



Overview of TV fictions' international co-productions in Europe

Conecta FICTION
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INTRO

PLAN

- 1. Definition of key concepts**
- 2. Changing models of international co-productions of TV fictions**
- 3. Legal framework for support and promotion of European works**



1. Definition of key concepts

What is a TV fiction?

- **Any scripted programme made for TV, except animation programme**
 - ✓ TV films included, but not films released in cinema

- **Different types of TV fictions:**
 - ✓ **Telefilms:** film made for TV. Does not retain viewers
 - ✓ **Long-running soaps / telenovelas:** 100-200 episodes/year
 - ✓ **Prime time/high-end TV fictions:** 3-13 episodes per season/or per year

What is an “official” international co-production?

- More than one producer / from different countries
- Agreed upon via a **co-production contract**
- Each co-producer **co-owns the work**
- Fulfils the conditions of **bilateral / multilateral treaties**
- Co-production approved by national authorities and considered as “**national**” in each co-producing country
- **Eligibility to public funding**, tax incentives... of each country

Reasons for co-producing?

DEFINITIONS

- **Financial:** pooling resources and sharing risks
- **Artistic:** collaboration between artists from different backgrounds or cultures
- **Access to more markets**
- **Eligibility to EU rules** of promotion of European works

....**But also some obstacles**

(work, organisation, languages, cultural..)



