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JUNE 2016 | YEAR 21 | # 273

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TELEVISION • DIGITAL PLATFORMS • LICENSING

## MOSES and the TEN COMMANDMENTS

176 EPISODES



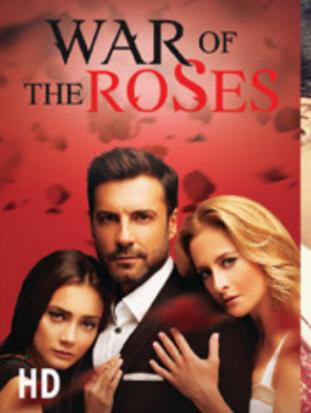
RECORD TV NETWORK

CENTRAL & EASTERN EUROPE ANNUAL SPECIAL ISSUE 2016  
NEW EUROPE MARKET - NATPE BUDAPEST - KIEV MEDIA WEEK



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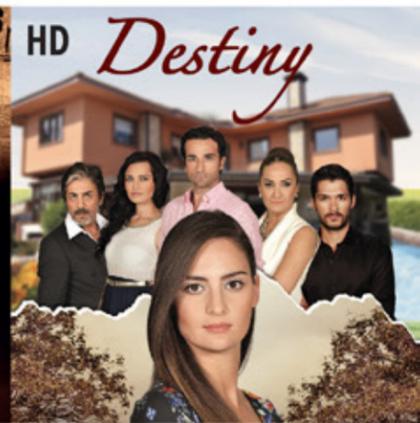
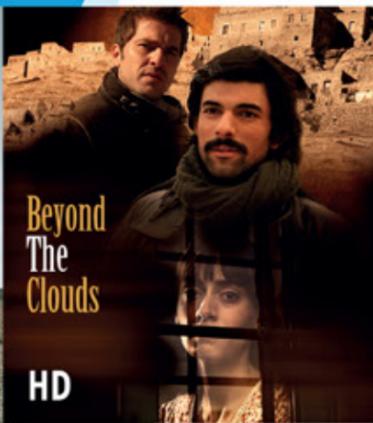
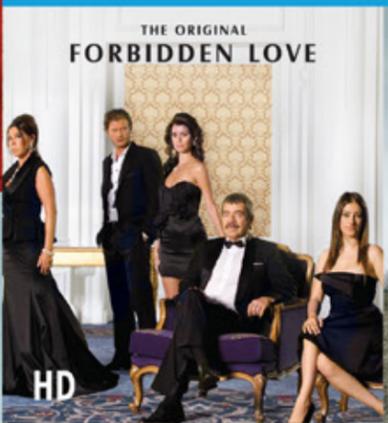


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por Fabricio Ferrara

# Fresh air for the CEE region

PRENSARIO is a close witness of the content business development history in Central and Eastern Europe, as it has been the very first Latin American publication to attend Discop East, back in 2004. To date, two crises have affected this region: the Global crisis in 2008 -2009, and the Russian Oil crisis in 2013-2014.



These have reshaped the regional business and its key players' strategies, resulting in a positive outcome.

This edition is a true proof of that evolution, being our Special Annual CEE Edition covering NATPE Budapest (June 17-30, Budapest), New Europe Market (June 14-16, Dubrovnik) and Kiev Media Week (September 19-23, Kiev).

Within these years there has been a consolidation of the CEE business into two to three main groups, resulting in fewer clients to attend each venue. Second, a good number of TV channels (traditionally buyers) became content producers and exporters, changing their relationship with the distributors. Now they require less canned content, instead of it more formats, co-productions and co-development alliances, following the global trends.

Third, the 2008-2009 global crisis strongly affected the CEE economies: ad billings have heavily fallen and it took a lot of time to recover from this slowdown. Next, Russia suffered the oil crisis in 2014, affecting mainly the CIS markets, but also others. Big media groups such as CME, MTG or Russian CTC Media redefined their strategies by selling part of their equity or redirecting their investments into other businesses.

Fourth, new trade shows appeared: World Content Market (Russia), NEM (Croatia), Kiev Media Week (Ukraine), as well as Discop Istanbul (Turkey), among others. The increase of venues reduced participation at the Budapest-base show in the following years.



El hotel Intercontinental

Fifth, the decision to extend the LA Screenings to Budapest changed the shape of this show: to many CEE buyers it is too expensive to spend 8-10 days in Los Angeles in May, so they appreciate that the Hollywood Studios bring the exhibition closer to them. It has not been good news to the indies, who have had trouble in organizing their meetings, as most of the buyers have decided to only attend the Screenings. For the buyers, this was one of the reasons why they keep attending the show.

In spite of these changes, NATPE Budapest has managed to be the top show in the region, gathering the largest attendance and top buyers' diversity. But, in order to maintain the leadership, key decisions must be made. The most significant one has been to better organize the Major screenings by integrating them to the market, to force the Studios and buyers to request a badge and to make themselves available in the market floor or suites. For the independents, the best thing would have been to see the screenings cease. But, this won't happen, as the studios are key partners at NATPE (in both Miami and Budapest) and they are the key to attract more buyers to the shows.

With the return to Budapest, the participants hope that the market will stabilize, not suffering changes in the near future. To the distributors selling in this region, Budapest is a strategic hub for business towards the CEE. Everybody must effort to maintain this evolution.

## NATPE Budapest 2016

Schedule		
EVENT	DATE	TIME
Warner Bros. Screenings	June 27	9am-5pm
CEE Content Showcase: Games, Talent and the Hottest Shows in CEE	June 27	2pm
The Practicalities of Making a European Co-Production Workshop	June 27	3pm
Lionsgate Screenings	June 27	5-8pm
CBS International Screenings	June 28	8.30am-12.30pm
Conference: Broadcaster 1-on-1: RTL's Hungarian Vision with Peter Kolosi	June 28	9am
Conference: Case Study Lunch Session: HBO - ARANYLET (Golden Life)	June 28	12pm
NBCUniversal Screenings	June 28	12:30-6pm
Panel Breakfast Session: Global Formats - What's Working, What's Falling, What's Next?	June 29	8am
Pitch & Play "LIVE" Lunch: Presented by NATPE, CEETV and TVBIZZ: 12P - 1:30P	June 29	12pm



## Prensario International

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Payments to the order of Editorial Prensario SRL or by credit card.  
Registro Nacional de Derecho de Autor N° 10878

Published by Editorial Prensario SRL  
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**THE REVENANT**



BY FABRICIO FERRARA

# Central & Eastern Europe reshaping the content business



Co-productions panel: Claude Chelli, producer & general manager, Capa Drama-Newen subsidiary (Versailles, Zodiak Rights); Simon Maxwell, head of international drama, Channel 4; Anne Mensah, head of drama, Sky; Eric Welbers, international producer; and Ben Donald, executive producer, international drama, BBC Worldwide

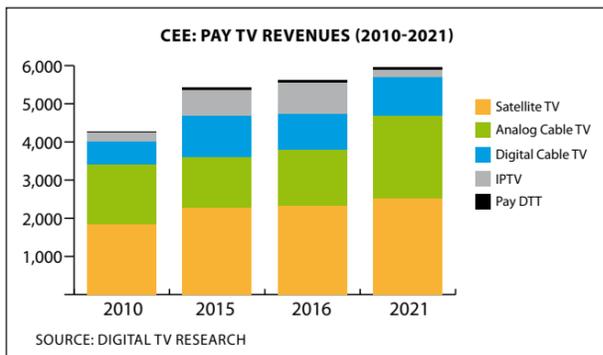
Co-productions continue to be a hot topic in CEE regions, as broadcasters are looking for alternatives to Hollywood product. At NATPE Budapest, the organizer presents "The Practicalities of Making a European Co-Production Workshop" on June 27

Following the global trends, Central and Eastern Europe is positively evolving on the content business: the region has let behind the 2008-2009 crisis and, slowly, Russia is recovering from the oil crisis of 2013-2014 pushing other markets to grow again after difficult years.

The biggest economies, Russia, Poland, Ukraine, Czech Republic, Hungary, Croatia, among others are now very active in the international markets, looking for all types of content and producing much more local content. Digital platforms are growing too, especially since Netflix disembarked in the region a year ago. Now, there are opportunities everywhere and for everybody.

The programming vendors have started to place CEE again in their "must" lists, after 4-5 years of the distribution business bring tough. Along with the industry, local players have evolved at many segments of businesses: co-production, co-development and digital. 2016 seems to be a good year for the region in a whole.

A good example of this recovery is the transformation from buyers to sellers of some players at the CEE countries. This has been happening at big markets, such as Russia and Ukraine (there are new distributors from these territories, such as **Signal Media** or **Kvartal 95**, respectively) and the Czech Republic (**Ceska televise** has consolidated its international operation), but it is also happening at smaller ones, such as Croatia (**RTL** is selling their drama series within the Balkans), Hungary (**MTVA** is strengthening its distribution arm), Armenia (**Shant TV** launched its



international division at the recent MIPTV) and Albania (**Vizion Plus** catalogue is growing steadily).

After MIPTV, four clear trends have consolidated in the market: first, the great number and quality of big prime time dramas; second, the short video business is growing everywhere; third, the growth of virtual reality & augmented reality technologies; and fourth, the sport gaming platforms.

As said, these new trends are reflected in the CEE, too, and the positive economy situation in most of the nations has helped this recovery. Now, it is time to focus on the business itself; there are also big news among the trade shows.

## Moving to Budapest

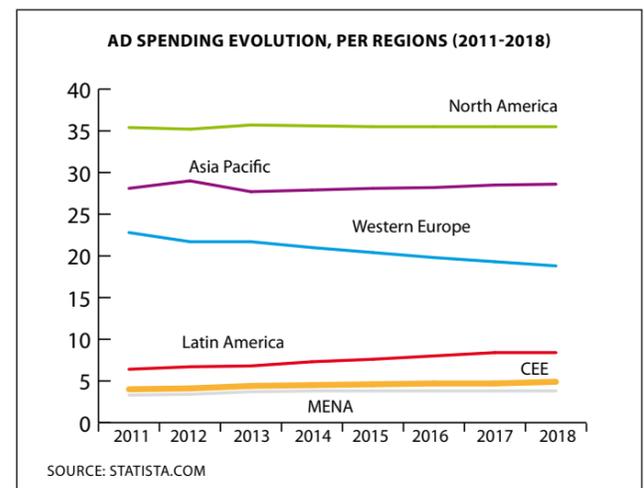
Every year the CEE represents for NATPE a different challenge: in 2011 it acquired *Discop East* and organized *NATPE Budapest* in 2012 and 2013. But they were not the best editions of the pioneer market in the CEE region.

A survey among the participants selected Prague as most voted option to move the market the following year. Two editions, 2014 & 2015, have been organized for the brand new *NATPE Europe* in the capital city of Czech Republic. Again, most of the participants — especially independent distributors — were not satisfied with the results, so NATPE took a new risk: it again changed the host city, and Budapest was selected.

**NATPE Budapest 2016 Market & Content Summit** is taking place on June 27-30, now in the Intercontinental Hotel. After checking with a sample of attendees, PRENSARIO could see that this has been the best decision; other options were Poland, Russia and smaller CEE countries. 'Returning to the origin is great news. We are full of expectations for this edition', one of the buyers remarked.

The final figures showed last year that *NATPE Europe* has remained stable in terms of attendees, compared to 2014. 600 executives from 27 countries participated at the Hilton Prague, among them 250 buyers.

For this year, the organization commanded by COO & managing director, **JP Bommel**, is breaking all the previous records in terms of exhibition and buyer attendance. 'We will have this year 120 exhibitors, 20 of them new to the show — and over 420 buyers from 217 companies, coming from



47 countries, including 25 countries from CEE but also the UK, India, Israel and Turkey, among others. This will be truly a global stage'.

He describes the venue as not only Screenings by the major producers, but also a 'great opportunity' to show the local content, unscripted or drama. 'Budapest is the media capital of Central Europe, and the Intercontinental is a beautiful place to meet other people, with lots of sunshine and a pleasant atmosphere to meet other one-one-one, without having to check the watch every thirty minutes'.

'The exhibition space has been sold out, all the major studios from Hollywood are present — **Paramount** is coming back after five years — and we have provided to participants cost-effective solutions, with tables that do not require huge fees to conduct business. To many of the participants it's too expensive to attend the L.A. Screenings or other venues; we make it happen here', he adds.

There will be a *CEE Content Showcase* and a pitching contest judged by a coproduction panel, with ten finalists and three winners, who will receive development guidance. 'We are very proud of being able to bring a large amount of new content to the marketplace. This is really about creation of content, new content, the true experience of story telling. And, you can't have just linear television, many of the buyers are coming from digital platforms, this will allow to extend the scope of the programming offered here'.

'The important thing here is that all the participants will be able to do business in a well-organized environment, with time to discuss the details of every deal. The region is prolific regarding the development of original content, with countries such as Hungary and Romania being very good at unscripted programming. Poland has had a situation regarding certain laws but it is also an extremely creative nation and we are sure it will also impress the buyers with exciting content at this venue', he completed.

Kicking off on Monday, June 27 with a *CEE Content Showcase*, **Danny Kershaw**, international research manager at **K7 Media** (UK) spotlights on the very best in CEE original unscripted programming, revealing the current tastes and cultural differences across content created in the region. This is followed by a unique *Master Class*, designed to provide detailed information on the steps required to reach global co-production success.

In *The Practicalities of Making a European Co-Production*, a panel of experts covers all the aspects of scripted co-production, from how to best design an effective pitch, right through to choosing the proper distribu-



Polish buyers: Urzula Skassa, acquisitions manager, and Bartolomiej Gralek, programming manager, TV Puls; Borys Slawik, online acquisition executive, TVN; and Justyna Trosczynska, senior content acquisitions manager, Groupa Onet

Poland is a key market for the television business in CEE, but also one of the most dynamic within online. Along with Russia, the nation has one of the strongest digital advertising investments and the content development for digital is growing steadily



Andreas Fischer, SVP, RTL for emerging CEE countries, with RTL Hungary; Peter Kolosi, Deputy CEO, and Tibor Forizs, head of program acquisitions

Expectations for the CEE market are up for many reasons, but specially because the organizer decided to come back to Budapest. Participants consulted agreed that the return Hungary capital city is a good symptom for NATPE Budapest 2016 success

tion platform. Launching the program on Tuesday, June 28 NATPE Budapest presents a keynote chat with **Peter Kolosi**, Deputy CEO of **RTL Hungary** at **RTL Group SA**, who will discuss the opportunities and challenges of local scripted content in the CEE.

Participants reconvene during lunch for a *Case Study* session spotlighting **HBO's Aranyélet**. An eight-hour drama series produced by **HBO Europe**, based on the Finnish format *Helppo elämä* (*Easy Living*) with the story and characters adapted for Hungarian audiences by local writers. These and other matters are being examined by **Antony Root**, EVP, original programming and production, **HBO Europe**, and **Gabor Krigler**, creative executive, **HBO Hungary**, who developed and oversaw the show creatively and **HBO Europe** Production Executive **Anna Zavorszky**.

On Wednesday, 29 June formats are the stars at the breakfast session *Global Formats: What's Working, What's Failing, What's Next?* featuring a world-class lineup of industry executives that includes **Mike Beale**, EVP global development and formats, **ITV** (UK); **Merrily Ross**, VP Formats & Content Development, **Modern Times Group**; **Amos Neumann**, COO, **Armoza Formats** (Israel), and **Pascal Dalton**, regional sales director, **TV formats and new media, CEE Endemol Shine Group**. The panel will analyze the past, present and future of the global non-scripted business.

*Pitch & Play Live* is a session presented in partnership with **CEETV** and **TVBIZZ**. It aims at showcasing original non-scripted format ideas with international potential from across the region. Non-scripted developed formats created after June 1, 2015 in the CEE region have been submitted for consideration.

Up to 10 titles, out of all the entries, will be selected and reviewed by a *Finalist Selection Committee* comprised of five TV industry professionals who will be in charge of selecting three finalists: they are **George R.**



JP Bommel, COO & managing director, NATPE

'We will have this year 120 exhibitors, 20 of them new to the show — and over 420 buyers from 217 companies, coming from 47 countries, including 25 countries from CEE but also the UK, India, Israel and Turkey, among others. This will be truly a global stage'.

**Chakarov**, CEO at CEETV, TVBIZZ Group; **Jordan Ryder**, VP of Domestic & International Programming, NATPE; **Pascal Dalton**, **Endemol Shine Group**; **Nick Smith**, SVP international format production at **All3Media International**; and **Noelia Nicolas**, director European formats, **CBS Studios International**.

The top three finalist formats will then be identified and presented “live” by their creators during the session to a Blue Ribbon jury of three highly respected TV professionals including **Can Okan**, CEO & president, **ITV Inter Medya** (Turkey); **Amos Neumann**, Armoza Formats and **Girts Licis**, Head of CEE, formats & content development, **Modern Times Group**. Collectively these three jurors will select and declare one format as the winner at the conclusion of the session. In addition to media coverage by **CEETV**, **TVBIZZ** and **NATPE**, the winning format will be awarded a development meeting.

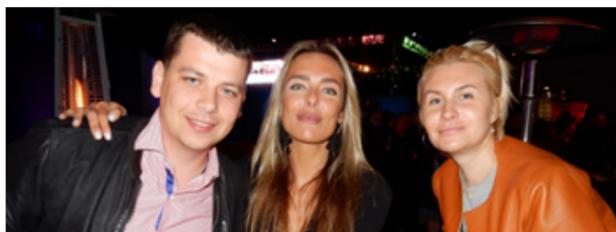
### Digital platforms

2016 has been the year chosen by **Netflix** to launch its service in CEE. After six months running there is not much to be said officially. But some local reports indicated that the platform is doing well. With prices



Buyers from the Balkans: Hamdi Rashiti, programming director, Alsat (Albania); Ana Novovic, programming director, Televize Vijesti (Montenegro); Andreja Sertic and Mirela Pammer Glavan, from distributor Media Acquisitions (Croatia) and Jovica Tojagic, head of film department, RTV (Serbia)

**Historically, the Balkans nations used to be programming buyers, but in the last years they have become content producers and exporters offering TV series that are sold within the same region because the need no dubbing**



Friday TV (Russia): Maxim Krivitskiy, programming director, Anastasia Korchagina, head of acquisitions, and Nataliya Ospiova, international director

**After the Oil crisis of 2014, the Russian economy is recovering well and the main audiovisual companies of the country have returned to the market. Internally, the big groups are reshaping their strategies to continue expanding, locally and internationally**



NBCUniversal screening with Czech buyers: Althia Plange, NBCUniversal; Jitka Bodlakova, acquisitions at Ceska televize; Manuela Morar and Nia Murrel, NBCUniversal; Alexandra Bezpalcova, acquisitions manager, and Karolina Paknerova, content specialist TV Nova (Czech Republic); Ben Cowling, NBCUniversal; and Zuzana Mensikova, head of channels, Nova Cinema

**Hollywood Studios have been organizing regular screenings in CEE since 2011, gathering a good quantity of buyers that are not able to attend the screenings in May in Los Angeles. CBS, Warner Bros., Lionsgate and NBCUniversal organize presentations this year**

### Ping Pong Trends

- **The new international boom: big dramas**
- **The next big business: short contents**
- **The newest (1): virtual reality and augmented reality**
- **The newest (2): sport gaming platforms**

ranging from 8€ to 12€, Netflix is better positioned in Russia, Poland and Romania, the most competitive on demand markets.

The main obstacle is programming. The platform is still offering U.S., Canada and some European contents in English, and has started to dub it into local languages. Local content will be a key driver for growth. ‘While there are no detailed reports about its performance to date, general data refer to it (Netflix) offering insufficient, or maybe none, localized content. There is a general assumption that, until this is rectified, Netflix is unlikely to become an important player in any CEE TV market’, remarked **Chris Dziadul** on Broadband TV News.

Instead of competing with local players, such as **CME’s Voyo** service, it is expected that **Netflix** will have to join them. The word, instead, is co-operating. It will be important for the U.S. company to better understand the market and the content trends in CEE. It is considered that agreeing with broadband providers will be another strategy to allow reinforcing its presence on CEE homes.

Figures produced by Gemius for Wirtualne Media and published by the latter show that it had 337,674 real users on PC’s in its first month of availability (January this year), with 2,744,902 opens and a reach of 1.49% in Poland. However, this dipped to 73,666 real users and 619,603 opens in February, with a reach of 0.34%, before picking up in March to 160,618 real users, 959,775 opens and a reach of 0.73%, said an article from Broadband TV News.

In Romania, **Netflix** was accessed by 163,637 users via PCs in January, its first month of operation in the country, according to Media Express by Gemius, was double the total number watching voyo.ro, a similar service operated by CME’s Pro TV. In January, it had an online reach of 2.2% in Romania, compared to **voyo.ro’s** 0.85%.

But there are another challenges for the company. Recently changes to the European Union’s broadcasting rules could force **Netflix** to devote a fifth of its streaming catalog to European content in an attempt to create ‘a more leveled playing field’ for works from the region, according to a draft of the proposal obtained by the British Daily Mail.

