



LOSMISERABLES

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DISCOP ISTANBUL 2015 SPECIAL ISSUE

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EMERGENT MARKETS, TECH BOOMING

The evolution of Discop Istanbul is a good example of worldwide content market transformation. This is the third year we attend Turkey with a separated, full-dedicated edition, and the market has been growing progressively in volume but especially in variety of businesses.

First, Discop Istanbul was the second part of Discop East, which was held in Budapest, Hungary during two decades looking for the medium and small Central & Eastern European buyers. When CEE region got mature, the idea was to create a new event in the East, to get new buyers, emerging territories for finished products.

This way Istanbul was getting stronger many years, especially with Turkey as a new great production pole for the world. But content market gets global, evolution times get faster and in any place of the world, the own production and new media developments take place.

Two years ago, the event was called 'West Asia', to make

focus on the '...tan' countries: Kakhastan, Ubekistan, Pakistan, Kirgistan, etc.

But then, the event got back to the Istanbul name, as it began receiving people from Africa, from East Asia, more from CEE... now it is an event focused on emerging territories, with stress both in finished products and productions projects. The main region is MENA —Middle East and North Africa— that is getting strong in pan-regional production ventures, for many countries at the same time.

New media/digital ventures are the new step. It is the new big thing worldwide, and takes a main attention this year in Istanbul. There are many VOD services appearing, from cable, from Internet, etc. Many evolving news are taking place. Undoubtedly, Discop Istanbul is a good place to be nowadays at the content market.

JUST TO REMEMBER...

For those reading PRENSARIO INTERNATIONAL for the first time, this publication has 25 years covering the whole international market, and now it manages strong coverage and feedback from all regions of the world. We have very good online development, as well, with daily online newsletters during the markets. At Discop Istanbul, please enter www.prensario.net to read them.

Nicolas Smirnoff



DISCOP ISTANBUL 2015: MAIN SCHEDULED EVENTS

Event	Day & Time	Place
Content Creation Delivery & Consumption in the Digital Age	Feb. 24, 9am	Conference Room
The Perfect Storm (SE3)	Feb. 24, 11am	Conference Room
World Premier – It's Showtime (Global Agency)	Feb. 24, 11am	Conference Room
Count the Audience? Not so easy those days (Eurodata TV)	Feb. 24, 3pm	Conference Room
VICE media: Building a media empire	Feb. 24, 4pm	Conference Room
Buyers networking hour	Feb. 24, 5pm	Cocktail Area
Welcome Party	Feb. 24, 7pm	Hilton Hotel
The ITV Inter Medya Party	Feb. 24, 10pm	Sofa Hotel
Unlock the market potential of Turkey – Licensing Facts & Figures	Feb. 25, 10am	Conference Room
Cocktail Party	Feb. 25, 11am	Cocktail Are
Hollywood Model in Screen Brand Licensing	Feb. 25, 11.30am	Conference Room
360° Brand Licensing Strategies	Feb. 25, 2.30pm	Conference Room
Gala Dinner in Honor of Jordan	Feb. 25, 7pm	Cocktail Area
Global Agency Party	Feb. 25, 10pm	Shangri- La Boshporus Hotel
The Format Day + Pitching	Feb. 26, 9.30am-2.30pm	Conference Room

PRINT & ONLINE

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TURKEY, ONE STEP AHEAD

Turkey is one step ahead this 2015. The domestic market continues to grow (and change) in all business segments and the movements in the ranking of channel, as well as the higher quality productions, keep motivating the advertising expenditure that has reached record numbers in 2014. Globally, the success of the Turkish series has allowed the international distributors to gain new markets, such as Latin America. Trends & figures in the report below.

PRENSARIO has been witnessing the growth of Turkey since the very beginning, and the evolution is notorious. The local TV industry shows high-end quality productions and new twists on the series stories that mix drama, suspense, thrillers and mystery in both, series and miniseries. Production companies are getting stronger and competing fiercely, while working independently from the broadcasters and distributors.

Seven out of 8 national TV channels broadcast 1-2 original series ('100) every night, which means some 50-60 episodes every week. This means a lot of work and employees dedicated to this business that shows strength year-to-year in all aspects.

According to figures from the Professional Union of Broadcasting Organization (RATEM), Turkey has become the second biggest producer of content (in volume) in the world after the US, and before Brazil. The entity confirmed USD 212 million in exports for 2013, but still has not informed about the 2014 results. The top 6 distributors have seen their overseas sales grow by 20% last year (North/South America and Asia), so it can be estimated that the content export figures will close up to USD 250-300 million in 2014.



Created by O3 Production/MBC (UAE), *Kaderimin Yazıldığı Gün* is one of the leading series on Star TV prime time



Omer Ozguner,
general manager, Star TV

'We are pioneers in establishing the rules of competition. While this gives us confidence, it makes us more careful and meticulous. For the past three years a new era began in rating measurements. Targets changed and the numbers increased. In turn, viewer profile changed. People wanted more entertainment and to relax'



Ozlem Ozsumbul,
Head of Sales & Acquisitions,
Kanal D

'TV business is always the most important media asset for Turkey because we love watching TV too much. This is the cheapest and widest entertainment. It is for everyone, nor borders, no ages, no times...it is 24/7. That sustainable interest helps and guides us'.



Adem Gürses,
general manager,
ATV

'Our content is more diversified and we are getting better feedback in the international arena. The distribution strategy is to secure existing markets such as MENA and CEE regions, but also growing in Latin America and Far East. Our best-seller TV drama, *Sıla*, has been sold to Chile and will be on air very soon'.

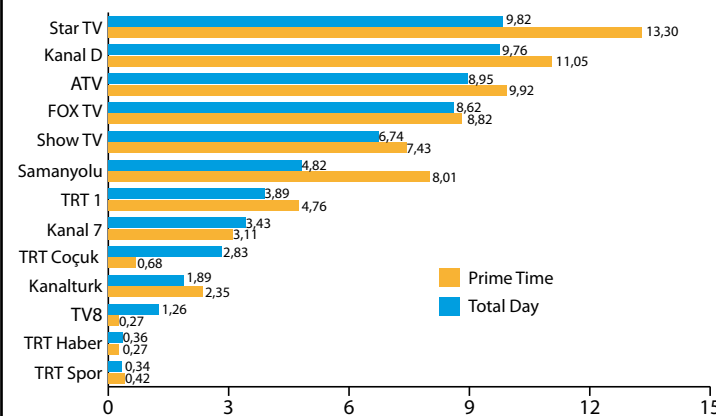
All these production needs to meet the international market to complete the cycle.... Turkish distributors have done a great work in that sense: there are new distributors and merges (TRT has closed a distribution deal with ITV InterMedya, for instance), and the existing ones are getting more professionalized with better investments on advertising and promotion, market coverage and stronger attendance to global tradeshows.

Regarding territories, Turkish series are strong in specific territories of Eastern Europe, especially the former countries of Yugoslavia (Serbia, Bosnia, Croatia, etc.), as well as Hungary and Romania, among others. They are working well on the Central Asian markets, and the great news of 2014 has been the penetration and

consolidation in the key territories of Latin America (more information in the main report of this edition).

ABC (USA) has confirmed the development of five pilots, including a show based on the Turkish drama *Son* (aka *The End*), internationally distributed by **Eccho Rights**. It is the second Turkish format to be chosen for the domestic market after *Game of Silence* (NBC); but the third if it is considered *Forbidden Passion*, the Latin adaptation from **Telemundo**.

TURKEY: AUDIENCE SHARE, BY TV CHANNELS – PRIME TIME & DAY TIME (JAN-DEC. 2014)



Source: Kantar Media



Burcin Gulsen,
Head of Marketing
FIC Turkey

'The audience is more addicted to content but we can still tell that they have the tendency to associate specific content to specific channels. Turkish audience loves watching drama. It's a highly increasing trend mostly due to diversifying high quality drama portfolio of TV channels'.



Hasan Bozaslan,
international director,
Samanyolu

'The series are not being so long and the topics of them are mostly local issues. The epic series keep taking the attention of the audience, specially the stories from the Southeast Turkey: smuggling, traffic, bands, etc. Entertainment shows don't work much in our network, but neither in the country. Series leads by far'.



Mehmet Demirhan,
Deputy Head of TV Department
TRT

'Turkish TV market is based on production in an environment that is highly competitive to bring the best in front of the viewer and reap the most reward in return. We aim to make TRT presence felt in areas like co-productions and mini-series, which private channels tend to avoid as a result of financial worries'.

THE MARKET

TV ownership is around 99%, which is almost 76 million in Turkey, where people have really intense TV viewing habits. TV viewing is still increasing and, on fall season, it reaches close to 4.8 hours a day. Almost 70% of the population prefer watching TV as their favorite leisure time activity. TV still gets the highest percentage of media spending in Turkey, more than 50%, which is higher than European and global averages. In total, there are 8 national FTA broadcasters.

According to local sources, the total ad market is valued USD 5 billion, where TV takes 50-55%, that means USD 2.5-3 billion, making Turkey one of the largest ad market



For My Son started on January at Kanal D and reached huge audience in a short time: it is #1 on Wednesday nights and has a good mix of romance, comedy and action triangle

in Eastern Europe.

After the acquisitions in 2013 of **ATV** and **Show TV** by **Kalyon Group** and **Cyber Group**, respectively, last month Istanbul's 4th Administrative Court has annulled the sale of the later and, as a result, **Show TV** is once again under the control of the Savings Deposit Insurance Fund (TMSF). This is the second time the court annuls the sale of the channel. TMSF confirmed then the appointment of a new general manager, **Ümit Önal**.

The **Turkey Statistical Institute** reported in January that Turkish citizens have spent USD 5 billion on cultural activities in 2014. TV got the biggest share, 28%, or nearly USD 1.45 billion. Data processing equipment ranked second with 15.6%, followed by books with 13.4%, newspapers with 11.1%, magazines 9.7%, and Pay TV services with 3.7% share.

About the market, PRENSARIO noticed since last year some changes on the drama production system because of the new *People Meters* from **Kantar Media**. These effects are being highlighted by the protagonists in this special report, and basically affect the target composition, as well as the length of the series.

THE PROTAGONISTS

Doğuş Media Group acquired **Star TV** in 2011 to **Doğan Holding** (owner of **Kanal D**) and since then the channel has become

the leading Turkish broadcaster. The group has inaugurated a new high tech studio in Maslak. 'As the leader in the past 3 years, we set the trends in broadcasting, marketing and advertising. **Star** takes the viewer's demands into account and reflects the dynamism and interests of the public to its content', explains **Omer Ozguner**, general manager.

'During the day, we broadcast magazines and two shows focused on women are our most popular ones. We have two top rated soap operas, *Aşkın Bedeli* and *Beni Affet*, while the most popular programs on off prime are the talk show *Dada Dandinista*, and *Vay Arkadaş*, a great game show. Our prime time starts at 7.15pm on week days with the drama *Deniz Yıldızı*, and *Kurt Seyit and Şura* is one of our most important title. We begun broadcasting two new series by the end of last year that we know that are also popular in the international market: *Paramparça* and *Kaderimin Yazıldığı Gün*, created by **O3 Production/MBC** (UAE)'. 'We are a pioneer institution that establishes the rules of competition in the market. While



ATV's best-seller TV drama, *Sıla*, has not only been a success in Turkey, but also in the international market: it has been recently sold to Chile and will be on air very soon

this gives us confidence, it makes us more careful and meticulous. For the past three years a new era began in rating measurements. Targets changed and the numbers increased. In turn, viewer profile changed. People wanted more entertainment and relax. They request game shows, especially'.

'Game shows on **Star** have broken rating records. But a return to drama began with the arrival of the new season. Demands of the viewers and the sector led TV to go back to drama. We didn't abandon entertainment: we will broadcast a game show once a week during



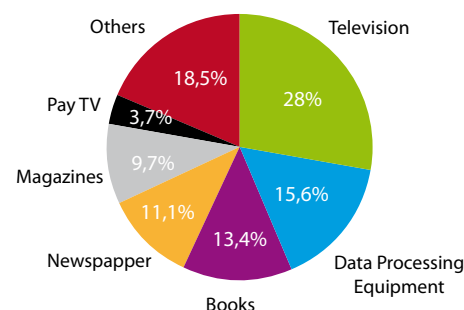
Karagül is Turkey's most watched TV series for the 2014-15 season in total audience, and it is also mostly #1 in ABC1 20+ segment on FOX TV

prime time and one another off prime time'.
 'There is tough and devastating competition in Turkey, so big investments are needed to bring more shares from advertising. At the same time, our dramas are picked up all around the world. This success has made local TV managers and producers to think globally. Through **Global Agency**, we are distributing some of our productions. The most recent sales and deals in the globe were for: *Village Girl*, *Runaway Brides*, *Reaction* and *Broken Pieces*', he says.

Startv.com.tr and its **Facebook** (3.3 friends) and **Twitter** (600.000 followers) accounts are the most popular in Turkey. 'The corporate social media and shows accounts, managed by **Star TV Digital**, reach 10 million people with 32 active social media accounts', **Ozguner** concludes.

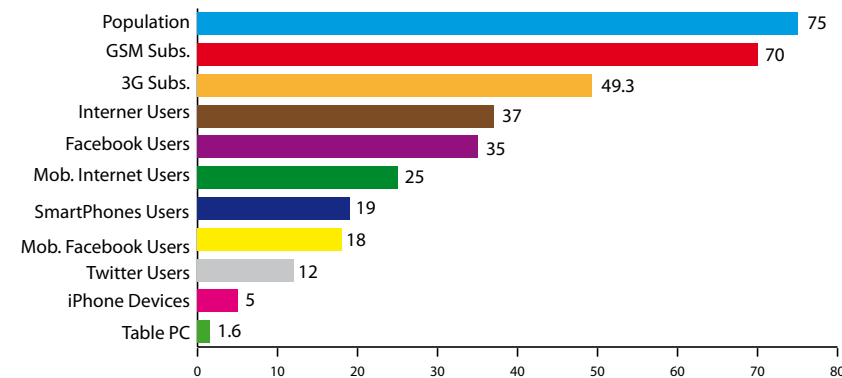
Ozlem Ozsumbul, Head of Sales & Acquisitions, **Kanal D** describes: 'Our main objective for 2014 was covering the whole audience. Each member of the family is important for us. All the projects that we have should contain many elements for those characters to be more attractive for TV audience'.

TURKEY: CITIZEN SPENT ON CULTURAL ACTIVITIES, BY MEDIA (2014)



Source: Turkey Statistical Institute

TURKEY, IN NUMBERS – IN MILLION (2015)



Sources: License Time-Turkey www.licensetime.com, World Bank www.data.worldbank.org/country/turkey

Top shows for this TV season are the series *Matter of Respect*, a remake of an Italian drama that is also offered in the international market. 'War of the Roses is a simple, attractive drama with its romance, story and dynamism, and it is one of our successful titles on prime time. *For My Son* started on January and reached huge audience in a short time: it is #1 on Wednesday nights and has a good mix of romance, comedy and action triangle', she adds.

Regarding trends, she is very clear: 'Turkish dramas are still the most important content for free TV. Because of high competition and commercial revenues we all prefer to broadcast local dramas. Other important genres are Turkish features, studio based game shows and reality programs. Our in house format *My Partner Knows* is still doing well at prime time and access prime time'.

'TV business is always the most important media asset for Turkey because we love watching TV too much: it is the cheapest and the widest entertainment. It is for everyone, no borders, no ages, no times, 24/7. This sustainable interest always helps and guides us. The new thing is facing digital world and its growing structure. Digitalization is affecting TV business and audience day by day. We should keep learning about it and make good combination with usual media and new media in the best way'.

Adem Gurses, general manager, **ATV**: 'We have been the #1 channel for many years but this season, as the Turkish TV market experience fluctuations, also affects us. New players such as **TV8**, the rise of **FOX TV** and the new rating system have impacted the TV market. The competition in the market is becoming and fiercer everyday and the gap between the channels is decreasing'.

'There are days where entertainment programming is needed. For example, in the weekend the audience prefers talk shows, sitcoms and formats. During working days, there

is a more tendency towards fiction. We can find most strong dramas on Mondays for example'.
 'An important change in types of Turkish content is visible due to the new *People Meter*. In the new panel, a majority of representation is shifted from AB demo-group to CD, which is considered more rural. As a consequence, the productions evolved to local stories. We are also adapting to this trend by introducing new productions'.

'We are following the new media trends closely in order to adapt to digital changes, online live broadcasts, catch-up videos and re-run of the episodes can be found on our website. Audience interaction is also provided via social media (**Twitter**, **Facebook**). Partnering with online content service providers such as **YouTube** and mobile networks is also on the table and it's likely that this aspect of our business will grow in the future, too', adds **Gurses**.

'Our content is more diversified and we are getting better feedback in the international arena. The distribution strategy is to secure existing markets such as MENA and CEE regions, but also growing in Latin America and Far East. Our best-seller TV drama, *Sila*, has been sold to Chile and will be on air very soon'.

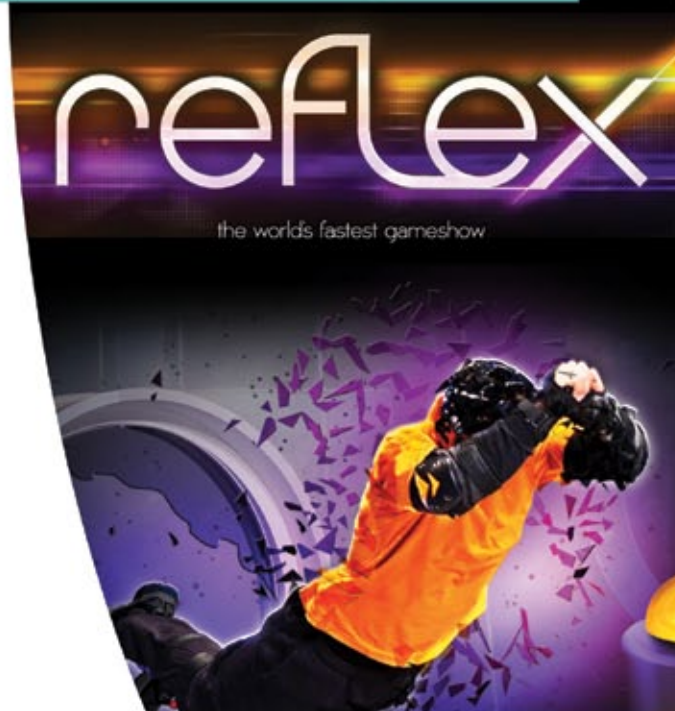
By the end of 2014, **Jan Koeppen**, president at **Fox International Channels Europe & Asia** announced that the company has combined **FIC Turkey** and **FOX TV** into a single operational business unit, to be a more 'integral' part **21st Century Fox**.

In Turkey, **FOX TV** is a leading FTA national channel, broadcasting local series, shows and news, as well as top box office Hollywood and local movies. 'Even it is the youngest station, its loyalty percentage is higher than the competitors. It is among the top 3 channels in terms of *Top of Mind*', explains **Burcin Gulsen**, Head of Marketing, **FIC Turkey**.

'It is perceived as a family channel offering



Let the Games Begin



From shiny-floor studios to competitive campsites, from challenging Cube's to quizzical taxis, we have format games for everyone.



TURKEY, ONE STEP AHEAD



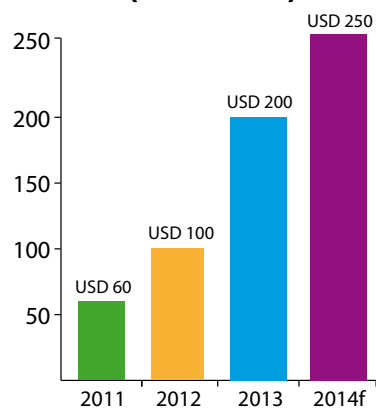
For this TV season, TRT has produced the series *Filinta*, which was conceived in a different way from the general drama concept with their production qualities, sets created and content

qualified and original content, targeting all age, sex and SEG group segments. This 2014-15 season, FOX has kept its #1 position in total all day in 5 out of 6 months. We are also #1 on prime time, by broadcasting the most watched nationwide news bulletins with FOX *Main News*, *Main News Weekend* and *Calar Saat Weekend*.

Karagul, *Kiraz Mevsimi*, *O Hayat Benim* and *Kocamin Ailesi* are among its top local productions. The first is Turkey's most watched TV series for the 2014-15 season in total audience; also, it is mostly #1 in ABC1 20+ segment; *Kiraz Mevsimi* became the most watched series in the total and it is constantly #1 on 12-19 age group. 'It has a very high and active social media interaction, almost every week *hashtags* related to the show are on worldwide and Turkey trending topic lists', she stands.

'The audience is more addicted to content but we can still tell that they have the tendency to associate specific content to specific channels. Turkish audience loves watching drama. It's a highly increasing trend mostly due to diversifying high quality drama portfolio of TV channels. Along with it, they also like entertaining and simple-to-watch programs

TURKEY: CONTENT EXPORTATION EVOLUTION (2011-2014f)



Source: RATEM (2011-2013) and PRENSARIO based on the estimation of growth announced by the top 6 Turkish distributors (2014 forecast)

such as music and stage performance shows. 'Watch-together as a family trend still continues for linear TV, however along with rising Internet and electronic device penetration, younger audiences started to prefer watching TV from digital offer. It is possible to see similar quality and type of shows at the same time on different channels. That's why, they mostly choose to watch only one on the channel, and they consume the others from digital services, this is quite common especially in female audiences.'

Gulsen finishes: 'TV market keeps growing despite the crisis. 2014 was a lucky year for Turkish TV market due to the fact that our content has been acquired by global broadcasters from all around the world. We continue to invest in the acquisition of local movies as well as Hollywood movies and we'll also benefit from our 20th Century Fox output deal. So, drama will still predominate, but we'll also have first-on-TV movies and entertainment shows.'

Samanyolu Broadcasting Group concluded a great 2014 in a top position in the ranking with its in house drama series *Little Bride*, *The Hill* and *Others*, produced by the owned *prodco Ser Film*, which is the new brand the company is pushing in the international markets through its director, **Hasan Bozaslan**.

He describes: 'We have one different series every day of the week (six series on air at the same time) and daily soap *Torn between worlds*, which places us in the first positions during the week. We'll have second seasons of *The Hill* and *Little Bride* this year.'

