linear environment means that you don’t have to dumb down the drama for any audience. Audiences appreciate complex and complicated stories, so broadcasters are coming to us looking for something that stands out. It’s exciting when you read about what succeeds across the world—there’s a massive variety. And it can come from any country—it’s not just coming from the U.S. or the U.K.”

For Sarah Doole, the director of global drama at FremantleMedia, the series Deutschland 83 could serve as a case study of just how much the international business of drama has changed in the last year. “This time last year [July 2014], it hadn’t even started shooting, and I was in New York persuading Christian Vesel at SundanceTV to read the script. Within a year we finished the series, presold it across the world without a frame going on television and brought SundanceTV on as a full-blown co-producer. I was at lunch with a network executive from another US channel and she said, Why didn’t you bring us Deutschland 83? And I thought, because this time last year everybody thought we were crazy trying to get a German show on an American network? That’s a milestone for the great storytelling by our guys out of Germany, and for where European drama is heading.”

For all the headlines that serialized shows generate, there remains a clear demand for the types of procedurals that have sustained broadcasters for decades. ACCORDING TO PROCEDURE

“Broadcasters used to get a lot of procedurals through their [studios] output deals,” explains Stuart Baxter, the president of Entertainment One (eOne) Television International. “And even the studios aren’t delivering as many of those as they used to. The ProSiebens, the TFIs, the Mediasets, the Antena 3s, a lot of them are developing co-production partnerships, development partnerships, specifically to need, fund and identify these more procedural-type shows.”

FremantleMedia’s Doole also believes that “there’s a real dearth of great procedurals out on the market. The American networks have moved toward more serial drama. So I think we will see the emergence of procedurals done in a cleverer, more modern way. There’s a commercial need for them, as broadcasters can amortize the cost—they can run those episodes over and over again.”

Alexander Coridass, the president and CEO of ZDF Enterprises, confirms that broadcasters, while open to serialized shows, are still in need of repeatable procedurals to fill their weekly drama slots. “Long-running series are still very popular, especially crime and medical,” he notes.
Whatever the subgenre, Cordlass says that the most important factors to look for are “quality and the right package. Outstanding content such as The Killing and Bron have opened up new slots and established a trend. We believe in superior content more than in mathematical factors for success.”

At eOne, Baxter has a few elements that he has an eye on when determining if a drama can cut through the clutter. “The quality of the writing always has to stand out,” he says. “The world that it’s set in has to have some sort of originality. There’s got to be a twist in the character, in the framing of the story, in the setting. And then the feeling that it will travel, that it will appeal not to a specific geography or even to a specific narrow niche, but that it will appeal broadly around the world. Those are the three things that are most important to us.”

For Katrina Neylon, the executive VP for sales and marketing, TV series, at STUDIOCANAL, “It all comes down to the story, with well developed and creative writing and compelling characters. Some of these stories can be local yet at the same time have a global appeal.”

As an example, Neylon mentions Harlan Coben’s thriller The Five, which STUDIOCANAL will be showcasing at MIPCOM. “It is set in Liverpool, but you have never seen the city in such a modern way. With the cinematic look and the gripping story, The Five could be set in any modern city in the world—and this is exactly what the buyers are looking for.”

Alexandra Heidrich, the head of TV sales and acquisitions at Global Screen, observes that the “demand for WWII or Nazi topics seems endless.” Also hot commodities, she notes, are crime and romance. Indeed, two of the company’s top drama sellers are the European telenovela Storm of Love and the German crime drama Alarm for Cobra 11.

Heidrich says that the company’s German-language dramas have been notching up sales across the continent, as well as in Latin America and Asia, for some time now. A new development, however, can be found in Eastern Europe, where Global Screen’s big-budget dramas are now making their way into prime-time slots.

**EUROPEAN SUMMER**

This speaks to a trend expressed by ZDF Enterprises’ Cordlass: “There are more and more possibilities for European content to compete with U.S. series on certain slots.”

It’s a particularly fruitful time for scripted content in Europe, which is increasingly making its way to foreign shores.

“We have put even greater emphasis on project developments in key European territories such as the U.K. and Scandinavia,” says Cordlass. “We have partnered with two U.K. companies, BonaFide Films and Projector Pictures, on a first-look basis. We believe in the potential of a great idea brought to life with the right package of writers, producers and directors, who are ready to come on board early for projects with international appeal.”

The cross section of European dramas ZDF Enterprises will be touting at the market this year include the Scandinavian series Vita Hate and The Fourth Man, HBO Europe’s Watana and two German shows, Sibel & Max and From Istanbul with Love.