While this edition was closing, the body was reportedly getting ready to unveil a new plan that would impose quotas to ‘ensure adequate prominence’ of European shows and movies on streaming services like those from **Netflix** and **Amazon**. Though the Computer and Communications Industry Association — where Netflix is a member — is against imposing cultural quotas, it might not have a major impact on Netflix’s catalog. A European Commission study found that European movies account for 27% of films on streaming services overall and 21% on Netflix.

However, another stipulation from the proposed rules could have wider implications. According to the draft, member states could mandate streaming services based outside their countries to ‘contribute financially to the production of European works, including via direct investment in content and national funds’. Currently, the European broadcasters spend about 20% of their revenue on European content versus 1% for streaming services.



# Turkish Radio and Television Corporation & TRT Sales

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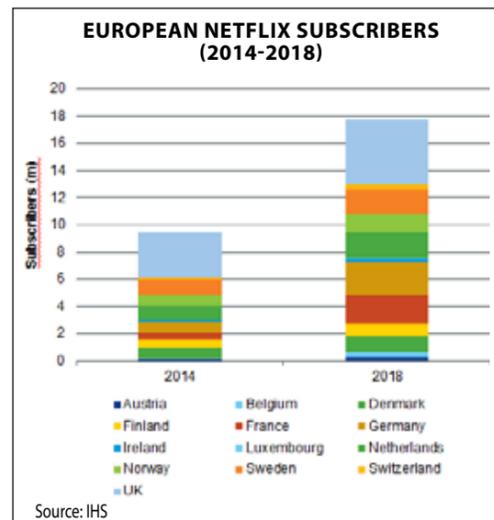




# OTT Europe: one step ahead, with Netflix

European OTT markets have been growing steadily thanks to major and smaller players in each territory but, as it has happened in other global regions, the appearance of Netflix last year has already impacted in the continent. Strongest competition, local production and programming costs.

scription VOD services —around 15 minutes per day—, according to the *Dutch Consumer Video Behaviour* report from **Telecompaper**. Netflix is especially popular with households with children. A quarter of these subscribe to Netflix, compared to 17% of all Dutch households. In the fourth quarter of 2015, Netflix had a total of 1.3 million subscribers in the Netherlands.



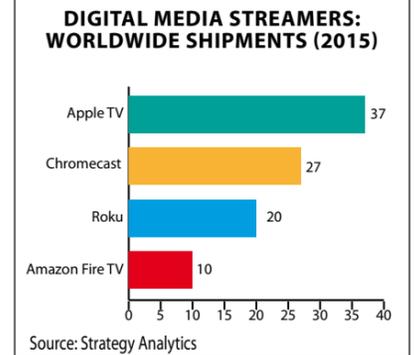
In France, the big news has been the release of the first original series from **Netflix**, *Marseille*, produced by **Federation Entertainment** (France) and with two episodes available on leading French broadcaster **TF1**. The agreement was a surprise for the whole industry and, no matter the audience result, it was a good experiment.

In CEE, where digital is still on the development process, **CME** digital asset **Voyo** have been playing a key role since its release in every market the group has operations, but the land of **Netflix** in some of those territories earlier this year hasn't been unnoticed. Immediately after its launch in January, audience tried the service, which

In Western Europe, broadcasters and Pay TV players (networks and operators) used to be the protagonists of the digital market, offering SVOD, VOD, and OTT services based on the programming they produce for their linear services. With the arrival of **Netflix** within the last four years, everything has changed.

The two largest European markets for **Netflix** are UK and The Netherlands. In the first one, **BARB's** *Television Landscape Report* informed recently that SVOD has nearly a quarter of the country's households subscribing to one of the three main suppliers: **Netflix**, **Amazon Video** and **Sky's NOW TV**. Launched in 2012, **Netflix** is the market leader having grown by 1.4 million between the end of 2014 and the same period in 2015, compared with an increase of 500,000 households for **Amazon Video** and 300,000 households for **NOW TV**.

In the second one, consumers devote on average 5% of their daily video viewing to sub-



showed good numbers that month, especially in Poland and Romania, but started to descend in February and March.

According to the specialist the big challenge is on the company's content catalogue: there is a need of *localized* content, but this is missing on the company's line up. Romanian, Polish and other subscribers have only access to in-



*Marseille*, the very first European original production from Netflix, was also aired (two episodes) on French leading broadcaster TF1, a deal that surprised the industry

ternational content dub into native languages, but no original productions. The largest global SVOD service will need to partner local companies to develop or acquired programs from CEE and Europe if wants to grow. This will probably happen the next years.

**Netflix** is now focusing on making its service available in more and more European countries. But leadership won't be easy to obtain, as it has happen in Latin America since its launch back in 2009 (**Netflix** gathers now almost 70% of the SVOD regional market): the big difference is that the European market was already an established territory in terms of digital development. Similar thing is happening in Asia Pacific.

Regarding digital media streamers, **Amazon** (*Amazon Fire TV*), **Apple** (*Apple TV*), **Google** (*Chromecast*) and **Roku** (*Box and Streaming Stick*) accounted for more than 8 out every 10 shipments worldwide in 2015, according to Strategy Analytics. **Apple TV** has more than 23 million active users globally, out of these approximately 7 million in Europe, according to Dataxis. **Roku** is the most popular streaming platform in US and has 9 million active accounts worldwide by end of 2015. In Europe, is only available in UK, Ireland and France.

Global shipments of all Connected TV Devices (Smart TVs, Blu-ray, game consoles and digital media streamers) totaled 220 million units in 2015. Smart TVs accounted for 54% of all Connected TV Device shipments in 2015 reaching 120 million units. **Samsung**, **LG** and **Sony** have a combined 50% share of the market although Chinese brands **TCL** and **Hisense** enjoyed the strongest annual shipment growth.



# YAGO

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## Free TV, Pay TV and SVOD new channels in CEE

### FOXPlay launches in the Baltics



**FOX International Channels**, in partnership with telecommunications company **Telia**, launched its new on demand service **FOXPlay** for the Baltic region. The service was released with 200 hours of content. The basic package is available for free to all **Telia** customers. The programming offering includes series *Wayward Pines*, *The Walking Dead* and *Da Vinci's Demons*, among others. There will be contents updates every day and immediately after world premiers of major series such as *Game of Thrones*.

### Czech Republic: Digi TV plans to launch new channel



Czech satellite service **Digi TV CZ** continues to acquire sport rights: the company announced this week that it has acquired the rights to 86 matches from Sky Bet Championship for the next three seasons. It is also planning to launch its own sports channel.

### FilmBox channels to launch on Baltcom in Latvia



**Baltcom**, the second largest telecommunication operator in Latvia has recently launched five new channels from **SPI International's** worldwide pay TV channel portfolio. SPI bouquet includes **FilmBox**, a movie channel featuring a variety of Hollywood hits, and European popular films; **FilmBox Arthouse**, offering film masterpieces; **FightBox HD**, a martial arts channel; **Fast&FunBox HD**, adrenaline sports network; and **DocuBox HD** with amazing docs.

### Two new channels launched in Russia



Tele Distribution Company (Teledistributsia) launched two new TV channels on the platform Orion Express: children's **Penguin LoLo** and entertainment **Pro100TV**.

The audience of the first is kids 4-12 years old and most of the programming consists on animated cartoons produced in Russia as well as content from independent animation studios based on classic stories, Cinderella, The Snow White, Robin Hood, and others.

The second one is oriented towards family and people 30+. Programming includes own produced shows, international kids series, scientific and entertainment projects, as well as movies and series for the entire family.

### Greece: ANT1 launches paid online TV service



Greek **ANT1** has launched the paid online TV service **ANT1 Next**, which offers users the opportunity to watch the channel's original productions ahead of their linear broadcast. The catalogue includes series like *Brusco*, *Tamam*, *Twin Moons*, *Without You* and *Daddy Cool*, which can be watched on a computer, table or cell phone without ads. One episode can be watched for 1€ or 5 episodes for 2.46€.

### bTV launched bTV international



Bulgarian commercial network **bTV** is celebrating its 16<sup>th</sup> anniversary. On the occasion, the CEO of **bTV Media Group**, **Pavel Stanchev** announced on an interview on the channel that the company is launching **bTV International**, which will be available globally on the company's SVOD platform **Voyo**.

### New business channel launches in Kazakhstan



The first multimedia channel for business news **Atamen Business Channel** (ABCTV) was launched on May 23 in Kazakhstan. GM, **Yulia Valiakhmetova** said that the channel provides exclusive economic and financial news in the country. The main goal of the new media resource is to inform the business society by presenting verifiable and relevant information. Broadcast will happen in the official national and Russian languages.

### 10TV to launch in Moldova



The **Coordination Council on Television and Radio of Moldova** (KSTR) has issued an operating authorization to channel **10TV**, which the founder of newspaper **Timpul de dimineata**, **Silviu Tanase** plans to launch. According to the approved concept, the new broadcaster promises to cover all events without bias and discrimination, and to present balanced information to the audience. Broadcasting license is issued for six years. **10TV** expects to launch by the end of this year.

### UATV releases in Estonia



Ukrainian international channel **UATV** has launched in Estonia, the Ministry of Information Policy announced last month. The channel is part of the **DigiTV** package of Estonian national cable operator **Telset**. The operator was founded back in 1001 and operates in Tallinn as well as numerous cities throughout the country.

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BY NICOLÁS SMIRNOFF & FABRICIO FERRARA



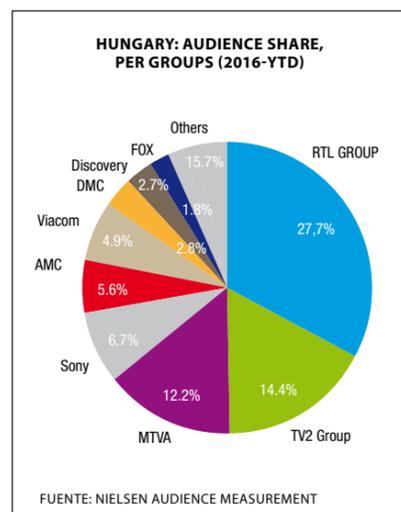
# Hungary: market fragmentation, new channels and original dramas

Traditionally home of NATPE Budapest —and former Discop East, acquired in 2011 by NATPE—, Hungary is a key market in Central and Eastern Europe: country's total population is around 10 million and there are close to 120 Hungarian channels. Pay TV is growing, but Free TV is still the leading platform, while digital its on its early stage. Prensario interviews the biggest media groups for this special report.

The three big media groups are the commercial **RTL Group** and **TV2 Group** and the Public conglomerate **MTVA**. According to Nielsen Audience Measurement, from January to May, the leading group is **RTL** with 27.7% of share, followed by **TV2** with 14.4% and **MTVA** with 12.2%. Other big groups are **Sony Television** (6.7%), **AMC Networks** (5.6%), **Viacom** (4.9%), **Digital Media and Communications** (2.8%), **Discovery Networks** (2.7%) and **FOX Networks** (1.8%).

**RTL Klub**, the flagship channel of **RTL Group**, has been the leading TV channel of Hungary for a long time, and though competition roars and advertisement pie is flat this year, its figures for the first 5 months are very positive. Comparing to the last years, the big new thing is that the channel started to produce original dramas.

The second largest group has also great news: **TV2** plans to launch 9 new channels.



In a first phase, it has already launched five new Pay TV network and has rebranded two of them. It is the biggest investment in the Hungarian media market in the past years and the final goal is to create a strong family of channels that could cover all the important segment of viewers.

During January-March 2016, the six public TV stations from **MTVA**, **M1** (generalist), **M2** (children and family), **M3** (archive programming), **M4 Sport**, **Duna TV** (generalist), and **Duna World** (Hungarians living abroad), possessed altogether 17.3% of the whole time spent watching TV in the entire Hungarian population, which represents a 2.5% point increase compared to the same period of 2015 (+ 17%). All of them together reach 4.12 million viewers daily.

## The protagonists

**Tibor Forizs**, director of content acquisitions, **RTL Klub**: '2016 is another complicated year for global incomes, as advertisement pie in total TV would be flat or even decrease a little bit according to a local survey. The good news for free TV broadcasters are that after 2.5 years from the analogue switch off (31 October 2013) the Government has accepted us to charge a distribution fee to cable operators carrying our channel. This is brand new thing so we must see how it works, but it will be a fresh income for us and a second pillar to support our structure, added to advertisement'.

'On the other

hand, our main competitor **TV2** has new owners and it is making important investments to gain market share, developing new prime time entertainment shows. We've also decided to invest more but at the same time we are confident in our current successful shows. On weekdays prime time we've bet on **Endemol's** format *The Farm*, a daily reality show, which had very good results. And we've continued with our evergreen daily drama series, *Among Friends*, together with *Budapest Day and Night*, a scripted reality currently in its 4th season. In five months — January 1st to May 31 — from 152 prime time nights, we've won 134, and lost just 18'.

'So far this year, we've achieved an average of 18.9% of market share with the whole channel. But these three prime time shows have been upper: *Farm* a 21.5%, *Budapest* 22.8% and *Friends* 23.1%. This spring **TV2** invested heavily at the weekends, with talent and celebrity shows both on Saturday and Sunday. We've competed mainly with Hollywood blockbusters and a funny game show, NBC's *Hollywood Game Night*, which mixes two celebrity teams that compete against each other for a prize. We will re launch our big talent shows in autumn, with the return of *X Factor* in its 6th Season and introducing a local version of a very popular kids talent show called



RTL Klub: *Divorced* (Talpa) is the first localized Hungarian drama series that will have a second season; and *Budapest Day and Night* is the local version of the constructed reality format (all3media)



Tibor Forizs, director of content acquisitions, RTL Klub



Ökrös Gergely, program & creative director, TV2 Group



Monika Gyurity, Programming Director of MTVA



Edina Balogh, senior acquisitions manager, Digital Media and Communications Zrt.

*Little Giants* (Televisa Mexico)'.

'The new big thing, comparing to the past, is fiction production. Last fall we've localized our first fiction format, **Talpa's** Dutch series *Divorce*, which aired on Thursday evenings with above average audience shares. Currently we are producing the second season, to be launched in autumn, and we have also a couple of more fiction projects in development. We want to have strong mix of local production both of scripted and non-scripted to keep our business steady. Producing fiction is not easy and involves a lot of engagements and costs, but today it is something strong and fresh for the audience'.

Digital? 'We have now a specific division to manage both digital and distribution goals, so I can't provide many details. The news are that Netflix was launched this year in Hungary, but till now the content is not translated or subtitled to our language, so the effect is minimum. To launch an own SVOD service I imagine is a chance but also a big challenge. Our catch up service *RTL Most* is working well, it gains serious increase when we have big shows on air such as *X Factor* for example. But they involve just one percent of our live audience, it is more of a complementary service at the moment'.

'All in all, we are pretty satisfied. There are more than 110 Hungarian speaking TV channels in Hungary, for a little bit less than 10 million people. The market becomes overcrowded. And more channels are announced to come. Our group has one free TV and seven cable channels, one of them **RTL 2** with local production —reality shows, cooking



TV2 makes the difference with prime time entertainment shows: *The Big Duet*, an in house developed format is a prime time leader, and with *My Man Can* (Red Arrow) the broadcaster increased its prime time share by 30% in 18-59

shows — which complements our general offering. Undoubtedly the solution is not only volume but quality of programming'.

**Ökrös Gergely**, program & creative director, **TV2 Group**, explains: 'We are the second largest commercial TV portfolio with one terrestrial and 3 thematic channels. At the moment the TV market of the country is about to change, as **TV2 Group** launches various new channels and repositions its already existing ones. The portfolio at the moment has primetime average 16.4% share in the total population'.

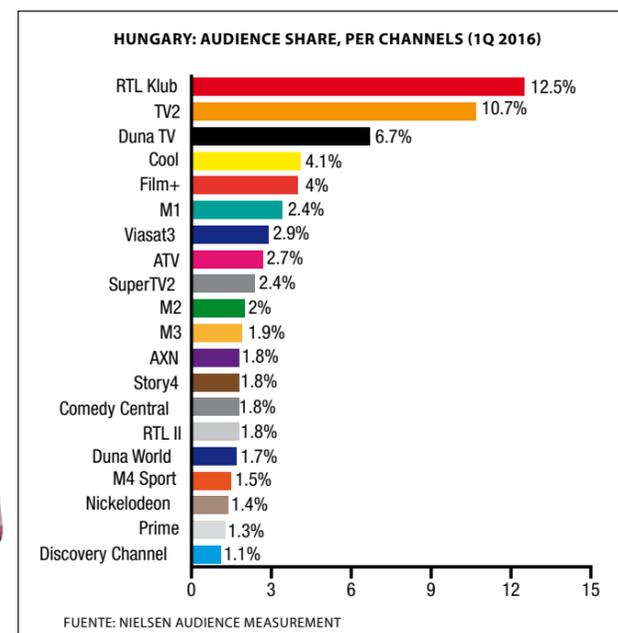
'On the big channels, like **TV2**, local production is the key to success, while on the thematic channels good quality acquired content works better. What we see is that on the terrestrial channels large-scale event shows are absolutely preferred by viewers. The most watched TV program of 2015 in Hungary was *Your Face Sounds Familiar* (**Endemol Shine**) while till now in 2016 the first place of the viewership top list is owned by *The Big Duet*, original created by **TV2**'.

'The spring of 2016 is a great step for us, our strategic goal was to first become #1 on weekends, therefore both Saturdays and Sundays we air and produce event shows. I am proud to share that we achieved this goal. Saturdays we have *Littlecools*, an in-house developed kid talent

show, while on Sundays we air *The Big Duet*, where well-known professional singers and celebrity amateurs form pairs and perform duets together. Next step is to win weekdays as well, it is absolutely in progress, with the launch of *My Man Can* **TV2** increased its primetime share by 30% in 18-59'.

'For the autumn we have a great hit as well, we will launch *Star Academy*, a format combining reality and talent shows. Based on the acquired format the contestants of the talent show will move in together and viewers can follow their daily routines during the weekdays, how they prepare for the big challenge, the live show. In the meantime, we are working on a fiction LP to launch', he completes.

**Monika Gyurity**, programming director of **MTVA**: 'The positive impact of the changes in the profiles of the public service channels as well as the launch of the **M4 Sport** channel contributed to this year's excellent results. The portfolio will be complete with the addition of the new educational channel **M5**, starting from September'.



## TV2: new channel releases and rebrands



About **TV2 Group** Pay TV channels expansion, **Fischer Gábor**, cable channel program director, explains: 'Linear TV is still absolutely #1 and there is no sign of change yet. The number of TV subscriptions in households is growing on a yearly basis and even the time spent with watching linear television programming'.



Fischer Gábor, cable channel program director



'In total population the average daily viewing time per person is 309 minutes, which is more than 5 hours a day. Of course we see the digital trends and act according to them, therefore many of our programs became interactive with voting through our in-house developed application called *TV2 Live*', he adds.



'Fragmentation is very strong on the market, the ratings of the big terrestrial channels are declining, while the smaller, thematic channels are gaining viewership. Therefore, profit-oriented companies cannot view separately on channels one by one anymore, but have to develop portfolio-oriented thinking, gaining the biggest accumulated market share possible through various channels'.



Because of that, **TV2 Groups** recently announced strategy on launching new channels and repositioning new ones. In addition of strengthening our terrestrial channel **TV2** and **SuperTV2**, we have launched various thematic channels. 'We reposition **FEM3** as **Prime** (premium entertainment channel) and **PRO4** as **Mozi+** (movie channel). We will launch **Izaura TV** (telenovela), **Chili TV** (cooking), **Zenebutik** (music), **Joy TV** (lifestyle), **Kiwi TV** (cartoon). And this is only the first phase of the portfolio extension and we have still great plans in mind', concludes **Gábor**.



'We are looking forward to the launch of the channel as we will be able to broadcast Hungarian and international documentaries of a high standard at accessible airtimes beside other educational content. In the evenings, **M5** will broadcast cultural and artistic programs and art house films that could not easily find their audience on a general entertainment channel until now. We strongly believe that **M5** will find a discerning audience who could not find the content they wished for on other Hungarian TV channels

before', she adds.