According to the executive, content trends are changing in Turkey: 'The series are not being so long and their topics of them are mostly local issues. The epic series keep calling the attention of the audience, specially the stories from the Southeast Turkey: smuggling, traffic, bands, etc. Entertainment shows don't work much in our network, but neither in the country. Series leads by far.'

In the distribution business, the company is doing well in Central Asia, specially, but also in CEE territories. 'After attending Natpe Miami we hope to do our first sales in Latin America, where the Turkish series have successfully disembarked', adds **Bozaslan**.

Among the top titles, it offers the brand new series *Orphan Hearts* about a man who grew up without love, and an orphan girl whose parents were murdered and had to grow up in an orphanage. Three seasons of *The Hill* (37x'80), about a commander that, while fighting for his country, he looks for his lost sister. And the soap *Torn Between Two Worlds* ('45), with the story of a woman stuck between love and her

son who she met after years.

Mehmet Demirhan, Deputy Head of TV Department, TRT, comments: 'As the Public broadcaster, without making financial worries the priority, we take action keeping in mind the responsibility we carry and aim to produce programs that bring together variety and balance, information and entertainment.'

'This year we have put our signature on 2 very high quality productions, *Filinta* and *Resurrection*. These were different from the general drama concept with their production qualities, sets created and content. Their meeting with the audience has been quite an exciting time for us. We are happy because of the feedback we have received so far.'

'We see that entertainment formats are at the forefront. Constant evolution in the world creates psychological and social changes within people, and that inevitably leads to new trends



Samanyolu broadcast one different series each day of the week, but its daily soap *Torn between worlds* place the channel in the first positions during the week

in the broadcast TV industry. People's interests change in conjunction with their social lives. Because of the historical accumulation and cultural diversity our country holds, it's very difficult to analyze Turkish viewers within certain molds. Saying this, the #1 choice for prime time is still drama series.'

'Technological advancements have proven the importance of digital, especially the rising tendency of singular living within our societies has massively increased digital platform usage. We are working on creating content for these platforms, trans-media studies, web-based projects, Internet TV, etc.'

'Turkish TV market is based on production in an environment that is highly competitive to bring the best in front of the viewer and reap the most reward in return. We aim to make TRT presence felt in areas like co-productions and mini-series, which private channels tend to avoid as a result of financial worries. New markets are rapidly forming: Latin America, the 'motherland' of all TV dramas, has also met with Turkish series and they want to experience more', concludes **Demirhan**.



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MEET US AT DISCOP PAVILION 9

TOP NEWS FROM THE CENTRAL ASIA

PRENSARIO reproduces below the top most recent news from the region published by the news portal CEETV.NET. They noticed the new TV channels to be launched this year, the plans about the analogue switch off, content trends and media preferences, as well as new regulation on the TV industry.

KAZAKHSTAN POSTPONES ANALOG SWITCH OFF TO 2018

Kazakhstan has decided to postpone the analog switch off to 2018. The introduction was initially planned for 2015. Digital TV services are currently reaching 3.5 million

people in four cities. The government will spend a total of 22.5 billion tenge on the development of the DTT network in 2015 and 2016.



NEW CHANNEL LAUNCHES IN UZBEKISTAN

The President of Uzbekistan **Islam Karimov** has launched on January 1 the new TV and radio digital channel, **Mahalla**, operated under the structure of the **National TV and Radio Company of Uzbekistan**. The purpose of the channel is to inform the population, especially the youth, on the importance and significance of Mahalla in the formation of a democratic state and civil society, problem solution and

covering the experience of activities of different Mahallas.

Most of the digital TV channels in Uzbekistan should be working 24/7 since the beginning of the year. UzDaily.uz reports that those are **Uzbekistan, Yorshal, Sport, Tashkent, Madaniyat va Marifat, Dunyo Buylab, Mahalla, Kinoteatr, Navo, Oilaviy, and Diyor**.



AZERBAIJAN SWITCHES TO DIGITAL BROADCASTING IN FEBRUARY

Analog TV broadcasting in Azerbaijan will be terminated before the end of February 2015. Currently, the total number of digital television signal transmitters working in the country is reaching 80. The population has free access to the social package consisting of 12 channels. The broadcasts are done in the MPEG-4 format. For the transition to digital broadcasting people must purchase a decoder. The cost of these devices in the domestic market is 25-30 manats.



GEORGIA INTRODUCES REGULATIONS ON TV ADVERTISING TIME

At a meeting between the Financial-Budget Committee and the Committee of Sector Economy and Economic Policy of the Parliament of Georgia and the National Communications Commission was adopted the decision to reduce advertising volume on Georgian TV channels.

As stated by the Head of the National Communications Commission **Vakhtang Abashidze**, the reason for the amendment to the Law "On broadcasting" was the fact that Georgia has no limitations on the amount of commercials per hour, which has resulted in the broadcasting of TV commercials and ad sponsors for half an hour in the evening time-slot.

According to the *Draft Law*, in 2015 to advertising and sponsors' block should be assigned no more than 15 minutes per hour and they shouldn't be aired one right after the other. By 2016 it's planned to reduce this time down to 12 minutes per hour. Abashidze is convinced that commercial broadcasters would not be affected by this change.



KYRGYZSTAN TO LAUNCH NATIONAL SPORTS CHANNEL IN THE FIRST HALF OF 2015

Kyrgyzstan's first national sports channel KTRK-Sport will be launched in the country in the first half of 2015, according to the Press Secretary of the **Public Broadcasting Corporation (KTRK)**, **Dinara Israilov**, who said: 'It will be thematically sports-oriented and will focus on physical health culture. Its main objective will be to support the development of sports in the country by promoting healthy lifestyles and attracting young people to engage in sports as well as in the distribution and

promotion of national sports.'

The channel will operate in two languages, Kyrgyz and Russian and will broadcast 24 hours on the whole territory of the Republic. The core of the broadcasting network will consist of local and global sporting events, public broadcasts and commercials, including the relevant Government departments responsible for sports and health, sports federations and clubs.



MEDIA PREFERENCES IN TAJIKISTAN

The research and consulting company **M-Vector**, together with *Central Asia Barometer*, performed a national poll in Tajikistan that has confirmed that TV is the main source of information. 'The TV audience in the country is 87% of the population (aged 18 and older). The audience prefers watching local TV channels instead of the Russian ones. The most popular Tajik channels are **Safina** (36%), and **Shabakai Avval** (15%)', explains the report.

The first one is most in demand by residents

up to 44 years old, and the second one is most popular among the older generation.

The data from the **National Information Agency of Tajikistan (NIAT)** Hovar shows that **Safir** is also the most popular Tajik channel abroad and has a wide Russian-speaking audience. Russian TV is popular with 26% of the population: mainly its channels **Rossiya 1, NTV Russia** and **Perviy**. Residents of middle and older age watch them more often than others do.



DISCOP ISTANBUL 2015, THE IMPORTANCE OF BEING HERE

DISCOP ISTANBUL is celebrating this year its fifth edition and again, the expectations are high. The show takes place on February 24-26, and it is organized by BASIC LEAD in partnership with GLOBUS CONGRESS & FAIR under the audit of the UNION OF CHAMBERS AND COMMODITY EXCHANGES OF TURKEY (TOBB). For second year in a row, the chosen place is the INTERNATIONAL CONVENTION & EXHIBITION CENTER.

The tradeshow has become a strategic hub to meet players from Turkey that represent 80% of the market, but also from the Middle East & North Africa (MENA) and CIS, which have become two key regions to attend for major content providers, as well as some top TV stations from CEE, who bring larger delegations year to year.

All these regions gather 850 million people from 45 countries and represent over 20% of the global entertainment business revenue, and this explains why it is important to be here... in the past five years, the market has shown an increase of 50%, transforming from a hotel-format show to a convention center last year.

This edition gathers entertainment brand licensors, agents, consumer goods manufacturers, major retail chains and trade associations seeking to buy and sell licensing and merchandising rights for Turkey and neighboring countries, from international licensors representing popular film, TV, online and video game brands.

DISCOP Istanbul 2015 honors Jordan, a country set to play a key-role in the development of television content production and distribution across the Middle East, with a series of prestigious events and promotional initiatives.

SWEET FIGURES

The 2014 edition had showed a growth of 33% totalizing a record number of 1,048 delegates from 67 countries, and the organization expects

similar numbers this year; the buyer increase has been also a record: +52%.

Organizers are confident with the figures showed by the end of January, which demonstrate that DISCOP Istanbul is having a great reception among the covered regions, and newcomers both sellers and buyers, that have been confirmed.

'The successful editions of this market in Istanbul have strengthened the position of DISCOP as a must-attend destination for the international TV content business. The 2015 show is going to be bigger, stronger than last year', remarks Patrick Zuchowicki, managing director, Basic Lead.

He continues: 'There are three new national pavilions, China, Korea and Gulf Countries, in addition to the French and European pavilions. We have registered 750 more participants by the beginning of the month, which means 300 more than last year at the same time. We are expecting a total of 1,000+ participants. There is an increase of 20% in sellers and 30% in buyers.'

PRENSARIO estimated a buyer attendance of 400-450 acquisitions & programming managers. Among the new participants/countries coming to Istanbul are Bahrain, Tajikistan, Yemen, Pakistan, Chile, Colombia and Nigeria. After Turkey, the country with more representatives is United Arab Emirates with 38 companies.



Hakan Adiguzel, president of Globus Fairs and Congress (Turkey) and Patrick Zuchowicki, managing director of Basic Lead

Discop founder has announced in 2014 that the Istanbul-based trade show organizer Globus Fairs & Congress has acquired 50% of Discop Istanbul to expand the market in the future years

NEW COUNTRIES REPRESENTED AT DISCOP ISTANBUL

-  **BAHRAIN**
-  **TAJIKISTAN**
-  **YEMEN**
-  **PAKISTAN**
-  **NIGERIA**

The emphasis of this edition is on scripted and unscripted formats with one full day (last day of the market) dedicated to them. *The Format Day* runs parallel to the market on 26 February and features a morning presentation of today's most adaptable dramas with international appeal.

It will be followed by a discussion and analysis of innovative concepts. During the afternoon, it will take place a pitching competition for independent international producers, who present their original non-scripted TV format concepts to a panel and audience of TV executives looking for the next big talent. Finally, an award ceremony will conclude DISCOP Istanbul 2015.

Other highlight is a whole day dedicated to licensing and merchandising opportunities in Turkey, organized in partnership with the LIMA association. And a special two-hour presentation from VICE Media editors: Ryan Grim, managing editor, and Benjamin Shapiro, senior editor and on-screen reporter, will share their experiences

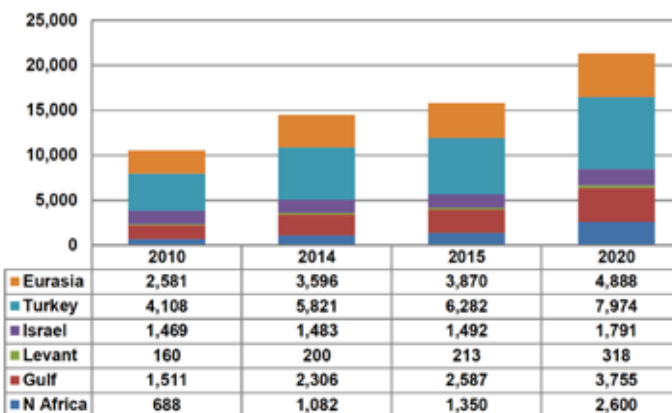


On its fifth anniversary, Discop Istanbul has not only consolidated the participation of the main players of Turkey, but also from Middle East & North Africa region, specially the Gulf States

Hassan Al-Hamdan, general manager, production and programming, Saudi Broadcasting Corporation (Saudi Arabia); Fadi Ismail, general manager Drama, O3 Productions/MBC Group (UAE); Can Okan, CEO, ITV Inter Medya (Turkey); Marwan M. Azar, media consultant, GMT (Qatar); and Jamal Douba, managing director, Media Link International (Lebanon); and Fabrice Gueneau, CEO, Dream On (France)



MENA: SPLIT OF PAY TV HOMES BY SUB-REGIONS - IN '000 (2010-2020)



Source: Digital TV Research

on working at the global media phenomenon, providing a unique view of what it is like to work at the successful media outlet and what it takes to engage the current youth generation.

TURKEY

Hakan Adiguzel, president of Globus Congress & Fair, comments: 'Turkey has become a major player in the global industry. Both as a marketplace for international content suppliers and as a production center with a plan to export USD 1 billion of TV content in the next decade. The city is now a strategic TV business hub for Central and Eastern Europe, Central and West Asia, North Africa and Middle East.'

Zuchowicki adds: 'The Turkish product continues to grow worldwide, especially in Latin America. Popularity unscripted and scripted formats for adaptation purposes are also on top. On the entertainment side, during the market we have the worldwide launch of Global Agency's new format *It's Showtime*, to take place at a press conference on the first day of the market', says the executive.

About the region in general, he concludes: 'Turkey and its surrounding regions are

populated with large, educated, influential youth demographics. Traditional media outlets have

struggled with new forms of consuming media, making this a priority session for most executives and companies in attendance'. Turkey has exported content for USD 212 million in 2013, according to the Professional Union of Broadcasters (RATEM) but no figures were still available for 2014 when this edition was closing. PRENSARIO found out which are the main distributors... 'Kanal D has exported USD 35 million in 2013', a source revealed. 'And the other two main distributors are Global Agency and ITV Inter Medya', it completed. But they are not all... other Turkish strong companies in the international landscape are Echo Rights, Calinos Entertainment, ATV and the pubcaster TRT, which has signed a distribution deal with ITV Inter Medya.

PARTICIPANTS & TRENDS

East Asian community is also numerous in Istanbul. The Filipino broadcasters GMA and



Filip Zunec, head of films and series, and Marco Doslic, head of schedule and research, RTL Croatia (borders) with Tatjana Pavlovic, director of international sales and acquisitions at Antenna Group (Greece)

Discop Istanbul is a market primarily focused on the Turkish, Middle East & North Africa (MENA) and Central Asia buyers, but year to year there is an increase on the CEE broadcasters attendance because of the success of the Turkish series in those territories

ABS-CBN, and Trans TV (Indonesia) buy and sell here. Malaysia, through the state agencies FINAS, CCMA and MDeC, attends Discop with producers and distributors regularly.

CEE countries such as Serbia, Bulgaria, Romania, Hungary, Croatia and Bosnia Herzegovina, are keen on Turkish series. Istanbul wants to be a global market, among the fastest growing territories.

Latin America has a strong presence of its traditional telenovela distributors, providing both canned and formats and exploring co-production opportunities. They agree to PRENSARIO: 'Our advantages are the quality/quantity of TV executives (writers, directors) that guarantees high production levels; a variety of locations; and production costs (cheap and fast)'.

Turkish series have successfully disembarked in Latin American territories, especially in Chile where 3 out of 4 national networks are broadcasting them. For instance, as a proof of the importance of this content, Juan Vicente, acquisitions manager from Mega (Chile), is at DISCOP as a buyer. The channel has on air Global Agency's *1001 Nights* (dubbed by them into Spanish), as well as Kanal D's *Fatmagul*.

Other countries with *1001 Nights* on air are Colombia (Caracol TV), Argentina (El Trece), Brazil (Band), Uruguay (Canal 10), US Hispanic (MundoFox), Ecuador (Ecuavisa), Bolivia (Unitel). This growth was reflected in the attendance of Turkish distributors to the last NATPE Miami: the biggest of them had a booth in the floor and met Latin buyers from every country of the region. The trend is spreading fast...

Returning to Discop, the contexts are not as stable as they used to be the past years in Turkey (freedom of press), Middle East (the political is



2015 will be a great year for Turkey. Apart from reaching new strategic markets such as Latin America with its high-end drama series, it has been named by Reed Midem "Country of Honour" for MIPCOM 2015

Turkey, 'Country of Honour' Mipcom 2015: Dursun Topcu, VP, executive director, Istanbul Chamber of Commerce (ITO) and Jerome Delahaye, director, Entertainment, Reed Midem, signing the agreement. Stand up: Mahmut Ozden and Ilhan Soyul, members of ITO board; Deniz Erfogan Barim, consulate generale of Turkey in France; and Fahrettin Basiloglu, ITO



Cheker Besbes, independent producer, Tunisia; Muthar Al Bakaa, CEO, Al-Ghaadeer Satellite Channel (Iraq); Mohammad Al-Ghamdi, chairman of the Saudi Arabia Producers & Distributors Association; and Waleed Shalaan, content manager, Rotana International (Egypt)

There is a wave of new countries taking part of the international tradeshows: their local industries are growing and evolving fast in both, content production and distribution, as well as new broadcasters and pay TV channels

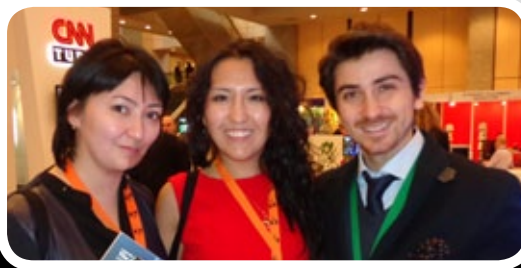
volatile) and CIS (oil prices are down). For instance, the drop on the oil prices has caused a devaluation of the Ruble in Russia, with the correspondent deceleration of the advertising market. This is not only affecting Russia, but also Kazakhstan and other CIS territories.

But, as it has happened during other crisis, the media industry continues to evolve, even in a complex situation. Evidence of this are the new channels to be launched within 2015 and the announcements regarding the digital switch off, as well as new regulations to modernize and improve the business (there is a special section with this news at the beginning of this edition).

Some Central Asian countries, such as Pakistan, Uzbekistan and Mongolia, are showing better organized TV industries (fighting the piracy, for example), which is an advantage for international providers looking for new territories to distribute their contents.

'In comparison with two-three years ago, now they are not asking and researching about the product, ratings, etc... they are buying directly', explained a seller to PRENSARIO last year in Istanbul. As seen, it is a fact that, as a result of this organization, TV channels and producers from these nations are demanding more formats, both entertainment and fiction, and contents.

MENA Pay-TV homes will double in number this decade to 21.3 million by 2020, according to a report from *Digital TV Research*. Turkey will account for 37% of the regional penetration by 2020, when 24% of all MENA households are forecast to subscribe legitimately to these services, up from 18% at the end of 2014.



Because of the drop on the oil prices, some CIS countries are seeing their international business affected, but that is not and impeding to keep attending international tradeshows

Asel Nukisheva, program director, and Ainur Nusipbecova, chief content acquisitions & sales, Channel Seven (Kazakhstan) with Amac Us, acquisitions and sales specialist at Kanal D (Turkey)

Qatar will record 72% pay-TV penetration by the time it hosts the *FIFA World Cup in 2020*, with Israel's providers reaching 71% of the population. However, regional disparities mean less than 10% of TV households in Algeria, Jordan, Morocco, Syria and Tunisia will receive pay-TV services.

The report estimates that the expansion was due to the growth of operators OSN, 1.16 million subscribers by the end of 2014, and beIN Sports, with 819,000. Piracy remains a major problem: there are 34.3 million FTA satellite TV homes in MENA sub-regions (excluding Israel, Turkey and Eurasia). The source believes that at least 10% of these homes also receive pirated premium satellite TV signals.

WHAT'S NEW?

PRENSARIO has noticed several new players at the market place, which will be at DISCOP Istanbul this year again, especially content associations such as the **Georgian Association of Regional Broadcasters**. 'We are buying all kind of contents for the smallest channels of the country', explains **Natia Kuprashvili**, executive director.

The panel *Focus in Iraq* showed in the last year edition, that there is enough room to grow in MENA. Players from markets such as Tunisia, Saudi Arabia and Egypt agreed that the social revolutions held the last 10 years (from Saddam Hussein fall in 2003 to the Arab Spring in 2010 and the Tunisian revolution in 2012) 'affected positively' the media market: 'From the state monopoly to a vibrant open market with more and more content output options', they said. Egypt is the oldest content producer in the

region (1950) and its productions cover the whole Arabic region. 'We have over 40 projects annually and 70 studios', commented **Waleed Shalaan**, content manager at **Rotana International**, one of the main media enterprises in the country.

THE ARAB WORD

- 80 MILLION ARAB HOUSEHOLDS
- 95% RECEIVING SATELLITE TV A
- +700 ARAB CHANNELS
- DRAMA IS THE TOP GENRE
- DUBBING POWER

The **Saudi Arabia Producers & Distributor Association** promotes local producers and alliances. 'In our country there is a lack of artistic teachers and associations to promote the audiovisual industry, but we are calling foreign investors to promote local business. There is a strong potential, as we are one of the most important economies of the region. Over 15 local FTA satellite channels are operating in our country', stated **Mohammad Al-Ghamdi**, chairman of the entity.

'In our country there are more openness and players in the audiovisual industry: the social & political stability is good for growing on production, especially drama', concluded **Cheker Besbes**, a free-lance producer in Tunisia.

DISCOP AFRICA EXPRESS

Basic Lead has announced the launch of *DISCOP Africa Express*, to take part on June 2-4 at the Sofitel Ivoire Hotel in Abidjan, Cote D'Ivoire, partner to its successful annual event **DISCOP Africa**.

Patrick Zuchowicki, founder of **DISCOP Africa** & *DISCOP Africa*, expresses: 'Our annual Johannesburg based market continues to exceed expectations each year. Following a survey of a cross section of our participants in November, it became clear that the time is right to establish a second dedicated market, at the heart of Francophone Africa, to further the growth of this important region and become an essential partner to our thriving Johannesburg event.'

Held at the Sandton Convention Centre in Johannesburg in November 2014, DISCOP Africa was attended by more than 1,500 delegates, including 230+ exhibitors representing global and regional entertainment content providers from Africa and overseas, alongside 400+ key acquisitions, commissioning and programming executives. The date for the 2015 edition is November 4-6 at the same hotel.