Europe’s biggest generator of top-selling drama today is the U.K., where eOne has stepped up its co-production activities over the last year or so. The company has a deal with Eleven Film that has resulted in two shows, E4’s Glue and Sky’s The Enfield Haunting. It is also now eying opportunities elsewhere in the region, having inked a deal for its first French co-pro, Ransom, set for TF1 and produced in partnership with Shaw Media.

“We weren’t in European production a year ago,” says Baxter. “Now we’ve got three in the U.K., one in Scandinavia and one in France.” FremantleMedia has an extensive slate of British drama, but it

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Scandinavian crime continues to be a strong seller for ZDF Enterprises, which arrives at MIPCOM with the series The Fourth Man.

**The Last Panthers**, a British-French co-pro distributed by STUDIOCANAL and Sky Vision, is the MIPCOM World Premiere TV Screening this year.
too has been expanding its portfolio of European scripted titles.

"This time last year, FML, our distribution company, had never sold any drama that wasn’t in the English language,” Doole notes. “Within a year we’ve transformed that business. They’re now selling Deutschland 83 from Germany; Acquitted, the top-rating drama out of Norway, Dicte out of Denmark. And we’re launching, in October, Modus, a fantastic Swedish detective thriller, based on a set of books from Anne Holt, a Swedish best-selling crime novelist.”

Doole has her eye on France and, increasingly, Spain, where signs point to broadcasters now restarting their drama investment endeavors. She is also not taking her eye off the vibrant business in the U.K. “We’re definitely looking to work with more U.K. indies in terms of bringing their shows to market. We’re going to do that in different ways. We might do one or two individual co-developments with an indie on a project. We’re talking to about five indies about that. Or maybe we’ll do some more formal partnerships with drama indies or drama start-ups in the U.K.”

FremantleMedia’s British production business is substantial already, with its revived Euston Films label and Newman Street working on shows like Suspects. And yet the company is still looking outside of its network to further its drama capabilities, as are numerous other distributors seeking out innovative ways to partner with the best talent.

FEEDING THE BEAST

At eOne, Baxter mentions an alliance with Creative England, a division of the BFI. “It’s a joint fund to identify and encourage drama writers to develop projects,” Baxter says. “We will add creative support and input, and then hopefully help those projects go into proper development and ultimately get them made. Creative England is trying to encourage regional diversity, to get producers and writers who aren’t just central London-based—so, people who work in Glasgow and Birmingham and Newcastle. There is a concern that a lot of the industry is progressively becoming more London-centric.”

Other creative alliances at eOne include a partnership with American super-producer Mark Gordon for an indie studio that “finances and produces film, network, cable and digital content” that will be repped worldwide by Baxter’s division. He also references the appointment of Fancho Mansfield to the newly created position of president of global scripted programming “to bring the TV division to the next level.” These follow eOne’s international output deal with AMC Networks. Out of that alliance, eOne will be showcasing Fear the Walking Dead at MIPCOM, alongside another headline-generating title, Into the Badlands.

ITV Studios’ drama resurgence over the last few years has added a wealth of high-profile titles to the ITV Studios GE portfolio. At MIPCOM, the distributor will be unveiling Beowulf and Jekyll and Hyde, both from ITV Studios. ITVGE is also tapping into the slates of acquired companies like Mammoth Screen, the producers of Folded, and joint-venture partners such as Noho Film & Television, which is making the highly anticipated Prime Suspect prequel, Tennison.

"Partly because we’ve been bringing these companies into the organization, more is coming from within ITV,” Clarke says of her current drama slate. “But we’re also working with many third parties. We distribute Scandinavian content like Jordbo and Angelby. We have an exclusive distribution arrangement with 42, and a first-look development deal with Warp Films. It’s a strong mix and that’s really important for us. Our international broadcasters want a vast range of content, and that means that we should be working with a broad range of production companies as we can.”

Red Arrow’s Pabst estimates that up to 75 percent of his drama distribution catalogue comes from third-party producers. His slate includes, from within the network, Fabrik Entertainment’s Bosch, returning for a second season to Amazon Prime, alongside third-party properties like Cleverman, a futuristic drama for ABC Australia, and the ITV event movie Peter & Wendy.

“We’ve built, over the course of the years, a great network of producers,” Pabst says. “Because we are so selective, people like to work with us and we commit ourselves to projects at a very early stage. That means we go in at the script phase of the projects, we share our thoughts on international appeal, we help where needed to increase the value and make the project better. It is the early-stage involvement that helps us get our hands on projects.”

The selection process, deciding what to invest in, is more important than ever, Pabst says. “In drama, there’s a 60 percent to 70 percent flop rate. No one in the industry can change that. You can do everything right, you can have 100 percent convinced of a project, but it can still happen that the viewer doesn’t like it. Everybody who wants to play this game should be aware of that.”