According to Nielsen Audience Measurement data from the Q1 2016, **MTVA** channels reached prime positions in the rank of more than 110 domestic networks. All 6 channels are placed in the top-20 list of all

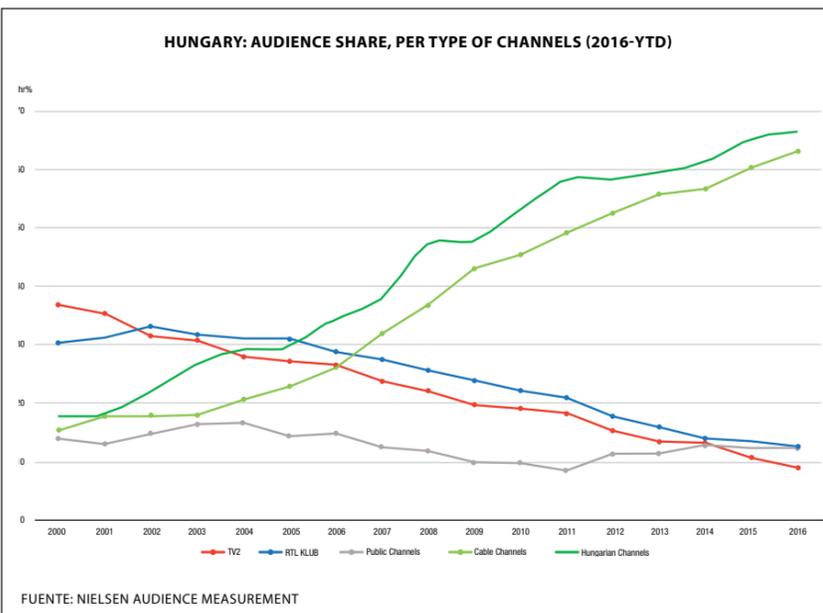
channels based on the highest audience share: only 14 out of 110 channels had a daily reach higher than 1 million people. All six public service channels are included in this group.

**Duna TV** is the third highest-rated channel with 6.7% (2.3 million people by reach). Since its profile change in March 2015 it achieved the largest increase among all the channels with 3%. **M1**, which became a daily news and current affairs channel is at 6<sup>th</sup> place on the list with 3.4% (2 million), **M2** is the 10<sup>th</sup> with 2% share (1.19 million), **M3** is the 11<sup>th</sup> with 1.9% (1.02 million), and **Duna World** (1.36 million reach) occupies the 16<sup>th</sup> position with 1.7% share. **M4 Sport** is the 17<sup>th</sup> with 1.5% (1.09 million) based on the results from the first quarter of 2016.

In the same period of time, the first two most watched programs were two entertainment shows: first, the final of the national pre-selection show for the *Eurovision Song Contest* called *A Dal*, simultaneously broadcast on **Duna TV** and **Duna World** reached 920,000 viewers (20.6% share); second, *I love you Hungary (I love my country, Talpa)*. Third and fourth, an episode of *Familie Dr. Kleist* and one from the quiz show *Still Standing (Armoza Formats)*, both aired prime time on weekdays. The Hungary-Croatia football match that was the most watched sport event in the first quarter of 2016 occupies the fifth place.

**M4 Sport** broadcast the *UEFA Champions League* this year, and the audience share has increased by 67% full-day, while in prime time it more than doubled among the total

HUNGARY: AUDIENCE SHARE, PER TYPE OF CHANNELS (2016-YTD)



In Q1 2016 the first two most watched programs on public service media MTVA were the final of the national pre-selection show for the *Eurovision Song Contest, A Dal* (Duna TV and Duna World) and the entertainment show *I love you Hungary* (Talpa)

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On DMC channels the top shows are foreign drama with series such as *Downton Abbey*

population. On the *Formula 1* weekends the results are outstanding: audience share is more than doubled and the number of people switching to M4 Sport has a more than 56% increase on these weekends. The most watched races this year have been the Spanish and the Russian Grand Prix.

### Pay TV

**Edina Balogh**, senior acquisitions manager, **Digital Media and Communications Zrt.**, the successor of **Sanoma Digital Media**, adds: 'After the company sold its assets worldwide —except for their property in the Netherlands and Finland— the channels were acquired by **Central Media** and after a short period they were bought up by their previous minority shareholders in 2014 November. By this transaction, the company has practically become one of the last channel groups who do not belong to any big holdings or international owners'.

According to **Balogh**, this is a 'great challenge' on this 'peculiar' market, which has been in turmoil in many other ways lately. **DMC** operates **Story 4** (Female 18-59), **Story 5** (Female 30-59), and **Galaxy** (Age 18-59). 'We currently do not have in-house production. We try to balance programming between library studio programs and first run European production. There are shows that seem evergreen for the audience and produce satisfactory ratings like *Desperate Housewives* and *Little House on the Prairie*'.

'We are particularly proud of the *Downton Abbey* premieres and try to maintain and look after brands like the Agatha Christie franchise with *Poirot* and *Miss Marple*,

as well as other shows like *Murdoch Mysteries* and *Midsomer Murders*. Drama represents the majority of our programs and currently we have just a small portion of entertainment'.

'The Hungarian market finally got to the point when players realized that they need to produce quality local production in the fiction genre. We are way behind the surrounding countries that is certainly very disappointing if we think about the great tradition of Hungarian movie production in the past, not to mention how much talent we gave to Hollywood decades ago'.

'Regarding the competition between Free TV, Pay TV and Digital, the trend in Hungary has been for years now that cables were growing at the expense of free terrestrial channels. I am not saying this is bad just that how it is. Digital is definitely at the threshold'.

'All that talk about online rights and monetizing these rights are finally cropping, although in my opinion the market's reaction seems a bit abrupt, and I don't understand why we let it go with no action for so long when we have known it has been coming. For those who have their own production it does not mean such a threat but fiction buyers can now face the holdbacks against pan-European VOD-deals'.

'The commercially important audience is still rather conservative. Hungary is among the countries where time spent with watching television is among the highest (a little more

than 5 hours per day). Television is still one of the cheapest way to entertain and looking at the economy of the country that is not a surprise, this is the only thing a huge number of people can afford. Hungarians are still very fond of serialized American shows and Hungarian reality programs. Studio programs are affordable to big channels and they are the producers of local reality shows'.

'People want to relax while watching television. So we would like to provide them with "feel good" channels. Our sources are more limited than that of the big corporations but we believe that we can provide an alternative with violence free programs from Europe and outside the US, lighter crime series and period dramas. We are trying to provide a program flow that can be watched from early morning till the end of the day. We also appreciate female viewers as we believe that they represent enough purchase power for advertisers too'.

'Without saying too much about our future projects we do know that we have to be very smart about our next moves which takes into account possible new alliances and content partnerships but I cannot be more specific at this stage. Taking into account that RTL and TV2 are becoming chargeable channels for viewers in the near future, smaller channels have to offer valuable alternatives for the platforms and the audience. We are considering all possible options to be able to provide that'.

HUNGARY: TOP 20 PROGRAMS, BY TV CHANNELS - AGE 18/59 (2016-YTD)

Program	Channel	Reach	AMR %	SHR %
A Nagy Duett /Zenes Show-Musor/	TV2	713,828	13,8	27,6
Hirado	RTL KLUB	638,963	12,3	26,4
Gyerekjatek /Am. Vigjatek/	RTL KLUB	602,346	11,6	21,7
Farm /Magyar Reality Show/	RTL KLUB	584,694	11,3	28,7
Nasz-Ajanlat /Am. Vigjatek/	RTL KLUB	583,147	11,2	22,9
Baratok Kozt /Magyar Filmsor./	RTL KLUB	565,728	10,9	23,4
Kutyabajnok /Kanadai-Amerikai Vigjatek/	RTL KLUB	544,512	10,5	20,4
Szilveszter Ejjel /Am. Vigj./	RTL KLUB	520,783	10	20
Shrek A Vege Fuss El Vele /Am. Anim. Film/	TV2	498,093	9,6	18,8
Ejjel-Nappal Budapest /Magyar Filmsor./	RTL KLUB	492,938	9,5	21
Kismenok /magyar szor. Musor/	TV2	492,224	9,5	23,8
Amerika kapitany: az elso bosszuallo /Am. Sci-fi Akciof./	RTL KLUB	489,382	9,4	18,6
Fokusz /Kozeleti Magazin/	RTL KLUB	487,716	9,4	24,5
Sorozat Kviz	RTL KLUB	487,127	9,4	20,9
AZ Acelember /Am.-Kanadai Fantasztikus Akciofilm/	RTL KLUB	484,540	9,3	19,1
Taxi 3. /Francia Akciovigjatek/	RTL KLUB	477,750	9,2	17
A Karate Kolyok /Am.-Kinai Akciofilm/	RTL KLUB	477,509	9,2	20,7
A Szallito /Am.-Ang.-Nemet Akciofilm-Sor./	RTL KLUB	473,113	9,1	19
A Karib-Tenger Kalozai /Am. Kalandfilm/	RTL KLUB	471,916	9,1	18,4
Harmadik Shrek /Am. Anim. VIGJ./	TV2	467,310	9	17,5

FUENTE: NIELSEN AUDIENCE MEASUREMENT

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# Nova Bulgaria, towards online video production

'Our spring season has reinforced our leadership position in Bulgaria. Nova's goals were simple: to become market leader in 2014, to continue through the spring and autumn of 2015, and to bring our success into 2016. And we did it. Nova is Bulgaria's most watched TV channel among active-aged audiences and we have also achieved amazing results in key areas.

Didier Stoessel, CEO, Nova (Bulgaria) describes to PRENSARIO the good performance of the television corporation, and he continues: 'Our good performance in terms of audience's growth also enabled us to grow our Bulgarian revenues approximately 20% in 2015. We were able to maintain this growth into Q1 2016'.

'Having taken away the leadership of bTV (CME) in the autumn of 2014, we were able to maintain our top position throughout 2015 and have continued to dominate in Q1 2016. We increased our share in the commercial demo, active population audience (TG 18-49) by 23% in Q1 2016 vs. same period last year, while bTV posted a 5% decline over the same period'.

On a group level, NBG (Nova + niche channels Diema, Diema Family, Kino Nova, Nova Sport) growth is 14%, while the second media group BMG (bTV + niche channels bTV Action, bTV Cinema, bTV

Comedy, bTV Lady, Ring) posted a 1% decrease year-to-date. 'Since 2014, MTG (NBS + Fox, Fox Crime, Fox Life) has been the undisputed market leader ahead of CME (BMG + Fiesta, Cartoon Network, Nickelodeon). MTG increased by 12% its audience share in commercial demo (18-49) in Q1 2016 vs. same period last year'.

Stoessel adds: 'Our digital business has been developing with a very fast pace, too. We currently reach over 80% of Bulgarian Internet users, allowing advertisers to get to over 1.5 million real users in just 24 hours. There is no other Bulgarian digital company that can offer this'.

'Our online business is so huge that we are constantly working on numerous large-scale projects – whether they have to do with improving our existing websites and platforms, developing mobile versions and apps, or creating brand new products. 10 months ago, we set up 7Talents, Bulgaria's first online video production and distribution business, which now employs about 30 people. The team not only produces digital content, but also manages talents to make sure they get the largest possible distribution and monetization of their products. Currently, 7Talents manages over 550 Vbox7.com and YouTube channels'.

Own productions are the backbone of Nova's schedule: 'Starting with our news and current affairs programs, reaching big prime time formats such as Big Brother, X Factor, Your Face Sounds Familiar, etc. Other landmark shows in our portfolio include Deal or Not Deal and Family Feud in prime access, as well as Sofia Day and Night in the late prime. Still, acquired content has its place on Nova, comprising mainly of blockbuster movies and selected top US series such as The Blacklist and Hawaii-Five-0. In daytime, similar to other countries in the region, we are very successful with Turkish and Indian series', he adds.

Bulgaria's first web teen series, Don't Do That, Bro, produced by 7Talents, has been performing well, with each episode attracting multiple and loyal audience. 'For a little over a month, the videos related to this series have generated over 2 million

Didier Stoessel, CEO, Nova Broadcasting Group

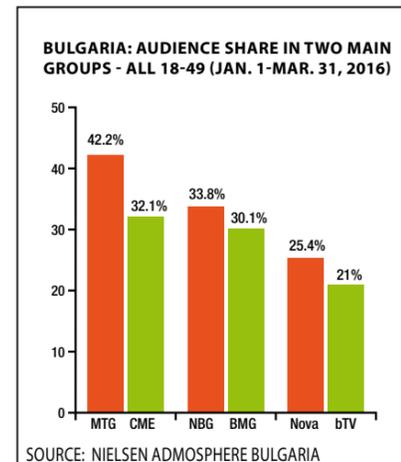


Bulgaria's first web teen series, Don't Do That, Bro, produced by 7Talents, has been performing well, with each episode attracting multiple and loyal audience

views, while the web series episodes uploaded on Bulgaria's biggest web series, Vbox7.com, have been watched by over 1 million users', he says.

'Reality and entertainment is what our main channel Nova has been traditionally associated with and we have great success stories in those genres. This spring we launched the first original medical Bulgarian drama series, Stolen Life, which proved to be very successful. Therefore, we are constantly looking to add new genres to our portfolio and further improve the viewing experience we offer'.

Stoessel concludes: 'Just several months ago, NetInfo acquired 51% of Grabo.bg, Bulgaria's biggest daily deal site, as well as 51% of Trendo.bg, a leading fashion online store. As part of the deal, NetInfo also acquired a majority stake in Opoznai.bg, Bulgaria's biggest tourist locations catalogue, which is part of Grabo.bg. Our penetration into market places and price competition is part of our long-term strategy to grow and diversify our online business'.



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# Pro TV: 'We reinvent the way Romanians watch TV'

Pro TV is the market leader of Romanian television, since its launch more than 20 years ago. It offers news and entertainment targeting the 18-49 years old, Urban, audience, as well as drama series, sports programming, blockbusters, TV movies, and some foreign series.

In 2015, it reached in prime time an annual average audience share of 23.9% and 9.1 rating points, a considerable distance from the main competitor in second place with only 14% and 5.3 rating points.

The last year lineup introduced new productions that won top positions in viewer's preference, and set new audience records. The channel has always been a trendsetter and an innovator in the local market as we continually strive to give our viewers more of what they enjoy.

In addition to this, Pro TV is one of the most powerful brands in Romania, with a spontaneous awareness of 83.3% (2015), significantly leading other relevant media competition, which ranked only 64.3%. Also, it had 40% top of mind, three times higher than the next TV station mentioned. Last year, it won for the 10<sup>th</sup> consecutive year the Reader's Digest "Most Trusted Brand" in TV category.

**Aleksandras Cesnavicius**, CEO: 'Entertainment is the leading genre. Blockbusters

and movie premiers on TV, as well as sport competitions and news programs are also preferred by the audience and bring high ratings. The biggest trend in 2015 was the introduction of the strip schedule in prime time and also a focus on reality entertainment'.

'Pro TV managed to reinvent the way Romanians watch TV, proving that horizontal scheduling can be successful. With shows as *I'm A Celebrity*, *Get Me Out of Here!* and *The Farm*, we captivated audiences, increasing the loyalty of our viewers and expanding our demographic pool', he adds.

Pro TV is investing more and more in local productions, having a balanced programming grid together with foreign content. 'I strongly believe that productions are the brand differentiating elements and, for me, the power of the Pro TV brand is extremely important. We produce local versions of international talent show (*Got Talent*, *The Voice*), real life cooking competitions (*MasterChef*, *Bake Off*) and reality shows (*Survivor*, *Extreme Makeover: Home Edition*)'.

One of the channel's biggest drivers has been *Got Talent*, an outstanding rating success for six consecutive seasons, averaging 45.6% audience share (Spring 2015). *The Voice* will commence its sixth season this autumn, and it will also produce *The Voice Kids*, as well as *Survivor*, which launched the reality show genre in TV.

Cesnavicius remarks: 'Local scripted series bring audience leadership, too: *Las Fierbinti*, an authentic comedy series, has been running for 9 seasons and in 2016 we introduced a new series, *Atletico Textila*'.

'Sports have always been an important pillar of our content strategy, and we are a reliable broadcasting partner for important football competitions such as Europe League and *UEFA Champions League*, or Romania's National team games and Romanian competitions. For the first time, we will broadcast the European Football Championship, broadcasting *UEFA EURO 2016* nationwide'.

'The trust and loyalty of our viewers represent the driver of our success. Pro TV's strategic initiative is to increase the leadership gap



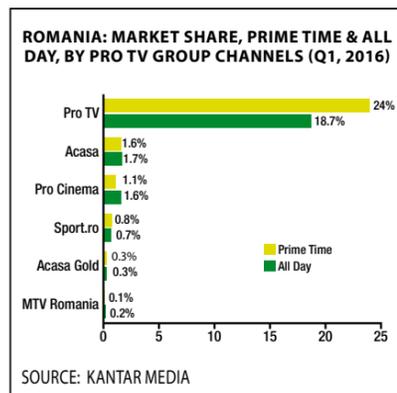
Romania Got Talent is one of Pro TV biggest drivers becoming an outstanding rating success for six consecutive seasons, averaging 45.6% audience share (2015)



Las Fierbinti is an authentic comedy series, which has been running for 9 seasons and in 2016

between the competition and us. All our productions and shows are supported by our strong digital presence, including websites, microsites, social media platforms, and also two very important platforms: PRO TV Plus, our catch-up service, and Voyo, our SVOD service'.

Cesnavicius concludes: 'We are integrating digital platforms in on-air content and this successfully drives young audiences from on-line to free TV. For us, the digital engagement with our viewers is highly important in driving brand affinity, which positively influences the linear TV results. Content cross-promotion, exclusive previews, relevant information sharing, second screen applications and special digital campaigns are therefore an important pillar in the communication mix'.



Aleksandras Cesnavicius, CEO, Pro TV



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# Channel 31, Kazakhstan: 'We rely on own production'

Channel 31 is one of the leading broadcasters in Kazakhstan, associated with the new trends and society renewal. Over the last three years it has started to position itself as a family channel with the slogan *Watching with Whole Family!*

**Bagdat Kojakhmetov**, general director, explains to PRENSARIO: 'Family is the most important thing for every Kazakhstani. There are only 1.25 TV sets per, and that's not because we are poor, but because TV leaves the traditional screens and transfers to modern devices. Every family, irrespective of the number of TV sets in its house and level of income, gathers together to watch television at least once a day'.

Channel 31 has found its niche and technological way to get to each televiewer, which has allowed to be among the best three, and #1 for many other parameters, for example for 6-54 years audience in Almaty —the largest city in Kazakhstan—, and for 6-54 years audience among the Kazakh population.

**Kojakhmetov:** 'We have the best news and many TV sitcoms. We were able to create new trends regarding the production of concert films and comedy shows. In 2015 we became the inspirer and organizer of *Burabai Azil Fest*, the annual national festival of humour. We have never bought any global formats, but we created own

reality show such as *House for Weight Loss*. This project was also #1 within two years'.

As for acquired content, it takes more than half of programs among the Kazakhstani TV and on Channel 31, in particular. 'The preferences of viewers change every 2 or 3 years. Several years ago Turkish TV series were #1. Later, the Indian TV series overcame them over the past 2 years. But Turkish TV series are back again this year. Viewers have a renewed interest to old product, as a kind of nostalgia. Last year we were able to open a new window: TV series from The Philippines. They have the same kindness, correct director's work and script. *Filipino* people are very similar to the Kazakhs', he adds.

'Feature films were totally from Hollywood (Warner Bros., Disney, Paramount) but now Asian cinema is on top: Uzbekistan, South Korea, Kyrgyzstan, Philippines, Thailand, Indonesia and Turkey. They are expensive, but they have a serious chance to overcome Hollywood movies in the near future. They are very close to us in terms of mental content'.

'Traditional watching of melodramatic TV series (Turkey, Russia, etc.) will be preserved. There will be no abrupt changes on the audience's preferences. Free TV viewers are mostly women at the age of 16+ with higher incomes, but their TV preferences do not differ much from the rest of the spectatress. Negative economic events of the past 2 years in Kazakhstan led to the fact that the purchasing power fell sharply. Now, we cannot afford both the purchase and production of expensive high-quality products'.

'Global hits, as *Games of Thrones*, do not work well on Free TV, as Kazakhstanis have already seen it on Internet. A large part of the audience perceived such series as a strange Hollywood fairy tale for children. And they were not able to see in it something that is associated with their traditional way of life. Turkish TV series *Magnificent Century* showed extraordinary ratings, as well as the Indian TV series *Daughter-in-Law*'.

Traditional viewer in Kazakhstan and worldwide is aging: 'Young



Burabai Azil Fest, the annual national festival of humour

people no longer watch TV news and those programs that are produced by the classic TV channels since they have a new format, clip system of thought. They will be the majority within 5-7 years, so TV production technology will be changed itself. For example, producers of videos of no more than 10-15 seconds are very popular'.

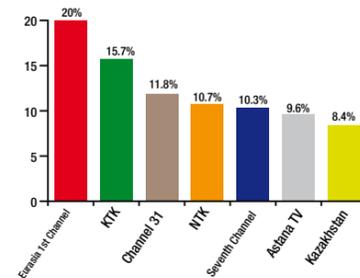
'At Channel 31 we rely on own production. In future, those who manage to cheaply and qualitatively produce will win, because the Kazakhstani viewer has a need to watch domestic TV. And only now, 20 years after independent TV has been introduced, the first steps are being taken to meet such demand. But there is one drawback. This is a feature of the Kazakhstani market: we have a big country and a small population: 17 million people'.

'Ad market is narrow, too. In addition, it lost 100-120% over the last year in the foreign currency equivalent. Therefore, we still cannot afford to make big shows that would be very popular. Unfortunately, the Government has not yet worked out a clear system of assistance to the local TV channels. The state import substitution program works: this program should give first priority to the TV. We hope that the situation will change with the appointment of a new minister of information', concludes **Kojakhmetov**.