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**TRENDS
BUYERS & CONCEPTS**

HASSAN AL-HAMDAN, GENERAL MANAGER, PRODUCTION AND PROGRAMMING, SAUDI BROADCASTING CORPORATION (SAUDI ARABIA)
‘SAUDI TV WAS MANAGED BY THE MINISTRY OF CULTURE AND INFORMATION AND DURING 2014 GOLDEN JUBILEE, HAS BEEN TRANSFORMED INTO SAUDI BROADCASTING CORPORATION (SBC). OPERATING A MEDIA COMPANY IN SAUDI ARABIA IS A MAJOR RESPONSIBILITY FOR US, AS IT IS A VERY IMPORTANT MEDIA REACHING ALL THE SOCIETY AND RELIGIOUS STATEMENTS. WE ALSO HAVE A PAN-REGIONAL APPROACH’



FADI ISMAIL, GROUP DIRECTOR OF DRAMA PRODUCTION, MBC GROUP/ O3 PRODUCTION
‘FOR THE FUTURE, THERE WILL BE MORE QUALITY CONTENT AND BETTER PRODUCTION VALUES WITH STRONGER STORYTELLING. WE ARE OPEN TO ADAPT INTERNATIONAL SCRIPTED FORMATS BUT ALSO LOOKING FORWARD AND WORKING TOWARDS THE DAY WHEN OUR PRODUCTIONS CAN TRAVEL WORLDWIDE AND BE ADAPTED ELSEWHERE’.



AKIF EBIÇLIOĞLU, FOUNDER OF BRANDED ENTERTAINMENT EUROPE MENA ASIA ASSOCIATION (TURKEY)
‘THE AIM OF BEEMAA IS TO GATHER PRODUCT PLACEMENT AGENCIES FROM EUROPE IN ORDER TO UNIFY THE SECTOR AND MANAGE BUSINESS BETTER, AS WELL AS GENERATING AN UPDATED DATABASE AND FIXING STRATEGIES FOR THE FUTURE. WE HAVE INCLUDED MENA & ASIA, AND DEFINED ISTANBUL AS OUR HEADQUARTERS FROM WHERE WE CAN COVER BOTH REGIONS TOGETHER WITH EUROPE’



MUTHAR AL BAKAA, CEO, AL-GHADEER (IRAQ)
‘IN 2003, AFTER SADDAM HUSSEIN FALL, THE MARKET WAS OPENED AND STARTED TO GROW. WE HAVE 80 FTA SATELLITE CHANNELS AVAILABLE IN ARABIC AND KURDISH LANGUAGES IN THE COUNTRY. THIS BIG AMOUNT OF NETWORKS IN NEEDS OF CONTENTS, BOUGHT MAINLY FROM TURKEY AND OTHER PRODUCERS OF THE REGION. THERE ARE ONLY 4 PRODUCTION COMPANIES, BUT STILL NOT GENERATING GREAT CONTENT’



ROSS BIGGAM, MANAGING DIRECTOR, ASSOCIATION OF COMMERCIAL TELEVISION (EUROPE)
‘WHY WE ATTEND DISCOP ISTANBUL? TWO REASONS. FIRST, THE DYNAMISM AND INNOVATION IN PROGRAM MAKING FROM THIS PART OF THE WORLD IS NOT NEARLY WELL KNOWN ENOUGH TO THE EU INSTITUTIONS. THE OTHER REASON IS SIMPLE. WHAT IS DECIDED IN BRUSSELS TODAY WILL BE APPLIED IN ISTANBUL, KIEV, TIRANA, BAKU AND TBILISI TOMORROW’



ANDREW EBORN, PRESIDENT & CEO AT OCTOPUS TV (UK)
‘WE HAVE TO UNDERSTAND THAT PEOPLE DON'T WATCH TECHNOLOGY, THEY WATCH HIGH QUALITY CONTENTS. SIMPLICITY IS THE NEW SOPHISTICATION’



OVER 1.8 MILLION VIEWERS IN TURKEY AND RELEASED OVER 36 OTHER COUNTRIES

TWO HEARTS AS ONE

‘WHEN YEARNING SHAKES FURTHER SIDE OF THE SKY, TO HEARTS AS ONE’

1915 THE BURNING EAST FRONT OF WORLD WAR 2, THE FEE BETWEEN U.S.S.R AND GERMANY IS SPREADING TO NORTH CAUCASIA, SUFFERING PEOPLE AND AMONG THEM, THERE IS CENNET.

AFTER HER HUSBAND WAS CAPTURED, CENNET IS LEFT ALL ALONE WITH HER BABY, AND AS IF THIS WAS NOT ENOUGH WITH THE DIVISION OF NASTI, SHE FINDS HERSELF IN PRISONER CAMPS IN GERMANY.

SHE WITNESSES LOVES OF THINGS BETWEEN LIFE AND DEATH, BUT THE EPIC LOVE TO HER HUSBAND AND ANOTHER INSTANCES GIVE HER THE STRENGTH TO TRY AND BEAR THE ENORMOUS PAIN. HER ADVENTURE, INCLUDING WORKING CAMPS, EVACUATIONS, ESCAPES AND DEATHS COMES TO END IN THE MIDDLE OF NOWHERE IN ASIA. CENNET WAITS FOR 30 YEARS, SHE ARRAYS HER HUSBAND WITH THAT ENDLESS LOVE AND LITTLE HOPE IN HER HEART WHEN THE CALENDARS SHOW THE 30th. INSTEAD OF HER HUSBAND NIAZ, SHE FINDS A TURKISH FAMILY: YANIR, DILEK AND THEIR CHILDREN.

THEY'VE LEFT THEIR COZY HOME IN TURKEY AND HAVE COME TO THE OUSTITUTE AND CHALLENGING GEOGRAPHY OF MIDDLE ASIA. YANIR'S AIM TO BUILD A SCHOOL AND RAISING YOUNG TREES IN THAT ARID LAND, THIS CAN BE SEEN AS A CRAZY DREAM.

HE IS AN EAGER VOLUNTEER OF EDUCATION, BUT DURING THIS EXILING VORAGE HE DOESN'T REALIZE THAT HIS MARRIAGE IS COLLAPSING.

DILEK IS A DAUGHTER OF A WEALTHY FAMILY, SHE LOVES HER HUSBAND, BUT HIS UNTHINKABILITY, FEARFULNESS IS HARD TO TOLERATE. TO LIVE IN THAT POOR REGION, TRYING TO COPE WITH INCREASING BODIES, MAKES HER REFINED ABOUT MARRIAGE/QUERRE IN BETWEEN HER HEART AND HER MIND. DILEK STRUGGLES WITH HERSELF, SHE DOESN'T WANT TO LOSE HER HUSBAND AND THOSE PURE FEELINGS, BUT WHEN SHE MEETS CENNET, THE MARRIAGE OF PATIENCE, SHE BEGINS TO UNDERSTANDS, THE UNION OF THESE TWO HEARTS UNITES HUNDREDS OF THOUSANDS.

IN FACE THIS BRIDGE OF AFFECTION BETWEEN TURKEY AND MIDDLE ASIA WORLD BRING ALONG LOTS OF UNEXPECTED EVENTS AND SURPRISES.

NIAZ, WHO WAS THOUGHT TO BE DEAD ... TWO HEARTS AS ONE IS THE STORY OF PEOPLE WHO SACRIFICE THEMSELVES TO REALIZE A DREAM. IT IS THE STORY OF PEOPLE WALKING WITH THE AIM TO GIVING LIFE, PEOPLE SEARCHING THE SECRET OF INFINITY, IT IS THE STRIVING OF PATIENCE.

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Year of Production: 2013 - 2015 **HD**

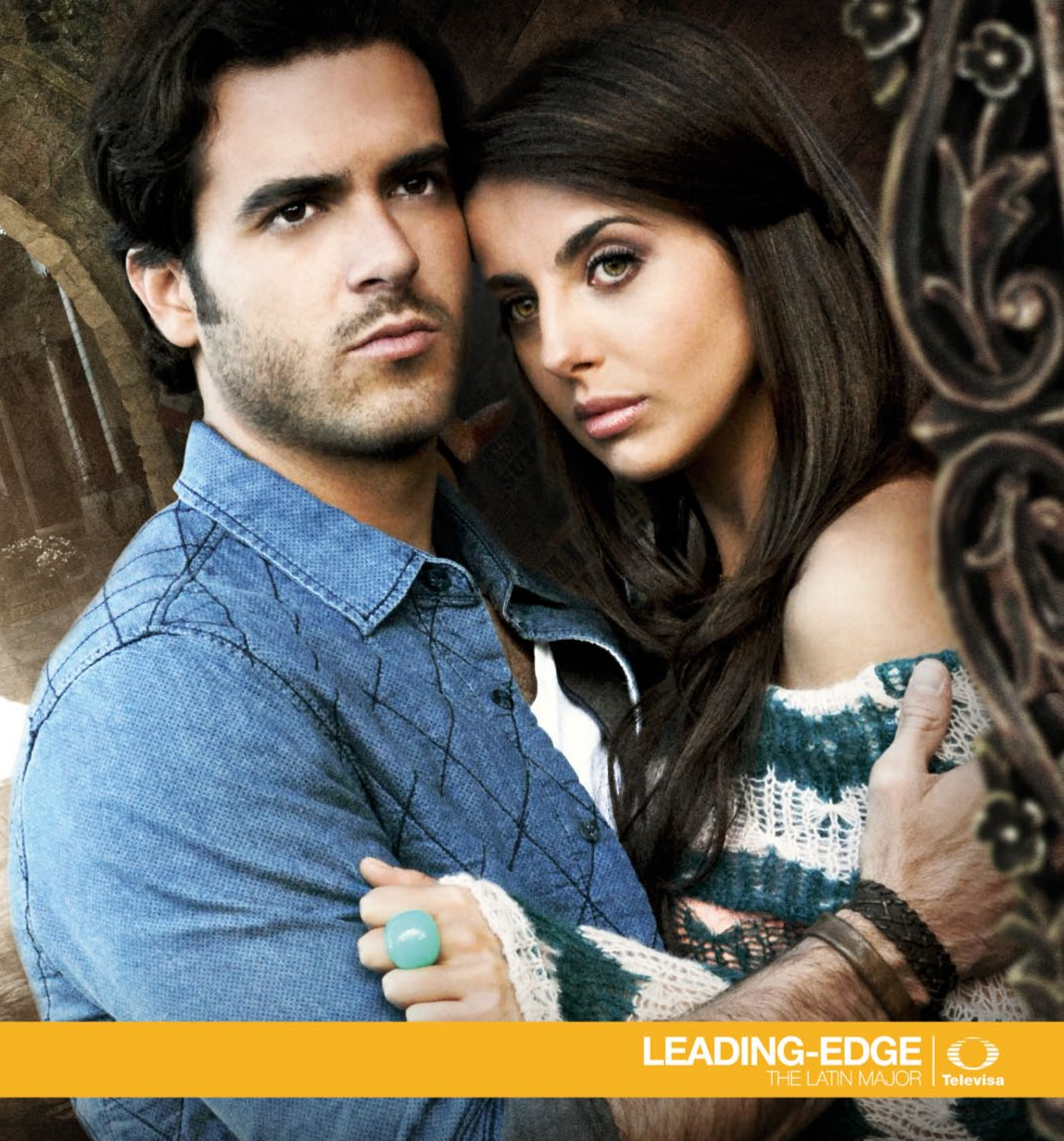
Season 1: 99 x 45'

Season 2: 120 x 45'



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OSN, THE FIRST WINDOW PROPOSITION IN MENA

Leading Pay TV network OSN brings to the Middle East and North Africa (MENA) audience the widest choice of premium Western, Arabic, South Asian and Filipino entertainment with a broadcast footprint that covers 24 countries across the region. It is the home to over 140 channels, offering blockbuster movies (100 uncut and uninterrupted premieres a month), top rated series, sports, documentaries, news, kids entertainment and live talkshows. All content is subtitled in Arabic and is available with a dual-language EPG.

OSN operates 46 HD channels and is currently the only network offering a full HD bouquet of channels as well as 3D entertainment. It was also the first to launch the OSN DVR HD; the region's first online TV platform, OSN Play; the first on 3D, HD, Internet enabled satellite receiver and recorder, OSN Plus HD and the first VOD service. In mid-2014 launched, the group launched Go by OSN, a premium online TV service providing subscribers access to thousands of hours of content, contract and commitment-free.

Khulud Abu Homos, EVP of Programming & Creative Services at OSN, explains: 'We have 20 owned and operated channels that are positioned as premium & exclusive. The programming on the platform, be it premium Western or Arabic is based on the "first window proposition" that includes movies being offered to viewers first – that is closest to

their theatrical release and series airing 'at the same time as the US'. A lot of effort was invested in making evident the benefits of such initiatives to both producers and licensors as a counter to piracy and creating synergy with the way youth and viewers are consuming content today.'

It has also embarked on original Arabic productions that resonate with local tastes and preferences appealing to all demographics. 'We led the proposition of premium Arabic content with the launch of the OSN Yahala channel bouquet, the premier destination for quality and premium Arabic entertainment, specially adapted versions of successful western dramas. The introduction of international quality benchmarks has positively influenced Arabic productions quality both technically and from an editorial perspective.'

'The focus is on drama brands and formats with social relevance to vital issues in MENA, like the Italian format *You got mail* that was adapted and focuses on forgiveness as a virtue: *Al Mousama Karim* was headlined by George Gardahi and brought human-interest stories to life. Another self-developed concepts was *The Boss* and *Saudi Doctors* that incorporates elements from international shows however are significantly relevant to local and regional preferences while also tackling bold and edgy issued within accepted parameters.'

'The appetite is growing for locally relevant content and the success of Turkish dramas and long format shows indicate the shift of investments from American TV shows to locally produced content. The latest and hit Hollywood movies however continue to be the most preferred choice among regional viewers', she says.



Shows such as *Saudi Doctors* incorporates elements from international shows, however are significantly relevant to local and regional preference

'With TV and video viewing habits in the Middle East being rated as the highest around the world driven by a digitally savvy young audience, it opens opportunities for non-conventional concepts and story lines with an increasing appreciation and acceptance of 'out of the box' concepts. There is a further move towards new genres, specifically satire in all forms, standup, comedy and action-driven concepts as compared to repetitive stories in drama and slapstick comedies that used to dominate our screens.'

'Similar to what we are seeing globally (movie stars talking on more TV projects), within the last five years Middle East drama productions have also seen a leap in both production and editorial quality with the shift of cinema or movie stars, directors and producers moving to TV. We are setting the trend when it comes to delivering a new and comprehensive viewing experience.'

'Over the last 12 months we have witnessed a peak in consumption of shows such as *Game of thrones* when we provide previous season box sets alongside the day/date airing of the latest season. OSN has also offered full seasons of *House of Cards* via its digital services, as well as the latest season of *Homeland* and *Downtown Abbey* airing close to their US/UK emission, while also offering full season box-sets of all previous seasons of these shows.'

Homos concludes: 'The expansion will come with creating enhancements to the viewing options presented to viewers with *second screen* experiences, live studio based and daily shows that bring interactivity with the viewers. The future is engaging via content and getting viewers to engage with the content, integrating social media elements and interactivity. Furthermore personalizing the viewing experience will be a key aspect to TV viewing albeit via multiple connected devices.'



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Khulud Abu Homos, EVP of Programming & Creative Services, OSN





FIC TURKEY, SOLUTIONS FOR BIG GLOBAL AND LOCAL CLIENTS

Jan Koeppen, president of Fox International Channels Europe & Africa announced by the end of 2014 that the company has combined FIC Turkey and FOX Turkey into a single operational business unit. 'By combining our Pay TV business and our FTA channel we have made them a more integral part 21st Century Fox. We have created a stronger partner for advertisers and platforms, as well as a powerful creative destination for producers.'

After a structured operational integration process over the last months, it was defined that Mehmet Icagasioglu leads Ad Sales for the business; Sebnem Askin continue to run programming at FOX TV; and Dogan Senturk continues in his role as head of News and Sports at FOX TV.

Burcin Gulsen, FIC Turkey Head of Marketing, continues: 'We operate 10 channels in Turkey, which are distributed in the main Pay-TV platforms,

such as Digiturk, D-Smart, Teledunya, Tivibu and TurkcellTV+. FIC Turkey has recently launched its non-linear brands that let viewers to connect and watch content every time, everywhere.'

'We created the most pre-

ferred sales team in Turkey not only representing our own channels but also other strong channels such as Disney Channel, Disney XD, Galatasaray TV, Da Vinci Learning and more to come. We incorporated the first 360° project team in house, Factory, offering turn-key, customized and innovative solutions for our partners'. Additionally, FIC Content Sales Team offers 'a wide range of content' to the market including series, documentaries, entertainment shows and cooking shows.

Among the shows currently aired, head of marketing lists *The Walking Dead*, *Homeland*, *American Horror Story*, *Da Vinci's Demons*, *CSI* and *NCIS* franchises, *Madame Secretary* and *Empire* on Fox Life, FX and Fox Crime. *Brain Games*, *Cosmos: A Spacetime Odyssey*, *90's*, *Big Cats Week*, *Years of Living Dangerously* are the most popular shows on Nat Geo channels. Most popular shows on 24Kitchen are *Jamie Oliver*, *Anthony Bourdain*, *Gordon Ramsay* and *Rudolph van Veen*.

Regarding local productions, she adds: 'We produce local shows and/or local short content for Nat Geo channels such as recent *Tracking the Brown Bear* and *Inside: Turkish Airlines* documentaries. Besides, we produce three local cooking shows for 24Kitchen: *For the Love of Food* with Gabriele Spozza, *Art of Taste* and *Maksut's Neolocal Kitchen* with Maksut Askar and *Tom's Istanbul Delights* with Tom Aikens.'

Gulsen comments that Turkish media market is 'competitive', but linear TV remains the leader. However, Pay TV penetration is not that high, it's around 31%, 6 million households. 'Our main motivations are affiliate and Ad Sales. We are the one and only group who do not offer ad-sales solutions



The Walking Dead and *Homeland* are top shows from FIC Turkey

only for our own channels but also for big local and global clients. When our clients experience the high quality service we provide to them, they keep coming back for more campaign briefs even if it has nothing to do with our TV businesses.

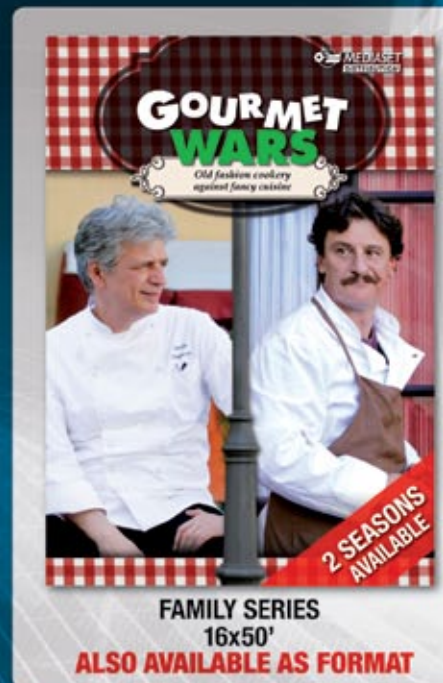
'On the content side, we have two very important output deals with the world's biggest content provider studios: 20th Century FOX and CBS. Also, we believe in the importance of localization, so we act really careful when choosing content, scheduling and promoting it. We try to make sure that Turkish audience feels that these are tailor-made channel managed according to their need and habits. That's also why we invest on local production as opposed to our competitors.'

As a trend, she visualizes that 'there is no more fall and mid seasons in Pay TV; it is now a 4 season business with more summer dramas than comedies. The biggest change in content is that movie stars are now on TV. TV series are hosting the biggest Hollywood movie stars.'

'Audiences are increasing enjoying the convenience of time-shift technologies and second-screen applications all around the world. We are already seeing major studios and platforms releasing their own OTT offerings. With the output deals that we closed, we have the VOD and Catch-up rights almost for all of our highlights. Our upcoming Fox Play app will allow the users to reach their favorite shows wherever and whenever they want.'

'On the other side, Pay TV in Turkey is still suffering from illegal web streaming of the foreign series. It is getting more important to broadcast premium US content at the same time with US, like we do for *The Walking Dead*, *Homeland*, *Glee*... FIC's newest highly anticipated production, *Wayward Pines* will be broadcasted at the same time in 126 countries on May 14th, concludes Gulsen.

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Jan Koeppen, president of Fox International Channels Europe and Africa

CTC MEDIA, RUSSIA: ADAPTING TO THE DIGITAL AND CONTENT TRENDS

CTC MEDIA is a leading Russian independent media company, operating four networks in that country, CTC, DOMASHNY, PERETZ and CTC LOVE, as well as CHANNEL 31 in Kazakhstan and a TV company in Moldova with combined audience over 150 million viewers. Apart from that, it operates international versions of CTC (North America, Europe, Central Asia, Armenia, the Middle East), Peretz (Belarus and Kyrgyzstan), several digital assets such as VI-DEOMORE.RU, DOMASHNIY.RU, CTC.RU and PERETZ.RU.

2014 has been again a record year of the group, positioned as the second largest broadcasting conglomerate in Russia gathering a combined audience share of 14.7% in all 10-45 demographic, while it has delivered a set of strong operational results in 3Q: the Russian advertising revenue increased 4.3% year-to-year.

Yuliana Slashceva, CEO: 'We reconfirmed our full year outlook for OIBDA margin at around 30%. Devaluation of the ruble, which lost 15% against the USD dollar during 3Q, significantly affected our performance. The ruble declined 17% year-on-year. However, a set of cost management initiatives is helping us to ensure efficient cost control. We expect that our full-year programming expenses will increase more slowly than our revenues. This will help us to keep high margins in extremely challenging

macroeconomic conditions.'

The core audience of the group flagship **CTC Channel** are young adults (25 & 35), which generates 'exceptional' demand for news and information about what's going on in the world and their country, she says, and adds: 'All new launches on **CTC Channel** enjoyed higher-than-average audience shares including *The 80s*, *Angelika* and *Family Business*'.

The executive states that there have been changes in the demand for content generated by the audience enjoying entertainment shows. 'The demand is shifting from humor and sitcoms to drama and happy-ending *dramedy* shows. We took this trend into consideration for content production, and **CTC Media** came up with a series of new projects in these genres that we are expecting to launch across our channels in the coming months.'

The updated programming and content policy of **Domashny** is attracting significantly younger audiences to this channel: the share of women aged 50-59 fell to 2% compared to 8% in 1Q. 'We are evaluating whether to switch from women aged 25-59 to women aged 25-50, which is a more attractive demographic from an advertising standpoint, starting from 2016. We are also considering to increase our ad prices faster than the market average starting from 2015, as well as evaluating a potential transformation of **Peretz**, which took the hardest hit from the news channels', describes **Slashceva**.