STRENGTH AT HOME

Strategies on how to minimize risk are varied. STUDIOCANAL is tapping into the resources of its storied French film studio. “Starring in high-quality dramas presents strong appeal to film talent, so a lot of the conversations we’re having are around the key talent that we are able to obtain at STUDIOCANAL.”
Neylon observes, "Our library contains over 5,000 titles, including remake rights. We’re producing originals for CANAL+, and our TV production companies—TANDEM Productions, RED Production Company and SAM—are all leading producers with an established track record of success in prime time programming."

Neylon continues, "Our focus is on prime-time dramas that can transcend borders. Our productions have a narrative style and pacing with production values that appeal to audiences worldwide. Expect to work with top-level writers like Danny Brocklehurst and showrunners such as Frank Spotnitz, who understand the story lines that travel across cultural lines and geographical borders."

Co-production partnerships are also helping companies share risks and allowing them to offer up titles that are infinitely more international. The MIPCOM World Premiere TV Screening this year is "The Last Panthers," a collaboration between France’s Haut et Court and Warp Films in the U.K. for CANAL+ and Sky Atlantic. Distribution rights are being shared between STUDIO CANAL and Sky Vision.

"That’s an interesting model, to have two commissioning broadcasters, two distributors and two production companies all jointly invested in the success of an epic series," Sky Vision’s Munnich says. The collaboration process involved “a lot of communication, a lot of dialogue and a lot of trust and respect. It’s actually been a real pleasure to work together, especially when we know we’re going to deliver something that the audience will really love.”

Munnich is not just relying on Sky commissions to fill her drama distribution needs. "We are open for business in terms of finding third-party producers to work with. That could be at any stage in the production as well. We’re looking at scripts, start-up companies and development deals, and also investing in companies, writers and producers. We are out there, just like our competitors, scouring the world for the best dramas."

**DRAMATIC SHIFTS**

BBC Worldwide is heading to MIPCOM with a host of BBC drama commissions, led by the big-budget "War and Peace," Tony Jordan’s Dickensian and the psychological thriller "Doctor Foster," among several others. But even with BBC’s significant in-house resources, Koelen is keen on external partnerships such as the one inked with Atresmedia for "The Refuges." That experience, he says, "was hugely instructive in terms of how to get these shows off the ground. Now people from different media companies around Europe are approaching BBC Worldwide to get involved in other projects."

**HIGHER STANDARDS**

Variety and quality are hugely important for any drama distributor of scale, Koelen says. "You’re dealing with a world where it’s not only the American market on your doorstep via Netflix and other suppliers. There are some amazing dramas being produced in the Scandinavian region, in France, in Germany, so everything has to stand up to a global market now. That wasn’t the case three or four years ago."

Koelen also notes that the trend towards co-production partnerships is having an effect on how broadcasters, at least in the U.K., commission new dramas.

"Three or four years ago it was all about. We’ve got a 9 o’clock slot to fill and that’s the most important thing to think about. Nowadays it’s, is this of interest to an international market? What other co-producers are we going to be interested in getting on board? Everyone is thinking the same way, which is encouraging in that scale and being able to stand out in a global market are first and foremost."

ITVS GE’s Clarke notes the importance of having a diverse slate that will meet the needs of a variety of clients. "We grew our business as a British distributor but we have become more and more global in the last few years, and it’s really important to have that mix. We want to work with the best drama, wherever it comes from.‘ Jordskott has been a phenomenal success in Sweden, and at MIPCOM we’ll launch ‘Angelby,’ another Swedish drama. We’re also distributing some French-language drama. ITV Studios France remade ‘A Mother’s Son,’ which was a British format. It’s selling! European-language drama within Europe is a strong business."

Global Screen has a mix of German- and English-language productions among its MIPCOM highlights. Heidrich cites, among others, the period piece "The Weißensee Saga," now in its third season, and two brand-new shows, the Ken Follett adaptation "A Dangerous Fortune" and the German political series "Capital Power."

Creative collaborations across borders are a key growth opportunity for many companies, especially those like FremantleMedia that have a built-in network of producers to tap into. "We get 25 or 30 producers in the same room together regularly," Doole says. "When you get the best creatives from Italy and Germany and whenever in a room, clusters of production or co-production units are emerging. Our Danish producers and our German producers are working together on a project, which is really exciting. And this has come out of being in the room together. Our German producers are talking to our Australian producers about a story that would play out across the two countries. These are emerging from the stories, not from the fact that we want our producers to work together. It always has to come from the creative."

Ultimately, ITVS GE’s Clarke says, "Borders are coming down and talent is traveling far more internationally now. It really feels like a global market at the moment, more so than ever."