Bagdat Kojakhmetov,  
general director of Channel 31

KAZAKHSTAN: TOP 7 CHANNELS - ALL 6-54, 07:00-25:00  
(JANUARY, 1- MAY, 23, 2016)



SOURCE: TNS GALLUP MEDIA ASIA



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# New Europe Market 2016: fourth edition with larger attendance

Organized by **Mediavision**, the **New Europe Market (NEM)**, one of the fastest growing markets gathering of CEE media industry professionals in the Balkans region, took place on June 14-16 at Hotel Dubrovnik Palace, in this coast city of Croatia.

This year edition was also attractive to local startups, as well as companies working in IT and ICT areas. NEM also had its first global premiere: the Croatian drama series *The Paper* (12 episodes), whose director is Cannes laureate Dalibor Matanic.

**Christoph Mainusch**, co-CEO of CME and executive director and CEO of **Nova Group** gave a keynote on the first day, and there were other conferences about hot topics of the industry such as the future of channel bundling, with **Michael Moriarty**, president **AMCNI - Central Europe**, **AMCNI - DMC**, **AMCNI - UK**, and **Bartosz Witak**, SVP, general manager, **Viacom In-**

**ternational Media Networks**, CEE & Israel.

Or how DTH is facing the challenge of OTT with **Apostolos Triantafyllou**, SVP of Sales for DACH, CE Europe, Israel, Caucasus & Central Asia, **Eutelsat**; **Bill Wijdeveld**, VP Business Development, **M7 Group**; and **Stanislav Georgiev**, Head of Broadcasting, **Telekom Austria Group**.

NEM is organized in one of the most challenging and attractive telecommunications market, Central and Eastern Europe, which has a development potential unsurpassed by any other region in the world. Organizers and participants agree that, apart from the key thematic panels, here professionals get informed about the latest trends and have access to ideal business setting through various exhibition options and networking events.

All key TV, production, marketing, IPTV, satellite and cable companies attend the show. More than 250 companies from all over the world found NEM a 'unique market to broaden possibilities and opportunities and to get acquainted with colleagues, exchange ideas, learn from each other and start new partnerships', it was highlighted.



*NEM 2015 Welcome Party*, sponsored by Pickbox.TV: the presenter Antonija Mandic with Tim Daly, the star of the hit series *Madam Secretary* from CBS Studios International; Sanja Bozic-Ljubicic, CEO and Owner at Pickbox, NEM & Mediavision; and Emelyn Daly, Tim's daughter

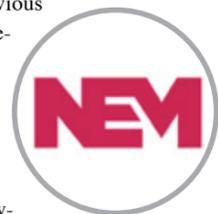


The leading satellite operator, Eutelsat, has proven the CEE region's importance with the Diamond Sponsorship of the fourth consecutive NEM 2016. Pictured is Apostolos Triantafyllou, SVP of Sales for DACH, CE Europe, Israel, Caucasus & Central Asia (center), with sales team during last year NEM



*A Match Made In Co-Production Heaven*: moderator Ankica Juric Tilić, Producer, Co-founder of Kinorama; Tom Fontana, Writer and Producer; Bonita Pietila, Producer/*The Simpsons*; Nigel McCreery, Writer and Producer; Peter Nadermann, Managing Director, NADCON

In just three previous editions, NEM became recognized by more than 120 leading world experts who came to share their knowledge, opinions and know-how on newest technology potentials, advertising challenges of the multiscreen era, content marketing era and how to create social media buzz.



## A successful track record

Last year edition saw 10 panel discussions about the most important trends in the CEE media industry. Some of the subjects were how to find a new successful TV format, how new technologies affect the TV industry, the influence of satellite technology on the OTT market, how did the economic crisis affect the biggest media companies and purchasing of various rights, how does advertising work in today's media market and how is it influenced by the increasing number of new platforms. The world's top producers shared their experiences.

The goal of NEM has been from the beginning to connect people from all over the world with professionals in the region, in order to emphasize its huge potential. NEM 2015 hosted new business deals made at numerous networking places.



*FTAS Beating The Economic Slump*: moderator Scott Roxborough, European News Editor, *The Hollywood Reporter*; Henning Tewes, CEO of RTL Croatia; Pete Smith, Managing Director, Antenna International; and Pavel Stanchev, CEO BTV Media Group, Bulgaria



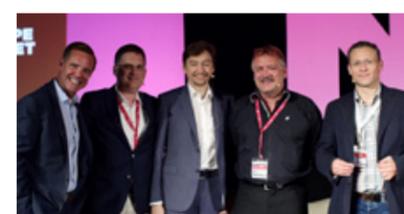
*Creative hubs: what can we learn from them?*: moderator Igor Stoimenov, Programming Director, B92 (Serbia); Daniela Matei, CEO Nordics, Central-Eastern Europe and The Balkans, FremantleMedia; Izzet Pinto, Founder and President of Global Agency; Simon Shalgosky, Head of Development, Keshet UK Productions; and Girts Licis Head of CEE, Content Development & Formats at MTG

As it has been happening since the first edition, the giant of the satellite market **Eutelsat** was the diamond sponsorship of NEM for the fourth consecutive year. The company has acknowledged the value of this market in the CEE region since 2013. Every year it has presented the newest technology through leading experts in the satellite industry.

'NEM has gone beyond being a regional content event, it's now global. Throughout these 4 years it has gained international awareness and reputation, and we can't wait to find out what NEM has in store for the industry this year. Eutelsat is the bridge between content providers and DTH, cable and OTT/IP TV operators. Together we create an interactive platform where content find their distribution solutions', said **Apostolos Triantafyllou**, SVP Sales DACH, CE Europe,



*Will Second Screen Always Play Second Fiddle?*: moderator Irena Battelino, Content acquisition manager, Telekom Slovenije; Aleks Habdank, Chief Operating Officer for Pay-TV Emerging Markets at MTG; Richard John Brešković, Director of Marketing, Hrvatski Telekom; Adrian Ježina, Member of the Management Board and Chief Technology Officer, Vipnet; and Saša Kramar, Chief Executive Officer, Iskon



*Is Sky The Limit?*: moderator Robert Despot, Senior Proposition Management and Products Development Expert; Apostolos Triantafyllou, SVP of Sales for CE Europe & Eurasia, EUTELSAT; Thomas Staneker, Head of TV Technology Service Center, Deutsche Telekom; and Nikola Francetić, Head of Group Content, Media and Broadcasting, Telekom Austria Group

## CME: Christoph Mainusch, keynote speaker at NEM 2016

**Christoph Mainusch**, Co-CEO of **Central European Media Enterprises** and Executive Director & CEO of **Nova Group** Czech Republic, has been the keynote speaker during NEM 2016.

Since his arrival to the company a year and a half ago, **CME** has strengthened its leading position in the region. 'It was clear that the turnaround will take more than one year. There were a couple of items we focused on: maintain our clear audience leadership in all our territories, improve our advertising revenue results in the Czech Republic by introducing a revised sales policy, better manage our program inventory, apply a high cost discipline, concentrate on our core activities and divest non-core assets, and restructure the company so it's more lean and efficient', he explains.

**Mainusch** has spent his whole career as a media industry insider, and believes that TV has become even more powerful in the digital era: 'Increased competition and more channels always constitute a bigger challenge. The digital development, however, has not jeopardized TV consumption. The opposite is the case. TV is stronger than ever. Digitization offers a lot of new opportunities'.

'The challenge was to realize and capitalize on this trend and make content offers available on all platforms. The advertising market has obviously reacted to this change in consumption: we estimate that in our markets the share of TV and online advertising of the total ad spent has increased

from 52% in 2006 to 71% in 2015', he adds.

In an interview with **PRENSARIO** for **MIPTV**, the executive remarked: 'TV was and is the #1 medium. Our digital strategy is to complement our leading broadcast offering and make our content also available on all platforms, including SVOD and AVOD. We launched websites in each country, mainly to support our linear TV offers. Over time these were complemented by additional news, lifestyle and entertainment websites while the company built out a division focused on digital businesses'.

The company has also pioneered in the deployment of SVOD services under the brand **VOYO**. 'We launched initially in Slovenia since Internet penetration was particularly high, and in 2011 it was implemented in all **CME** countries. In 2013, the digital business in each country were consolidated with the TV broadcast operations, so we reduced the number of existing niche websites in order to focus on the most successful sites that best complemented our broadcast operations', remarked **Mainusch**.

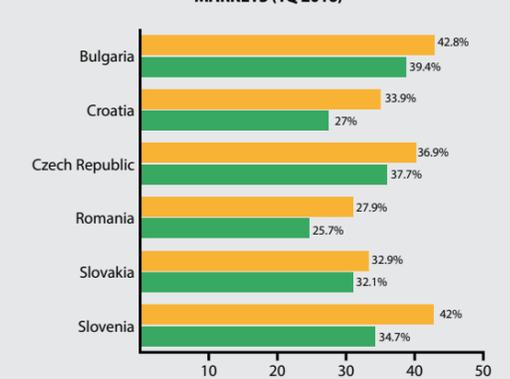
About how executive sees the future, **PRENSARIO** asks if digital replace or complement traditional. He concluded: 'Complement. All media will essentially be digital and distinctions between traditional and digital media will start to disappear. We focus on our premium content making it available on all platforms at any time. Therefore cross-media measurement becomes very important'.



Christoph Mainusch, Co-CEO of CME and executive director & CEO of Nova Group Czech Republic



**CMETV GROUPS AUDIENCE SHARE - PRIME TIME & ALL DAY, BY MARKETS (1Q 2016)**



Source: (1) GARB; (2) y (6) AGB Nielsen Media Research; (3) ATO - Nielsen Admosphere; Mediaresearch; (4) Kantar Media; (5) PMT/TNS

SUITE #242B



## Signal Media: the largest Russian Pay TV programmer

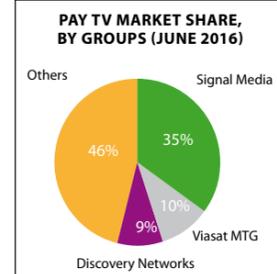


Mikhail Kovalchuk, general director, Signal Media

**Signal Media** is the largest distributor of content on Russian Pay TV market with a portfolio of 28 digital channels and SVOD platforms offering the most popular local content. It holds 35% of market share, betting international groups as **Discovery** or **Viasat MTG**. The company works with more than 1,500 TV service providers in Russia and CIS.

The company main client, **DTR**, a joint venture of **Rostelecom** —the largest European telco— and **VGTRK** —Russia's public broadcasting group and Europe's largest media company— has chosen **Signal Media** to promote their channels and in-house content on the global market.

**Mikhail Kovalchuk**, general director: 'We started distribution of the first **DTR** channel, **My Planet**, six years ago. Since then, we managed to create portfolio of seven factual channels, whose success affirmed the level of in-house production and opened for us an opportunity to bring more than 2,000 hours of HD programming to the international markets'.



Among the top rated shows available in different languages, are the travel & food series **World Markets** (18x'44) and **A Year In Space** (18x'44), a reality

show made by Russian astronauts. **Kovalchuk**: 'Two years ago we decided to develop kids shows. We launched the new kids channel **Mult**, which offers a unique concept of the first and only channel dedicated entirely to modern and classic Russian animations'.

He continues: 'With more than 250 episodes of our children's programming portfolio we moved to international markets with series such as the 3D **Be-Be-Bears** (52x'5'30) for 3-6 years old kids, or **Fantasy Patrol** (13x'11) for 6-12 years old kids or the edutainment series **Paper Mates** (13x'11)'.

Present in 37 countries with its channels, the company will continue global distribution of the TV channels, as well as its programming, for the global market, with special focus in Latin America. 'We consider this region significant and strategic. Our shows are available in different languages, including Spanish and Portuguese, as we try to open up new business frontiers in Latin America', he adds.

And he concludes: 'Our vision is to become reliable partners to the local TV channels and content providers by providing fully localized animation and entertainment factual. As for Latin America we believe that our product will be a great supplement to the local TV channels and we have no doubt that it will be very attractive to the end consumer'.



World Markets, travel & food series



Be-Be-Bears, 3D animation for 3-6 years old kids

### RTV, Serbia: historical series

Founded in 2006, **Radio-Television of Vojvodina** is one of the main Serbian public broadcasters producing and broadcasting regional programming for **RTV1** and **RTV2**.

**Rastislav Durman**, head of content development: 'Our programming is produced in 10 languages and include game shows like **TV Puzzle**, with almost 50 season aired, and **Bingo and song**, historical series, and documentaries series like **Danube: The Never Ending River**'.

'We produced some good formats during a few years but we don't have the capacity to produce contents in the way that they need to be produce to have success internationally. But we find in coproductions and alliances with broadcasters from the region what seems to be the solution for the moment. It will take a while but we have the tools and the ideas necessary to grow', he concludes.

### TV Vijesti, Montenegro: news & films

As part of the Montenegrin news agency **Vijesti, Televizija Vijesti** (Montenegro) is specialized in informative programming.

**Marijana Bojanic**, CEO: 'Over 50% of the network's programming is informative, with an addition of external programming, films and TV series, sports and edutainment'.

Here, co-productions are essential. 'We are a very young channel in a small country with a small economy and with very low TV advertising budgets, so co-productions are extremely important. We are open to new things, especially documentaries, offering in return high skill professionals, good ideas and amazing locations', she says.

And concludes: 'The evolutions of other countries in the recent years made us look into our own backyard, forcing us to bet and believe in our industry, exploring new contents and business models'.

### First HDTV, Russia: docs & kids series

Founded in 2007 in Saint Petersburg, **First HDTV** is a Russian Pay TV channel with over 6.2 million subscribers all across the country. The company is very aware of the international content, as they don't produce much original content.

'Russian audience is not different as the rest: they look for attracting stories very well produced. In that sense, it is very similar to Brazil: we love football and drama, but also natural and wild life documentaries', explains **Valentina Boldueva**, head of acquisitions department.

The group acquires many documentaries and kids programming for the 6-12 target and preschoolers. 'We have our own dubbing studios where we dub the international content we acquire. We are also interested in meeting companies from all parts of the world to discuss co-production opportunities', she concludes.

# END OF DAYS

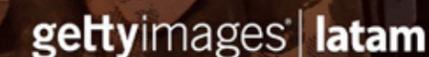
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## Česká televize: drama, a key product



Milan Fridrich, director of Program and Channels, Česká televize

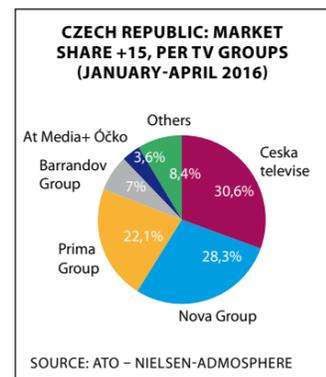
Česká televize is the public and one of the leading television groups in Czech Republic, operating six TV channels, ranging from generalist to thematic networks about sports, kids, news, documentaries, etc. Flagship channel is ČT1, followed by ČT2, ČT24, ČT sport, ČT :D (kids channel) and ČT ART.

During the first fourth months of 2015, but also in May (until 27<sup>th</sup>) the Czech TV group is the market leader in share in 15+ population with 30.59%, according to ATO – Nielsen-AdmospHERE. By TV channels, ČT1 is the second network in the local market, while ČT :D is the #1 on the 4-12 years old kids segment.

Milan Fridrich, director of Program and Channels, explains to PRENSARIO: 'We are still are focused on TV dramas like a key product for the main channel ČT1. We produce two crime TV series a year, and a third, of 13 episodes, that will historical or family theme'.



'We are very successful wit our own production in Czech Republic, which totalizes 67% considering all our channels (75% in ČT1, 44% in ČT2, 99% in ČT24, 70% in ČT sport, 64% in ČT art, and 32% in ČT :D), and also when we sold to abroad (through its own international division)'.



'Another genre in which we succeed are Sunday's miniseries. In spring, we broadcast 22 TV movie or TV miniseries (2-3 episodes) about crime or historical theme. Our plans are also to strengthen our original production of sitcoms. Now, we produce four different shows for 2016/ 2017 and they are still focused on entertainment like *Stardance* or *Wonders of Nature*, *The Smartest Czech*, etc'.



Crime in Polná, drama series

## Prima: program mix, short videos & gaming



Roman Mrázek, Programme Director FTV Prima

Prima Group operates 5 terrestrial channels and features a broad portfolio of websites. Flagship generalist channel TV Prima; Prima COOL, for younger males; Prima LOVE, focused on popular series and entertainment; Prima ZOOM, dedicated to documentaries and the youngest member, Prima MAX (2015) focused in movies. Average monthly reach of Prima Group is over 92%.

Roman Mrázek, program director, FTV Prima: 'Most of the broadcasting on our channels consists of acquisition. Of course we also wish to encourage even more of own production in the future. Czech viewer is interested in local TV and news coverage, which makes Czech audience relatively specific'.

Prima won in April 17 times in ratings after 8pm among commercial channels. Daily share was 22.44% and prime time share was 23.13% in target group 15+. Thanks to these figures, monthly share of the sales department reached record numbers, 30.56% in target group 15-69. The YoY growth of video views on Prima PLAY in April was 129% and its traffic rose by 33% (546 000 RU).

Mrázek: 'Series are a great phenomenon, but in the Czech Republic especially. We launched two originals: *Ohnivý kuře*, the most watched series in April in Prima (1,01 million, 24.67% share), and *V.I.P. vraždy* (982,000 viewers, 21.79% share). *Přítav* is also very popular on the +15 target group. Cooking shows are also very important: the one with chef Zdeněk Pohlreich belongs to viewers' favourites, along with reality show *Prostřeno* and talk show *Show Jana Krause*'.

'The biggest change in next years is digitalization. We can expect a slight redirection from linear TV. Young people watch videos more than ever before. There are many challenges in distribution ways as well as formats. We would try to attract audience fleeing to Internet videos by programs and program bundles. Prima COOL shows the way of how it is possible to present standard TV contents to make it attractive for the young generation also'.

And he concludes: 'Shorter videos and user-generated content will also be a trend. Technologies are likely to be so interconnected that TV that one could choose what and when they will be watching something and take a play a game or make a bet in the meantime. What is interesting is gaming events launched by MTG, which can even sell out a whole stadium. We would like to launch a similar channel in Czech Republic: worldwide programs like these usually reach to tens of millions viewers'.



Ohnivý kuře, the most watched series in April in Prima: 1,01 million, 24.67% share

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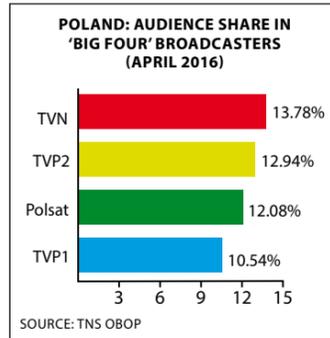
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## TVN: leading every business segment



Markus Tellenbach, president/CEO, TVN Group

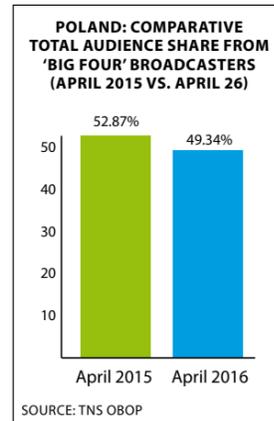
After completing its acquisition by Scripps Networks Interactive (SNI) during the end of 2015, TVN is going through a great 2016 consolidating not only its linear television group, but also the digital assets including **Player.pl**, the leading OTT service in the country. The group operates a big number of TV channels, lead by **TVN HD** and followed by **TVN 7**, **TVN24**, **TVN Meteo**, **TVN Turbo**, **TVN Style**, **Religia.tv**, etc.



Original drama series is the most important program on its grid, as well as entertainment formats such as *Mali Giganci* (*Little Giants*, **Televisa**),



whose first season was the prime time leader for 10 weeks with 21.4% of share. Second season started in February with 18.7%, betting its main competitor **Polsat** for more than 4 points.



During April, TVN led the Polish TV market in total viewers in the 7-11pm slot: the channel got 13.78% share, registering the heist growth among the "big four", 4.71%. **TVP2** was second with 12.94% followed by **Polsat** with 12.08% and **TVP1** with 10.54%, dropping 22.8% share, according to **TNS OBOP**.

The total share of these big four broadcasters was 49.34%, dropping from the 52.87% a year ago. **TVN** was also the market leader in the commercial 16-49 demo with 16.05% share, informed the same source.

## Kino Polska: audience and incomes growth

**Kino Polska TV** released its first quarter 2016 results. The total income exceeded USD 1.29 million, which is a 10% increase compared to the first three months of 2015. The Group's first quarter 2016 revenues from sales reached USD 7 million, 5% more than in the same period of 2015.

This shift was predominantly driven by a 14% increase in the **FilmBox** channels' sales results and nearly 13% higher revenue from advertising sales generated by the **Kino Polska** brand channels. With in 1Q16, the Group's acquired content resulted in higher viewing ratings.