Lastly, **CTC Love** became a part of the TNS measurement panel in September and became a Top 20 TV channel in its target audience with 0.8% share during the first month.

'Our *transmedia* business is growing fast. We signed a partnership agreement with a leading social network in Russia, **Odnoklassniki**, which helped us to increase traffic on all **CTC Media** resources and open up new monetization opportunities. We are preparing to launch seven large-scale *transmedia* projects that we expect will generate USD 1.83 million of revenue. One of them has been launched on **CTC Love** channel that has generated income not only from the sale of TV-ads, but also in digital projects. Overall, we have consolidated our position as a technology leader. The revenues of the



All new launches on CTC Channel, including *The '80*, enjoyed higher-than-average audience shares

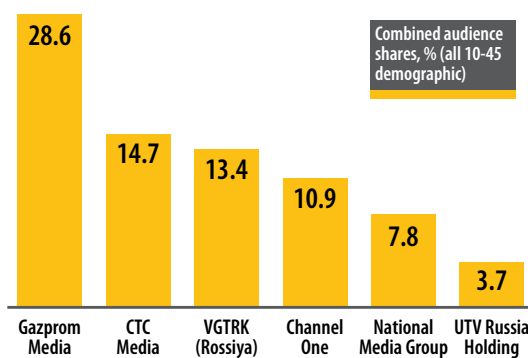
transmedia unit increased by 55% on YoY basis on 3Q14', she concludes.

Among the most important news since 2015 begun, are that **CTC Media** has completed its acquisition of 51% of the stakes for USD 2.2 million in **CarambaTV**, a producer of digital and *transmedia* content. The transaction included the **Carambatv.ru** and **100500.tv** web portals, which together receive over 2 million unique monthly visitors. **CarambaTV** content generates over 75 million views per month, including 20 million views of online content.

It has also launched the first fully developed mobile game in Russia based on the network's popular *Molodezhka* multimedia TV series, developed and released in cooperation with the gaming company **Game Insight**. Since last December, the game has been free-downloaded by over 500,000 users.

In Moldova, **CTC Media** has started a gradual transition to sub-license the content of its international channels, while intends to begin selling content to other TV channels in the country. It has closed the subsidiary, **I.M. Teledixi S.R.L.**, which was broadcasting as **CTC Mega** since 2005 to focus on the cable and satellite distribution of **CTC Media** channels.'

RUSSIA: COMBINED AUDIENCE SHARES, BY MEDIA GROUPS – ALL 10-45 DEMOGRAPHIC (3Q 14)



Source: TNS Russia, CTC Media research department



Yuliana Slashceva, CEO, CTC Media

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WHAT'S UP IN THE MIDDLE EAST?

By SIGLINDE MARTÍNEZ SMARTINEZ@EURODATATV.COM

With a population of more than half being under 25 years old, and a high penetration of mobile phone and Internet in all target groups, the Middle East is a region that is attracting media and advertising companies. Moreover, average daily viewing time per individual – even though conducted with different measurement instruments – has increased in most countries. This is likely to improve in the years to come as new media hubs are being created to facilitate local relationships and boost foreign investment; likewise the deployment of technological advancements is making it possible to identify viewers' habits.

A LITTLE BACKGROUND

With the increase of Satellite TV channels over the last decade—since 2000—TV producers and broadcasters experienced an intense pressure to provide quality content and innovative concepts that appeal not only at a local, but also at regional level. Since launched-Satellite TV channels are capital-intense companies, their goal is to capture as much audience as possible. However, the difference of TV audience measurement (TAM) in the region did not allow a forecast of potentially successful formats. This made TV channels adopt a risk-averse attitude towards the creation of new content and therefore prompted the broadcasting of Turkish and Mexican soap operas.

Evolution of content creation in the Arabic TV industry was mainly done through previous successful shows. However, because of the strong religious and cultural values, the reality-shows as *Al Ra'is*, the adaptation of *Endemol's* format *Big Brother*, were prohibited after several days of broadcasting on MBC. Others such as the Arabic version of *American Idol: The Super Academy*, or the reality-show *Super Star* were highly criticized.

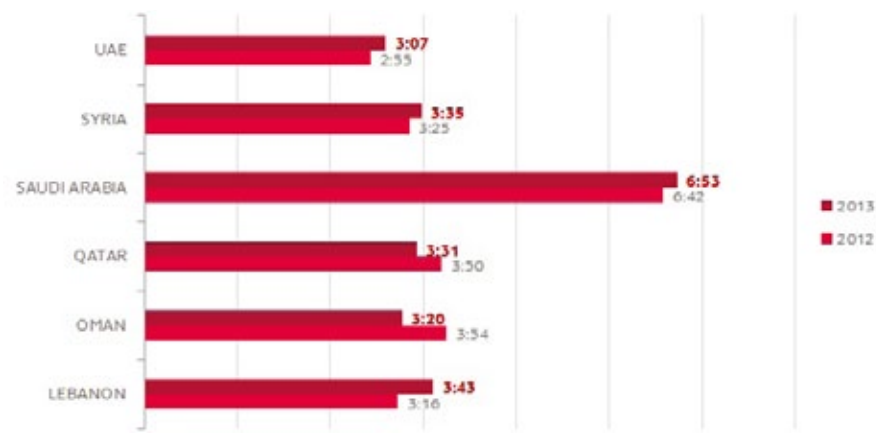
Recent government efforts to create



Ana We Baba We Mama on Dream 2 revolved around the conflict between the new and old generations, while *Sahib Al Saada* on MBC Mars covered family issues with a comedy narrative succeeding in the portrayal of social matters

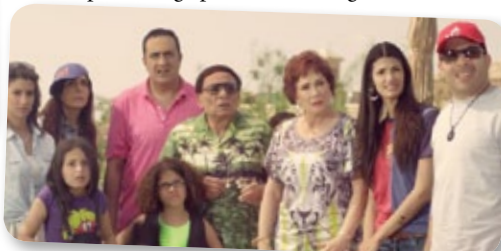
PRENSARIO INTERNATIONAL

MIDDLE EAST: AVERAGE DAILY VIEWING TIME PER INDIVIDUAL – TOTAL INDIVIDUALS



media hubs within the region—besides the well-known media cluster in Egypt—have been made, especially within the Gulf countries as the recent media center *Twofour54* (UAE). Aware of the indirect and direct benefits of film and TV productions, countries like Lebanon, UAE and Jordan are starting to create policies that promote foreign media investment and increase original Pan-Arab content production. Moreover, the adoption of people-meter as TAM in the most relevant countries for the Pan Arab TV advertising market—UAE, Saudi Arabia and Egypt—are widening the TV Landscape for producers and broadcasters.

A lot has been said about the TV Satellite channel explosion and its consequences. Some divided it in a simplistic manner by stressing out that after the Arabic TV industry was liberalized—as a natural evolution of the economics of media production—Western production would rather “democratize” the industry or “westernize” it by forcing the adoption of formats. Though, these two views area paradox, they took place, but not at the same time; they occurred gradually, and several external factors contributed to it. This was more evident for the news programs at the beginning of the channel *Al Jazeera*, who later adopted foreign practices creating a tremendous



success leading to regional competition. The channel competed with MBC's news channel *Al-Arabiya* in 2003.

When launched, TV groups are capital-intense, such as *CBC Group* (2011) or *Al Nahar* (2011), and they do not figure as the main producers of original content. However, groups already established with several niche channels such as *MBC Group* (1991 – e.g. *MBC1*, *MBC Drama*, *MBC Masr*), *Abu Dhabi Media Company* (1969) or *Nile TV International* (1994 – e.g. *Nile Life*, *Nile Culture*, *Nile Family*) are producers of most of the original content broadcasted in the UAE and Egypt.

The original production in 2014 in Egypt was mainly fiction, with series and sitcoms. Entertainment and factual shows were produced and adapted in a less degree. *Al hayat*, *MBC1* and *El Mehwar* were the TV channels with more new original formats broadcasted in Egypt.

TELL ME WHAT'S GOING ON

Looking to create a link with viewers, original series in Egypt were mainly focusing on portraying opposite sides of daily life situations in a humorous way. Comedies such as *Danna Banat* broadcasted on *Al hayat* and on *Al Nahar* showed the clash among social classes; meanwhile, *Ana We Baba We Mama* on *Dream 2* revolved around the conflict between the new and old generations, *Sahib Al Saada* on *MBC Mars* covered family issues with a comedy narrative succeeding in the portrayal of social matters.

The same mix of comedy and social context is perceived in the series *Embratoreyet Meen?* on *MBC Drama*; this series is not only a sarcastic

UAE: TOP 5 PROGRAMS – BEST PERFORMING PROGRAMS (JANUARY-DECEMBER 2014)

Channel	Date	Time	Program	Genre	Origin	Total Individuals		
						Rat%	Rat#	Shr%
MBC1	[29/06/2014-03/08/2014]	18:59	RA'EEZ QERESH AL BAHR	Entertainment	Egypt	1.7	107.2	10.3
MBC1	[29/06/2014-28/07/2014]	16:36	SARYA ABDEEN	Fiction	Egypt	1.7	103.2	9.5
MBC1	[29/06/2014-27/07/2014]	00:58	HOWA WE MAY WE HEYA	Entertainment	UAE	1.6	98.1	8.1
MBC1	[11/10/2014-12/10/2014]	14:04	QARERI	Entertainment	UAE	1.5	94.7	14.8
MBC1	[20/12/2014-28/12/2014]	16:53	ARABS GOT TALENT (S4)	Entertainment	UAE	1.4	88.8	8.8

Source: Eurodata TV Worldwide/Relevant Partners TVview

comedy, but it also reflects the political and social changes following the Egyptian Revolution. Likewise, *El Excellence* on *Al hayat* or *Seseq El Omr* on *Dream 2* had political events in Egypt's storyline, and the latter reveals the life of the ex-President Gamal Abdel Nasser and his Minister of Defense, Marshal Abdel-Hakim Amer.

Story based series about women such as *Sarya Abdeen* on *MBC1* were also relevant; the production was considered the year's biggest drama production with a number of well-known actors from the Arab world and had a considerable budget. The series deals with women conflicts on the period of time between 1866 -1890. Along the same line, *Sign El Nisaa* inspired by a play written by once a political detainee—*Fathia Al Assal*—illustrates real life events around three Egyptian women in prison.

The trend of portraying social situations was also followed in the UAE with original productions such as *Motalqat Sagherat* on *MBC Drama*, which discussed the phenomenon of early divorce in the Gulf Society. *Derek Al Fareej* and *Saray Al Bait* on *Abu Dhabi Al Oula* were also social series with a narrative comedy.

LET'S PLAY AND TALK

Portraying a Pan-Arab culture was also the theme of one reality show *Al Raqisa* on *Al Kahera*, which aimed to find the most talented belly dancer in the world. This was the only talent show that did not include celebrities as participants in 2014. Other original formats in Egypt as *Foash* *Fy El Mo'a* and *La'aret El Frahna* had different famous stars as hosts; in both programs,

celebrities are victims of a joke that is revealed at the end. With the same “Behind the scene” notion the programs *Shewayet Eiyal* and *Ramez Qersh Al Bahr* captured the reaction of children when interviewed by the Egyptian comedian Ahmed Helmy, while the latter program spots celebrities' reactions facing terrifying situations.

On the factual genre, several talk shows that analyze political and economic topics. *Al Aassemma* on *El Mehwar* invites guests to know their opinion about the situation in Egypt; meanwhile, the program *Aan Al Awaan*, deals with the latest presidential elections in Egypt, hosting the famous interviewer Hala Sarhaan.

Contrary to Egypt's obvious trends, the UAE's entertainment and factual productions remain diversified with game shows, cooking talent quest programs, or formats inviting the audience to participate by phone calling.

A PAN-ARAB FLOW AND BEYOND

With the increase of costs due to the production of new contents and low spending on TV advertisement, one program is usually broadcasted on several channels. *Sign el Nisaa* was broadcasted on 9 different Satellite TV channels throughout the year in Egypt, Saudi Arabia and UAE. The series *Ad Tnazool* and *El Morafa'a* were broadcasted on three different channels such as *El Mehwar*, *CBC*, etc.

Therefore, in order to maintain viewers, there has been an inflow of foreign programs, with fiction being the most imported genre in UAE, Egypt, Lebanon and Saudi Arabia. In Egypt and UAE, *MBC Group* was the one that imported



Story based series about women such as *Sarya Abdeen* on *MBC1* were also relevant; the production was considered the year's biggest drama production with a number of well-known actors from the Arab world and had a considerable budget

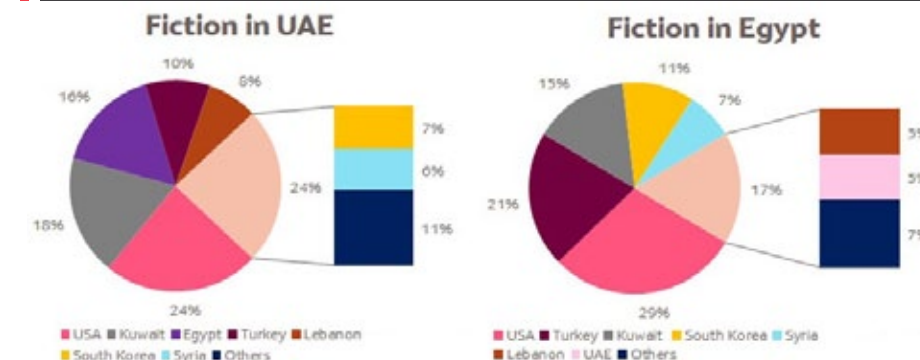
the most. In Lebanon, the TV channel *Al Jadeed* figured as the first importer, followed by *MBC+ Drama*. Egypt and UAE retrieved their fiction formats from a large number of countries and mainly from the USA, Turkey, Lebanon and Kuwait. On the contrary, Lebanon and Saudi Arabia imported mainly from Arabic countries.

The flow of TV formats within the Pan-Arab region has been a given, but *MBC4's* acquisition of more than 15 South Korean fiction formats such as *Gaeinui Chwhiyang*, *Ameerati Anti* or *Al Ameer Wal Faqeer* broadcasted in Egypt and UAE is a clear example that TV broadcasters are looking to differentiate themselves and offer “new” content. The wave of South Korean programs is mainly focused on romantic comedies and family values.

Co-production projects are allowing the entrance of programs with countries outside the continent such as the Indian/UAE romantic comedy *Saraswatichandra* or the series *Abou Hieba Fy Gabal El Halal* on *CBC*, a co-production between Egypt and England.

Though, the amount of co-production with non-Arab countries is still low, TV producers are highly investing in adaptations such as *Forsa Thanya*, the Arabic adaptation of the Colombian format *El Matrimonio Feliz*. By using the latest technology, producers are betting on delivering quality content and saving expenses with the new facilities available in the UAE.

FICTION ORIGINS IN UAE & EGYPT (2014)



Source: Eurodata TV Worldwide

Want to know more about ratings and programming trends in more than 100 territories worldwide? Please order Eurodata TV's “One TV Year in the World” and “International TV Trends” reports. To find out more about these reports and more, please contact Eric Lentulo: elentulo@eurodatatv.com

Source: Eurodata TV Worldwide - Relevant Partners / One TV Year in the World / TVview / IPSOS MediaCT

THE EVOLUTION OF PAN-ARAB ADVERTISING MARKET



PRENSARIO summarizes below the key figures in the evolution on the Pan-Arab advertising expenditure by media, according to the report *Arab Media Outlook 2011-2015*, which highlights that Satellite TV continues to account for a major share of the advertising spend, thus explaining the lower proportion of domestic TV advertising spend at a country level.

For the purpose of this analysis, it has been considered digital advertising spend in individual markets based on an assessment of the number of internet users, ICT infrastructure, Internet usage and consequently the volume of traffic of the various markets across the Arab region.

While the Internet has by definition a pan-Arab reach, the report has attributed digital advertising spend to individual markets to reflect actual online consumption and consequently advertising budgets for each country in the outlook. As a result, it was seen varying levels of digital advertising spend across the individual markets but have not reported pan-Arab digital spend.

The regional unrest, which occurred in many markets coupled with the overall economic climate in 2011, resulted in a decline of 12% of Pan-Arab advertising spends between 2010 and 2011. Since 2012, there was a slight growth of 4% and we expect advertising spend in 2015 to grow at a CAGR of close to 6%, to reach approximately USD1.65 billion.

In addition as many of the advertisers on Pan-Arab platforms are international brands, global uncertainties including the prolonged economic crisis in Western markets continue to weigh heavily on the market in the short term. However, with real GDP forecast to grow by close to 5% over the period from 2013- 2015, ad growth shows a stronger uplift in the outer period of the analysis.

REGIONAL SATELLITE TELEVISION

Despite a decline in satellite TV advertising spends in the last years, TV continues to account for the highest proportion of pan-Arab expenditure at 93% of the total spend. The major broadcasting groups are consolidating their position at the top (in terms of launching channels under the same umbrella).

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Whilst MBC remains the dominant broadcaster across the region accounting for the majority of top watched channels particularly in the GCC, the introduction of the *People Meter* systems in both the UAE and Saudi Arabia brought to light some distortions with the current ratings and benefit some smaller channels.

The market for pan-Arab news channels has seen a number of entries recently and became even more competitive in with the introduction of new news channels like *Sky News Arabia*, and *Alarab*. The pan-Arab FTA market has already witnessed growth of 44% between 2009 and 2011 in relation to news and current affairs channels in the region, with this segment becoming increasingly competitive compounded by the regional disruption.

Overall, TV is the only pan-Arab platform for which it is foreseen relatively strong growth (apart from digital which has been analyzed at a country level) over the period up to 2015, highlighting the resilience of pan-Arab TV in the region. Advertisers continue to use pan-Arab TV at the expense of local TV for the following reasons:

Satellite dishes in some countries (KSA) have almost reached full household penetration whereas in other markets (North Africa) there is a rapid growth of the satellite platform at the expense of terrestrial as the most practical way to deliver a true multichannel proposition to

consumers (as DTT and IPTV take-up remains limited)

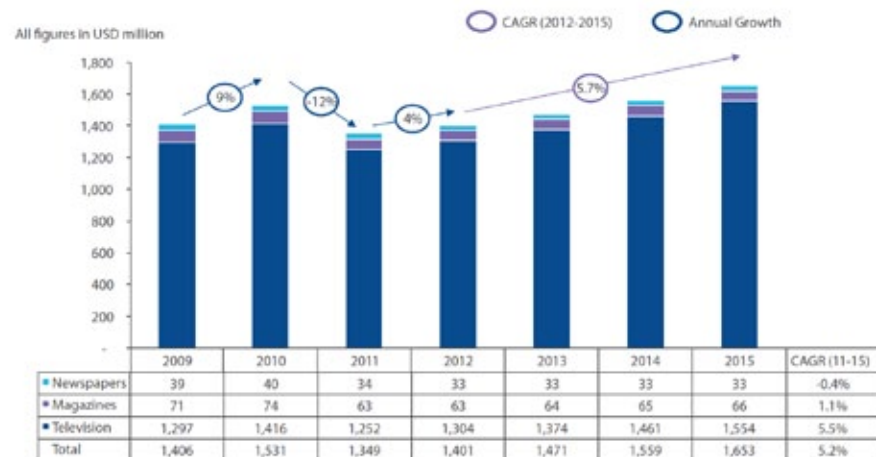
The audience measurement initiatives in Saudi Arabia and the UAE improved transparency in the market, increasing the confidence of advertisers (regional and international) in the platform and generated value for the industry as experienced in other markets where TV audience measurement was introduced

While the number of FTA channels continues to rise (reaching close to 600+ channels) the rate of growth is slowing down and we see further consolidation of new channel launches around the main FTA players. This in turn builds scale, increases advertising premium and ensures higher budgets are allocated to quality content production, increasing the overall value of the pan-Arab advertising market.

Broadcasters on pan-Arab are investigating new ways to better target sub regional audiences, for instance using dedicated transmission feeds to specific markets.

Overall, the study anticipates that satellite TV advertising on the pan-Arab platform will increase at a CAGR of 6% over the projection period, reaching nearly USD 1.5 billion by 2015, 94% of the total pan-Arab advertising expenditure.

PAN-ARAB NET ADVERTISING EXPENDITURE (2009-2015)



Source: Zenith Optimedia; Deloitte Analysis

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INSIDE THE ELECTRONIC MEDIA MARKET IN PAKISTAN

BY MOHAMMAD HANIF RAVDA (*)



Pakistan is a strategic market in Central Asia of 190 million people, where 67.1% are below the age of 30. It is divided into four provinces: Sindh, Punjab, Baluchistan, and Khyber Pakhtunkhwa each with a unique ethno-linguistic identity, together with the Islamabad Capital Territory, the north-western Federally Administered Tribal Areas (FATA), the northern semi-autonomous Gilgit-Baltistan region, and Pakistan-administered Kashmir (known locally as Azad Jammu and Kashmir).

Pakistan's middle class has doubled to 70 million people in the past decade, and consumer spending increased at an average rate of 26% (2010-2012) compared with 7.7% for Asia as a whole. Household incomes in the urban areas rose faster than inflation by an average of 1.5% per year (2006-2011) and the retail sector grew at 5.3% per year, what explains high levels of media



consumption and the exponential growth of the telecommunications sector.

Television was relatively slow to grow in Pakistan as it wasn't until 1964 that **Pakistan Television Corporation (PTV)** was launched, but this state monopoly ended in 2002 and the market was liberalized. This led to the boom in new private TV channels that have only received licenses for cable or satellite only, so PTV is the only channel that provides terrestrial services.

After the de-regulation of electronic media industry, TV sector remains vibrant: there are more than 80 TV channels out of which 15 are major news channel and the remaining caters for entertainment, music and religion. According to the **Pakistan Electronic Media Regulatory Authority (PEMRA)**, there are only 12 million TV sets in the country, approximately one every 14 people while private surveys put the number at about 18 million.