2. Changing models of international co-productions of TV fictions

2.1

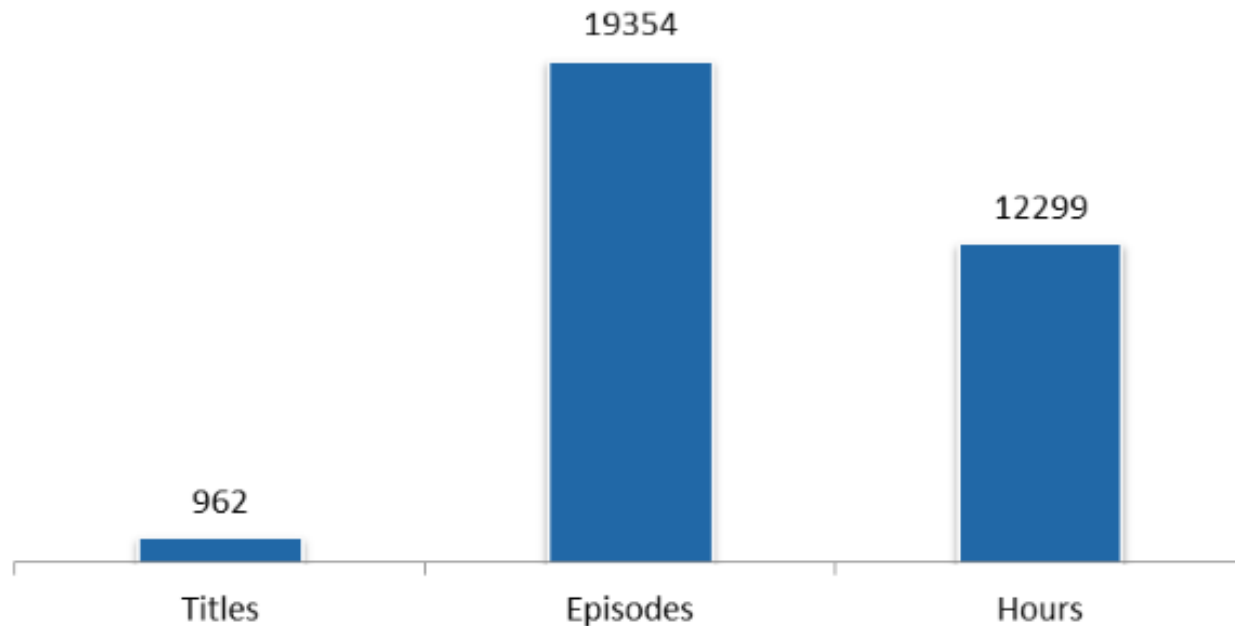
PRODUCTION

Overview of TV fiction production in Europe



Volume of TV fiction production in Europe

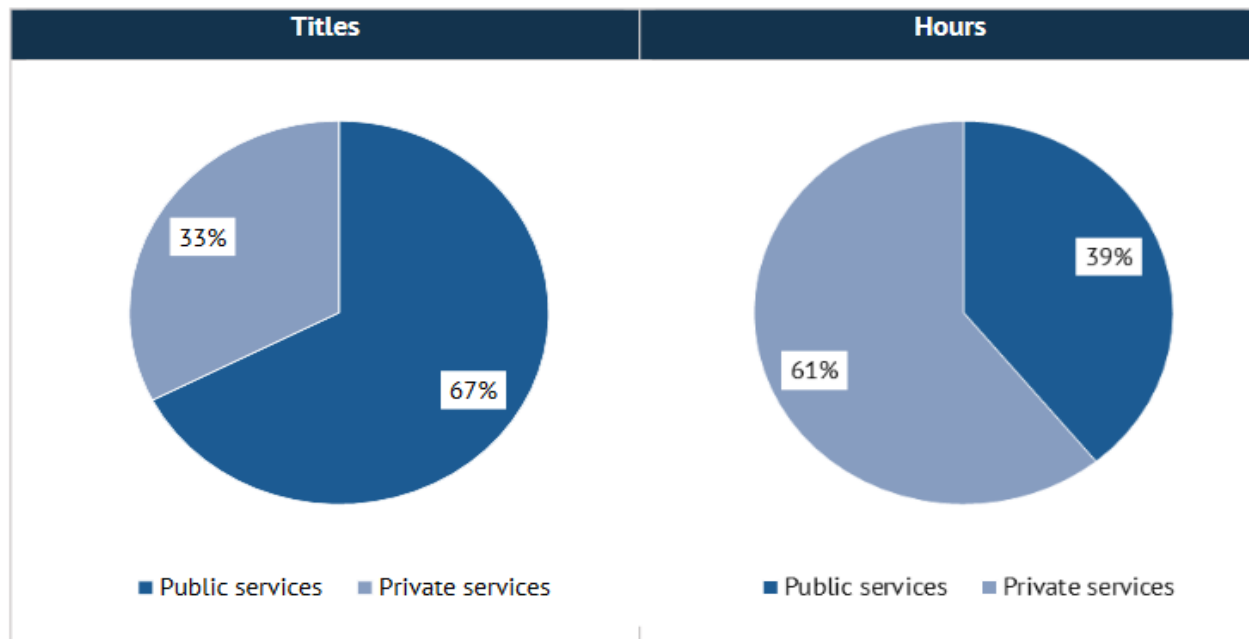
All format - 2017



Source: European Audiovisual Observatory

Breakdown of production of TV fiction by public / private services

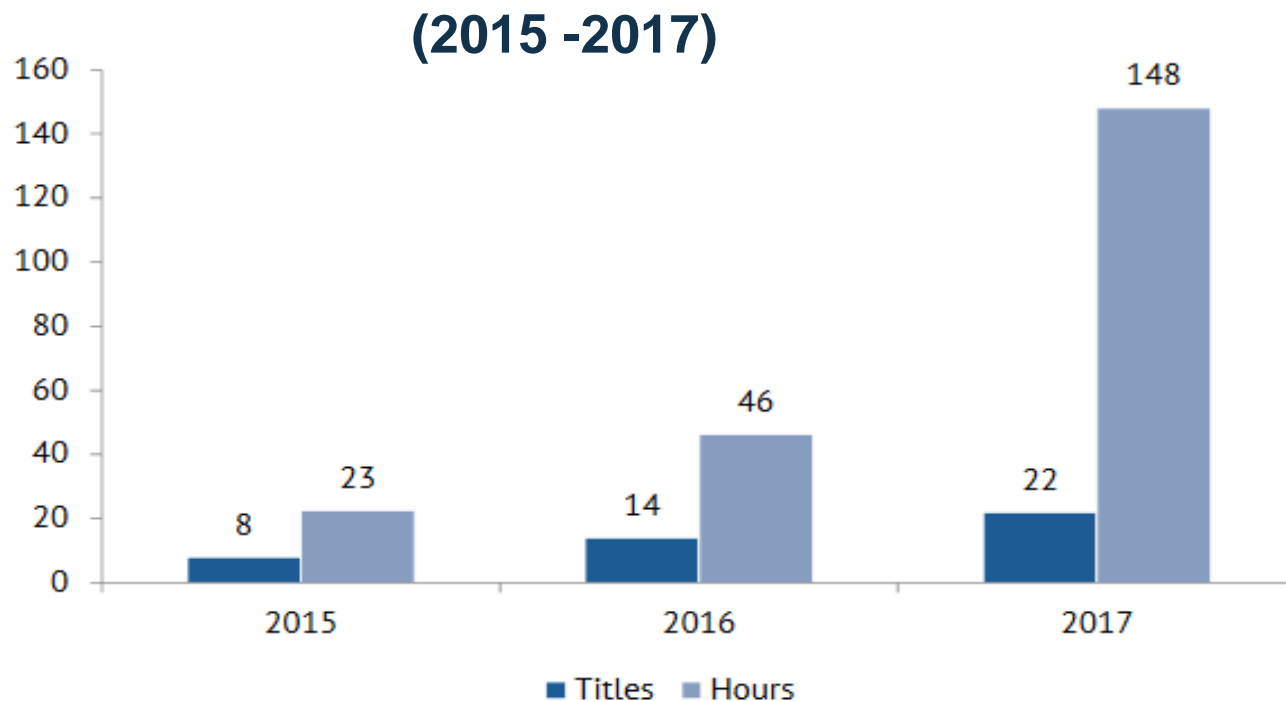
(All formats – 2017)