Furthermore, **The National Broadcasting Council** in Poland confirmed its decision on granting a license to broadcast **Zoom TV** channel within the MUX 8 digital terrestrial television multiplex. This validates an investment agreement signed by **Kino Polska** and the **PIKSEL Foundation** established by **PIKE**, the **Polish Chamber for Electronic Communication**. **Zoom TV** is the second DTT channel developed by the company.

On May 3<sup>rd</sup>, the Group movie channels **Kino Polska** and **Film Box**, the music network **Kino Polska Muzyka** and **Stopklatka TV** (co-owned by **Agora**) gained a total average audience share of 3.21% in the basic commercial group 16-49 years old.

**Kino Polska TV** gained 1.07% thanks to teen series *Adventures of Cywil*, *the Dog*, and comedy films *Sztos 2* and *Skrzydlate swinie*; **Stopklatka TV** received 1.7% thanks to comedy *Och, Karol*; and **FilmBox** delivered good results with 0.34% with *Hyde Park on Hudson* starring *Bill Murray* and *Asterix and Obelix* movie.

## TVP: docs and current affairs, too



Magdalena Borowska, commissioning editor, TVP1

**Telewizja Polska** operates a number of TV channels and online platforms, which are audience leaders in the Polish market, dominate in 2015 by private networks such as **TVN** or **Polsat**, among many others. **TVP1** is the flagship networks that broadcast a

wide range of contents.

TV series are the most important ones in terms of audience, as well as entertainment formats. But it is also a leader on documentaries, including titles about wild life, natural history, current affairs



World War II an history-related docs. 'We look for the best quality of the picture. We have a slot called *BBC in Channel 1*, so the type of docs we buy are of that quality', explains **Magdalena Borowska**, commissioning editor, **TVP1**.

**TVP2** is the second channel of the public group and it also broadcast documentaries as well as sports and kids content. 'We look for documentary series up to 6 episodes and up to 3 episodes when they are related to history. Also for 1 hours productions, not '90, which are difficult to program', she concludes.

## Fokus TV, Poland:

**Fokus TV** is a new Polish factual and documentary channel launched in April 2014, which is now distributed on Free DTT platform with basic cable and satellite simulcast.



**Lukasz Nowacki**, content acquisitions specialist, explains:

'Our target audience is all 16-49 with prevailing male audience. We currently have 1% market share. Our brand awareness (and reach) is growing slowly due to the fact that Polish market is extremely crowded. In terms of programming we look for history, science-tech, medical, wildlife/travel, long running series, modern warfare, pop-science'

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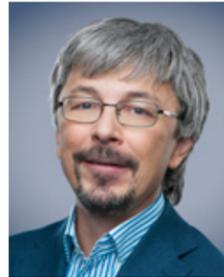
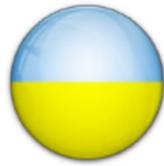
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# 1+1 Ukraine evolves in crisis: leading local series and expansion to Pay TV



Aleksander Tkachenko, CEO 1+1 media

**1+1 Media Group** is one of the four big media conglomerates in Ukraine, and comprises 7 national TV channels: leader **1+1**, **2+2**, **TET**, **PLUSPLUS**, **Ukraine Today**, **UNIAN TV** and **Bigudi**, as well as **1+1 International** for Ukrainians living abroad. It also controls the production house **1+1 Production**, and the online news platforms **TSN.ua**, **UNIAN**, **Glavred.info**, **Telekritika** and **Dusia**.

The group is expanding and has reached into an agreement with **MTG** to acquire DTH and Internet TV businesses of **Viasat Ukraine**. **Aleksander Tkachenko**, CEO, explains to **PRENSARIO**: 'The Ukrainian market is in crisis, and our main strategy is to maintain what we have already gained. We have no intention to ally with anyone either in the local market or the international market'.

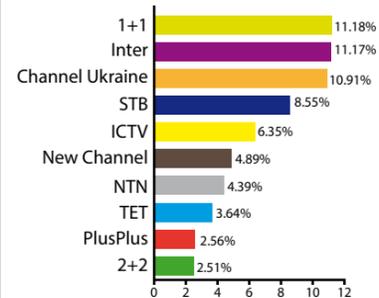
Regarding programming, he describes the evolution of the local content: 'Around 70-80% of programs are Ukrainian-made. While the last spring season saw 8 hours of in-house prime time TV series, the prime time products have now reached the mark of around 28-30 hours. Due to this change, following the first 4 months, we have gained the lead in Ukraine'.

'Our main partner is **Studio Kvartal95** (see interview below), who provide some of the most successful comedy products in CEE: *Make the Comedian Laugh*. *Kids* was sometimes ahead of *The Bachelor*. We also aired the series *Kinsfolk*, and now a rather successfully animated series *In-Laws* and season 2 of *The Laughter League*. These products gain above-the-average performance among all the channel's products'.

'We also work with other producers. For example, *The Witch TV (PROTV)* has been demonstrating high popularity. Regarding TV series, the drama *She-Boss* and season 2 of *The Last Moskal (1+1 Production)* achieved great performances. Also, season 4 of *The Voice of the Country* has some of the best performance in the channel's history; the special project commemorating the 30<sup>th</sup> anniversary of the Chernobyl disaster,

*Split into Atoms*, which got more audience viewing than competitors. We work closely with Turkish distributor **Global Agency**. Among other Ukrainian partners is **Film.ua**'.

UKRAINE: AUDIENCE SHARE, BY TV CHANNELS (JANUARY-APRIL, 2016)



SOURCE: NIELSEN PEOPLEMETER PANEL

'In Ukraine everyone is oriented towards their in-house TV series production in their attempts to compensate for the lack of TV series hours caused by the legislative regulations. Entertainment shows gain high numbers, as well. There is no imbalance in terms of the audience's interest. TV series is a product designed for several runs; with this we ensure the library's occupancy rate', he adds.

'The most viewed are big entertainment shows such as *The Voice*, *Got Talent*, *The Bachelor*, an also our original *Evening Quarter*. There is almost no Pay TV, only services to access channels but not the content. Now, we do not feel any digital impact on our performance indicators', concludes **Tkachenko**.



Split into Atoms is a special project commemorating the 30th anniversary of the Chernobyl disaster

## Kvartal95: Servant of the People



Volodymyr Zelenskiy, CEO & Creative producer, Kvartal 95

Released at MIPTV 2016 by **Echo Rights** (Sweden) and **Kvartal 95** (Ukraine), *Servant of the People* (24x'23-'25) is a political comedy series produced and starred by **Volodymyr Zelenskiy**, CEO & Creative producer of the production company. Both companies hold distribution rights: finished product was bought by Kazakhstan, Estonia and Moldova.

**Zelenskiy** performs a humble teacher caught on camera raging over the miserable situation in his country. When a pupil posts the video on Youtube, it becomes a viral: people love his outrage and started gathering money for a presidential campaign he wins.

He explains to **PRENSARIO**: 'The series has become the highest rated TV-product of the autumn in all demos and most talked-about premier of 2015 on **1+1** with a share in the opening day of 28.51% and 10.08% rating (Nielsen). It also gained 300,000 subscribers on **YouTube** official channel in the first 2-3 weeks'.

There was an unprecedented promo campaign, which is already used as a case study in various marketing lectures. First, the video, an emotional monologue that received 15 million views and gained media publicity; and second, the election campaign that attracted high interest and induced an active reaction of the public.

The company is starting to film the sequel, feature film and second season, which will be filmed in different Ukrainian cities. We plan to release the movie in 2017 followed by premier of the second season of the series on TV. '*Servant of the People* raised many topical issues rather painful in today's Ukrainian society. It reflected many people's needs and hopes for honest politicians', concludes **Zelenskiy**.



Servant of the People

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# Ukrainian media market realities unveiled

International media business is changing rapidly under the pressure of new technologies, new ways and methods of content creation and distribution. Old business schemes are destined either to evolve and rebuild themselves within the frameworks of new challenges or to diminish in this turbulent and highly competitive market conditions.

The 6<sup>th</sup> edition of KIEV MEDIA WEEK (September 19-23 in Hyatt Kiev, Ukraine) will focus on new ways of cooperation between media marketers all over the world, as well as will give unique opportunity for media industry professionals to discover high-end experience of their colleagues and discuss the burning and top-prioritized issues of today's media market development strategies.

Being an exclusive project for media market, one and the only of a kind in the CIS region and Central and Eastern Europe, KIEV MEDIA WEEK offers a range of events for top players of TV, movie, new media and other media businesses that gives an opportunity to meet colleagues and to network in formal and informal atmosphere, to tie up beneficial contracts and to learn about current trends of the international media business.

## Strong schedule

Along with traditional range of events during the trade-

show, *Ukrainian Content Market; Format Show, Kiev Co-Production Meetings, Film Business, Television as Business, Pay TV in Ukraine*, among other, it offers a unique line-up dedicated to the most challenging issues of the local media industry. KIEV MEDIA WEEK will help to find the answer to the most important question today: 'How should CIS region media business develop under the new order of things?'

pensive content aired by terrestrial free-access channels. From the production point of view due to large investments in content by broadcasters the situation is prolific.

Ukrainian adaptations of international



Victoria Yarmoshchuk, CEO Media Resources Management

Also there will be special focus on Ukrainian TV and media market as one of the most interesting territories for cooperation with really tremendous prospective of growth. Ukrainian TV is a high-competitive market with a great number of nation-wide television networks airing high quality content: both acquired and locally produced one.

## Ukrainian TV Market

For many years Ukrainian TV channels that mostly belong to four industrial moguls invested large sums of money in content, and it led to the situation when Ukrainian TV viewer got used to very high quality and ex-

TV formats are recognized internationally to be among the best ones in the world. Scripted content production is also well developed in Ukraine. Due to mental and language similarity of Russian and Ukrainian people till the beginning of Russian-Ukrainian armed conflict on the East of Ukraine in 2014 scripted series were produced for both markets either as a co-pros or as pre-sales to Russia. Co-productions between Ukrainian and Russian producers were mostly of a very high quality due to access to money not only from Ukraine but also from Russia.

The situation changed dramatically after the beginning of Russian-Ukrainian conflict that led to ban of airing large portion of Russia-produced content (including Ukrainian co-productions) as well as to restriction of production partnerships with Russians. Ukrainian broadcasters felt great shortage of high-quality content, so to fit the indulged tastes of Ukrainian viewers they began to in-



Daddy's House format has been sold to three countries: Poland, Lithuania and Estonia

crease the quantity of locally produced content (both scripted and non-scripted). On the other hand they began to acquire more content from Europe, Americas and Asia.

## Future

In order to change the current situation and to open Ukraine as a powerful production hub (with well-developed production facilities, qualified and skillful crews and technical specialist, creative talents, lots of picturesque and unique shooting locations, and of course low costs of production) for foreign producers the largest Ukrainian TV and film production companies united around an incentive scheme for the local film industry entitled #KinoKraina (#КіноКраїна).

On the local level this incentive proposes to start supporting TV producers and to enlarge the total amount of the state support of the industry to USD 250 million for a 5-year period. It will lead to creation of at least 75 feature films and more than 5,000 episodes of locally produced TV-series of a high quality. As a result of #KinoKraina initiative implementation the share of locally made TV series in the air of Ukrainian broadcasters will triple, according to MRM research. In 2014 the share of Ukrainian TV series on TOP-10 TV channels was 5%, while 6% was the share of Russian-Ukrainian co-productions.

From the international point of view #KinoKraina scheme implementation will allow foreign producers to payback up to 25% production costs on the territory of Ukraine due to new cash rebate system. Moreover, it is planned that foreign producers will be able to receive additional 10% payback from the labour-production costs in Ukraine.

Currently Ukrainian TV industry is seeking for new ways and forms of cooperation with non-CIS region partners, aiming to trade and coproduce more with European countries and beyond. Ukraine has a great technological and creative background what is proved by numerous sales of Ukraine-originated

## K7 Media & MRM: CIS report

MRM and K7 Media are promoting a special report with the main findings of the three biggest CIS TV markets: Russia, Ukraine and Kazakhstan. *Understanding Russia, Ukraine and Kazakhstan: Current Trends in the TV Market* details the developments in the broadcasting and Pay TV markets and general trends.



Keri Lewis Brown, MD K7 Media

During 2015 there were many structural and legislative changes within the Russian, Ukraine and Kazakhstan TV markets. For an outsider looking in, keeping track of these developments presents a challenge without a comprehensive overview of these three key CIS markets: markets that when combined cover a significant territory across Europe and Asia.

*Understanding Russia, Ukraine and Kazakhstan: Current Trends in the TV Market* offers a good approach. Ads markets have suffered recently due to the economic crisis, causing mass depreciation of the national currencies. In Russia and Kazakhstan the value of the currency has halved within a 2-year period, whilst Ukrainian currency depreciation is almost 200%. As a result, the volume of the TV ad markets in the three countries has tumbled.

The markets also differ when it comes to the ownership of the broadcasters. In Ukraine, the state is a passive player with not one of the state-owned channels featuring in the ten most popular networks. In Russia, the sector is mainly controlled by the state, whereas in Kazakhstan commercial and government-owned broadcasters act as equals.

The most-popular genres are scripted TV series, non-scripted TV shows and movies in all the countries. Russia has large volumes of locally produced scripted series. The situation is contrasted with that in Ukraine and Kazakhstan, who still suffer from a shortage of high quality local content. Nevertheless there is a gap between the production markets in this former: Ukraine has better developed production facilities and creative forces, and produces scripted and non-scripted content to a high international standard.

Recently, Russia and Ukraine are becoming increasingly active players on the international level as exporters both of ready-made TV products, and of scripted and non-scripted TV formats. Meanwhile, Kazakhstan is making tentative steps as a seller of its original product. For instance, distribution company **Gold Cinema Group** is offering TV series from the three largest national broadcasters.

Despite current negative trends in their economies, all three markets are strong and powerful suppliers of original ideas, new techniques and creative content for an international market that always needs fresh blood.

content all over the world. Further development of Ukrainian TV market depends on realization of this potential and on building closer ties with international partners. New legislation in the country aimed to make it more open to the world is underway.



*Eskimo Girl Arctic Adventures* is a 3-season animated series from Film UA sold in 58 territories, and *The Sniffer*, from the same producer, has been sold as scripted format in France and Japan

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## Star TV, Turkey: 'We want a TV that targets female viewers'



Ömer Özgüner, general manager, Star TV

'In 2015, the Turkish TV sector had a tough time. The changing viewer profile and the shrinkage in advertising shares affected a little. High rating TV series are aired on the same day on all the channels. You cannot find these many products on free TV channels anywhere else in the world'.

Ömer Özgüner, general manager, Star TV, describes to PRENSARIO the moment of one of the most vibrant TV markets in the world: Turkey. He continues: 'Competition is fierce and the need for new instruments has risen. We are trying to produce quality series that are strong and have a strong cast. In the meantime, we are trying not to lose our viewers. Since we do not want to give up on airing quality series just to get ratings we want to broaden our scope and also keep our popularity within the country'.

Summer season has become more important. Özgüner explains: 'The projects we have begun in the summer retain their popularity in the winter if the cast and script are strong. We believe in diversity. We want our viewers to find everything their looking for on our channel. With this regard, we create prototypes that include series, shows and game shows. *Broken Pieces*, which was launched last year and is sold abroad, and *Kiralık Aşk*, which is breaking records in the ratings, are two of our most popular series. *Endless Love*, which began in the new season, is doing very well'.



'Our new series *Göç Zamanı* increased its ratings quickly and reached its targeted mass on Saturday, which is a tough day. The local ratings of *Muhteşem Yüzyıl Kösem* are far from ideal but international sales are great. *Big Brother Türkiye*, *Evleneceksen Gel* and *Dada* are also productions that have brought us a different viewer profile and we are happy about them.

'Viewers have always placed Star TV in the top three. We want a TV that targets female viewers, as we believe they control the remote: a popular channel with women has a better chance of surviving.



*Göç Zamanı*, brand new series that increased ratings quickly reaching it target mass on Saturdays prime time



*46 Yok Olan*, brand new pioneering series for PT2 and 60-minute length

Drama will be popular in every case. I believe that we will see a period where dramas and game shows continue their popularity', he adds.

'The TV world offers viewers a rich selection and the people in the background are very important in this regard. New content is being created every day and the biggest share goes to dramas. Dramas will continue to be popular in the near future. We have set out to offer joint broadcasts to different generations and peoples. We will continue to feature real or imaginary life stories in our content'.

'We believe in diversity. We don't just want to be #1, we want to be a great TV station. PT2 works are also very important for us. We believe that they will improve us and not just statistically but as a brand. In 2016, our main goal is not to lose this perspective. We will be pioneering with series *46 Yok Olan*, which we are planning to launch on PT2 in March. In a time when the length of series is up for much debate in Turkey, we will continue to show our diversity and our support for alternative shows by airing this 60-minute show even though it will end up costing us adverts', Özgüner concludes.



## A+E launched a FTA channel in Turkey



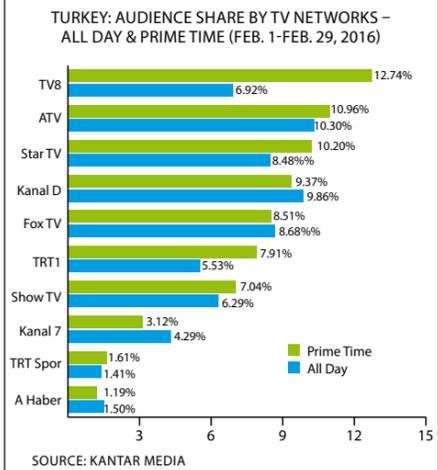
Dean Possenniskie, MD, EMEA, A+E Networks, and Esra Oflaz Guvenkaya, president de MCD Medya

A+E Networks and MCD Medya will launch **Lifetime Turkey** on April 26, the first A+E's free-to-air (FTA) channel in the market. **Fox Media** has been appointed as ad sales representative in territory, and the lead of the local team will be in charge of **Esra Oflaz Guvenkaya**, president, **MCD Medya**.



Dean Possenniskie, MD, EMEA, A+E Networks, says: '**Lifetime Turkey** represents a key element of our growth strategy to extend A+E Networks' portfolio across EMEA. The channel will collectively give us the ability to reach over 19 million households and deliver to advertisers a high-value, upscale audience with real scale'. According to the executive, programming will mix successful global franchises, recognized films, and formats and local series.

Esra Oflaz Guvenkaya completes: 'The channel's program schedule draws from a rich library of content and formats that are well-localized to match Turkish viewing habits. Lifetime will be a pioneer in the Turkish market, filling a gap across the Free TV landscape from the viewers' perspective and in the industry from the advertisers' perspective'.



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## Edil Al Group, Albania: entertainment leads

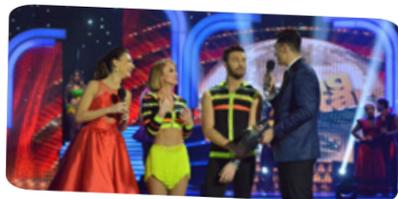


Mesila Kerkeshi, acquisition rights director, Vizion Plus

Edil Al Group, led by CEO Ar-tan Dulaku, is one of the most important groups in Albania with interests in different industries. On media, it operates a national satellite broadcaster **Vizion Plus**, the DTT platform **Tring TV** and **Tring Communications** (TV, telephony and Internet). Albanian TV market keeps growing in number and quality, but without a credible audience measurement. Established in 1999, **Vizion Plus** reached all over Albanian territory covering about 80% of audience and with a market share on 30-35%. 'Our own surveys showed that we are one of the three most important TV channels in Albania', stands **Mesila Kerkeshi**, acquisition rights director.

She adds: 'We are an authoritative voice for news and current affairs, as well as documentaries, with which we have won many awards. We produced 46.9% of our prime time programming and 60.8% of programming aired between 7am and 7.30pm. We acquire contents from US studios and independent distributors such as **BBC** (*Dancing with the Stars Albania*, seventh season) or **Endemol Shine** (*TuSiQueVales*), while we hold the rights for three years of the *UEFA Champions League*. We seek to be market innovator in formats and scheduling, while we maximize ad revenues'.

'A key element of our growth strategy is to build and capitalize on our programming library: 76,961 hours: 10,500 of news and 66,461 of talk shows, variety, game shtows, sports. This has enabled us to derive revenue generally from fully amortized programming through the airing of reruns and the regional distribution and syndication of our own programming'.



Vizion Plus: Dancing With the Stars Albania will have a seventh season

'Albanian audience mainly likes soap operas and serials (Turkey, USA), and political formats such us *Dritare by Rudina Xhunga*, which are very popular but not at the same level as years before. Definitely, the main trend is towards entertainments programs: *Al-Pazar* is a funny show, followed by *Oktapod*, *Kapital*, *ByPass Show*, *Vizioni i Pasdites*, *7pa5* or *Next*'.

'TV stations prefer to do what others do, and not to find something new and more effective. This fact is based on the lack of a real market research, to know what Albanians like or don't like. We still could not have a clear view of audience needs as well as their trends for the future', concludes **Kerkeshi**.

Regarding **Tring TV**, **Enkela Qinami**, TV programming director, explains: 'We cover 30% of the Pay TV market in Albania with 30% of original programming, and 70% of acquired. Audience in Albania prefers sports, serials, talents shows, films, and children programs'.