PAKISTAN, IN NUMBERS (2014)

- PAKISTAN HAS 190 MILLION PEOPLE, WHERE 67.1% ARE BELOW THE AGE OF 30
- 80 TV CHANNELS OUT OF WHICH 15 ARE MAJOR NEWS CHANNEL AND THE REMAINING CATERS FOR ENTERTAINMENT, MUSIC AND RELIGION.
- THERE ARE 12 MILLION TV SETS IN THE COUNTRY, APPROXIMATELY ONE EVERY 14 PEOPLE; A PRIVATE SURVEY PUT THE NUMBER AT ABOUT 18 MILLION
- THERE 86 MILLION TELEVISION VIEWERS: MORE THAN HALF OF THESE ONLY ACCESS TO STATE-RUN, ANALOG TERRESTRIAL BROADCASTS WHILE 38 MILLION ACCESS TO DIGITAL SATELLITE CHANNELS DISTRIBUTED VIA ANALOG CABLES
- THERE ARE 50 OPERATIONAL INTERNET SERVICE PROVIDERS (ISPs) AND 29 MILLION INTERNET USERS, MORE THAN 16% OF THE TOTAL POPULATION

Given that there are 86 million television viewers in Pakistan, this low number indicates that communal television watching is popular. More than half of these viewers are only able to access state-run, analog terrestrial broadcasts while 38 million viewers can access digital satellite channels that are primarily distributed via analog cables owing to the high cost of purchasing satellite dishes.

In 2010, PEMRA introduced a fee structure and rules governing digital cable television transmission, and has called for a complete switchover to digital cable by 2015. However, digital cable television still has an extremely limited reach due to the high cost of set-top boxes and slow adoption of digital infrastructure by cable companies.

As a result of media reforms introduced by the Government, TV market was bisected between state-owned terrestrial broadcasters and privately owned satellite and cable television channels. In the past decade, Pakistan has shifted from predominantly terrestrial broadcasting (69.6% of TV households in 2005) to a roughly even split between terrestrial and cable television by 2010. According to one national survey, satellite and cable television access varies considerably by region; while 93% of television viewers in Karachi, Pakistan's largest city, have access to

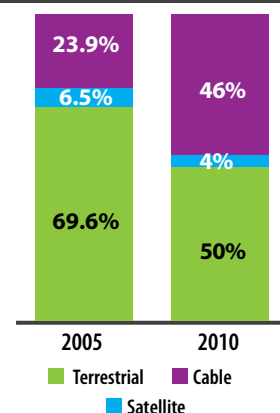
satellite channels via cable. A BBC survey further revealed that 69% of the urban population had access to satellite and cable television compared with 11% of rural respondents.

Satellite service consumption dropped from 6.5% in 2005 to less than 4% of television-owning households by 2010, due to the success of low-cost, accessible cable television connections. Multi-channel Multi-point Distribution Service (MMDS), a form of wireless cable via broadband networking, is available to a limited extent, providing access to over 80 channels for 330,500 subscribers.

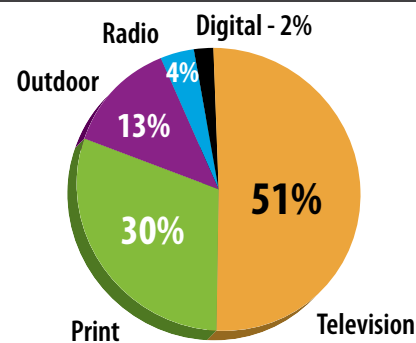
Pakistan Telecommunications Company Limited (PTCL), the largely state-owned telecoms corporation, is the only company currently holding an operational IPTV license. Additionally, three private companies have obtained mobile television licenses, and are also providing this service. Since 2005, there has also been a significant increase in Internet usage. There are 50 operational Internet service providers (ISPs) and 29 million Internet users, more than 16% of the total population

(*) The writer is a consultant to electronic media industry and presently associated with Indus TV network in Pakistan, and can be contacted at ravdahanif@hotmail.com and (92) 300-820-8110

PAKISTAN: TV VIEWERSHIP, BY MEDIA



PAKISTAN: ADVERTISING SPENT, BY MEDIA



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TV MARKETS IN TAJIKISTAN, UZBEKISTAN, AND TURKMENISTAN

BY ARTEM VAKALYUK, MEDIA RESOURCES MANAGEMENT, UKRAINE



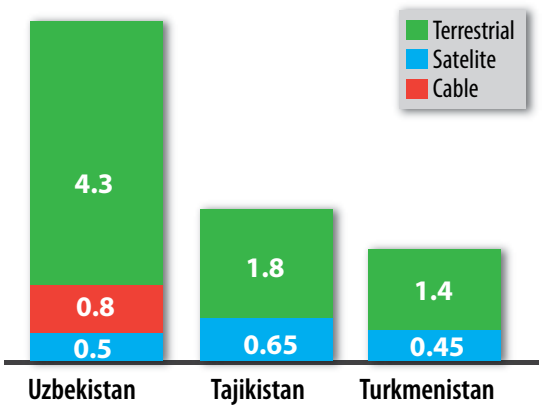
Television markets in such Central Asia countries as Tajikistan, Uzbekistan, and Turkmenistan differ a lot from the points of view of their volume, number of broadcasters, TV-content production facilities and trends of development. TV markets in Tajikistan and Uzbekistan, for instance, are just starting to evolve and integrate into global TV tendencies.

From the other hand Turkmenistan is a closed for TV business activities territory because of its inner governmental policy. In this article we'll give a short analysis of these three CIS territories from the point of view of current situation on their television markets. Unfortunately, data on TV ratings and share of the TV channels in all these countries is not available because of the absence of national-wide TV researches there.

TURKMENISTAN

Turkmenistan is situated in central Asia with an area of 491,200 km² and a population of 5.36 million people. There are a total of 1.85 million television households and an estimated 2.2 million television sets in use. Approximately 76% of the television households still rely on the analogue terrestrial platform for their primary television reception.

TV HOUSEHOLDS, PER PLATFORMS (2014)



Source: MRM

MAIN FIGURES OF THE MARKETS (2014)

	POPULATION	TV HHs	TV SETS	TV STATIONS
TURKMENISTAN	5.36M	1.85M	2.2M	6
TAJIKISTAN	8.47M	2.5M	—	57
UZBEKISTAN	30.2M	5.6M	8.1M	49

Source: MRM

Satellite television (DVB-S) has been seriously compromised following the decision by the President of Turkmenistan requiring that all satellite dishes be removed from the rooftops. However, cable television will be introduced although content will be strictly censored by the government.

The Ministry of Communication is the legislative and regulatory body responsible for broadcasting in Turkmenistan. It is responsible for proposing and implementing legislation in the area of electronic communications. Currently 6 national broadcasters are available on the analogue terrestrial platform. They are: **Turkmenistan** (informational), **Altyn Asyr** (general interest), **Yaslyk** (entertainment), **Miras** (cultural), **Türkmen owazy** (music), and **Türkmenistan-Sport**. There is also **A gabat TV** channel, which broadcasts only for the territory of Ashgabat.

Unlike the other countries of the former USSR, which have made some progress towards the implementation of their DTT platforms, Turkmenistan has not yet begun DTT trials. This can be attributed to the state's information policy, which may effectively conflict with the introduction of digital technologies. Data on TV ratings and share of the TV channels in Turkmenistan is not available because of the absence of national-wide TV researches in this country.

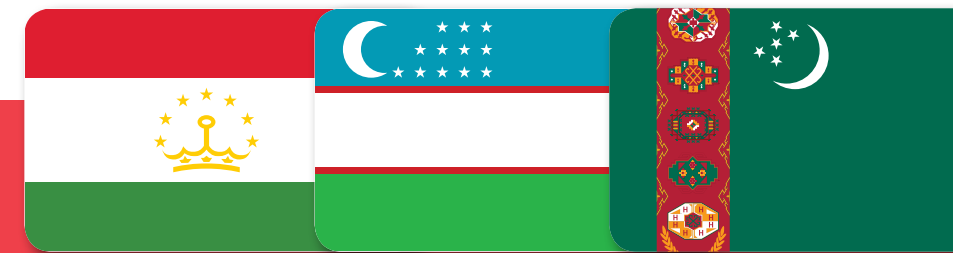
TAJIKISTAN

Tajikistan is situated in Central Asia with an area of 143,100 km² and a population of 8.47 million people.

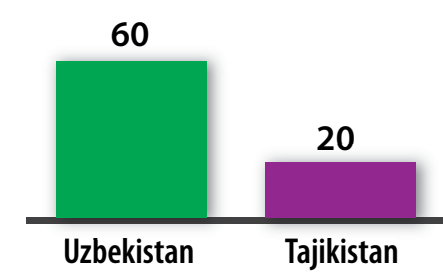
TV industry in Tajikistan is the less developed among other CIS countries but for Turkmenistan, which is the only one "closed for the others' eyes" market of the region with only 7 TV state-owned channels and without private TV stations at all. According to the TV and **Radio Broadcasting Committee of Tajikistan** there are totally 57 TV stations in the country, 17 of which are private and the others are state-owned ones. The main distinctive feature of the local TV market is absolute dominance of regional and local TV broadcasters (the majority of local TV channels are operating in the province of Sughd, one of 4 administrative divisions of Tajikistan situated on the north of the country).

Currently there are only four national-wide TV stations in Tajikistan that cover more than two thirds of the state territory by means of terrestrial and satellite distribution. They are: **First Channel Tajikistan** (99.7% coverage), **TV Safina** (77.4%), **Chahonnamo** (75.7%), and **Bakhoriston TV** (72.1%). And all these TV channels are state-owned. National-wide private broadcasters absence is the main obstacle of the country TV industry development. Local authorities actually stopped giving new broadcasting licenses in 1999 – from that time and till the beginning of 2015 only one TV channel was "awarded" by TV license – it was private NTT channel (stands for Independent Television of Tajikistan) which started broadcasting in summer 2007 and covers with its signal the capital of the state Dushanbe and its suburbs.

TV advertising market in Tajikistan is rather small: less than USD 20 million



ADVERTISING EXPENDITURE, PER COUNTRIES (2014) IN US DOLLARS (MILLION)



Source: MRM

(the population of the country nears 8.47 million people, there are approximately 2.5 million households). Out of 2.5 million television households, almost 1.8 million households rely on the terrestrial platform for their primary television reception while 650,000 households rely on satellite. Dominance of the state-owned channels on the market prevents the substantial growth of advertising industry in the state. This is also one of the main reasons of poor TV content production facilities – there is neither local series nor local adaptations of the international TV formats on the Tajik TV.

Situation may change after analogue terrestrial signal switch-off – it is planned for the end of 2015. DTT-signal transmission first started in May 2010 in Dushanbe in DVB-T, MPEG-4 standard. In 2011-2012 DTT became available in three more regions of the country. Nowadays Tajikistan is implementing DVB-T2 standard. Currently four abovementioned national-wide TV channels are available in the first DTT-multiplex. Overall two terrestrial multiplexes, which will include 20 channels, are planned.

UZBEKISTAN

Uzbekistan is also situated in Central Asia and has an area of 447,400 km². The population of Uzbekistan totals 30.2 million people. From the TV households number point of view the TV market of Uzbekistan

exceeds the one of Tajikistan more than twice – there are near 5.6 million households and 8.1 million television sets in use in the country. The terrestrial platform is used by 77% of all television households. Cable and satellite television delivery platforms are becoming increasingly popular with viewers and account for 10-15% and 7-9% of all television households, respectively.

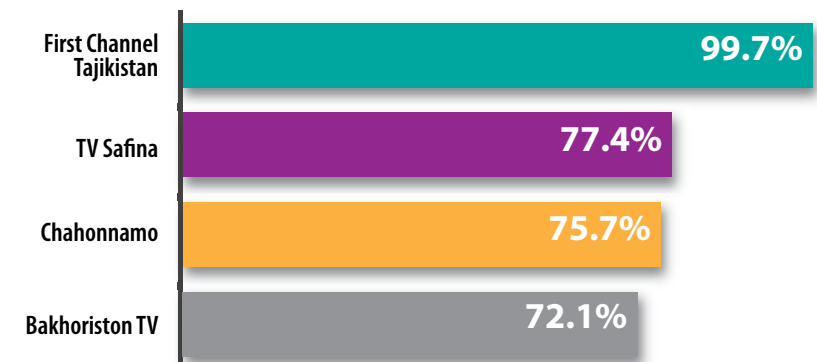
Although a government decree officially eliminated state censorship in 2002, it has continued to severely restrict independent media. In 2006 authorities further tightened state control by requiring re-registration by all media outlets not passing a summary review of qualifications. In 2012 almost 40 independent private television stations and 9 state-owned regional TV channels were operating in Uzbekistan, but four state-owned television stations, run by the Television and Radio Company of Uzbekistan, dominated the market. They are: **Ozbekiston**, **Yoshlar**, **Sport TV**, and **Tashkent**. By the end of 2013 the biggest and the most popular private TV channels (**Markaz TV**, **NTT**, **Forum TV** and **SoftIC**) were closed by the government.

TV advertising evolved rapidly in Uzbekistan till 2014. Its volume in 2013

reached almost \$60 million, and its annual growth was forecasted for further few years at the 12-15% level. But due to the closure of main private broadcasters at the end of 2013, the TV ad spend in 2014 dropped more than 40%. TV content production is just starting developing in the country. The main producers of TV series and TV movies are state-owned Uzbektefilm and Uzbekkino companies. In the last two years some private productions and TV stations started shooting local series and TV shows (no international TV formats are yet officially adapted in Uzbekistan).

In June 2008, the first DTT pilot project in central Asia was launched in the capital city of Tashkent. Viewers could access 8 standard-definition television services using MPEG-4 AVC compression technology. In September 2008, the further multiplex was launched offering viewers in Tashkent and Bukhara access to four government-owned television services. Regular DTT broadcasting started in September 2009 offering 12 DTT channels (the service was a mixture of 4 government-owned and 8 commercial pay-DTT channels). By the end of 2013 DTT-multiplexes covered near 42% population of the country. ATT switch-off is planned for the end of 2017.

TAJIKISTAN: CHANNELS NATIONAL COVERAGE (2014)



Source: MRM

MTG: 'IT IS ALL ABOUT SHAPING THE FUTURE OF ENTERTAINMENT'



Aleks Habdank, COO PayTV Emerging Markets, MTG



Modern Times Group (MTG), one of the largest European media conglomerates, offers pay-TV subscriptions through our own satellite service and via third party networks in Scandinavia (Sweden, Norway, Denmark and Finland) and the Baltic (Estonia, Latvia and Lithuania) countries under **Viasat** brand.

It operates over 100 free-TV and pay-TV channels in its portfolio and can be watched in over 140 countries, having sold more than 130 million subscriptions. 'MTG is all about *Shaping the Future of Entertainment*. For over 25 years we have been at the forefront of

changing consumer behaviour in offering new products and services. Our most recent developments have been investing in the Nordic largest Multi Channel Network **Splay** and launching new online services such as a video driven



WWII Air Crash Detectives, on Viasat History HD (photo credit: Like A Shot)

celebrity gossip site in Scandinavia and a news portal in Latvia, explains **Aleks Habdank**, COO Pay TV Emerging Markets.

In 2014 the company expanded to the MENA region and Turkey. 'We launched the factual channels **Viasat History HD**, **Viasat Nature HD** and **Viasat Explore** in Turkey, while the Russian language movie channel **TV1000 Russian Kino** was launched in Israel,

targeting the growing population of 1 million Russian speakers there.

'We also acquired the global youth media brand and pay-TV channel operator **TRACE** that has the **TRACE Urban** and **TRACE Sport Stars** channels available in all North-African countries on platforms such as **Maroc Telecom** and **Canal+ Overseas**. In the

Middle East, **TRACE Urban** is available on the **OSN** platform, while **TRACE Sports Stars** is available exclusively on **beIN Sports** for Egypt, Jordan, Morocco and Tunisia', remarks **Habdank**.

'Until 2014 our presence in the region had been limited to our Russian **Viasat** and **TV1000** branded pay-TV channels, which have been available in the Central Asian states of Kazakhstan and Kyrgyzstan for almost ten years', he adds.

Regarding programming, **Habdank** says: 'Our strength lies in the fact that we acquire and commission content that is relevant for our audience irrelevant of where the production company is based. For instance in our recent commission *Wicked Inventions* (*Like A Shot*) we look at inventions that have

been made all over the world, not just in the US or the UK. And the up-coming series *Spy Masters*, also features some great local stories that are relevant to the countries we broadcast in. We are always looking for great local stories that resonate with a wider audience.'

In Sub-Saharan Africa MTG has a production company **Modern African Productions** (MAP) that produces content for the two free-TV stations in Ghana and Tanzania, **Viasat 1** and **TV1**, respectively, as well as for other broadcasters in the region. 'We see MENA region as an area of potential growth, however still to fulfil its potential



London's Super Tunnel, on Viasat Explore (photo credit: Windfall Films)

because of significant piracy, nonetheless a perfect MTG emerging market', comments **Habdank**.

'We believe that by working with operators to offer a strong locally relevant content proposition supported by enhanced access rights reflecting how consumers in the region engage with content, further bolstered by the **TRACE** brand and product set, which uniquely connects with the younger consumer, we are very well placed to benefit, especially considering our global scale.'

About digital media, the executive says that in the MENA region it has been a 'clear growth' of mobile platforms offering interactivity. 'We offer full catch-up rights for the programmes on our channels to the benefit of our partners in Turkey and Israel, **Digitürk** and **Yes**, which have great advanced TV services. MTG operates eight DTH satellite platforms in Europe so we know how important advanced TV services are to retain subscribers.'

'TRACE has evolved from a traditional linear TV company into a 360° brand with the growth of digital platforms, not only in the MENA region but globally. Linear TV remains at the core of the business but TRACE content is now distributed on digital platforms like **YouTube** and **Daily Motion**', he says.

'The consumer is at the heart of everything we do. We always strive to follow their interests and needs by creating widely available content and brands that they can easily relate to. Being an operator of DTH satellite platforms and the streaming service **ViaPlay**, as well as owning the Nordic territories largest production studio **Nice Entertainment Group** we can take every area into consideration.'



Formatos de Entretenimiento

▶ Apuesto por ti

"Si tienes habilidades extraordinarias y sorprendentes, muéstrales de lo que eres capaz". Con esta invitación el programa presenta un sinnúmero de hazañas y pruebas que sólo algunos son capaces de ejecutar. Un jurado decidirá cuánto apuesta en dinero por la proeza que cada concursante ofrece realizar.



▶ Calle 7

Programa diario de desafíos y eliminación dirigido al público más joven. Los integrantes de dos equipos mixtos pasan por una serie de entretenidas pruebas físicas con el fin de no ser expulsados y ganar un gran premio final. Durante el desarrollo del ciclo de competencias, se va conociendo parte de la vida, romances y conflictos entre los jugadores de cada equipo.

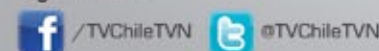


▶ Juega 2

Programa de entretenimiento en el que los famosos deben jugársela para cumplir el sueño de un personaje anónimo mediante pruebas y juegos. Dos famosos son los capitanes estables de dos equipos integrados por conocidos rostros de televisión que, junto con el personaje en cuestión, luchan en juegos deportivos con destreza y algo de picardía, para conseguir el dinero que hará realidad la ilusión del concursante.



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ENDEMOL TURKEY EXPANDS INTO SCRIPTED



Marina Williams, Endemol's CEO of Central and Eastern Europe, Middle East/ North Africa operations

Ahead with the significant growth of its scripted programming business in the last five years, **Endemol** launched a new slate of prime time scripted series in Turkey, including the contemporary comedy drama *Sparrow Palace*, which has been commissioned by **Star TV** to air early this year.

Set in Istanbul and locally known as *Serce Sarayi*, the series is directed by the Turkish TV director, **Mesude Eraslan** (*Falling Leaves*).

Also, Endemol Turkey has also been commissioned by **ATV** to produce *Overtorn*, a modern day family saga about love and revenge, which has been renamed to *Alabora*. It is expected to launch in a peak time spot next year with **Kadir Dogulu** (*Fatih Harbiye*) in the leading role. Series will be directed by **Aydn Bulut** (*Ihlamurlar Altında*).

Also, Endemol Turkey's first scripted romantic series *Broken Pieces* (*Paramparca*) will premiere on Star TV early December. **Global Agency**, who picked up worldwide distribution rights at MIPCOM 2014 has already secured interest from ten broadcasters.

Marina Williams, Endemol's CEO of CEE, Middle East/ North Africa operations, says: 'In the last year, we've seen Endemol Turkey expand from a purely non-scripted producer to become a significant player in drama production. We are very proud that our development and investment in this area has resulted in three new commissions for key broadcasters in Turkey.'

The company has seen a 75% growth of its scripted programming, which today represents a quarter of the company's worldwide business. Other Endemol drama

productions around the world include *Hell on Wheels*, (four seasons on **AMC**), *Kingdom* (recently picked up for two further seasons on **DirecTV**), *The Fall* (**BBCTwo**), *Black Mirror* (**Channel4**); and coming soon *Gallipoli* (**Nine Network** and **TV3 New Zealand**) and *Fortitude* (**Sky Atlantic**).

Endemol Turkey's scripted business has been launched by the team headed up by Managing Director **Gökhan Tararer**. Other recent credits include *The Money Drop* (Kanal D), *Still Standing* (Star TV) and *My Man Can* (Star TV).



Sparrow Palace & Broken Pieces, two successfully broadcast series on Star TV Turkey



FREMANTLEMEDIA, MULTI-YEAR, MULTI-FORMAT DEAL WITH MBC GROUP

FremantleMedia International (UK) announced a multi-year deal with media conglomerate **MBC Group** for the recommissioning of the pan-Arab versions of *Idol* and *Got Talent*, which will have three further seasons. It has also acquired the format rights to the **Syco TV** created entertainment format, *The X Factor* and the fashion competition, *Project Runway* for three seasons each.

Anahita Kheder, SVP, Middle East, Africa and South Eastern Europe, **FremantleMedia International**: 'Together we have already launched the very successful pan-Arab versions of *Arabs Got Talent* and *Arab Idol*. The Middle East region has evolved a great deal in recent years with audiences wanting something a little special, and with the introduction of *The X Factor* and *Project Runway*, **MBC** will deliver just that.'

Ali Jaber, TV Director, **MBC Group**, adds: 'MBC is always keen on delivering premium content coupled with the best TV productions in the MENA region. With the introduction of global formats a couple of years ago, they soon became top-rated TV shows and have created unprecedented engagement with the audiences on multi-platforms.'