Source: European Audiovisual Observatory

Production of TV fiction originated by SVOD¹

PRODUCTION

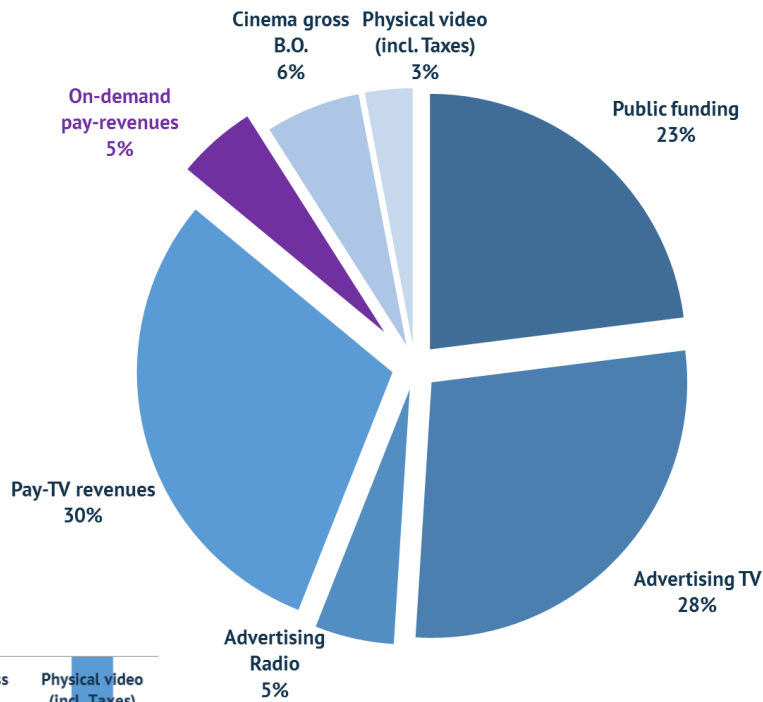
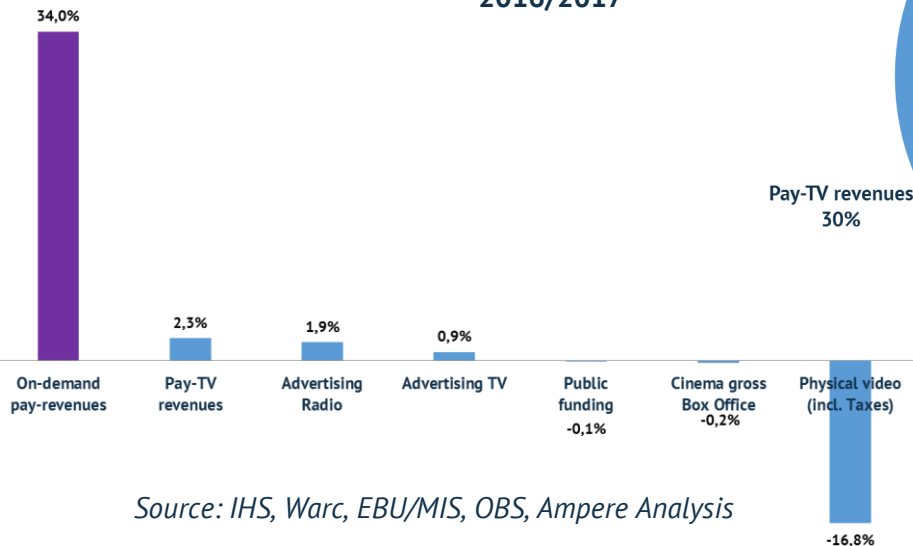