**Tring TV** has 320.0000 family subscribers, who access the channels via satellite, terrestrial, cable and IPTV (**My Tring IPTV**). 'We have invested in structuring **Tring** channels and programming with *Stina e Qershive*, *Bella Calamidades*, *Yemin*, *Gecenin Kralicesi*, *Kiralik ask*, *Kara Sevda*, *The Promise*, etc. We have branches all over Albania, Kosovo, Montenegro and Macedonia, and all over the world'.

'One of the most interesting channels of the package is **Living HD**, launched in August 2012 and aimed at women, life and the way of living; it also has its own website and magazine. Regarding originals, **Tring** has produced the comedy shows *Apartamenti 2XL* and *Grand Hotel 2XL*; local versions of *Shopping Monsters* and *Blind Test* (both from **Global Agency**); and the children format *Erdhen Shkronjat* and the interview lifestyle program *My Living*', concludes **Qinami**.



Tring TV: the local adaptation of *Blind Test* (Global Agency) produced for Living HD

## Alsat - M: news and current affairs



**Alsat - M** is a private national TV in Macedonia that broadcasts various general programs, mainly in Albanian language. Due to the two largest entities in the country, it broadcasts bilingual. **Hamdi Rashiti**, program director, Alsat - M

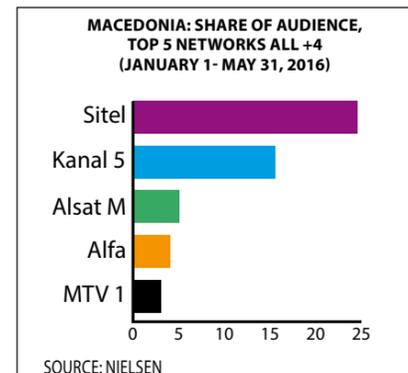


Hamdi Rashiti, program director, Alsat - M

**Rashiti**, program director: 'Our originals do not compete with Turkish series, which dominate in our market. Our most viewed original programs are newscasts and political debates. Local market has been very low and competition is not sincere: year-to-year, profits fall down and down'.

'We are a self-financed TV, while the state does not give the necessary subsidies for TV preparations. However we are the first TV on rang list of Albanian TV, and if we compare with the Macedonian TV we are #2 or with changes in time periods we are #3. We see the future more prepared in terms of more professional TV studios, increasing the staff member, and of course will have more productions'.

'We always have been and we are for various collaborations with other TV and productions. We expect to reach the second place forever and why not we pretend for first place in Country level', concludes **Rashiti**.



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## TRT TV Wonderland: great Turkish content in Antalya

With more than 40 international buyers representing all the continents, **Turkish Radio & Television Corporation (TRT)** organized on April 26-May 1 *TRT Screening Days* at the Mediterranean city of Antalya, Turkey. **TRT Sales** exhibited the most important series, *Resurrection* and *Filinta*, as well as the *TRT TV Movies* project, from which is already offering 33 titles.

The participant buyers highlighted the high-budgeted productions and the diverse topics and genres. And even the Ottoman Empire-alike serials are the most important, that's not all. The spring catalogue also offers 35 TV series, 5 miniseries, 4 feature films, 62 documentaries, 16 educational/science/tech and 16 religious programming, and 53 kids programs.

**TRT** also organized several panels about the global Turkish content *momentum*, the industry highlights in terms of investment, content exportation and improvement of quality production. The audience had the chance to see the experience from the talents, producers and actors, itself.

Turkish researcher **Eylem Yanardagoglu**, from **Kadir Has University**, described: 'The demand for drama on the Turkish audience has been intensifying since 1970, first with international series like *Fugitive on the public* and then with local stories that reflected the way of life and family values, such as *Sister Perihan*, **TRT** (1980)'.

The genre become very popular, especially since 1990 when the TV monopoly ended and the first private networks started. The very first Turkish success was *Gumus (Kanal D)*, which was seen by 85 million people — mostly women aged on average 15 years old — in the Arab world.

More than 40 Turkish prime time series were broadcast in the main local networks between 2015 and 2015. Internationally, there are 70

different titles on distribution in 102 countries, mainly in MENA (70 series), Balkans (45 series), Russia and Central Asia (20) and Latin America. 'Almost 400 million people globally watch Turkish series within 2014', explained **Yanardagoglu**.

International sales rates oscillate between USD 15,000 to USD 150,000 per episode. Production cost could be from USD 250,000 to USD 500,000 or even USD 1 million in series such as *Filinta*. 60 to 100 talents work in a series. Turkey is the second largest drama producer after USA. Exports reached USD 350 million in 2015, according to the Exporters Union. 'We do not only export contents, but culture. This is a fantastic way to show our country and to call for tourism. Istanbul became a commodity, a city that can be traded in all aspects', she concluded.

**Furkan Gundogan**, programming manager, **TRT1** presented the success case of *Resurrection*, which second season (45x'100) had an average share of 36.4% on prime time and 25.9% if we consider all day (April). 'It was our most recent biggest TV success which has placed the channel in the first position, something that has never happened before', he stand.

**TRT TV Movies** allowed the company to add 33 new own produced TV movies, which offers a new optic in the content production, joining new talents to the local industry. Born in 2014, in less than one year it gathers 900 scripts, from which 600 go through the next phase. Creators received training from key Hollywood producers (**New York Film Academy**).



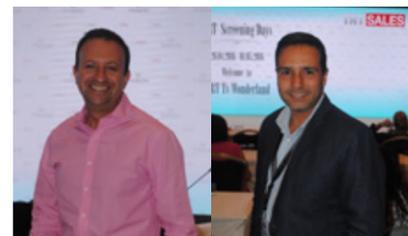
Tuncay Yurekli, head of TV department, TRT; Faruk Guven, executive producer, TRT TV Movies; Halid Simsek, deputy head of TV department; Meltem Tumturk Akyol, international sales manager; and Furkan Gundogan, programming manager, TRT1

**Faruk Guven**, executive producer, said: '**TRT1** programs TV movies on prime time. Until now we have familiar, sport, mystery, crime series (3 of each), epic (2) and other genres (3). The average total cost is USD 500,000 as a prime time series episode. Three have been on cinemas during May, being one of them *Seruhan*, which was premiered during the Screening'.

'The objective is to add new talents, to develop the industry and to raise the bar as high as possible in order to equilibrate the production process/quality among the Turkish market. With the TV movies we achieve more: we have inaugurated a new TV slot of original production that has become very popular among the audience. Our clients, global TV channels, can do the same', he concluded.



Zhuldyz Ikkakova, senior content procurement manager, Channel 31, and Ilkham Ibragimov, programming director, Astana TV, both from Kazakhstan (borders), with Diana Mamekova and Zarema Kolkombayeva, from the International & Public Relations Department, Kyrgyz Public Radio and Television Corporation (Kirgizstan)



Luis Nemtala Crespo, partner/owner, ATB (Bolivia) y Hugo Aloy, director, Seven Entertainment (Brazil) acquires content for two Portuguese TV channels in Mozambique and Angola, Africa



Buyers from CEE: Lejla Babovi, head of international and legal affairs, and Katka Ehlimana, head of foreign programming, Radio and Television of Bosnia Hersegovina, and Dagmara Was, acquisitions executive, TV Puls (Poland)



Buyers from America have also taken part at TRT Screenings Days: Doris Vogelmann, VP programming and operations, V-Me (US Hispanic), and Cida Goncalvez, from distributor 8 Star Entertainment (USA) with Ezgi Eskikanbur y Gokce Aydogdu, sales executives at TRT



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# The ABC of the International Media Market



Throughout our different editions, Prensario has provided a good sampling of new trends within the content market. But sometimes is good to take a break in the frenzy and refresh the business' ABC, the basics that govern everything that happens.

Obviously, being members of the industry, much of you will find what we will deploy here is familiar. But for sure, it will still be interesting this peculiar retrospection, encompassing past, present and future.

The report gives two graphs: on one hand, the evolution of the types of business and media players through its decades of existence; and from the current dilemma of production & costs, which solutions are being found as the most effective. Let's see...

## Compulsive ramification

The international media market has basi-

cally three axes: content, which means the sale-acquisition-production of programs independently; Pay TV, the commercialization of networks; and technology, including the sale of equipment, edition, etc.

At the dawn of the business, in the 80's, both content and Pay TV where very simple business: in the first one, it was about the sale of canned shows on Free TV, while at Pay TV, the channels were sold to Pay TV operators. But as seen in the chart, everything became more complicated, both in terms of products to offer, as platforms to broadcast them.

Let's begin with content: from finished

products, the companies began to offer also formats and production services, while Pay TV, Telco's and OTTs/Internet, plus broadcasters, became customers. And each of these categories are still branching, progressively

Canned shows today can be long, short or non-linear, such as RPG (role-playing games) where according to what is decided continue a pattern or another. The formats can now be also only scripts, ideas and expertise, among others. And production services became of all kinds: co-creation, co-development, creative, artistic, talent management, etc.

Broadcasters, meanwhile, can now be linear, as Free TV and cable, on demand such as VOD services, or interactive, with non-linear content, from Smart TVs, etc.

Pay TV has followed a similar evolution, with fewer branching options because 24 hours networks have been for a long time indivisible. But today to the traditional linear scheme, are added more and more variants on demand, with *HBO On Demand* in cable, *HBO Go* on mobile, etc. Future here also promises the growth of interactivity, with non-linear content or building the audience their own TV channels, even from the combination of different operators.

All this has created a big mess. The media market today is a confusing ecosystem of players, products and services. Who seem to compete, end up working together, or vice versa; who seems to be at the end of the commercial chain, appears at the beginning or in between. With social networks on top, the shaft has changed focusing on end users, which was the only thing stable, becoming an active figure in the generation of content.

Over the years, PRENSARIO has defined several figures of everyday life to illustrate the market, and the truth is that almost of them

remain very current: a Rubik's cube, allowing all kinds of combinations. A sea that can carry with the tide, but if you surf, waves help to go faster. Or a pendulum that comes and goes, and successful are those located first when the momentum changes.

## From dilemmas to solutions

Let's see the second graph. Broadcasters and media companies, within the new intertwined ecosystem described above, are signed by two pillars: the extreme competition at all level, broadcasters, media, producers; and that the way to differentiate is with own production, with original content that is placed first in the exhibition chain.

The issue is that to produce better is increasingly expensive, in an environment where having more and more players and platforms, the advertising cakes fractionate. So, media companies have increasing costs, with more or less, the same income that ever had. This is the biggest current dilemma.

How do you face? More creativity is needed to stand out, and low costs anyhow. Even both combined: apply creativity to lower costs. All the actions that we see today in the market, all respond to these basic needs.

Being creative and reduce costs basically apply to two fields of action: the products themselves, a comedy better than the rest of the comedies; and business formats, which means to proceed in distinct way to achieve advantages.

The solutions that the market has found to these equations are those seen at the end of the graph: international expansion, to multiply the local level; co-productions, which have become the high-end business between broadcasters and strong producers, even in different regions.

The *Second Screen*, where a product is broadcasted on TV, pay TV and digital platforms simultaneously sharing the costs of production and exhibition. *Branded Content*, when a product has a sponsor from the beginning, which pays the costs and defines the product.

*Production sharing*, which is the sharing of locations and technical staff between several other channels in order to reduce costs and have original content. And *360° developments*: licensing, merchandising, gaming, live shows, etc. As costs and revenues are growing more even after the international distribution of content, these 'extras' have become key to generate profitability at the end.

From these 6 options, the most extended today are 4: almost all players looking to launch an international platform; co-productions,

that as we know, today are a key being reason for many producers and broadcasters; the *Second Screen*, with digital boom and the interactivity chances, back stage, continuing the stories on smaller screens; and *360 developments*. In kids & teens content, it makes tremendous difference.



Ben 10 (Cartoon Network): Kids and teens programming are very proper for 360° development

Conclusion. To do different things is all about. The boom of big dramas in Europe, for short content, virtual reality, etc, is 'the newest thing among the new'. Entertainment shows reduce costs and generate more profits, and the growth of the international profile of most of the broadcasters and company try to complete the exploit circles.

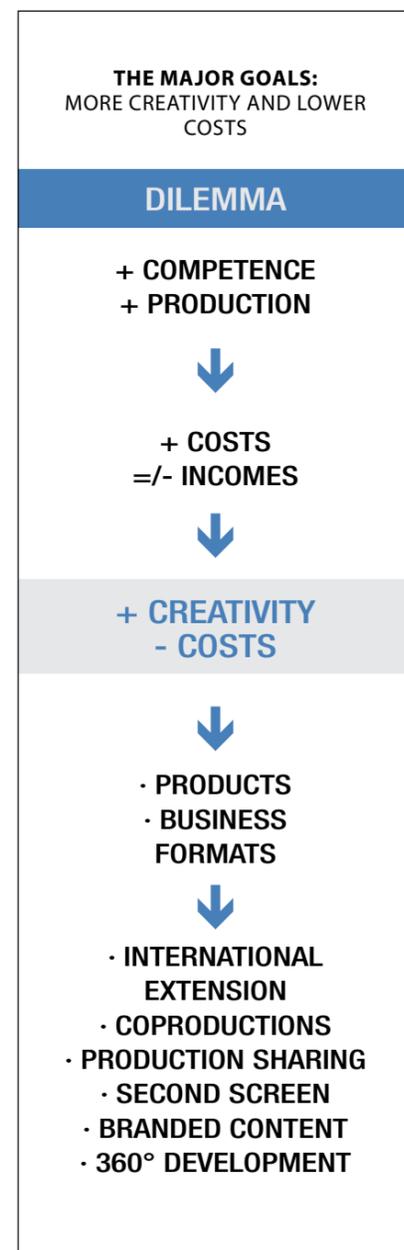
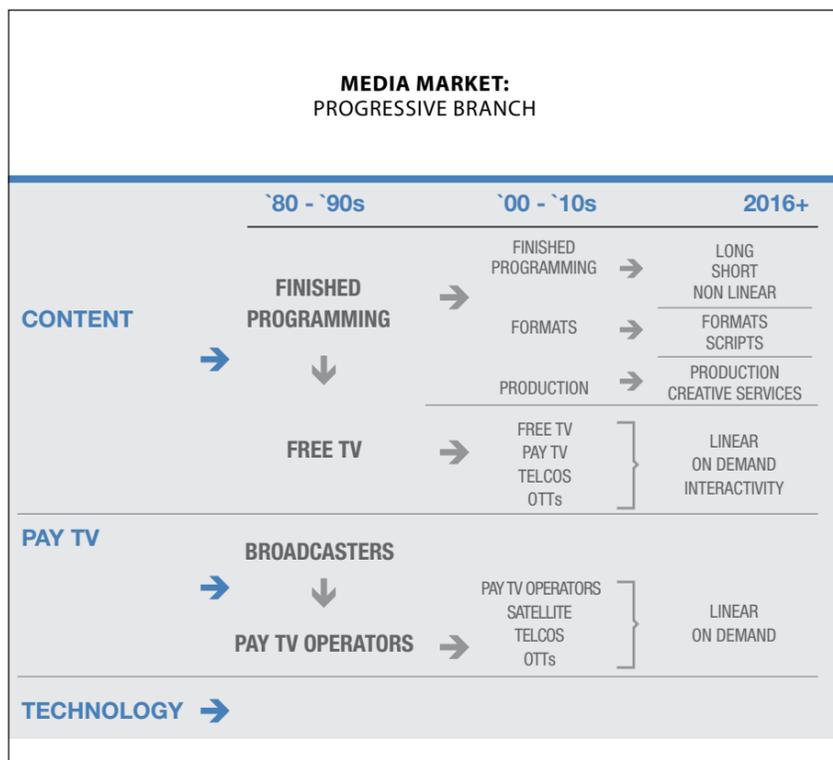
We suggest exercise to check each report, especially considering the new twists that can happen to them from now on. The challenge is permanent and is running.



Formats as *Big Brother* (Endemol Shine Group) are good for production sharing, the same location for different countries



*X Factor* (FremantleMedia): Local production heads ratings, but costs grow more than incomes year by year



## Televisa: global success for *Little Giants*

Televisa International (Mexico) has consolidated its position as one of the major players in the entertainment industry, not only a key provider of telenovelas and drama series, but also with its entertainment formats, launched a couple of years ago when the company recognized 'new needs' from the competitive global market. Today, Televisa formats are industry trendsetters, and *Little Giants* is one of the originals with more international adaptations.

The original format was aired for the first time in Mexico in March 2011 on Canal 2, and became an immediate audience success and a second season was quickly confirmed. After leading the prime time in Peru, Uruguay, Chile, Costa Rica, Panama and Ecuador, it became the most viewed Spanish language format in the history of its genre and in the USA it even led Univision to place above FOX and ABC with more than 3 million viewers.

With its arrival to Europe in October 2014, the show consolidated itself as the major prime time show that it is today. Spain was the first European country to release a format that became the revelation of the season. After seven

episodes, the show achieved 26.6% of the audience share on average, allowing Telecinco to dominate prime time and bringing the format back for a second season.

The resounding success in Spain served as the international showcase for many other countries to join forces with *Little Giants* and schedule kid talent shows on prime time. During 2015, the format continued adding territories like Poland (TVN), where the local adaptation, *Mali Giganci*, became a success and was renewed for a second season, Ukraine (1+1) and Portugal (TVI). The Portuguese adaptation of the format closed its second season recording 30.4% of the share, becoming the most watched program of the day.

In Italy (Canale 5), the format was released in February 2016 with an average share of 18.3% and 4 million viewers, and in Asia, *Little Giants* was adapted in Vietnam through Diên Quân Media and Entertainment for THVL1 as *Ngươi Hùng Ti Hon*, reaching an average of 11.2 rating points, and with a second season confirmed for 2017.

This summer in Hungary, RTL will be



*Little Giants* is one of the most adapted Televisa original entertainment format: in CEE, it was a huge success in Ukraine and Poland

the 16<sup>th</sup> channel to adapt Televisa's talent show. Through the agreement with RTL, *Little Giants* expands its international presence and demonstrates that it still leaves a mark over the entire world as a leading prime time entertainment format.

## New MGM International television executives



Chris Ottinger, president, MGM Television and Digital Group

Metro-Goldwyn-Mayer (MGM) announced today the promotion of two executives on its International Television Distribution Inc.'s, EMEA team: **Deblina Chakrabarty** and **Guro Viddal** have been elevated to executive directors.

Chakrabarty takes on distribution of all television media in Spain and continue to oversee her existing territories including Africa, Belgium, Greece, Ireland, Middle East and Portugal. Previously Chakrabarty was director, International Television Distribution.

Viddal previously served as director, International Television Distribution and continues to manage distribution of all television media in Italy, Poland, Czech Republic, Hungary, Slovakia and Turkey in her new role as Executive Director, International Television Distribution.

The company brings an aggressively expanded formats catalogue to the market with highlights including: *Coupled*, the modern take on the dating game; the technology competition series, *Greatest Makers*; the game show *Generation Gap*; and the hugely successful *Celebrity Apprentice* franchise, which pits actors, musicians, athletes, and even politicians against one another in business-related tasks.

## Beta Film: Arabic *Grand Hotel* opens its doors on Ramadan

The Arabic version of the international success-series *Grand Hotel* opens its doors as the top-event during Ramadan's super-primetime. Egypt's CBC starts the remake of the hit-series by Spanish production powerhouse **Bambu Producciones** and **Atresmedia** on June 6<sup>th</sup>.

Other channels in the region will follow. During the month of fasting, Arabic channels traditionally show their top-of-the-line programs to profit from the record viewership numbers. Rising Egyptian star Amr Youssef ('Sons of Rizk') is starring in this crime drama written by Tamer Habib, directed by Mohamed Shaker Khedair and co-produced by **Beelink Productions** and **Eagle Films**.

The Arabic remake stands in a row of successful adaptations, led by the Italian 'Imperial' (12xone hour) on RAI and *El Hotel de los Secretos*, the Spanish language version by Televisa USA. The original (three seasons, 39x70'/66xone hour) was aired on Spain's Antena 3 with constantly 3.5 million viewers and a market share of nearly 20% and was honored with numerous national TV awards. The series has been sold by **Beta Film** in over 90 territories; the company also handles the remakes.



*Grand Hotel* premier on Ramadan in CBC Egypt



BOOTH #54

## Azteca: renovate to keep growing



Fidela Navarro, Distribution Director, Contents & Networks

**Azteca** (Mexico), one of the largest Spanish-speaking content producers in the world, highlights this NATPE Europe its brand new international structure in charge of the sales of programming and Pay TV networks.

Its international sales are now operated in house and with four new distributors: the recently appointed **Berta Orozco**, former **Caracol** (Colombia), in charge of Africa, Asia and French speaking territories; **Cesar Diaz**, CEO, **7A Media** (USA) who takes care of US, Canada and Spain; **Juan Antonio Fernandez**, partner at **World Media Picture** (USA), the representative for Europe, Africa and Asia, and **Yonatan Ornelas**, in charge of Latin America.