The *Idol* format, co-owned by **FremantleMedia** and **19 Entertainment**, has now been produced in 51 territories worldwide. *Arabs Got Talent* became **MBC4**'s number one show in both 2012 and 2013 consecutively. Co-owned by **Syco Entertainment** and **FremantleMedia**, the global *Got Talent* phenomenon officially became the Guinness World Records' Most Successful Reality TV Format Worldwide in April this year and has now been commissioned in 65 territories worldwide.

The X Factor will join **MBC**'s impressive roster of programming for the first time. The pan-Arab version takes the format to 51 territories worldwide. The **Syco Entertainment** owned and created format is co-produced/licensed by **FremantleMedia** worldwide. Since the launch of *The X Factor* UK in 2004 the British-born TV show has been watched by more than 360 million people around the world and can be seen in almost every country on earth.

The **Weinstein Company** owned *Project Runway* has been produced in 23 territories including the US, Australia, Canada, Latin America and the UK.



Ali Jaber, MBC Group TV Director



Anahita Kheder, SVP, Middle East, Africa and South Eastern Europe, FremantleMedia International



Arab Idol will have a new season this year

READY MADE HIGH QUALITY PROGRAMMING



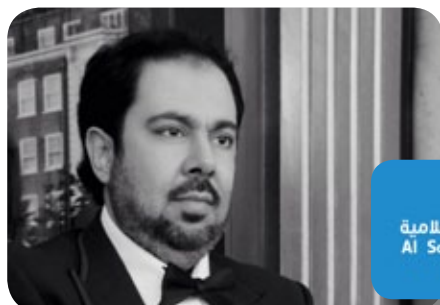
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AL SALAM MEDIA GROUP, AT THE CENTER OF TV DRAMA IN KUWAIT



Abdulaziz Al Mesallam, Chairman, Al Salam Media Group

In a market with 11 FTATV channels (KTV, Al Watan, Al Rai, Funoon, Scope) and 3 big satellite platforms (OSN, ART and Al Jazeera) distributing thousands of free and Pay TV networks, it is a hard work to become the best alternative in content production. But Al Salam Media Group (KUWAIT) has become a true option for these players, celebrating its 40th Anniversary this year.

Founded in 1975 in Kuwait, Al Salam Media Group focuses in the production and distribution of TV series for local broadcasters, film, documentaries, cartoons and theater plays (70 titles).

Abdulaziz Al Mesallam, chairman describes to Prensario: 'Since 2010, we are looking for partnerships in and outside the State of Kuwait in the field of media services. We are the exclusive program distributor of Gulf Cooperation Council Joint Program Production Institution (GCCJPPPI) and the brand ambassador of TwoFour 54 media company to State of Kuwait.'

In addition, it seeks to build a city for film production in Sharjah (UAE)



Shot in Kuwait and Europe, *Nor Aeni* is one of the most successful series from Al Salam Media Group

and has other ambitious projects, which need of strategic partners. 'Since Kuwait is the center for the TV drama in the Gulf States, most productions were made here and distributed to all channels within the GCC and to other parts of Middle East.'

'We seek to expand our media services outside Kuwait by distributing our contents and establishing live performances. Furthermore, to make partnerships in the field of technology, equipment for TV production, rentals for sound and lighting.'

Al Mesallam continues: 'For TV, we have produced numerous Gulf series that showed important topics, which achieved popularity to many private and government channels: *Freij Swaileh*, *Al Asel*, *Nor Aeni* (shot in Kuwait and Europe) and *Aledeid*, a traditional series which also shown old communities, houses, old shops and streets. It has achieved success and had distributed to several Gulf channels.'

Regarding TV production in the Middle East, he explains: 'The production of TV series are mainly divided into Gulf and Arabic. Dubbed Turkish series into Syrian accent also acquires market share of Arabic series; Turkish series does not affect the Gulf series. The production of Gulf series is estimated at an average of 40 series (30x45 each). The government channels and popular private channels produce up to 40 series per year with approximate USD 30 million on costs.'

'Most of the ideas are repeated and similar due to absence of Gulf characters (typically as either owner of a private firm or government employees) unlike with Turkish and Egyptian series, which have Bedouin, farmers, or people living in the mountains. Thus, environment or geographic location also plays a big role in creating new concepts and portraying characters. Storywriters are continuously experimenting to go beyond from ordinary and the same stories.'

The success of a Gulf series relies also to the actors playing the roles. 'Normally, it is one of the main criteria for selling and distributing the series to the channels. Not surprisingly, pro-



Freij Swaileh, animated series

ducers and channels only select famous actors considering the talent fees are high. And these famous stars do not exceed 20 productions.'

Continues Al Mesallam: 'The Gulf resources are limited. There are needs to outsource directors and other technical crews from other Arab countries. In general, the market for Gulf series is limited as well as with the revenue. It is obvious that influx of series from Turkish, Asian and Western makes the competition a lot tougher. Due to advancing technology and accessibility of entertainments thru different media platforms, the culture of the Arab world are continuously been influence by what are in and trending worldwide.'

'The industry for Arab and Gulf TV productions are normally controlled by the government stations. Unfortunately, there are no criteria for development. Relations and favoritism usually ends winning the distribution and the bureaucratic management which makes these difficult mostly to private producers held up only to short term strategies and left behind from a fast - changeable market.'

For 2015, Al Salam Media Group plans to produce its TV and other projects abroad. 'There is an upcoming Gulf TV drama series that takes place partly in Kuwait and Europe. The story is totally new and unique, about the family experiencing a vacation in a farm, where they will rebuild their relationships and a place where life becomes simple. Thru this series, we represent a love story, farm events (unique from most Gulf countries) and most importantly, cultural understanding between Muslim and other communities', concludes Al Mesallam.

smilehood MEDIA

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wake up! with no make up
13 x 1/2h tv TEEN SERIES
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LBCI, LEBANON: INNOVATIVE PRODUCT OFFERING



The **Lebanese Broadcasting Corporation International (LBCI)** is the number 1 private TV channel in Lebanon since its launch. Over the years, it has proven itself as a market leader and has maintained its position in the Lebanese market with an approximate 57% market share (2014). **LBCI** stands as a pioneer in the broadcast industry aiming continuously to set new standards.

Is a general entertainment channel always thriving to offer its viewers highly entertaining top quality programs. *The Voice, Got Talent, Celebrity Splash, Celebrity Duets, and Star Academy* are some of the top international entertainment programs aired on **LBCI** during the past years.



Ashrakat, el shams is a local drama series produced by LBCI



Celebrity Splash is one of the top entertainment formats produced in Lebanon

The grid consists of a variety of shows targeting all family members such as adapted international formats, in-house formats, Lebanese, Pan Arab & Turkish series in addition to current affairs & news programs. The local TV market is competitive and constantly evolving and the channel's mission remains to deliver content with high production values.

With an innovative product offering and well-defined brand equity, **LBCI** broadcast locally produced social & variety shows as well as Lebanese drama series are the trends in our market. In terms of digital media, it currently ranks as the number one entertainment website in Lebanon and *LBCI News* is the leading mobile application in terms of downloads. The company's future plans include focusing on the VOD platform, launching new mobile apps & sites.

PICKBOX.TV CLOSED NEW AGREEMENTS



Sanja Božić Ljubičić, CEO

Launched in May 2014, **Pickbox.tv** is a leading SVOD service for the region of ex-Yugoslavia with 3.000 hours of TV shows, films, documentaries, children's shows, as well as exclusive content from **BBC, Disney, ABC, CBS, ITV, MGM** and **Sony**. It was released in Croatia, Slovenia, Serbia, Bosnia and Herzegovina, Macedonia and Montenegro, and is available across all platforms, through iOS and Android operated devices, as well as its web app.

Last month, it launched its application for Smart TVs, and it is exclusively available on **Samsung's** TV sets from the 2013 and 2014 generation, and on the newest models. The platform has also signed a deal making the SVOD service available on Croatian leading telecommunication company **T-HT's** IPTV platform, **MaxTV**. More than 70 TV series and 300 movies are now available.

Sanja Božić Ljubičić, CEO of **Pickbox**, says: 'We are very happy to have entered into new business collaboration with the biggest regional telecom companies, as well as TV manufacturers. **Pickbox.tv** brings new flexibility of watching TV series and movies, which can be accessed when the subscribers want on a variety of devices.'

About contents, the SVOD platform signed a deal **CBS** to exclusively stream the shows *Madam Secretary* and *Extant* in the region. The first one is **CBS'** new Sunday night hit starring **Téa Leoni**; premiered to more than 17 million viewers, it ranks as one of the top-rated new fall series. It is available on **Pickbox's Hotbox** section, where the subscribers can watch a new episode, subtitled only 24 hours after it aired in the US. The service has secured the exclusive deal for the region where it's available for the next 6 months.



Madam Secretary, from **CBS**, is available on **Pickbox.tv**

MOBY GROUP, AFGHANISTAN: 'THE MEDIA MARKET IS TRULY BOOMING'



Zaid Mohseni, the COO of Moby Group

Television in Afghanistan has five top players capturing over 80% of the audience with the **Moby Group, Tolo TV (45%)** and **Lemar TV (6%)**, representing half the market, according to a special report by **Altai Consulting** done in 2010 and being the most updated map of the local TV landscape.

Zaid Mohseni, COO of **Moby Group**, describes the assets of the main TV group of the country: 'We operate three channels: **Tolo TV**, a Dari-language general-entertainment channel; **ToloNews**, Afghanistan's first and only 24-hour TV news channel, and



Afghan Star will have its tenth series this year, being one of the blockbusters on **Tolo TV**



Produced by **Kaboora**, *The Defenders* was a ground-breaking series in Afghanistan, setting a new standard for production quality in the country

Lemar, a Pashto-language channel offering general entertainment, news, and current affairs'. **Moby's** holdings in Afghanistan also include two radio stations, a general-entertainment satellite channel that broadcasts into Iran, **FARSII**, and a communications firm, **Lapis**, which operates in Afghanistan, Pakistan, and Yemen.

'Afghanistan's media market is truly booming. There has been more than 20% annual growth in the number of outlets each year since 2006, with over 75 active TV channels and 175 radio stations identified. There are a few hundred print media

outlets and dozens of websites.'

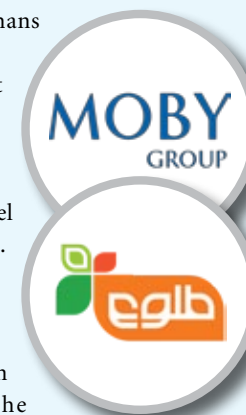
'The media sector has between USD 75 million and USD 100 million revenue per year, with 60% of that driven by ad revenue. TV has 88% penetration in urban homes, and 28% of urban homes own a computer. About a third of Afghans watches TV for more than 2 hours per day. Six million Afghans have access to the Internet.'

'Nowadays, **Tolo TV** holds a 59% market share in Afghanistan and is the country's most popular TV channel, while **Lemar** is the most popular Pashto-language channel in Afghanistan: is the third most popular channel overall, and holds a 6% of the market share. **Tolo TV** has approximately 40% in-house production and 60% acquired shows.'

The channel's flagship programs include *Afghan Star*, a musical singing competition featuring Afghan talent; *The Voice*, the Afghan version of the popular franchise; and *The Defenders*, Afghanistan's first full HD original series.

'**Kaboora**, a production house owned by the group, produces **Tolo TV's** shows such as *The Defenders*, a groundbreaking series in Afghanistan that set a new standard for production quality in the country. It is critically acclaimed and entirely scripted and produced to the highest international standards.'

'We also air high-quality, dubbed, international content, including the acclaimed Turkish series *Valley of the Wolves*, and the US series *Homeland* and *Prison Break*', remarks the executive, and completes: 'Our biggest upcoming productions are Season 2 of *The Voice* and Season 10 of *Afghan Star*'.



AL ARABY LAUNCH



A new Qatari-owned Arab satellite television channel called **Al Arabi TV Network** has launched across the Middle East and North Africa (MENA) from its base in London. Available from Sunday 25 January, the free-to-air channel aims to be 'a platform for Arab youth, talent, energy and aspirations' with content ranging from news to entertainment.

Fadaat Media, the Qatari company that owns the pan-Arab daily **Al-Araby al-Jadeed (The New Arab)** and its online editions, is behind **Al Arabi TV**. 'We are interested first and foremost in people and their concerns, rather than in regimes, businessmen and religious extremists', said **Islam Lotfy**, CEO, **Al Arabi TV**, who added that 60% of the content is politics and news and the other 40% is entertainment, with drama, music and independent films.

ROTANA GROUP

Rotana Group is one of the leading diversified media companies operating in the Middle East. The group's portfolio comprises music production, film and series production, management services, TV channels, Radio stations and publishing. This media conglomerate is Arab World's largest entertainment company, primarily owned by the Saudi Prince **Al-Waleed bin Talal**, with an 18.97% share held by **News Corp**.

The large pan-Arab media conglomerate includes a film production company, a magazine (*Rotana Magazine*), television (*Rotana TV*), seven music channels (*Rotana Radio*), a record label (*Rotana Records*), and others. On the TV business, it operates a bouquet of leading free-to-air TV channels including general programming stations **Khalijia** and **Masriya**, and the women channel **Rotana Women**.



The film channels include **Fox, Fox Movies, FX, Rotana Cinema** and **Rotana Classic, Rotana Aflam**, featuring a selection of films produced in various parts of the MENA region in their original dialects, Arabic, Egyptian, Khalijia, Syrian, and Lebanese, as well as the music channels **Rotana Clip, Rotana Mousica** and **Nagham**, and an Islamic religious channel **Al-Resala**.

The group's content is also digitally distributed on global scale. This is possible via a network of websites dedicated to its various TV channels, giving users access to their favorite shows online, through catch up and VOD services.

KANAL D EXPANDS TO NEW TERRITORIES

In 2014, **Kanal D Sales Team** (Turkey) reached new territories like India, Pakistan, Estonia, Latvia, Chile, Uruguay and Argentina. Its titles had good results where they broadcasted, and now it aims to keep that success and try to become one of the best Turkish content providers. **Kanal D** is among the top 3 Turkish distributors.

Explains **Ozlem Ozsumbul**, Head of Sales & Acquisitions: 'All in all, we reached 86 countries with our 61 titles. Rich culture, content, strong stories and production quality cause that international expansion's getting bigger and bigger each day. In 2014 we started to work with Latin America which was a great step for our business, and the success is so good that we are very proud of it.'

Last year the company also started to provide not only finished programs but also started to



Ozlem Ozsumbul, Head of Sales & Acquisitions

work on script and format rights of their dramas and programs. 'Our new targets for near future are North America, Africa and Far East. We are sure that it is so close to happen', ensures **Ozsumbul**.

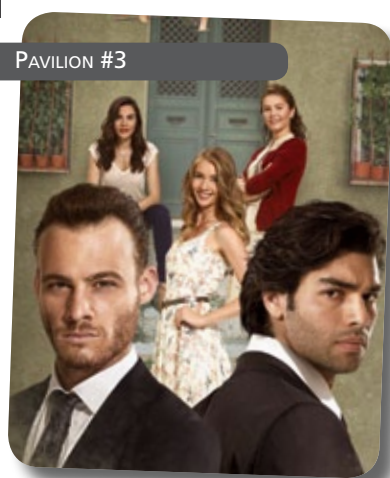
Top shows for this TV season includes the series *Matter of Respect*, described by the executive as a 'really good remake of wonderful

Italian drama', and that is also offered in the international market.

'*War of the Roses* is a simple, attractive drama with its romance, story and dynamism, and it is one of our successful titles on primetime. And *For My Son* started on January and reached huge audience in a short time. It is #1 on



War of Roses, simple & attractive drama



Matter of Respect, remake of an Italian drama

Wednesday nights. It has really good combination with romance, comedy and action triangle', she adds.

Lastly, the distributor offers the dramas *Life as It Is*, about a private hospital in Istanbul that lose some of its best doctors after having some financial crisis, and *Waiting for the Sun*, centered in a self-sacrificing woman who has raised her daughter as a single parent.

BOOTH #S28



Tamam

ANTENNA: DRAMAS & COMEDY

Antenna International Enterprises (Greece), the distribution arm of **Antenna Group** dedicated to worldwide sales of TV content produced by Antenna's televisions in Greece, Serbia and Slovenia, as well as by independent producers from the region, introduces at Discop Istanbul its catalogue of drama and comedies.

Head the slate *Tamam* (28x'60), a series centered in the life of barbershop owner in Athens and his two children. In *Waltz with 12 Gods* (263x'60), four people first meet after a car accident. They all carry an intense and painful past and their relationship will unravel in parallel during

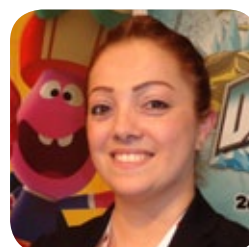
the 12 months that follows. And *Roi Mat* (200x'60) is a drama that follows three strong chess players that will stand as opponents. In *Trail Of Vengeance* (16x'60) 13 strangers find themselves stranded in an isolated hotel, somewhere in the fierce, unfriendly mountains of Greece. Lastly, the second season of *Brousko, The Grapes Of Passion* (195x'60). The first season of this one hour drama romance was sold in 25 territories.

VIEWING BOX #3



Sissi The Young Empress, highlight for Discop

MONDO TV: HIGH QUALITY ANIMATIONS



Micheline Azoury, International Sales

Mondo TV (Italy) owns one of the largest animation libraries consisting of more than 1,600 episodes of TV series run outright for all over the world together with more than 75 animated movies for video and theatrical release.

The international sales team is headed by **Micheline Azoury**, in charge of the French-speaking territories worldwide as well as MENA, Europe, Australia and Asia and **Alessandro Venturi** who handles Eastern Europe. In order

to support the sales activities in the Eastern European markets, the Group assigned **Theo Kouroglou** as sales manager for Greece, Cyprus & Ex-Yugoslavia.

At Istanbul, the company brings its new shows *Sissi The Young Empress* (26x'26), as well as *Drakers* (26x'26), the second season of *Dinofroz* (26x'26), *Playtime Buddies* (26x'13) and *Suzy Zoo* (26x'2). *Dinofroz* was launched in France on **GULLI**, and **Mondo TV** closed a deal with **Al Jazeera Children Channel** in the Middle East for a couple of programs.

Other top titles are *Bug's Ranger* (52x'11), a story that revolves around a group of best friends

who spend their time buggin' on down the boardwalk of life. In *Atomicrom* (52x'11), 13 billion years ago, after The Big Bang's explosion a contact point between the world of Matter and the world of Antimatter was created, the limit between good and evil.

Coproduced with **Rai Fiction** is *The Treasure Island* (26x'26), an animated series based on the **R. L. Stevenson's** masterpiece, while *Cat Leopold* is a coproduction between Mondo TV and **Russian Mobile Television**. This comedy is about the adventures of a very kind and précis cat and two mischievous naughty mice.



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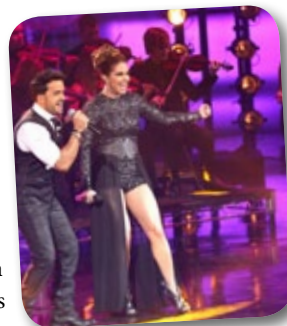


Karina Etchison, SVP Europe, Africa and Middle East

Through **Karina Etchison**, SVP Europe, Africa and Middle East, **Telemundo Internacional** (USA) participates for one more year at Discop Istanbul, where it brings its

3 million total viewers and 1,8 million adults (18-49), according to Nielsen.

The distributor also exhibits the telenovela *Land of Honor* (130x'60), a story of passion, secret affairs and betrayals where the destiny of six individuals will be taken over by the uncontrollable strength of their feelings, while in *Part of Me* (120x'60) two women share a tragic and supernatural destiny that binds them together even after death. Produced by



I'm the Artist, entertainment format

Cadenatres, *Love without Reservation* (120x'60) tells the story of two young souls separated by the prejudices of their families.

Etchison explains: 'Part of the business philosophy of our international division is to identify new development ideas to create original content and generate innovative businesses for



Masters of Paradise, co-production with TVN Chile

the different television platforms'. Following **Telemundo** offer is *Los Miserables* (120x'60), co-produced with **Argos Television**, and based on the Victor Hugo's best seller and narrates the story of a woman accused of a crime she didn't commit and is persecuted by the man she loves.

In *Queen of Hearts* (140x'60) a woman suffers an accident that will cause her to forget the last eight years of her life. Now she feels that she doesn't belong to the world of luxury and power that surrounds her and will strive to discover her own truth. Lastly, the entertainment format *I'm The Artist* (13x'120) from **Reset TV** (Spain) searches for that one-of-a-kind talent who can do it all... sing, dance, perform and captivate audiences with his/her charisma.

most important titles, highlighting the brand new "super series" *Masters of Paradise* (60x'60), centered in a world of crime, violence and dangerous alliances, a betrayed woman rises as its ruthless queen.

It is a co-production between **Telemundo Network** and **Television Nacional de Chile** (TVN) that has become the best-ever premier of the network with cumulative audience of

BOOTH #S48

TVN, ENTERTAINMENT FROM CHILE



Marcos Santana, president, Telemundo Internacional, and Ernesto Lombardi, manager of international business, during the presentation of *Masters of Paradise* at Natpe Miami

Apart from its successful *teleseries*, **Television Nacional de Chile** (TVN) has become a great option on entertainment with three game shows which have not only work very well in Chile but also in other Latin American markets such as Peru, Bolivia, Ecuador and Panama.

'We'd like **TVN** to be considered as a top-of-mind brand on entertainment: we have an in house team developing ideas and formats, which has been very successful in many markets. The most important characteristic is that they are flexible to adapt: *Calle 7* is the best example, as it has also been optioned in Spain and Italy', explains **Alexis Piwonka**, sub-manager of international business.



Juga2, game show

The four shows in distributions are *Calle 7*, *Apuesto Por Ti*, *Peloton* and *Juga2*. This former one has a celebrity-version on air with 15 rating points. 'We are focusing our efforts in developing new sub-genres, which we expect to launch in the next markets MIPTV, LA Screenings and MIPCOM', concludes **Piwonka**.

Through **Telemundo Internacional** (USA), **TVN** distributes its drama series, including the new co-production between both companies: *Masters of Paradise*, about the drugs bands in Miami in the '80 that was the best-ever premier on **Telemundo** in the US Hispanic with +3 millions of viewers.