Source: European Audiovisual Observatory

Pay-on-demand: 5% of all audiovisual ecosystem

PRODUCTION

Year-on-year growth rates by market segment
2016/2017



EU AV market in 2017: EUR 111,5 billion

Source: IHS, Warc, EBU/MIS, OBS, Ampere Analysis

2.2

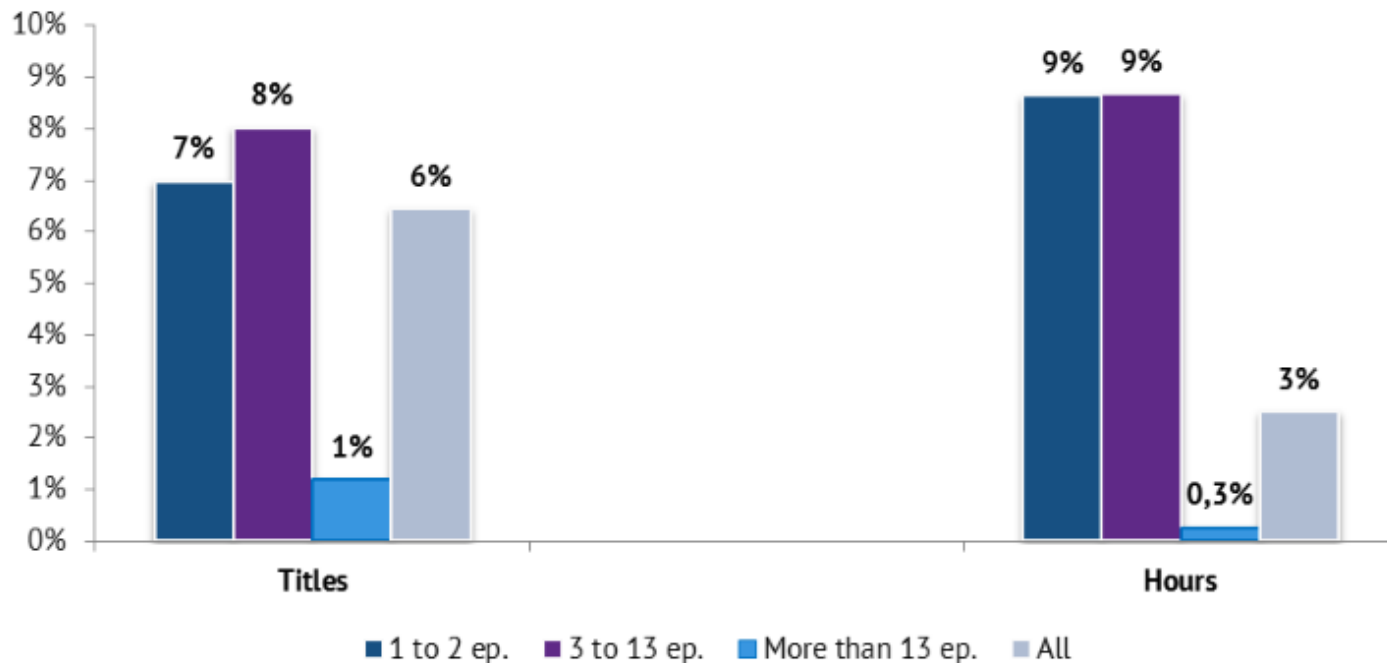
CO-
PRODUCTION

International **co-productions** of TV fiction in Europe



Share of international co-productions by format

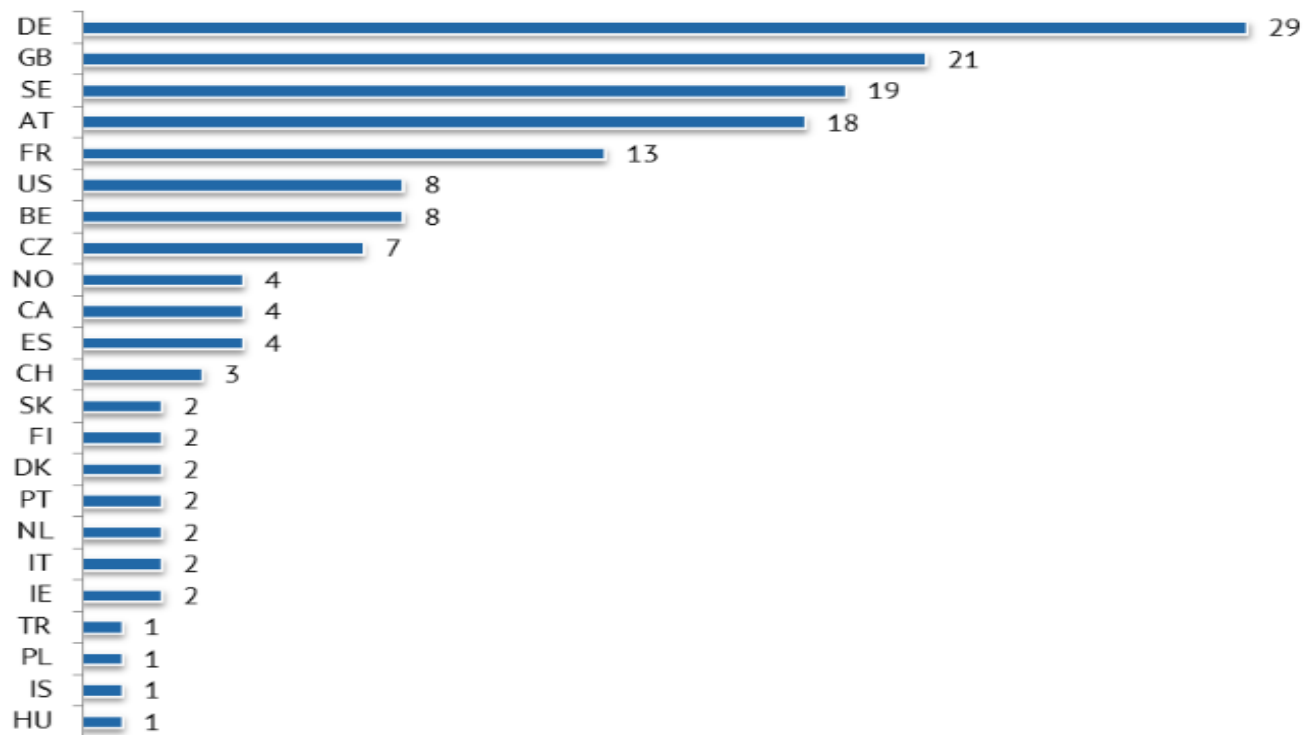
(2017)



Source: European Audiovisual Observatory

Number of co-production interactions by country

(All format - 2017)



Source: European Audiovisual Observatory

(All format - 2017)

Country	Interactions	Number of countries with interaction	Main countries of interaction
DE	29	5	15 with AT, 5 with CZ, 4 with SE
GB	21	6	7 with US, 4 with SE, 3 with CA
SE	19	7	4 with DE, 4 with GB, 4 with NO
AT	18	4	15 with DE
FR	13	6	5 with BE, 3 with GB
BE	8	3	5 with FR
CZ	7	3	5 with DE
ES	4	3	2 with PT

Source: European Audiovisual Observatory

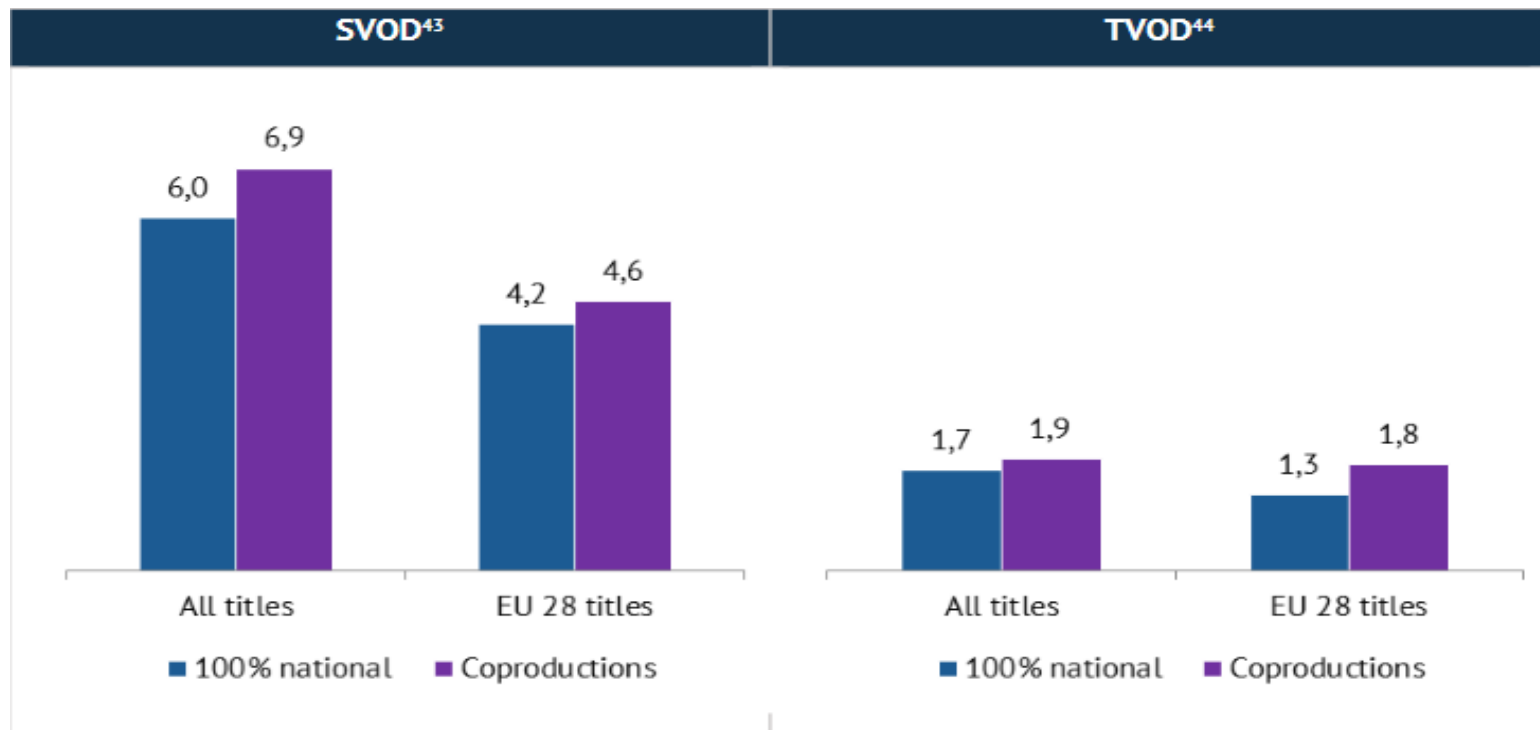
(TV - 2017)