**Fidela Navarro**, international director: 'The international market knows us by our telenovelas, but we have much more to offer. Above all, deepen the business in all its nuances. Beyond finished products, we want to make strong emphasis on co-productions, co-development, alliances, international synergies and multiscreen'.

In the organization of the catalog, is more focused on the concept of **Box**, intelligent bundling with important added values. One of the newest products in this Box is the **Lucha Libre**, which operates independently. With the logo of **AZ**, it offers **AZ Novelas**, **AZ Unitarios**, **AZ Cine**, **AZ Contenido alternativo**, **AZ Formatos**, each with its brand.

'In terms of products, we highlight two new unitary, **Un día cualquiera** and **Están entre Nosotros**, two shows that fit in every market, even



Un día cualquiera, telenovela

where telenovelas don't work so well. Also are the formats **La Academia**, entertainment, and **Lo que Callamos las Mujeres**, fiction/ testimonial, which are two of the biggest hits in recent times for **Azteca**', completes **Navarro**.

## Caracol: new dramas and formats



Lisette Osorio, VP, international sales

**Caracol Internacional** (Colombia) arrives to Budapest with three new titles for the international market. The first, **The Girl** (80x'60), is a story based on real facts about a young girl recruited by force by the guerrilla, where she lived in first-hand the horror of war. After many years she flees from the armed group and guided to set on a new path, returning to ordinary life which will not be easy due to the struggles of reintegration into society, the challenge of understating this new side of herself and confronting her own family.

Another new product for this season is **On Another Leve**, an original musical format which gathers the best professional singers in the country who are looking for fame. The singer has to go inside an elevator located on the first level and sing a song for 90 seconds.

The third one is **Digging for Love** (60x'60), a fun story for all the family that narrates the life of two neighbor families who have had the best relationship until one day they fight, and as destiny would have it, that same day something unexpected occurs.

Lastly, the company keeps pushing its super-production **The White Slave** (62x'60), which narrates the story of a woman who everyone knows as a marchese who arrived in America to marry a prosperous merchant from the region. However, the truth is that years back she was rescued from death and raised in secret by slaves who became her family, but she was taken from the hands of her loved ones to be sent to Spain, because according to society, a white woman could not live with slaves. And **River of Passions** (60x'60), a telenovela that follows the story of a young foreman of a cattle ranch, who discovers in the eyes of a beautiful woman, the one true love.



The Girl, based in real life events

## DINT, 33 years of experience in dubbing

**Oswaldo Barzelatto**, founder, and **Patricia Menz**, president from **DINT, Doblajes Internacionales** (Chile), describe the beginnings of the company created 33 years ago: 'It was a long learning process, we were at the end of the world, there was no Internet, and the tapes had to travel to Chile. There was no dubbing industry in our country, so we had to start from scratch, with actors who had experience on voice dubbing, and we brought directors from Mexico and Brazil to teach the role and work in neutral Spanish'.

Now, the company is pioneer in using kids voices for child content and has 17 studios – the last 7, launched in 2015-, 250 actors and

translator, and a big technical team.

'Is a family company, where each member is directly involved in the process of dubbing, this way we can control the quality of our product', adds **Paola Barzelatto** who, along with her brother **Christian Barzelatto**, handles the international sales.

Among the top projects of the company, it stands **Hi 5**, **Deadliest Catch**, **Bear Gryll** and **Little People** for **Discovery Channel**; for **Netflix** the company just dubbed the fourth season of **Orange is the New Black**, **Fargo**, **Marco Polo**, **Daredevil**, **Jesica Jones** and **Unbreakable Kimmy Schmidt**. And also has dubbed films as the **Steve Jobs**, the animat-



DINT, Chile: Patricia Menz, president, with Christian Barzelatto, VP of international sales, and Paola Barzelatto, VP of international operations

ed movie **Norm of the North** (**Splash Entertainment**) and **Beast of No Nation** (**Netflix**), and Turkish dramas such as **1001 Nights**, **Fatmagul**, **Ezel**, **Kara Para Ask**, **Gumus**, **Amor Prohibido**, **Medezzir**, **Broken Pieces** and **Kusuey Guney**, among others.



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## Lionsgate: edgy and over-the-top



Peter Iacono, president, international television & digital distribution (right) and Maryann Pasante, SVP sales, along with the marketing and sales

With nearly 80 TV shows on 40 different networks, and a strong and diversified presence in motion picture production and distribution, TV programming and syndication, home entertainment, digital distribution, new channel platforms, and video

games, **Lionsgate** (USA) has become in the last years in a premier next generation global content leader.

**Maryann Pasante**, SVP sales, highlights for this market a slate of comedies and dramas headed by *Feed The Beast* (10x'60), a crime drama TV series based on the Danish series *Bankerot*, by **Kim Fupz Aakeson** and adapted by **Clyde Phillips** for AMC, starring David Schwimmer (*Friends*) and Jim Sturgess (*21: Blackjack*).

Also, the company presents *Greenleaf*, a drama series created by Craig Wright, and executive produced along with **Oprah Winfrey**. The drama follows the unscrupulous world of the Greenleaf family

with scandalous secrets and lies, and their sprawling Memphis megachurch with predominantly African-American members.

Other top titles are the 23x'30 series *Casual*, a quirky comedy about a pair of siblings collectively facing the challenges of dating, love and family drama; the hit series *Orange Is The New Black* (54x'60), created by Jenji Kohan and based on the acclaimed memoir of the same name by Piper Kerman, and *The Royals* (30x'60), set in modern-day England and about the lives of a fictional British Royal family that inhabits a world of opulence and regal tradition catering to any and every desire.

Lastly are *Deadbeat* (36x'30), a comedy that centers around a loveable loser hapless but gifted medium; *Nightcap* (10x'30), an edgy, over-the-top, single camera, culture-commentary comedy that features a mixed cast of improvisational actors and real-life celebrities, and the reality series *Family Gold* (6x'30).



Feed The Beast, new crime series



Greenleaf, drama series

VIEWING BOX 23

## Studiocanal: France and Sweden merge under the Midnight Sun



Isabelle Fedyk, VP, marketing, and Katrina Neylon, SVP, both from Studionala, along with Oliver Bibas, Co-managing director of Atlantique (France)

**Studiocanal** keeps expanding itself as a key developer, producer and distributor of high valued dramas, both from its own production companies and from third-party. During the last edition of the *C21 Drama Summit West* (Los Angeles), the company introduced its new drama: *Midnight Sun*, produced by **Lagardère Studios' Atlantique Productions** and **MTG's Nice Drama** for **Canal Plus** (France) and **SVT Sweden**, but with a global appeal.

Awarded at the Series Mania Festival in Paris for "Best Series" according to audience, this first France-Sweden co-production follows a French police officer (**Leïla Bekhti**, *The Prophet*) who travels to a small community in remote northern Sweden to investigate the brutal murder of a French citizen.

With the help of a Swedish detective and member of the local Sami tribe (**Gustaf Hammarsten**, *The Girl With The Dragon Tattoo*), they are faced with new killings as the initial murder turns out to be the tip of the iceberg. Together they uncover a ten-year-old secret conspiracy involving many of the town's inhabitants and Kahina finds herself confronting both a ruthless serial killer and her own painful past.



Midnight Sun, coproduction between Lagardère Studios' Atlantique Productions and MTG's Nice Drama for Canal Plus (France) and SVT Sweden

## The Secret Agent of Content TV

**Content Television**, the television sales division of **Content Media Corporation** (UK) which holds the library rights to 5,200 hours of TV programming incorporating major drama series, non-fiction entertainment, special event programming, kids' series, TV movies and mini-series, arrives to the market with a slate by the drama mini series *The Secret Agent* (4x'45), an explosive and heart-breaking adaptation of **Joseph Conrad's** classic novel, in a tale of terrorism, espionage and murder set on the streets of Victorian London.

At the road movie *January 1st* ('85), a young man determined to find his father's beloved stolen piano before he returns to visit him, his teenage sister, his loyal best friend and a friendly Haitian street vendor, set out on a cross-country adventure in the Dominican Republic, while *Shooting for Socrates* ('91) follows nine-year-old who learns to pursue his dreams and to make sense of the world through his passion for football and his father's love of Greek philosophy. And *Marilyn Monroe Declassified* ('96) balances the image of the blonde bombshell icon we thought we knew with information about her revealed in newly declassified FBI and CIA files.



The Secret Agent

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BY FABRICIO FERRARA



# Virtual Reality, the next big thing... the future of the industry?

Even when it's not a recent phenomenon, virtual reality and augmented reality has been associated most frequently with the entertainment industry in recent years, a process that has accelerated thanks to companies like **Oculus** (*Oculus Rift*), **Samsung** (*Gear VR*), **Sony** (*PlayStation VR*) or **Microsoft** (*HoloLens*) that launched new lenses to access to several types of VR content.

Also **Google** launched the *Google Cardboard*, an economic cardboard device —between USD 20 and USD 30 depending the version— launched in mid-2014: the company said it had distributed more than 5 million in a year and a half. Almost at the same time, **LG** (Korea) presented its *VR for G3*, a similar version of the *Cardboard*, but made of plastic.

In 2014, **Facebook** acquired **Oculus**, and the *Oculus Rift* was launched for sale during the first trimester of 2016. By the other hand, in April, the Taiwanese Company **HTC** released *HTC Vive* at USD 799.

## Content

But within these important amount of announcements was missing a key partner: content. **Google** said recently that over 1,000 apps compatible with its *Cardboards* have been in-

stalled over 25 million times, and also indicated that more than 350,000 hours of content intended for that device had been played on **YouTube**. In December 2015, with the launch of *Cardboard Camera*, over 750,000 photographs in 360° format were taken.

In September, **Netflix** launched a VR app, and some of the iconic series like *House of Cards* or *Orange is the new black*, are now available with that technology.

In March, **Amazon** announced that the company started to work in its own VR platform.

The pioneer and most important sector is the one of game developers, the best habitat for virtual reality. But there are also others such as real estate, retail, entertainment and health care. In some of these categories, virtual reality already applied systematically, in others as entertainment and video, is just beginning.

In the latter, there isn't a lens base installed —which still have high costs— and audience demand is not strong. However, several tech giants have been launching applications and promoting virtual reality on different platforms. This trend is in concordance with another: the rise of production and consumption of short content (3-10).

Both trends were reflected in the last edition of MIPTV, in Cannes, an ideal environment for large developers to present their technological news to content producers. The content industry has begun to develop the first output to be consumed through virtual reality devices.

At MIPCOM 2015 **A365 Studios** (Argentina), led by **Pablo Aristizabal**, launched its VR

## Main figures about Virtual Reality & Augmented Reality (February, 2016)

- USD 80 billions is the estimated VR/AR market for 2025: 55% for Hardware and 45% for Software
- USD 3.5 billions is the value of 225 capital investment on VR/AR
- Facebook acquired Oculus for USD 2 billions in May 2014
- 2 million Google Cardboards have been distributed globally since June 2014
- In 48 hours, Samsung Gear VR was sold out in Amazon.com and Best Buy at a rate of USD 99
- 200,000 creators have been registered at Oculus to create VR games (September 2015)
- 100 videogames will be available at Oculus in 2016 with 20 of them developed by Oculus Story Studios
- USD 599 was the initial price for the Oculus consumer version, launched in January 2016

SOURCE: GOLDMAND SACHS - VIRTUAL & AUGMENTED REALITY: UNDERSTANDING THE RACE FOR THE NEXT COMPUTING PLATAFORMA

development based on its transmedia series *Creators*, a 360-degree series for television, print and digital (games, series, apps). The series is distributed globally by **Smilehood Media**.

During MIPTV 2016, some Canadian companies gathered at **Canadian Media Found** (CMF), presented their VR projects: *Infiltration* (**Urbania Studio**), *Nomads: Sea Gypsies* (**Felix & Paul Studios**), and *Cardboard Crash* (**Digital Studios**). And other three were launched at the MIPTV Digital Fronts: *Liquid Cinema* (**Deep Inc.**); *Time Machine VR*, which merges the world of gaming with filming, and *The Unknown Photographer*, about WWI. From France, **Francois-Xavier Poirier's Novovision**, introduced its developer *Eyes in the Box* (USA) and the new distributor **VR Distrib**, and shared the new shows with the attendees.

Another good example is the Latin SVOD service **Qubit.tv**, which created a virtual reality room at the **Buenos Aires Festival Internacional de Cine Independiente** (BAFICI), where participants could see VR content with the *Samsung Gear VR* lens.



## The Market

The report *Virtual & Augmented Reality – Understanding the race for the next computing platform*, from **Goldman Sachs**, offers data from this business that, although it's currently small, looks promising. According to the company, both technologies have the potential to become the next major computing platforms, with the possibility that new markets can be created.

'There is a large amount of examples of how VR and AR (*Augmented Reality*) can change the current way in which we do a few things like buying something, interact with a doctor or watch a football game. As technology advances, prices devices fall, new apps appear, the VR/AR promises to be a multibillion dollar industry', the report said.

According to another study launched on February by **Quebec Film and Television Council**, the global VR market will achieve USD 30 billions by 2020, mainly because of the proliferation of the several uses of the VR and contents, while for **Goldman Sachs** profits are estimated in USD 80 billions by 2025, with USD 45 billions from hardware and USD 35 billions from software, but it recognizes that the adoption of this technology is 'limited' by 'mobility and devices' battery'. The report recognizes 'big challenges' for expansion and indicates that currently is used mainly in the video game industry.

Nine economic sectors have been identified as the most important *drivers* in short term: Videogames, Live Events, Video and Entertainment, Healthcare, Real Estate, Retail, Education, Engineering and Military. By 2025, 60% of profits in VR/AR software will be driven

by consumers, while the remaining will be by businesses and the public sector.

Beyond video games, which will mean USD 11.6 billion by 2025 (25%), real estate, retail and health care are business segments where this technology is truly disruptive. 'VR/AR has the potential to change business models and how we interact', it summarizes.

Regarding content and applications, the report focuses on a well-known dilemma in the industry: what came first, chicken or the egg? It explains: 'Most of the players are cautious in the investment in VR/AR without an installed user base. But a funny thing happens: at the same time consumers and companies are refused to buy hardware without a strong supply of content and apps. **Facebook**, **Google**, **Sony** and **Microsoft** offer both'.

Prices, on one hand, should also fall to popularize. The report estimates that it will drop 5-10% annually. On the other hand, it believes that VR has won the battle to AR, as it has generated in a short time an ecosystem of sellers and partners. **Goldman Sachs'** scenario is 75% vs. 25%.

The segment of *Video and Entertainment* will have 24 million users by 2020 and 79 million by 2025, totaling USD 750 million in 2020 and USD 3.2 billion globally, the report estimates. 'Here, VR is creating a new environment for en-

ESTIMATIONS FOR VIRTUAL REALITY & AUGMENTED REALITY MARKETS, PER SECTOR (2020 & 2025)

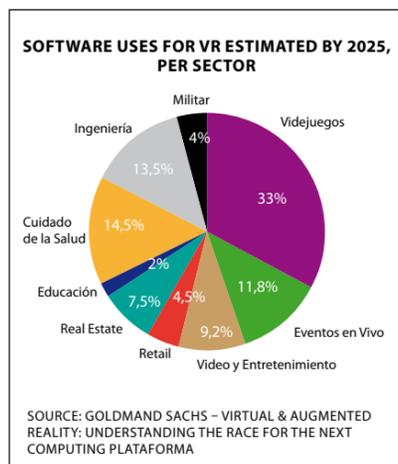
Sector	2020		2025	
	Users	Incomes	Users	Incomes
Videogames	70	6.9	216	11.6
Live Events	28	0.8	95	4.1
Entertainment & Video	24	0.8	79	3.2
Real Estate	0.2	0.8	0.3	2.6
Retail	9.5	0.5	31.5	1.6
Education	7	0.3	15	0.7
Healthcare	0.8	1.2	3.4	5.1
Engineering	1	1.5	3.2	4.7
Military	—	0.5	—	1.4

SOURCE: GOLDMAND SACHS - VIRTUAL & AUGMENTED REALITY: UNDERSTANDING THE RACE FOR THE NEXT COMPUTING PLATAFORMA

ertainment. The challenge is to enable new content, even without a big base of customers. There is a potential of 462 million homes market'.

It explains that the main challenge is the creation of content to expand that user base. To gain experience, the productions must be 360°. 'VR is essentially a new way to tell a story that requires a different way of writing and production techniques, different from traditional film and TV'.

In that sense, the costs of producing in VR is difficult to predict. 'Similar to the game industry, Hollywood needs to convince in the possibilities that that VR films gives to start to invest', completes the report. Nowadays, the overall development of VR is being led by China and Japan. Sources consulted by PRENSARIO indicated that in China 3-5% of the population (40-50 million people) already is watching content on their mobile with special VR glasses. 'But that number will grow to 30% in 12-18 months', conclude specialists.



VIEWING BOX #25

SUITE #246

## DW, documenting life Get wild with ORF-Enterprise

**Deutsche Welle** (Germany) keeps evolving – not just as an international broadcaster, but as a key distributor in the international market as well. **DW Transtel** offers hundreds of hours of programming with a wide range of documentaries and infotainment covering everything from automobiles to arts and culture and from science to sports.

At this year's NATPE, **DW Transtel** is featuring the new documentaries *Farming for the Planet* (6x'30), which unearths ideas and inspiration for sustainable agriculture and explores corporate and technological issues affecting food production worldwide, and *Art Beats* (7x'30), a different perspective on art, culture and music that goes beyond extravagant galleries, pop-culture products and mainstream concerts.

Available in Arabic, English and Spanish. *A Window on...* (9x'30) takes a look at some of the most fascinating cities in the world, while *Know it!* (6x'30 and 37x'2-6) is a magazine all about knowledge, packed full of information on science, technology and everyday phenomena. And *The Power of Sports* (7x'30) is a series that looks at the passion it takes to succeed, whether it is individual triumph or the power of teamwork.



Farming for the Planet



A Window on...

Also in DW Transtel's portfolio is *TastyTales* (7x'30), which narrates different stories about people who see food as an adventure and not only as feed; in *On Island Time* (13x'30) viewers will have access to the history of different island landscapes, their people and secrets, while *The Mysteries of the Brain* (5x'30) seeks to unravel the complex ways in which the brain acts and processed daily life in and out of conscious.



Marion Camus-Oberdorfer, Head of Content Sales

**ORF-Enterprise**, affiliate of the Austrian pubcaster **ORF**, recommends at Budapest, through Content Sales International division a slate of documentaries of nature and wildlife headed by *Turtle Hero – A Cold Blooded Passion* ('52), where with the excellent knowledge and extraordinary passion of a world expert on freshwater turtles, presents not only the largest freshwater turtle, but also probably the rarest animal on Earth: the

Yangtze Soft-shell turtles.

*The Secret Life of Snakes* ('52) gives an enthralling insights into Europe's most stunning snake species, while *The Canary Islands* (2x'52), shows why each island of the Canary Islands is unique with a diversity of terrain and climate.

Other highlights are *Transhumance - Europe's Last Nomads* ('52), which shows the adventurous as well as exhausting journey of herdsmen and their animals crossing the Alps, *Gober - On the Fate of an Orang-Utan Mother* ('52), centered in the dramatic life of an orangutan mother; *World Journal* (11x'30), presents current reports and internationally debated events and addresses the big issues of the day as they happen around the world every day; and *Flavours of Austria/Europe* (65x'45 & 13x'30) ex explores cuisine and cultures throughout Austria and Europe.

From the slate of scripted, ORF recommends the comedy *Suburbia - Women on the Edge* (20x'48), centered on five women, whose biggest challenge so far has been surviving their daily hour-long lux shopping tours burning up their husband's credit cards, and *Four Women and a Funeral* (58x'45), on four remarkable women sharing an exceptional pastime while join forces in order to bring some excitement to the boring village life by suspecting murder in all those cases which initially seem to point to the opposite.



Turtle Hero, documentary

## Eccho Rights: first remake for Fatmagul

**Eccho Rights** (Sweden) has signed a deal with German producer **Bantry Bay** for the re-make rights to the hit Turkish drama *Fatmagul* from **Ay Yapim**. The producer will develop a version for German speaking Europe.

'*Fatmagul* has already proved to be a global hit as a readymade so we are really pleased to announce the first remake in Germany. With a first rate producer at the helm we can't wait to see how they approach the script. We have several other re-makes in the works around the world for this great series', says **Fredrik af Malmberg**, managing di-

rector at Eccho Rights.

Originally produced by **Ay Yapim**, *Fatmagul* is one of the most successful Turkish drama series ever and has aired across the world with outstanding audience figures, especially in Latin America. Based on a novel by Vedat Turkali, it tells the story of a young that one night is raped by three men and her life falls apart.



Fatmagul, German remake

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## Kanal D, love and Destiny

**Kanal D**, one of the leading broadcasters of Turkey and one of the most important exponents of the Turkish series global success, recommends for the market the drama series *Live As It Is* (**D Production**), centered in a private hospital Doctor who devotes himself to save life without expecting anything in return, while at *Destiny* (**DUS Gezinleri**), a woman lost her mother during the birth and when she was only two days old, her father died. From that moment, miseries haven't left her behind...