UKRAINIAN FORMATS, AT DISCOP ISTANBUL



Iryna Kostyuk, co-founder of MRM, initiated the UA Formats project

UA Formats is a catalogue of almost every Ukrainian format made on local TV with a common feature a great success story of broadcast: either in terms of ratings, number of seasons on air or number of local adaptations in CIS countries or all three.

UA Formats project launch was initiated by **Iryna Kostyuk**, co-Founder of **Media Resources Management** (MRM), put together the most successful original Ukrainian TV formats, developed and produced by Ukrainian producers and TV channels. Among the top shows are the sensational political talk-show *Freedom of Speech*, the talent-show *Chance*, *Crossing Europe*, the most beloved travel-show of Ukrainians at the beginning of the century and the social reality show *Auditor*.

Many of these formats have never been presented to the right holders on the international market, but these shows have proved their success with high ratings and strong Ukrainian viewership. Some of them have been aired and produced in other CIS countries.

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TELEVISA BETS ON FORMATS TO GAIN NEW MARKETS

Televisa International (Mexico) releases in 2015 a full new catalogue of entertainment formats, genre that has given the leading Latin American distributor the opportunity to penetrate new television markets in the world. Among the top of them are *This is your song* (14x'90), *Night Shift* (52x'120), *Trivia Track* (30x'60) and *Los Gonzalez* (scripted).



Ricardo Ehrsam, managing director, Europe, Asia and Africa, Televisa

'Through our entertainment department we have developed a catalogue of 22 formats with presence in 40 countries', explains Ricardo Ehrsam, managing director, Europe, Asia and Africa.

Stand Up for your Country, an interactive talent show for the family, which has had record sales during its launch at MIPCOM 2014, called

the attention of many Latin buyers during last Natpe Miami where it was sold to 9 countries in the region. 'The show attracted so much attention to our customers than those that can't produce it locally are expecting the Mexican version to be released in April.'

He continues: 'Televisa provides to its clients a solution to their schedules, with a catalogue that complements the telenovela, our main genre. We seek to give our clients the possibility to rely on us and grow ourselves as a premium solution provider.'

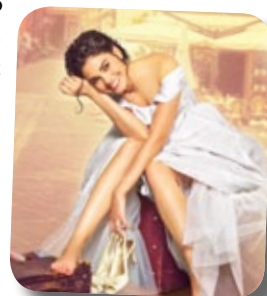
In Miami, Televisa had a 'good volume' of deals closed for entertainment formats, as they traditionally done with telenovelas. 'We have a very successful strategy in terms of content generation, have invested strongly and also



Stand Up for your Country, interactive talent show, sold in Western Europe, Nordic and Latin America

managed strategic partnerships. That, in addition to our ability to distribute, let us achieve success so far', he describes.

'Telenovelas will remain be star and for the moment, formats are just a supplement. We are introducing solutions that allow the different channels to program telenovelas and accompany that with entertainment formats', concludes Ehrsam, who highlights the new telenovelas *Italian Bride* (150x'60) and *Shadows of the Past* (150x'60).



Italian Bride, new telenovela

BANIJAY, IT'S ONLY TV ON LEBANON

Banijay International (UK) has licensed its hilarious, high-rating format *It's Only TV* to MTV in Lebanon, announced Sebastian Burkhardt, SVP International Distribution.

Originally produced by Banijay Group company H2O Productions for France's D8, the irreverent TV-themed panel show is being adapted for Lebanon by Studiovision, known locally as *Menna w Jerr* (39x'60) and will debut next month as a primetime weekly show. *It's Only TV* has aired in France with the local title *Touche pas à mon poste* since 2010,

where it is one of the country's highest-rating access primetime shows.

Burkhardt: 'This is a highly flexible and adaptable format for local markets, capturing the current zeitgeist and showcasing each country's most popular famous faces and comedians. It also carries a strong social media element which allows broadcasters to expand and grow audience engagement, creating real appointment TV wherever it airs.'



Sebastian Burkhardt, SVP International Distribution

ECCHO RIGHTS, ABC USA ORDERED PILOT BASED ON THE END



Fredrik af Malmberg, managing director

With offices in Stockholm, Hong Kong and Istanbul, **Eccho Rights** (Turkey) has established itself as a leader in distribution of Turkish dramas such as *Ezel*, *Son* (*The End*), *Karadayi* and *Kurt Seyit & Sura*, but also top products from Scandinavia, Western Europe, Korea and Japan.

Fredrik af Malmberg, managing director, believes the success of Turkish dramas relies on the 'strong position' of Turkish culture in the global market and the competitive domestic market. He explains: 'Some 7 channels are running 1-2 original '100 dramas per night, so we are talking about a big industry with some 50-60 episodes of high end dramas every week, 35 weeks a year. That

generates a very strong internal competence. Producers are strong and competing fiercely and are in most cases working independently from the broadcasters and distributors.'

It has been recently confirmed that TF1 and Shine are working on the local adaptation of *Son* (*The End*) in France, while Globomedia is doing it for Spain, plus five more territories to be announced shortly. Moreover, the US network ABC has informed that it will produce a pilot based on this Turkish series for the 2015 TV season. *Runner*, from 20th Century Television and written by Michael Cooney, follows a woman who finds herself dragged into the world of illegal weapon sales between groups in the US and Mexico.

It has launched for the international markets new series such as *Cherry Season* and *Kaçak* from Surec Films aired on ATV and FOX TV,



ABC (USA) will produce a pilot based on the Turkish series *Son*

respectively, as well as the daily series *Elif* on TV7 and *Can't Run from Love* from Erler Film on Star TV. On entertainment, it represents the hit format *Crack them Up* from Studio Kvartal (Ukraine), with over 10 versions around the world; *Beat the Champions* (TV Asahi) and *Exit* (NTV) are top formats from Japan. In terms of distribution the company is doing it directly, but in Latin America it has a co-operation deal with Somos Distribution (USA).

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CALINOS: FEATURE FILMS & DRAMAS



Firat Gulgen, CEO, and Asli Serim, sales manager, Calinos Entertainment

Established in 1997, **Calinos Entertainment** was the first company to sell Turkish TV series and films overseas which eventually lead to a phenomenon all around the world. The company appeals to a large audience with its selection from world cinema.

The company also acquires **HomeVideo** and TV rights for titles to reach a broader audience. At Discop, **Calinos** brings a wide offer of contents, including own productions and

third party series.

Firat Gulgen, CEO, recommends the animation feature film *Evliya Celebi: Elixir Of Life* ('105), an adventure history of a time-traveler from the 17th century. His best friend, a goose who drank the Elixir of Life and protected for 400 years accompanies him in this story.

In *Antidote* ('120) feared leaders of two different generations who have become prodigies of the underworld, while *Don't Worry About Me* ('143) presents different love stories that are different from each other through its strong and colorful characters in totally different geographies will tug at your heartstrings.

Calinos also launches the romance dramas *Dangerous Beauty* (46x'60), a compelling story filled with heartbreak, jealousy and powerful emotions, and *A Love Story* (79x'60), the story of a woman who brings happiness and hope into a man's life after the chain of disappointments



Dangerous Beauty

Evliya Celebi: Elixir Of Life, feature film

and hopeless life he has been living through.

Lastly, the company distributes new drama series *The Sinner*, about pure love, passion, betrayal and revenge; *The Girl named Feriha* (187x'60), about the dreams and desires of a young girl who got stuck between two worlds; *Hidden Lies*, about a young man with a beautiful family that run a successful business, but he met a woman that change his life forever; and *Conquest* ('180) is the story of a man that started a new era and changed the history of the world.

GLOBAL AGENCY: IT'S SHOWTIME



Izzet Pinto, CEO

At Discop Istanbul, **Global Agency** continues to demonstrate why it is one of the leading Turkish distributors: apart from new drama series, it is launching for this market a brand new entertainment format, the singing talent show *It's Showtime*, which is being presented on a press conference on February 24 at 11am in the venue's conference room. Moreover, the company organizes the traditional party on Wednesday at 10pm at Shangri-La Bosphorus Hotel.

One of the top goals of the company last year was the enormous evolution it has shown

in Latin America with its groundbreaking drama *1001 Nights*, after the huge success in **Mega Chile** (it was the #1 show in 2014 on the local TV): it is being broadcast in US Hispanic (**MundoFox**), Colombia (**Caracol**), Argentina (**El Trece**) and Uruguay (**Canal 10**), with great results.

Izzet Pinto, CEO, **Global Agency**: 'After six years trying to enter to Latin America, we are now very successful in all of the territories. In Chile, the first to air the series, it became an immediate leader in the prime time ratings and the most successful foreign series in the history of the country. This opened other markets in Latin America.'

This year, it will premier in Ecuador (**Ecuavisa**), Peru (**Latina**), Bolivia (**Unitel**) and Brazil (**Band**). The distributor expects to complete sales of the series all across the region by the end of 2015. Globally, it was



Seeds of revenge

It's Showtime

sold to more than 55 territories.

Other top news are the acquisition of the international distribution rights of the dance show format *Dance with Me*, created by Ami Glam, CEO of **Studio Glam**, and the sale of *Shopping Monsters* to **RTL** (Croatia), **Tring TV** (Albania), **RTL Netherlands** and **Polsat Café** (Poland).

The format was also aired in Bulgaria (**TV7**), Hungary (**FEM3**), Romania (**Prima TV**), Ukraine (**K1**), Russia (**CTC**) and Latvia (**TV3**) and has been optioned to Greece, Canada and Australia. In Turkey, **Kanal D** has aired 700 episodes of the format.

EONE: WELCOME TO SWEDEN 2

Entertainment One (UK) confirmed that the hit comedy series *Welcome to Sweden* has commenced production on season two with Neve Campbell (*Scream*) set to guest star in a major recurring role. The series is slated to return on **TV4** in Sweden, **NBC** in the US and **Bell Media** in Canada with 10 all new half-hour episodes.

Welcome to Sweden is based on a true-life story about a New York accountant who falls in love with a Swedish girl and follows his heart

to Sweden. And it was one of TV4's highest-rated TV shows in 2014. On NBC, season one averaged 2.9 million viewers overall, according to Nielsen. In total viewers, it is **NBC's** second-most-watched summer comedy in the last 10 years since *Come to Papa* (2004).



Welcome to Sweden 2

SMILEHOOD, MULTIPLATFORM



Silvana D'Angelo, director, Smilehood Media

Smilehood Media (Argentina) continues growing in the international market after confirming the sale of tween series *Wake up! With no make up* (13 episodes) to US SVOD and AVOD services **Hulu** and **YaVeo**, the first independent OTT service from **DirectTV** aimed at US Hispanic.

This way, the first fiction series co-produced by **Coca-Cola** and **Warner Chappell** will be seen in US and Japan. Created by **Sebastian Mellino's Once Loops**, the series was released on **E! Entertainment Television** with over 50 songs of the **Warner Chappell** library.

Other top new in the international market was the sold of *Plim Plim* (60x'7 & 24x'30), the animated and multimedia series for preschool kids to **Tiji**, channel that operates in Russia and CIS territories.

Another important addition to the company's catalogue is *Creators*. Launched at Natpe Miami, it is a tween product developed by **A365 Studios** with services from **Pol-ka** that will be officially launched at the LA Screening 2015, and released in **Telefe** in Argentina later this month.

Silvana D'Angelo, director: 'It is a huge audiovisual and innovative integration between quality animation and live action. We define it as a product of *TV 2.0* that invites children's universe to interact with it, create and be an active part from the other side of the screen, what we call an *IdoTainment* product (I create



Plim Plim, sold to Tiji Russia

my own entertainment)'.
Lastly, **Smilehood** has associated with producer **NightSun** to generate the TV version of the web success *According to Roxi*, originally created as a series for Internet. 'It was conceived as a second screen content, creating a loyal group of fans', says **D'Angelo** and concludes: 'Today, those who want to innovate on *transmedia* have a proven and successful format to do it. The series is oriented to a segment the advertisers are targeting more: women.'

Among the bets for this year stands *Moses and the Ten Commandments*, a 150 episode's

MEETING TABLE #1



The People's Choice

TURKEY KNOWS THE PEOPLE'S CHOICE

Armoza Format (Israel) new prime time show *The People's Choice* ('60-'90) has now reached its 4th deal of the market with **Endemol Turkey**. The entertainment format was developed in partnership with **TF1** (France), and it has been acquired by **Tresor TV Produktions** (Germany), **Toro** (Italy) and **Elk Productions** (Sweden).

The show takes audience engagement to the next level and tests how well we know our nation by presenting viewers with the most trending, thought-provoking and entertaining dilemmas. Once the nation has made its choice live, participants in the studio must guess what the entire country chose. Industry leader **Screenz** is providing the digital online platform solution.

RECORD, QUALITY AND FIDELITY



Delmar Andrade, International Sales Director

Record TV Network (Brazil) continues to grow steadily both in the domestic and the international market thanks to its catalog headed by high quality biblical series. **Delmar Andrade**, International Sales Director: 'In 2014 we consolidated our presence not just in the local market but also internationally. *Sims* was chosen as "Best Melodrama" at the **Rockie Awards** (Canada) and the first season of *Miracle of Jesus* received the "Best Integral Production" award at the **FyMTI** (Argentina)'.
Among the bets for this year stands *Moses and the Ten Commandments*, a 150 episode's

series that follows the story of Moses, from birth to journey to the Promised Land. 'The series, which is completely faithful to the Bible, seeks to change the history of biblical productions in the international market', remarks Andrade. The launch is scheduled for March 2015.

'Our main concern is to be sensitive to the needs of our clients and ensure that our products are commercially and artistically viable



Moses and the Ten Commandments



Miracles of Jesus, new biblical series release

for all markets', emphasizes the executive.

According to **Andrade**, audience is becoming more critical and starts looking productions more technically, which generates a 'need to have an even bigger care with the quality and fidelity of the topics covered'. 'Quality and fidelity are characteristics always present in our products and that makes them attractive both for the domestic and international markets. We invest very strong always to keep our professional equipment always updated.'

AZTECA/COMAREX: DRAMA & ENTERTAINMENT

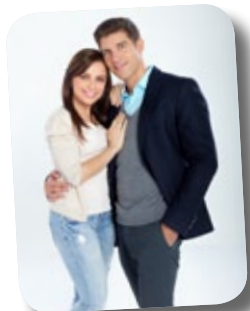


Marcel Vinay Jr., CEO

Through **Comarex**, **Azteca** (Mexico) exhibits at Discop its brand new telenovelas *Así en el Barrio como en el Cielo* (120x'60), a story that shows what happens when the roulette of life leaves the rich poor and the poor millionaires, and *UEPA: Un Escenario Para el Amor* (120x'60), about a woman who decided to work in a night club to take care of her youngest sister after their parent's death.

The Man of Your Dreams (13x'60) is an adaptation of the Argentinean version of the series produced by **Telefe**, while *I'm Your Double* (45x'60) is a reality show where 24 contestants compete to demonstrate their singing skills and ability to imitate the voice, movements and personality of a chosen/well known singer. *A Love to Remember* (135x'60) was recently adapted in Malaysia by the production company **Global Station** for **Astro**.

Other top titles are *Lucky Me* (140x'60), *Forbidden Love* (90x'60), *The Agency* (105x'60) and *Destiny* (105x'60). Regarding series, *The Other Side Of The Soul* (124x'60), and the reality show *La Academia Kids* (17 weeks) that seeks to discover the child artists of tomorrow, and the telenovelas *Timeless Love* (150x'60) and *The Kings* (125x'60).



Así en el Barrio como en el Cielo, telenovela

From the independent catalogue, **Comarex** highlights *Kitchen To Fame* ('30), a cooking reality show that follows 14 cooks with no professional experience as they compete to win big prizes, and the second season of *Niñas Mal*, a youth drama produced for **MTV Networks**. From the same producer, it brings *Senior Year* (70x'60), *Popland!* (70x'60), and three seasons of *Grachi* (75x'60, 81x'60 & 50x'60), produced by **Nickelodeon**. Lastly, the **transmedia** format *Conectados* (24x'60), from **New Sock** (Argentina).

ALL3MEDIA, FACTUAL ENTERTAINMENT

All3Media International (UK) keeps consolidating its position as factual entertainment formats provider. Top recent format *Algorithm* (5x'60) is being launched at Discop Istanbul and promise to have a great reception among the attending buyers. It is a brand new man-versus-machine game show where families go head to head with "The Algorithm" to win big money, but can a computer know your loved ones better than you do?

Other top title **Facundo Bailez** and **Natalia Sterlikova**, format sales executives recommend in Istanbul is *Undercover Boss* ('60), a multi-award winning global smash hit where CEOs go incognito in their own companies to improve their services, and unearth the best - and worst - employees, with big rewards for those who impress.

In the one-hour episode format *Salon Wars* four proud owners undergo treatment at each other's salons to find out who can give the best beauty treatment, while *Have a Nice Stay?* ('60 & '30) in an entertainment series that shows holiday resort owners battle it to find out who has the best vacation accommodation over a week of competition.

Lastly, **All3Media** highlights *Weighing up the Enemy* (4x'60). In this show, testing the weight loss theory that suggests your worst enemy can be your biggest motivation... especially when the loser must painfully hand over hard-earned cash to their rival dieter.



Facundo Bailez, format sales executives



Algorithm, new game show

UNIVERSAL CINERGIA, DUBBING AND SUBTITLING

Liliam Hernandez, managing director, of **Universal Labs of America**, and her partner **Gema Lopez** has been promoting internationally **Universal Cinergia**, which based in Miami operates a 10,000sq2 building that provides services for the worldwide TV industry.

Year to year the company adds more events to its annual agenda: last year had participated for the first time in **MIP Cancun** and **Discop Istanbul** with great results. Follow further driving their new offices in Mexico, where it dubs to the neutral Spanish for Latin America.

'We finished 2014 with two new recording studios, for a total of 8 facilities rooms in

Miami, five in Mexico, one in Barcelona, one in Los Angeles and other one in Paris', explain **Hernandez** and **Lopez**. And continue: 'We aim to grow in translating content in Portuguese and open to new territories like China, Korea and Japan.'

'We offer our services to international producers, channels and global distributors from Europe, Africa and USA, as well multiple countries in Latin America; our multilingual dubbing of native talents based here in South



Gema Lopez and Liliam Hernandez

Florida (French-Paris, Portuguese-Brazil & American-English) with our specialty in French. We worked for films, series, animations, documentaries, soap operas, corporate presentations, and infomercials, etc., they complete.

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RTVE, FOCUS IN NEW MARKETS

Radiotelevision Española (RTVE) participates in Discop with its sales team lead by the executives **Raul Molina** and **Antonio Perez**, who assist at Istanbul to keep pushing the hit series *Isabel* (26x'70) in these territories.

'We continue stepping forward towards the production of high quality series such as *Isabel*, which in its third season maintains its unique aesthetic and captivating narrative, *Aguila Roja* or *Cuentame*', highlights **Rodolfo Dominguez**, commercial director of TVE.

The executive assures that the company's channels have reached maturity not only locally but also internationally thanks to the 'unusual products in the market'. He continues: 'We started a new strategy focused in reach new markets with our extensive audiovisual catalog, our new TV series and movies that cross borders and can be of interest to other international audiences that are looking for quality products.'

According to Dominguez, to reach those new international markets it is 'essential' to create not only a strong sales structure and a catalog of high quality formats, but also a strategy of co-production with some of the most important players. 'A new stage for the company', he stands.

One of the biggest bets of RTVE for this year is *Victor Ros* (7x'70), a fully HD drama series that follows a brilliant police detective of the late 19th century who must tackle the most mysterious crimes of the city of Madrid. The distributor also exhibits *Victor Ros* and *Isabel* and highlights the launch of *El Prado, A Passion For Painting* ('52). Filmed in 4K, this documentary shows the extraordinary painting collection of the Museo del Prado, located in Madrid, Spain.



Rodolfo Dominguez, commercial director, RTVE

CISNEROS, NEW DEALS TO EXPAND

Cisneros Media Distribution (CMD), one of the leading Latin American distributor, attends Discop Istanbul again, through the representation of **Cristobal Ponte**, from **Sahara Management Holdings**, the long-time exclusive independent sales representative of the company catalogue in Europe, Africa and the Middle East.

CMD has also signed a deal with **Cesar Diaz**, former CMD's VP who has launched **7A Media**, to serve as an independent representative for Asia, in addition to evaluating and developing special projects.

'To increase our presence in core markets, while expanding our client's portfolio, we defined a solid strategic plan that includes the implementation of new sales strategies, revaluation and enhancement of our vast portfolio of products securing an exclusive mix of formats, scripts and productions that target a wide range of viewers', emphasizes **Marcello Coltro**, EVP of Content Distribution for Cisneros Media.

Following this guideline, the company announced during Natpe 2015 the signing of many strategic deals with **Turner Latin America** (to develop content for their networks), and with **ONY Productions** (USA) to market their teen series *Candela* (80x'60), from screenwriter Patricia Maldonado (*Rebelde Way*, *Cinderella*).

At Discop, the company recommends the telenovelas *Fallen over Love* (110x'60), *Secret Love* (150x'60), *Emerald Heart* (120x'45) y *Sweet Thing* (140x'45); the talk-show *El Palenque de Enrique Santos* (220x'45); the travel show *Latin Angels Special* (52x'30), *Animal Kingdom* (234x'30) y *XRC-Xtreme Reality Clips* (52x'30).



Cristobal Ponte, Sahara Management Holdings, is the exclusive independent sales representative of the CMD catalogue in EMEA



Victor Ros, new drama



Voltea pa' que te enamores

THE POWERFUL SECRETS OF MEDIASET

Mediaset Distribution (Italy), the international distribution branch of Italian group **Mediaset**, exhibits at Discop Istanbul a catalogue of more than 500 titles, including drama series, as well as scripted and unscripted formats.

As finished programs and also as scripted format, *For Love Alone* (10x'80) it's a new, compelling story of tormented love and emotional intrigue. *At Fury, the Wind of Hope* (6x'75) a family decides to seek their fortune in the hope of ensuring a more dignified life in a small town in northern Italy in the '50s.

The Devil's Shadow (1x'100 or 2x'50) is a new television format in

which historical events are not only reconstructed using film, witness accounts and relevant documentation, but also using dramatization to bring to life the memories and reactions of those who lived through them.