	Countries of presence
All titles	1,51
All co-productions	1,64
All European TV fiction	1,31
All European co-productions	1,57

Source: European Audiovisual Observatory analysis of The European Metadata Group data

Circulation of co-productions on VOD ¹⁸

Circulation of co-productions vs. 100% national titles on SVOD and TVOD



Source: European Audiovisual Observatory

2.3

MARKET

Market mutations and evolving models



Some strong European SVOD services

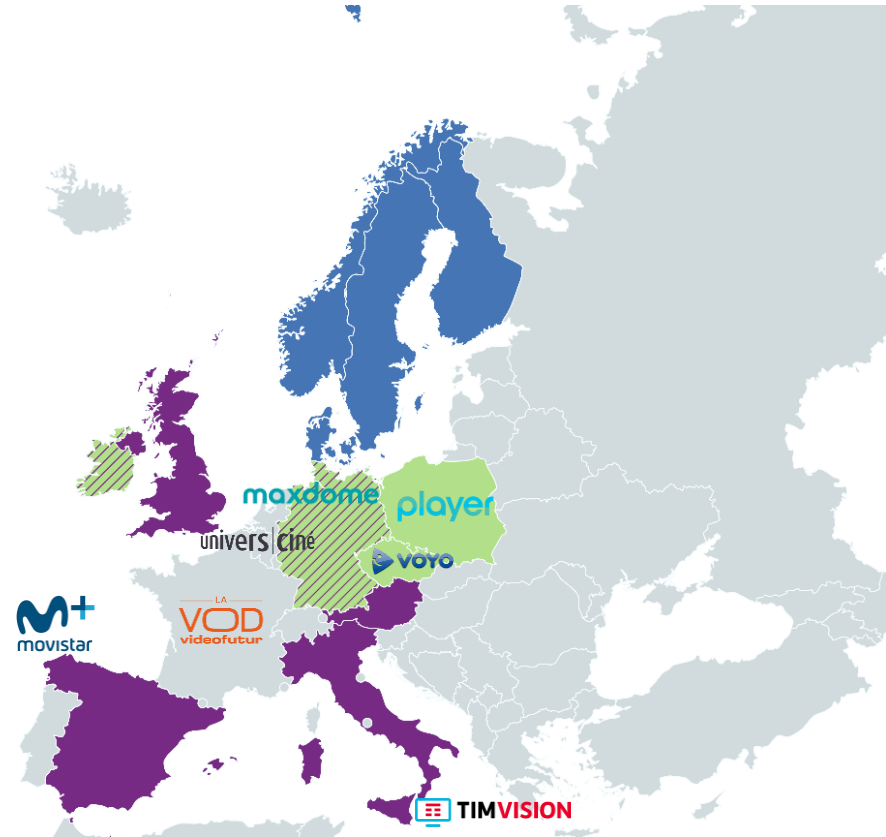
MARKET

Pan-European:

- C More 
- Horizon 
- Sky Now TV 

Local services:

- Player PL
- Videofutur
- Maxdome
- Movistar+
- TIMVISION
- Universciné
- Voyo Czech SVOD



Many joint services arising at EU level...

- **France – Salto: France TV + M6 + TF1**
(Online subscription video platform)
- **Germany – 7TV: ProSieben + Discovery**
(TV streaming platform)
- **UK – BritBox: ITV + BBC**
(SVOD service based on their US service, UK contents)
- **Spain – LovesTV: RTVE + Mediaset + Atresmedia**
(HbbTV-based platform, a joint OTT TV service as a second phase)

...and Alliances for high-end content production

European Pubcaster Alliance: RAI + ZDF + France TV (2018)

- Goal: produce high-end scripted productions & innovative projects for younger target groups.
- **Two** of the three broadcasters as **co-producing/commissioning partners**, with the **third** one designated as a **pre-buyer**.
- “Privileged” partnerships with RTVE, RTBF, VRT and RTS + invitation to join the alliance to other European broadcasters.

Nordic12 (2018)

- five Nordic channels (from Denmark, Sweden, Norway, Finland and Iceland).
- alliance to co-produce a dozen series a year.

May also end up co-producing with Netflix and Amazon?



3. Legal framework for support and promotion of European works

Creative Europe – MEDIA – TV programming

- **To support European production companies interested in producing a TV works demonstrating:**
 - ✓ High creative value
 - ✓ Cross-border potential
 - ✓ Cooperation between operators from different countries participating in the MEDIA sub-programme
 - ✓ Increased co-production and circulation of high-profile European TV drama series
 - ✓ Most supported countries (2018): FR, IT, Nordics, ES

Some examples of national schemes

■ Yes

■ No

Nordisk film and TV fund
Aids to cross platform initiatives

Regional aid TV fiction:
Aids to distribution on
all platforms

Regional aid to series as
international co-productions

National aids to Slovak
minority co-productions
of AV works

New aid to screenwriters of TV
series intended to become
futur co-productions

National aid to "High quality
international television series aimed
for an international market"

Promotion measures for European works under the AVMS Directive

Obligations on broadcasters (Art. 16-17)



*of transmission time to
European works*



*of transmission time/programming
budget to **independent EU works***

Promotion measures for European works under the AVMS Directive

VoD services (Art. 13)



**Minimum
share in
catalogues**

Including prominence



Financial contribution:

- Production
- Direct investments
- National funds

Including targeting services

Under the previous Directive of 2010

- The three obligations were alternative to each other

3.2

Level of investment in private VOD services

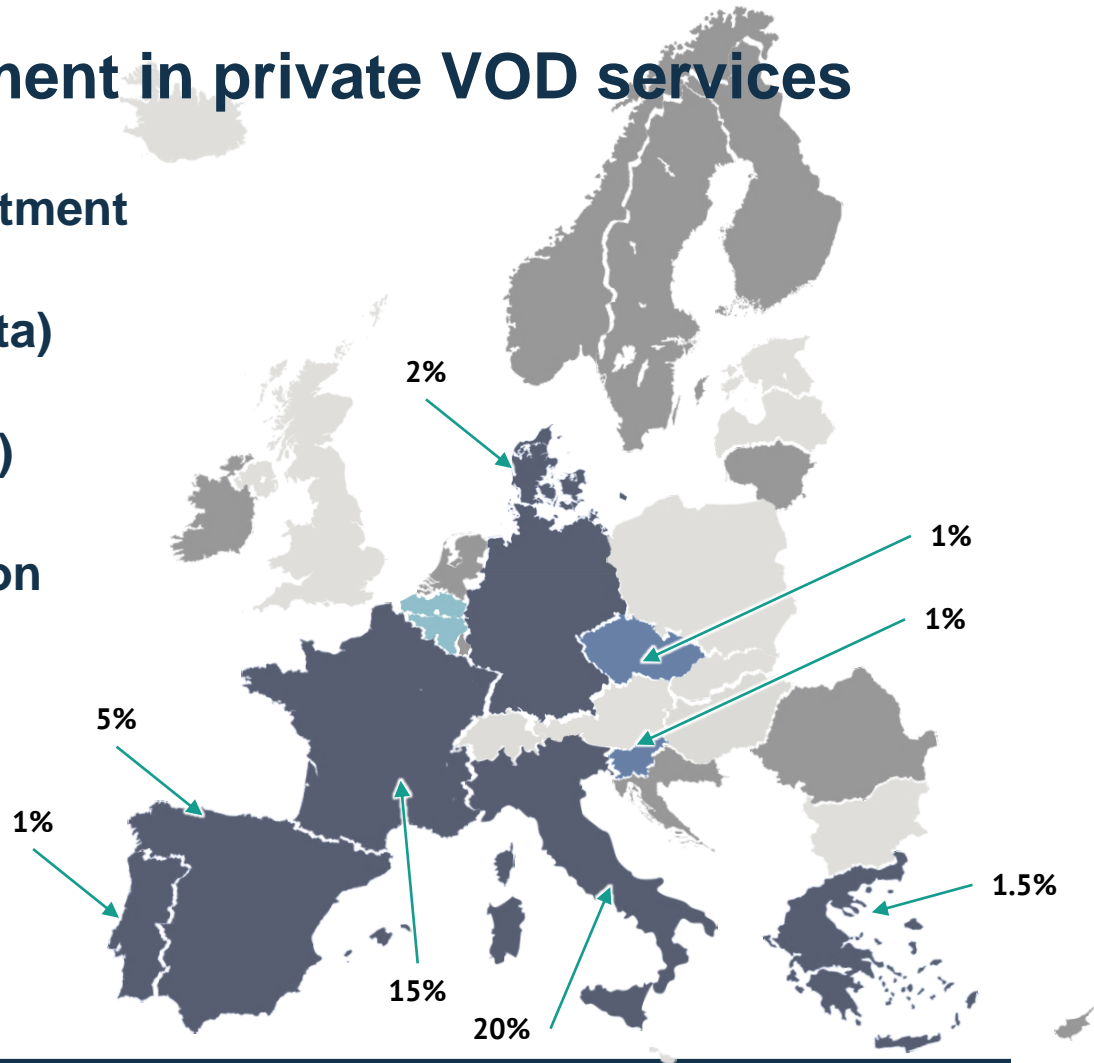
 Mandatory Investment

 Optional (or quota)

 Optional (or levy)