Both as finished program and available as scripted format, the company launches the fourth season of *A Matter of Respect* (6x'100 or 12x'50), the miniseries that follows two brothers who decide to avenge their father's death. One will take the way of the law, the other the way of organised crime. Their paths will inevitably clash.

Set in the 60', *Blood Ties* (6x'100 or 12x'50) tells the story of three siblings bound by a secret: the code to an account which contains the loot from a bloody robbery, while *Kissed by Love* (12x'50) is a new family comedy series full of sentiment, joy and funny twists.

Lastly, **Mediaset** offers the two seasons of the family series *Gourmet Wars* (15x'50) and the twice awarded Best Italian Soap Opera, *Powerful Secrets* (16x'50).



Powerful secrets



A matter of respect, adapted in Russia



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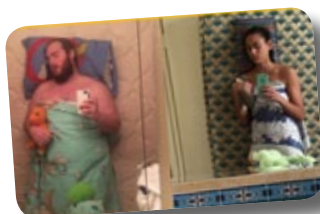
Nadav Palti, CEO Dori Media

Dori Media Distribution (Switzerland) continues evolving in the international market. On one hand, the company launched at Natpe Miami *Selfie Challenge*, an innovative, contemporary, dynamic reality game show filmed around the world that draws its inspiration from the cross-culture “selfie phenomenon” through a competition between two groups of friends.

On the other, it signed a new deal with **Sony**, this time to co-develop new digital platforms in Israel. From two platforms –satellite and Pay TV-, the company will have seven: an IPTV platform and new OTTs. **Nadav Palti**, CEO, highlights the launch of *Game of Chefs*, a reality game show that seeks to exploit the “boom” of culinary formats.

At Discop Istanbul, the company pushes the entertainment formats *Power Couple*, which shows eight couples moving into a village for 6 weeks facing in each week extreme challenges; *Famous Face* an entertainment quiz show that takes place on the street; and *Billy the Board* is a street game that enables people to have fun and earn money while waiting. Other entertainment top titles are the teen show *Boys vs. Girls* and *The Money Pump*.

Regarding series, the romantic comedy *Ciega a Citas* (140x'60), *A Good Family* (12x'30), *The Surfers* (50x'23), a new daily drama about



Selfie Challenge

a group of cool adolescent surfers who set up a surfing club on a deserted and cursed beach; the scripted comedy *Little Mom* (25x'30), that reveals the harsh truth of life after having kids, and *Driving Me Crazy* (11x'30), about three women friends on wheels that lead their lives and their businesses on the open road.

CARACOL, UNSCRIPTED FORMATS

Caracol TV Internacional (Colombia) exhibits its catalogue of series and telenovelas headed by *Emeralds*, *the color of ambition* (60x'60), about a small town that may be very well described as a “green hell;” where the ways of the jungle is law, fed by the greed awakened by emeralds; and *Beats of Love, Niche* (120x'60), a story about music, passion and romance.

In *Fugitives* (40x'60), a renowned civil engineer must escape from justice after being accused of the murder of his best friend's wife, while *Men Cry Too* (40x'60) tells the story of a man who thought that he had everything in life but when he don't receive the most coveted job promotion, his life takes an unexpected twist.

Regarding to unscripted formats, the distributor launches *TV Maniacs* (60x'60) a fresh and fun entertainment format created by **Caracol TV**. In this contest, two families made up of members from three different generations must pass knowledge and skill tests, based on TV shows and films that have been broadcasted, in order to advance on an interactive board to win prizes.

Lastly is the *International Humor Festival 2014*, composed by 20 exclusive episodes in which 70 artists from 27 countries performs high quality shows that vary from stand-up comedy, magic, imitation and fantastic dancing and light shows. Chile, Mexico, Argentina, Germany, Brazil, Taiwan and the United Kingdom are some of the countries that will be present in this version of the *International Festival of Humor* in 2014, which has been bringing talent and fun to homes for 21 years.



Berta Orozco, sales executive for Western Europe and MENA



Fugitives

ProMEXICO, INTERNATIONAL EXPANSION



Mexico is one of the most important global players in the audiovisual industry: its creative industries contribute up to 7% of the country's GDP, and are one of the most rapidly growing sectors in the economy, in terms of income generation, job creation and export earnings. It is the 18th largest exporter of creative goods in

the world and the leading actor in Latin America.

Through the governmental agency **ProMexico**, the country is setting up an aggressive plan of international expansion throughout 2015, after having a great experience as “Country

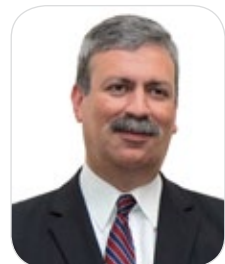
of Honour” at MIPCOM 2014, where close to 100 Mexican companies attended under the umbrella. ‘Our audiovisual content is being watched by over 1 billion people around the world per year, in more than 100 nations’, explains **Francisco Gonzalez Diaz**, CEO of **ProMexico**.

And continues: ‘Our main competitive advantages are led by the triple “I”: *Internal market, Infrastructure* and *Innovation*. In 2013, Mexico ranked in the 13th place of the *Global Entertainment and Media Outlook*, with a market value of USD 25 billion. Mexican creative industries are expected to grow 9% and achieved USD 27 billion for 2014.

‘In addition, Mexico is a platform for reaching North America, which is the industry's largest market in the world; and a gateway to Latin

America, one of the fastest growing consumer regions. Our high-quality infrastructure, natural wonders and proximity to key international spots have turned us in the industry's destination of choice. More than 1,500 companies that provide the wide range of services are requested by the industry’, he adds.

‘Mexico's leadership in this sector is being enhanced by the coordinated efforts promoted by the triple helix, comprised by the Mexican government, the private sector and the academia. Mexico offers attractive incentive schemes, created to attract international projects. Our incentives —as the **ProAv Fund**, **EFICINE** and **FIDECINE**— are amongst the most competitive ones and are designed to boost the local and foreign film and content sectors’, he concludes.



Francisco N. González Díaz, CEO of ProMexico

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Star TV, Turkey: Pelin Dogru, acquisitions director, and Can Aycetin, acquisitions authority

Kanalurk, Turkey: Merve Tufekci, senior acquisitions executive, Baris Turanli, programme manager, and Gaye Arman Bickacioglu



Efe Beserler, senior content manager, and Esra Acar, consumer product manager, at telecommunication company Turkcell, with Sibel Ozorhon, business development director, Calinos Entertainment (Turkey)



Fox, Turkey: Gul Arslan, drama manager, Tunay Ergin, foreign formats & movie acquisitions manager, and Itr Ozoflu, project development supervisor



TRT traditional cocktail party: Ibrahim Eren, deputy director general of the public network (center) with producers, TV directors and actors that work for TRT: Osmar Sinay, director & producer, Husyn Auni Danyal, actor, Biral Guven, director & producer, Ozkan Ipek, producer, and Rasi Ortelin, actor



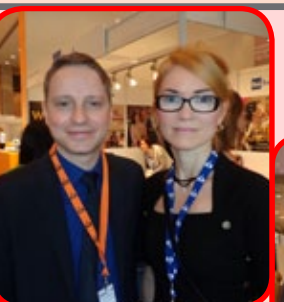
D-Smart, Turkey: Manolya Ilgun, acquisitions specialist, and Eylul Aytas, acquisitions assistant specialist



BEEEMA: Mehmet Akif Ebiclioglu, Raquel Casino Ortiz, and Olgierd Cygan from 3P (Turkey), CEO/Managing Partner, Digital One (Poland), two of the companies that integrate the entity



NTK, broadcaster of Kazakhstan: Talgat Dairbekov, advisor to GM, Saida Igenbek, general director, and Gulnara Sazanbaeva, program director



TV9, Russia: Inna Neudachnaya, head of marketing department, and Anna Tleuzh, program director



Igor Fedorov, director of acquisitions at Intra Communications (Russia) with his wife Maria



Channel 31, Kazakhstan: Olga Bordeianu, programming director, Iuri Brodskiy, general producer, and Natalya Tsymbal, programming director



RTL Klub, Hungary: Tibor Forizs, head of content acquisitions and scheduling, Póth Blanka, format and co-productions manager, Eva Kis-Bocz, head of cable programming, and Peter Kolosi, programming director



Nova, Croatia: George Makris, program director of Nova TV channels, and Danijela Bosnar, editor in chief Doma TV



Global Media Partner, distributor from Kazakhstan: Serik Saliyev, general producer, and Bezat Kaldygalieva, acquisitions manager



Channel 7, Kazakhstan: Assel Nukisheva, program director, and Ainur Nussipbecova, chief content acquisitions & sales



Elza Strapkova, acquisitions manager, and Peter Chalupa, head of acquisitions, at Markiza TV Slovakia (borders) with Izzet Pinto, CEO at Global Agency



National TV, Rumania: Larisa Mohut, acquisitions coordinator, and Anamaria Popa, acquisitions manager



Buyers from Serbia: Vladana Cirovic, general director, Happy TV, with Dexin Film executives: Dana and Andeja Petrovic with Ljupka Triunovic



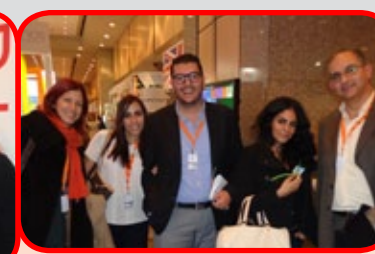
Georgian Association of Regional Broadcasters: Khatura Mamardashvili, Aleksandre Khutiashvili, Natia Kuprashvili, executive director, and Tamar Karkulia



Fox International Channels: Jason Simms, SVP Global Acquisitions (UK); Adam Theiler, EVP, FIC South Europe and Africa; and Jan Koeppen, president, and Diego Londono, COO, FIC Europe & Africa



Viasat, UK: Katrina Ivanova, acquisitions manager, Free TV CEE, Girls Licis, acquisitions manager, formats licenses, and Ilze Korjusa, head of acquisitions FTV CEE & Africa



Lina Matta, channel manager, MBC4/MBC2/MBC Max, Mia Edde, acquisitions manager, Tareq Falah Al Ibrahim, Channel Manager, MBC Drama and coordinator manager at MBC1, Fadia Azzam, acquisitions manager, and Fadi Ismail, group director, Drama, MBC



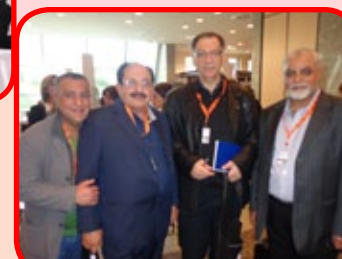
Brianne Bonney, CEO, at the distribution company Media, with executives from pan regional pay TV platform OSN (UAE): Ozge Conudoglu, acquisitions, Aya Medhat, digital executive, Nuha Mohieddin, acquisitions, and Ibaa Halal, acquisitions executive



Hassan Al-Hamdan, general manager, production and programming, SBC (Saudi Arabia); Fadi Ismail, general manager Drama, O3 Productions/MBC Group (UAE); Can Okan, CEO, ITV Inter Medya (Turkey); Marwan M. Azar, media consultant, GMT (Qatar); Jamal Douba, managing director, Media Link International (Lebanon); and Fabrice Gueneau, CEO, Dream On (France)

Middle East: Abdullah Hammoud, Media Audio Visual, Syria; Mohammad Yaghi, CO/general manager, Middle East Media, Jordan; Ibrahim El Massri, City RT, and Awni Al Lababidi, Founoun Film (UAE)

Middle East buyers: Mohamed Ali Dashti, executive director, Al Salam Media Group (Kuwait); Ahmad Assaad, general supervisor, Libya Awalun TV (Lebanon); Mohammad Al-Ghamdi, chairman, Saudi Arabia Producers & Distributors Association (Saudi Arabia), Albert Haddad, CEO, Arab Media (Jordan), and translator Mohamoud Darwish



UAE buyers and producers: Beem Lutfallah and Ruba El Khash, from Sama Art International; Nuha Mohieddin, acquisitions manager, of the Pay TV platforms OSN; and Ziad Rouji and Mazen El Khash, commercial & legal manager, Sama Art International



TV channels, producers and distributors from Egypt, Iraq, Tunisia, Algeria and Saudi Arabia, with representatives from Basic Lead at the panel Focus in Iraq held during Discop Istanbul



Middle East buyers: Awni Al Lababidi, Founoun Film (UAE), Ibrahim El Massri, City RT (Lebanon)



Middle East: Adham Nasrallah, content manager, Safe Media (Lebanon) with Sanaa Azzi, managing director, and Caline Nassif, head of production, Highway Productions (UAE-Lebanon)



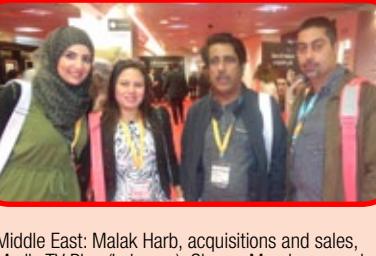
Amac Us, sales & acquisitions at leading Turkish broadcaster Kanal D, with Abdul Raouf Oria, deputy managing director, and Hayat Yaghubi, channel manager, TV1 Afghanistan



Afghanistan: Seyed Hamid Sadat, president, and Absul Rahim Azizi, international director of Khurshid TV, with Mohammad Ahmadi, content sales manager at Elena Production



GroupM Pakistan is a good example of new players at Discop: Syed Yasir Aqueel, head of GroupM entertainment, Fadah Bashir, head of buying and trading, Syed Muustafa Hussain Abbas, senior manager trading



Middle East: Malak Harb, acquisitions and sales, Media TV Plus (Lebanon), Sheren Magdy, general manager, Stars (Egypt), Abdalla Al Echlah, head of drama production, Dubai Media Inc. (UAE), Eslam Mosaad, senior acquisition executive at Arab Radio and TV Network (ART)



DMDon Square, Brunei: Abdullah Mariani, TV program and film distributor, and Jazline Rose Bte Dolamit, sales & acquisitions executive



Jane Roscoe, head of international content, SBS (Australia), Mehmet Demirhan, SVP acquisitions, sales and coproduction coordinator, TRT (Turkey), and Junko Ogawa, head of content marketing division, NHK (Japan)



Telzva TV, TV station from Tunisia attending for the first time: Zouhir latif, president and director general, Amel Smaoui, director of programming, and Nefissa Najjar, owner of the channel



LIFE AS IT IS (13x'90) IS A NEW DRAMA SERIES ABOUT A PRIVATE HOSPITAL IN ISTANBUL THAT LOSE SOME OF ITS BEST DOCTORS AFTER HAVING SOME FINANCIAL CRISIS. **DISTRIBUTOR:** KANAL D SALES (TURKEY)



LAND OF HONOR (130x'60) IS A STORY OF PASSION, SECRET AFFAIRS AND BETRAYALS WHERE THE DESTINY OF SIX INDIVIDUALS WILL BE TAKEN OVER BY THE UNCONTROLLABLE STRENGTH OF THEIR FEELINGS. **DISTRIBUTOR:** TELEMUNDO INTERNACIONAL (USA)



IN THE ONE-HOUR EPISODE FORMAT *SALON WARS* FOUR PROUD OWNERS UNDERGO TREATMENT AT EACH OTHER'S SALONS TO FIND OUT WHO CAN GIVE THE BEST BEAUTY TREATMENT. **DISTRIBUTOR:** ALL3MEDIA INTERNATIONAL (UK)



A PAST FILLED WITH HATRED AND PAIN WILL MARK THE DESTINY OF TWO YOUNG LOVERS WHO WILL HAVE TO RISK EVERYTHING FOR LOVE ON THIS CLASSIC TELENOVELA *SHADOWS OF THE PAST* (150x'60). **DISTRIBUTOR:** TELEVISIA INTERNACIONAL (MEXICO)



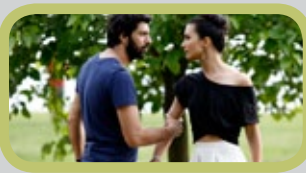
KITCHEN TO FAME ('30) IS A COOKING REALITY SHOW THAT FOLLOWS 14 COOKS WITH NO PROFESSIONAL EXPERIENCE AS THEY COMPETE TO WIN BIG PRIZES. **DISTRIBUTOR:** AZTECA/COMAREX (MEXICO)



SHOPPING MONSTERS IS A DAYTIME STYLE FORMAT THAT COMBINES THE ELEMENTS OF COMPETITION, GOSSIP, EXPRESS MAKEOVERS AND STYLE. IT WAS SOLD TO RTL (CROATIA), TRING TV (ALBANIA), RTL NETHERLANDS AND POLSAT CAFÉ (POLAND). **DISTRIBUTOR:** GLOBAL AGENCY (TURKEY)



THE FEATURE FILM *DON'T WORRY ABOUT ME* ('143) PRESENTS DIFFERENT LOVE STORIES THAT ARE DIFFERENT FROM EACH OTHER THROUGH ITS STRONG AND COLOURFUL CHARACTERS IN TOTALLY DIFFERENT GEOGRAPHIES WILL TUG AT YOUR HEARTSTRINGS. **DISTRIBUTOR:** CALINOS ENTERTAINMENT (TURKEY)



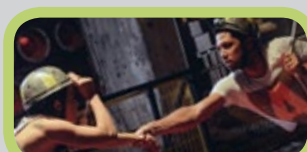
AMONG THE NEWEST DRAMA SERIES IT IS *BLACK MONEY LOVE*, A BREATHTAKING STORY FULL OF MYSTERY AND ROMANCE BETWEEN A YOUNG COP AND THE DAUGHTER OF A TYCOON. **DISTRIBUTOR:** ITV INTER MEDYA (TURKEY)



TV MANIACS (60x'60) IS A FRESH AND FUN ENTERTAINMENT FORMAT CREATED IN HOUSE, WHERE TWO FAMILIES MADE UP OF MEMBERS FROM THREE DIFFERENT GENERATIONS MUST PASS KNOWLEDGE AND SKILL TESTS, BASED ON TV SHOWS AND FILMS THAT HAVE BEEN BROADCASTED. **DISTRIBUTOR:** CARACOL TV INTERNATIONAL (COLOMBIA)



THE TELENOVELA *EMERALD HEART* (120x'45) FOLLOWS A YOUNG ENVIRONMENTALIST IN HER BATTLE AGAINST THE MOST POWERFUL INDUSTRIALIST IN VALLE BONITO. **DISTRIBUTOR:** CISNEROS MEDIA DISTRIBUTION (USA)



THE ENTERTAINMENT FORMAT *POWER COUPLE*, WHICH SHOWS EIGHT COUPLES MOVING INTO A VILLAGE FOR 6 WEEKS FACING IN EACH WEEK EXTREME CHALLENGES. **DISTRIBUTOR:** DORI MEDIA DISTRIBUTION (ISRAEL)



EZEL (155x'45) TELLS THE STORY OF A YOUNG MAN RETURNING FROM MILITARY SERVICE WHO IS SET UP BY HIS FRIENDS AND FIANCEE AND ENDS UP IN PRISON FOR LIFE. **DISTRIBUTOR:** ECCHO RIGHTS (TURKEY)



SET IN THE 60', *BLOOD TIES* (6x'100 OR 12x'50) TELLS THE STORY OF THREE SIBLINGS BOUND BY A SECRET: THE CODE TO AN ACCOUNT, WHICH CONTAINS THE LOOT FROM A BLOODY ROBBERY. **DISTRIBUTOR:** MEDIASET DISTRIBUTION (ITALY)



THE ANIMATED COMEDY SERIES *CAT LEOPOLD* IS A CO-PRODUCTION BETWEEN MONDO TV AND RUSSIAN MOBILE TELEVISION, ABOUT THE ADVENTURES OF A VERY KIND AND PRECIS CAT AND TWO MISCHIEVOUS NAUGHTY MICE. **DISTRIBUTOR:** MONDO TV (ITALY)



AWARDED AS "BEST MELODRAMA" AT THE ROCKIE AWARDS (CANADA), *SINS* TELLS THE STORY OF A FAMILY THAT ARRIVES TO BRAZIL IN THE EARLY '70S TO ESCAPE THE POLICE AND THE FINANCIAL DIFFICULTIES OF A EUROPE AT WAR. **DISTRIBUTOR:** RECORD TV NETWORK (BRAZIL)



FILMED IN 4K, *EL PRADO, A PASSION FOR PAINTING* ('52) IS A DOCUMENTARY THAT SHOWS THE EXTRAORDINARY PAINTING COLLECTION OF THE MUSEO DEL PRADO, LOCATED IN MADRID, SPAIN. **DISTRIBUTOR:** RADIOTELEVISION ESPAÑOLA (SPAIN)



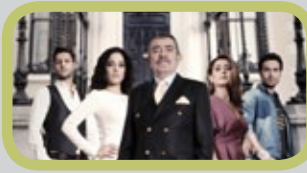
CREATORS (13x'60) IS 3D + LIVE ACTION TWEEN SERIES DEVELOPED BY A365 STUDIOS WITH SERVICES FROM POL-KA PRODUCCIONES THAT INVITES CHILDREN'S UNIVERSE TO INTERACT WITH IT, CREATE AND BE AN ACTIVE PART FROM THE OTHER SIDE OF THE SCREEN. **DISTRIBUTOR:** SMILEHOOD MEDIA (ARGENTINA)



APUESTO POR TI IS A PRIME TIME STUDIO-BASED ENTERTAINMENT FORMAT ABOUT PEOPLE WITH EXTRAORDINARY ACTIVITIES THAT SURPRISE VISUALLY, WHICH HAS BEEN OPTIONED IN SPAIN AND ARGENTINA. **DISTRIBUTOR:** TVN (CHILE)



FILINTA IS A HISTORICAL TV SERIES THAT AIMS TO TELL THE STORIES OF THE INSTITUTION OF KADI, WHOM WORKED HONESTLY AND HONORABLY THROUGH THE HISTORY OF OTTOMAN EMPIRE, TO YOUNGER DESCENTS. **DISTRIBUTOR:** TRT SALES (TURKEY)



THE NOBLE OF TODAY IS A STRONG DRAMA SERIES WITH CATCHY PILOT AND TRADITIONAL-MODERN MIXTURE, WHICH ARE THE MOST POPULAR TYPES IN TURKEY AND THE MOST REQUESTED INTERNATIONALLY. **DISTRIBUTOR:** ATV (TURKEY)

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