 General obligation

 No obligation






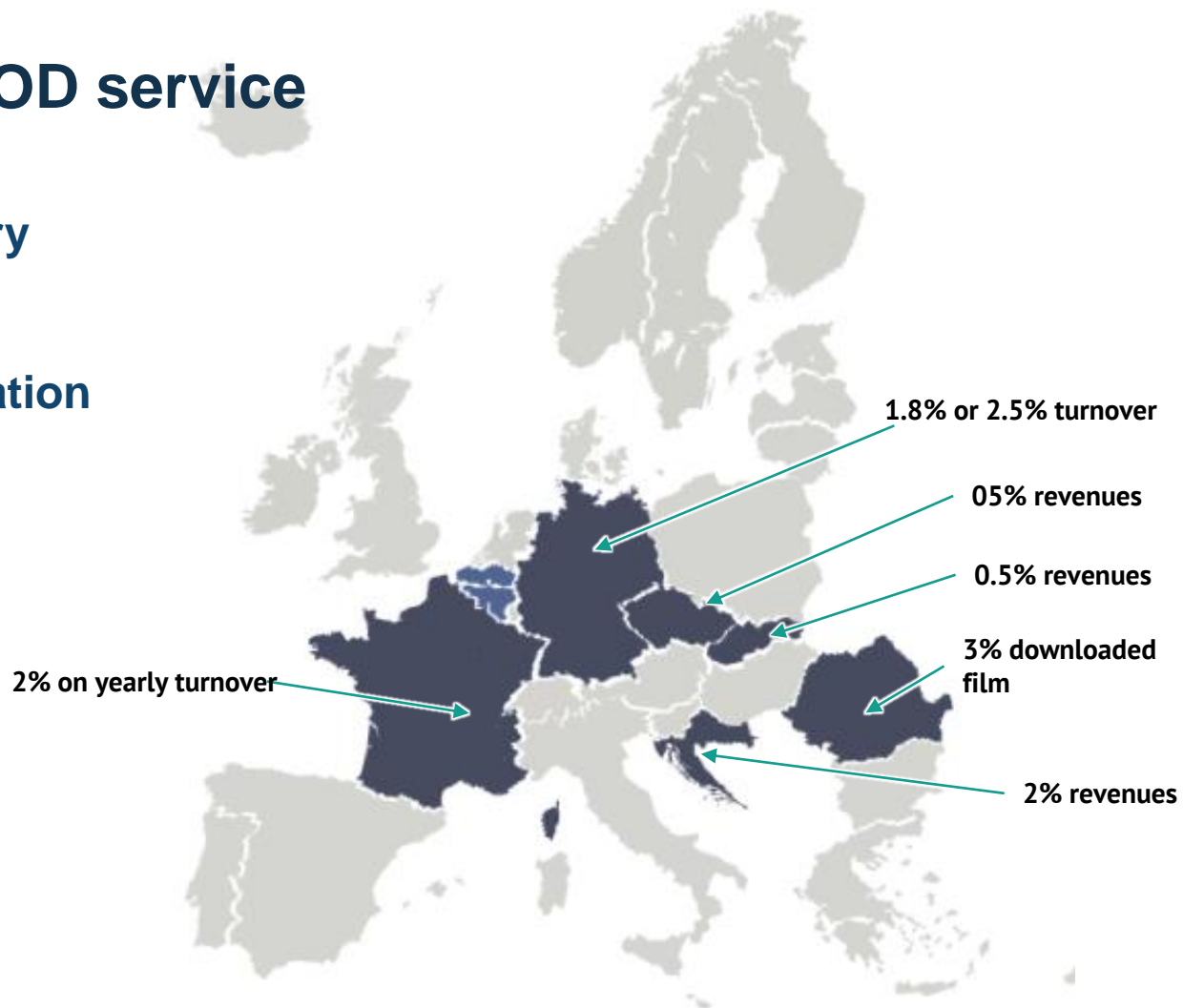
EAO "Mapping of national rules for the promotion of European works in Europe" for the EFADs

3.2

LEVIES ON VOD

Levies on VOD service

-  Mandatory
-  Optional
-  No obligation

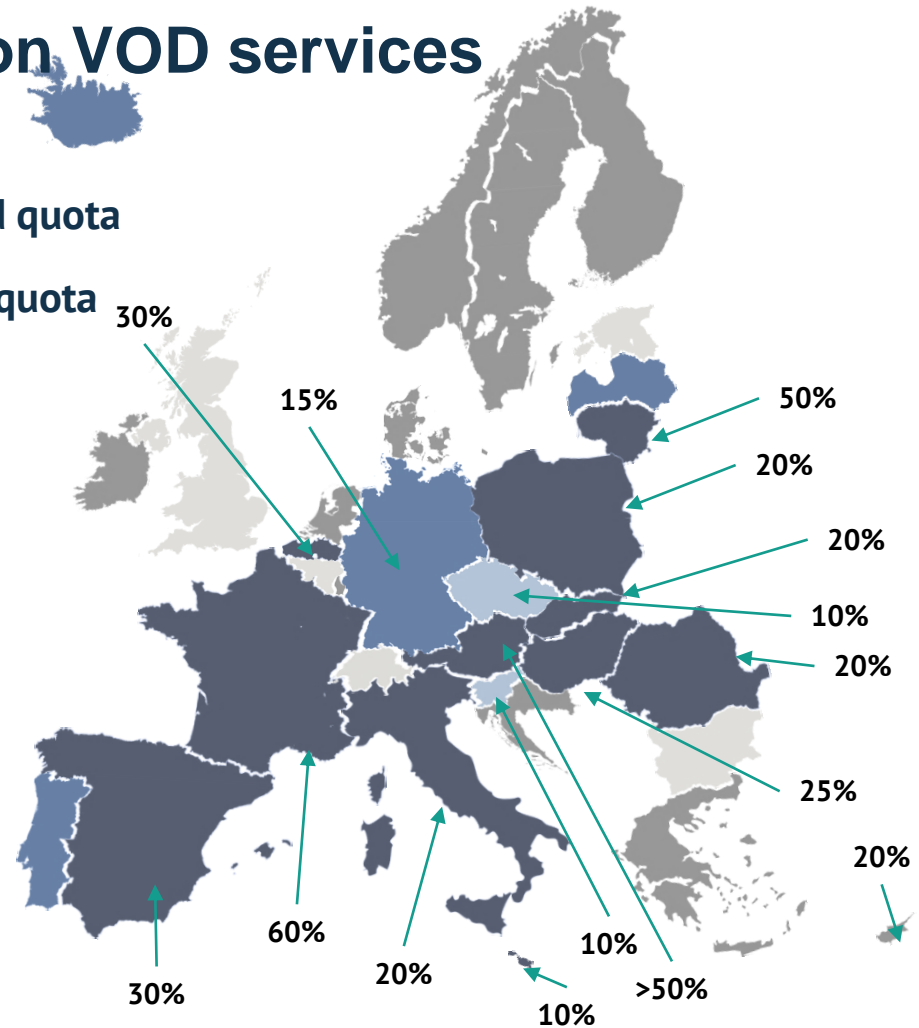


EAO "Mapping of national rules for the promotion of European works in Europe" for the EFADs

Quota obligation on VOD services

3.2

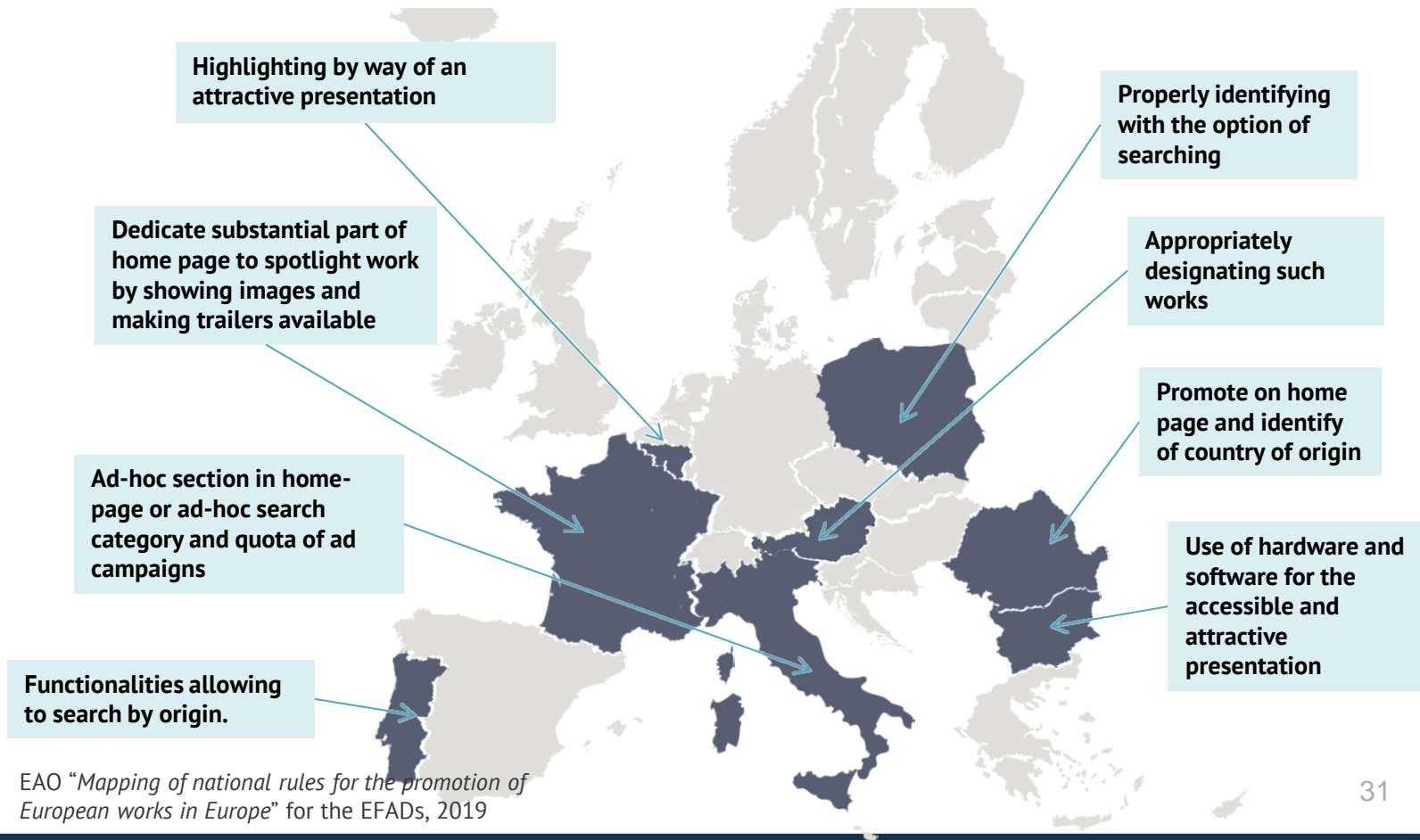
- Mandatory with a specified quota
- Mand. without a specified quota
- Optional (or investment)
- General obligation
- No obligation



EAO "Mapping of national rules for the promotion of European works in Europe" for the EFADs

Examples of prominence measures

3.2



To sum up...

- High-end TV series as key battleground to attract audiences
- New platforms and alliances of broadcasters to counter global platforms
- International co-productions as a way to pool financial resources, more than cultural aims
- Evolution of models towards more structured cooperation before production stage
- Level of investment into production still predominant on broadcasters

... so fresh air for production?.. or threat on independent production?

Thank you! Gracias

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