Other highlights are *For My Son*, a story in which love and hate, friendship and hostility, kindness and malignity are lived on the edge, and *Love*, a story that shows why if people were asked to name the one thing money couldn't buy, the most common answer would be "love"



Live As It Is, new drama

Regarding the international market, **Ozlem Ozsumbul**, head of sales and acquisitions, describes: 'Since 2006 **Kanal D** has reached 129 territories with 65 titles. We did our best results in 2015 and reached new territories like

India, Pakistan, Estonia, Latvia, Chile, Uruguay and Argentina with series like *Fatmagül*, sold to over 106 territories, and *Matter of Respect* (26x'90), adapted from **Mediaset Italia** format of the same name'.

Other top titles from the company are *War of the Roses*, *For My Son* (13x'90), and the youth series *Sunshine Girls* and *Waiting for the Sun*, about a self-sacrificing woman who raised her daughter by herself; other top series are *Kuzey Giney*, *Mercy* and *Time Goes By*, where oceangoing master spends the most of his time away from his family. While he is away, his wife takes care of their four children, and she tries to cover up her husband's deficiency. The story begins with his return of from his voyage, bringing with him dark secrets.

'For this year we will focus in production or coproduction and we will have some steps for new productions opportunities abroad, or partnering foreign players to produce in Turkey with our facilities', completes **Ozsumbul**.



Ozlem Ozsumbul, head of sales and acquisitions

## Lucky You bets on feature films



Robert Salvestrin, CEO

**Lucky You**, TV documentary distributor based in Paris, is now expanding its activities to international sales of feature films, including new titles like *Little Gems* (Les Pépites), directed by **Xavier De Lauzanne** and coproduced between **Aloest Productions** and **Bonne Pioche Cinema**. The documentary will make its premiere at *Sunny Side of the Docs 2016*, before being released in France on the 5th of October 2016, through **Rezo Films**.

Among the top titles from the company are the science program *The Origami Code*, which is a coproduction between la Compagnie des Taxi-Brousse, Leonardo Film and FACT+ Film, and *Looking Through the Pyramids*, an international coproduction involving Bonne Pioche, HIP Institute NHK, France TV, WNET for PBS and CuriosityStream and has been presold to around 10 international broadcasters. Other projects for which Lucky You is seeking prefinancing, there are several blue-chip Wildlife documentaries by Bonne Pioche and Wildbear, as well as two edgy science projects by Scientifilms, Tricky Memory and Dream Babies.

'We would really like to thank producers, broadcasters as well as competitors for the welcome they have given Lucky You, in today's audiovisual changing market', says **Robert Salvestrin**, CEO of the company, and completes: 'We are excited about the new adventure in the cinema business'.

## 9 Story Media acquires Garfield and Friends

**9 Story Media Group** (Canada) acquired the full *Garfield and Friends* classic animated series from **Mendelson/Paws Productions**, which consists of seven seasons (121x'30) along with twelve specials and two direct to video titles. 9 Story has secured exclusive worldwide rights across all languages and platforms and plans to remaster the classic content to an HD format.

Produced from 1988-1995, *Garfield and Friends* is based on the iconic Garfield comic strip created by **Jim Davis**. Syndicated in 80 countries and translated into 42 languages, 220 million people read the comic strip each day. *The Garfield* brand boasts 400 licensees across 5,000 products and has earned over 17 million fans on Facebook.

'We are absolutely thrilled to have Garfield and Friends join the growing 9 Story library', said Natalie Osborne, CSO for 9 Story Media Group. '*Garfield* is one of the most beloved and iconic characters of all time, and the classic television series will continue to delight audiences for generations to come'.

'This is the first time we've awarded the rights to a single distribution partner who will handle all markets and all platforms. We're very excited to see how the library performs, particularly given the opportunities in digital', adds Jim Davis and completes: 'We are sure the classic TV library is in good hands with 9 Story'.



Garfield and Friends



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## Dorimedia, modern and different



Dorimedia en la última Natpe: Michal Nashiv, Nadav Palti, Revital Basel, Elena Antonini, Maria Campi

**Dorimedia** (Israel) is a good example of what content companies should be today: versatile, present in several links of the commercial chain, and making a difference wherever they focus.

The company traditionally had Pay TV channels in Israel, then bet big to America and became in a referent in modern telenovelas. Today it develops channels on different platforms in Europe and Asia, and generates both fiction and entertainment in terms of production, where it's making formats 'out of the box', as *The Power Couple*.

Highlights **Nadav Palti**, CEO: 'Today, our big news are three: *El marginal* (13x'45), a thriller produced in Argentina by **Underground** for the **TV Pública/Canal 7**, with international appeal. Then we have *Invisible*, an innovative *non scripted* format where a well-known mentalist takes the viewers on a fascinating journey into the mind of an illusion artist, and the third one is *Classroom Challenge*, a kids game show where 20 classes from different schools compete for a big prize'.

'We always try to do different things, be one step forward. At the time with *LaLola*, or *Ciega a Citas*, we generated new genres. *Power Couple* is already a success in China, Slovenia, South Africa, India... very different places. It's a competition between real life couples, but each other'.

'At NATPE we have several new big dramas and *non scripted* formats. Both genres have strong potential. The entertainment on Free TV, and fiction in particular with the boom of the new media, all the time there are new platforms. In Israel there are now 3 more: **Partner** (mobile OTT), **Cellcom** (mobile) and **Walla** (instant platform, like *Yahoo*). With digital players, more and more dramas are needed, and people consume faster than ever before'.

## Red Arrow, thrillers and entertainment

**Red Arrow International** (Germany) highlights at NATPE Budapest a slate of formats and scripted dramas headed by the second season of *Bosch* (20x'60), produced by **Fabrik Entertainment** for **Amazon Studios**, and the drama *Cleverman* (6x'60), with a second season in development.

Also, are the formats *Kiss Bang Love*, dating show from the creators of *Married at First Sight* that puts the power of kissing to the test in this radical new TV experiment; *My Diet is Better than Yours* (8x'60), reality format for **ABC** (USA) that pits five diet experts and their revolutionary weight loss plans against each other, to help five contestants lose weight, and *The Day the Cash Came*, a social experiment produced for **BBC** (UK) that tests what a family

## Pol-ka: predictability and cost management



Manuel Martí, director of development and international production, with Alex Lagomarsino, CEO of Mediabiz, in charge of the distribution of formats, and Luciana Egurrola, international sales

Content producers are going through challenging times in the international market, partly because of the rising costs and also by the search for new concepts that serve both for traditional media and new digital platforms. **Pol-ka** (Argentina) is a good example to analyze.

The company announced during MIPTV a co-production deal with **Televisa** (Mexico) for its OTT **Blim**, and the first title is the youth series *Divina* with the Laura Esquivel, the protagonist of *Ugly Duckling*. **Manuel Martí**, director of development and international production: 'It's a natural step in our relationship. We are in a scenario where the contents have global reach and markets are increasingly demanding and competitive'.

He continues: 'We seek long-term agreements in the global market that can give us predictability and better cost management. We have reduced the number of episodes, improving production quality and, if the product is successful, we can add seasons'.

2016 has been a great year with the continued success of *Violetta* and launching of *Soy Luna* —both with **Disney Channels Latin America**—, where the company also gave production services, and *Esperanza Mia*, a daily strip issued in **El Trece**, which has been licensed in several markets by **Dori Media**, both as finished and format.

'The market is demanding more content and we want to be there, minimizing risks and partnering more companies. Drama grows, our core, the tween content is revalued in Europe and the finished shows are enhanced for new digital platforms. This year we have productions broadcasted both at pay TV and digital, and we will produce more than in 2015', he concludes.



*Divina*, new youth series co-produced with Televisa for its OTT service Blim

living below the poverty line would do if they were gifted a year's salary in one lump sum of cash - no strings attached.

Lastly, are the scripted series *Case* (9x'60), a thrilling new psychological crime drama from Iceland; *The Romeo Section* (10x'60), a high-stakes thriller about espionage in the Pacific Rim from acclaimed showrunner Chris Haddock (*Boardwalk Empire*, *Da Vinci's Inquest*), and *Peter & Wendy* ('120), a magical family adventure based on J.M. Barrie's much-loved classic, starring Stanley Tucci, Laura Fraser and Paloma Faith.



*Kiss Bang Love*, new dating show

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## Record TV: more than epic stories



Delmar Andrade, international sales director

**Record TV Network** (Brazil), leader distributor of epic series, launches at Budapest its new 4K telenovela *The Slave Mother* (150x'60). 'Some stories are so striking they span generations. Such is the case of *The Slave Isaura*, the life story of the light-skinned slave girl who was obsessively pursued, won the world through page and screen. But every story has a beginning, and none of her story would have come about without the characters and plot of *The Slave Mother*', resumes **Delmar Andrade**, international sales director.

Another top product for this season is the hit *Moses and the Ten Commandments* (176x'60) that retells one of the most famous parts of the Bible: the story of Moses.

Since its launch, the series become a very important framework for the company, and result of our talent but also of the success of the previous epic series launched.

*Moises* was sold to **Telefe** (Argentina), **Canal 10** (Uruguay), **TVN** (Chile), **MundoMax** (USA), **Telemicro** (Dominican Republic), **Telemetro** (Panama), **Televisiete** (Guatemala), among others countries in Latin America, Poland (both at Pay TV and Free TV), Portugal, Angola, Mozambique and Cape Verde.

Other highlights from **Record**'s catalogue are the series *Miracles of Jesus* (35x'50), in which every week are narrated the difficulties faced by those before obtaining the blessings of Jesus; *Joseph of Egypt* (38x'60), centered in the story of the young Hebrew who returns to Egypt to save the brothers who made him suffer so much in the past, and the telenovela *Victory!* (208x'45), about 12 years-old boy who, after an accident,



The Slave Mother, new drama series

becomes paraplegic. Lastly **Andrade** recommends *Obscure Power* (12x'50), a series about power struggles, ambition, love affairs and betrayal, besides all great national questions, involving three generations of the same family's members.

## ITV Inter Medya adapts to international market

**ITV Inter Medya** (Turkey) has become a key global business developer and a consultant with significant experience in the market with very strong business relationships.

'Within this frame, we have proven ourselves as a problem solver in movies, TV, new media content and formats. We are creating financial worth by participating in increasing work volume in the new area and layers of the sector by creating cooperations and solutions between countries and regions', explains **Can Okan**, CEO.

'In order to provide those services the company is continuously researching and internalizing new business models, concepts and techniques basing its services on a solid technological ground that can provide the most accurate and punctual services'.

At **NATPE Budapest**, the executive highlights a catalogue of Turkish dramas, its core business, and new entertainment formats as part of a strategy that seeks to keep growing in the international market as a key distributor.

Heading the slate of scripted shows is *Endless Love*, produced by **Ay Yapim** and centered in two separate worlds that lie on two sides of the road in a seaside neighborhood of Istanbul. Both too close and too distant from each other. While *In Between* (126x'45) is the story of a young traditional woman who lives with her father and her aunt in the suburbs.

In formats, **ITV Inter Medya** highlights *Join Instant*, an online interactive **quiz show** with a 2.0 screen technology which enables viewers at home to participate; *Fifty Fifty*, a quiz show where 8 people participate in 4 rounds, sharing half of their money with the other contestants. And *Answer If You Can!*, a TV format based on show, performance and knowledge.

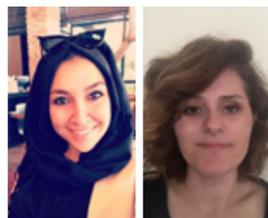


Can Okan, CEO



In between

## MISTCO, exclusive sales agent of TRT



Beyza Nur Torun and Aysegul Tuzun

**MISTCO** (Turkey), a brand new distribution company led by **Beyza Nur Torun** and **Aysegul Tuzun**, attends to NATPE Budapest with a diverse catalogue consisting of top rated Turkish TV series, mini-series and TV Movies. It has been appointed as the exclusive sales agent of **Turkish Radio and Television** (TRT).

Having a variety of contents, the company aims to bring top programming and broadcasters together and to build long-term relation-

ships with global partners. Among the top titles from **TRT** are *Resurrection*, a story set in the 13<sup>th</sup> century, where the strongest hero of his time is struggling to find a home for his tribe and the woman he is in love with; *Filinta*, about a clever officer in the Ottoman Police Station, and *What Happens to My Family*, a family drama that sees the story of a father and a baker who has lost his wife many years ago and trying to take care of his children by being both a mom and a dad to them.

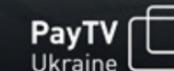
Lastly, the company highlights a slate of TV Movies produced by **TRT** under the *TRT TV Filmleri* project, which allowed the Turkish broadcaster to add 33 self-produced TV movies with new talents and well known stars to its offer.

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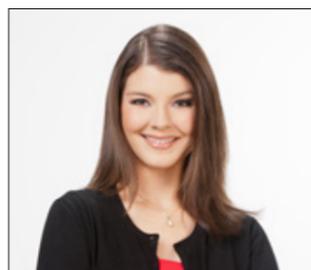


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SUITE #222

## Telemundo: high-value dramas



Melissa Pillow, VP of sales for Europe

At Budapest is **Melissa Pillow**, VP of sales for Europe, who recommends *Rich in Love* (121x'60), a series that follows the mother of three young girls who became homeless after her husband's bad business decisions left her family in ruins, and *Eva's Destiny* (122x'60), where the perseverance and values of a strikingly beautiful woman have led her to proposer in business, designing strategies and routes – something she began to do at a very young age when she accompanied her father, a truck driver, on the open road.

Other top title is the fourth season of *The Lord of the Skies* (80x'60), the most successful *Telemundo Super Series* in the network's history. After breaking audience records in the US with its third season, the story of Aurelio Casillas continues this time defying a force he had never

**Telemundo Internacional** (USA) launches at NATPE Budapest a slate of new dramas and comedies from leading worldwide producers including **Telemundo, Sony, HBO, Mega** (Chile) and **Reset TV** (Spain), among others.

From the slate of **Mega**, the company highlights the reality format *Would You Take Your Ex Back?* ('90), where for the first time, a reality show documents the intense and exciting experience of 12 real former couples who meet again, while from **Grupo Imagen Multimedia** (Mexico), the distributor presents *Don't Be Late*, the adaptation of the TVN Chile production with the same name, starring Gabriela de la Garza and Mario Cimarro. It was filmed in Mexico and tells of the despair of a mother who learns that her son's sudden death was not accidental.

feared or ever been so close to death. The company highlights another successful Super Series: *Woman of Steel 3* (80x'60). This action drama follows a beautiful and tough tempered woman, and one of the most respected and feared "coyotes" of the border between Mexico and the United States.

feared or ever been so close to death. The company highlights another successful Super Series: *Woman of Steel 3* (80x'60). This action drama follows a beautiful and tough tempered woman, and one of the most respected and feared "coyotes" of the border between Mexico and the United States.



Eva's Destiny, telenovela



Would You Take Your Ex Back?, reality format from Mega

## Keshet International: The "A" Word

During the last *Drama Summit West 2016* edition, held in Los Angeles last May, **Keshet International** (Israel) realized the US premiere for worldwide buyers of the hit **BBC One** (UK) drama series *The A Word*, co-produced with Keshet.

The series is a drama based on the Israeli series *Yellow Peppers*, from the Israeli Keshet and **July August Productions** and created and written by **Keren Margalit**, who is also an exec producer, and follows a 5-year-old boy and how his dysfunctional family copes with the revelation that he has autism. *The A Word* was acquired for **Sundance TV** in US, and was written by **Peter Bowker**.

The launch of the British version of *The "A" Word* seeks to follow the success of other big scripted hits from the company such as *Prisoners of War* (aired in 2010 & 2012 in Israel), adapted in 2011 as *Homeland* by **FOX** (USA).



Laura Saunders, directora de relaciones públicas; Kelly Wright, head of Latin America; Keren Shahar, managing director, distribution; Alon Shtruzman, CEO; and Rob Lee, president of non-scripted programming

## Universal Cinergia expands its sales team

**Universal Cinergia Dubbing** attends NATPE Budapest after its participation at LA Screening, where the company ended with big projections, and the incorporation of **Elisa Aquino** as new executive marketing, sales and new business development, focusing on the expansion and finding new customers in Africa and Asia.

**Aquino**, who joins the team led by **Lilian Hernandez**, CEO, and **Gema Lopez**, COO, arrives **Universal Cinergia** after holding several positions in major companies such as **MGM Networks Latin America, Sony Pictures Entertainment Latin America** and **Reed MIDEM**, among others; where he has worked with clients such as **Televisa** (Mexico), **Telemundo** (USA), **NBC Universal** (USA), **Globo** (Brazil) and **Telefe** (Argentina).

'We are delighted not only for the appointment of Elisa, but also what it represents; the expansion of the company worldwide', says **Hernandez** and she adds: 'With this announcement, along with the expansion of our dubbing studios – The company has launched 4 new studios in Mexico to satisfy the big demand of Spanish dubbing that we have-

and our customer base, adding new productions of countries such as Japan, China, Korea, India and the Philippines, we are coming to NATPE stronger than ever'.

This announcement goes in concordance with the strategy of the company towards the international markets, which also includes the attendance both to main shows like the MIPs and new regional tradeshows such as Natpe Budapest, Rio Content Market, Discop Istanbul, and ATF.

'We have experience in dubbing in Portuguese, English, French Paris and neutral Spanish in all genres, from telenovelas, series, animation, documentaries, feature films, video games and infomercials, and our goal is to continue offering quality and innovative products to our current markets and provide additional value in our new areas', she completes.



Elisa Aquino, new sales executive for Africa and Asia

## all3media: the Constructed Realites, refreshed



**all3media International** (UK) arrives at NATPE with a refreshed slate of *Constructed Reality* shows, which sees the launch of *Street Cops*,

joining successes such as *Families at the Crossroads* and *Cases of Doubt*, after the launch of a new office in New York, which is helmed by **Sally Hammershaw** with **Maria Ishak**, and having confirmed plans to open an office a Singapore in the autumn.

Whilst the APAC office in Singapore, the company will be looking to licence formats and completed programs into the region, building on the company's success with formats such as *Gogglebox* and *Undercover Boss*, and following a strategy that seeks to find formats to export to the rest of the world, including ideas suitable for Cen-



800 Words is offered as scripted format, and is presently Australia's #1 drama

tral and Eastern Europe.

And new faces are also aboard for the European region. Under the wing of EMEA EVP **Stephen Driscoll**, **Lucy Roberts** is handling format sales in the EMEA North region, with focus across CEE, CIS, Benelux and Germany, whilst **Ben Packwood** is looking after finished sales of dramas and documentaries. Both faces are familiar to the **all3** Group from their time with leading



Undercover Boss, factual

entertainment producers, **Optomen**, who look after many of the **Gordon Ramsay** stable of shows.

**Roberts** highlights: 'This NATPE, we are bringing with us the latest *Constructed Reality* format from **FilmPool**, *Street Cops*. Using real police officers in constructed crime situations, the format represents an exciting new twist on a genre, which is already hugely successful and well established for us in the region. We will also be focusing on other proven international brands such as *Undercover Boss*, *Gogglebox* and *The Cube* which are now gaining momentum across CEE'.

The executive arrived the company after being part of **Granada International** (now **ITV Studio Global Entertainment**) since 2006, before going on to hold sales roles across a range of EMEA territories at **BBC Worldwide**, **Keshet International** and **Optomen**.

While **Packwood**, responsible for all finished programme sales across CEE, Russia and CIS, joined **all3media International** at the beginning of 2016 after the merger with **Optomen International**, where he was sales manager for USA and Latin America. Before that, he spent 8 years working for **Electric Sky** having sold to Scandinavia, USA, Canada, Germany, Benelux and Global Digital.

**Packwood**: 'I am attending NATPE Budapest for the first time representing **all3media International**'s line-up of scripted series, factual entertainment and specialist factual. As well as new shows and returning favorites, our globally successful brands such as *Brokenwood Mysteries*, *800 Words* and *Tattoo Fixers* have all been recommissioned offering much increased volume that I expect to be very appealing to the region'.

The new team will also be looking at op-



Step Dave is a humorous and warm drama



Lucy Roberts, format sales manager for EMEA North region

Ben Packwood, responsible for all finished programs sales across CEE, Russia and CIS



Families at the Crossroads, one of the pioneers in Constructed Realities



Street Cops, brand new Constructed Reality format

portunities for scripted format deals in the region, having received interest for *800 Words*, which is presently Australia's #1 drama with its charming narrative about a family who move to New Zealand; and *Step Dave*, a humorous, warm drama about how a very attractive, older woman starts a relationship with a younger man

The team will also be focusing on the *Constructed Reality* favourite *Day & Night*, which is presently filming in Budapest with **RTL Klub**, the new procedural *Red Rock*; the factual entertainment hit *Tattoo Fixers*; and the engineering speed fanatic, **Guy Martin**'s catalogue of shows. Engines are also at the fore in *Supertruckers*, whilst in the kitchen *America's Worst Cooks* educates and amuses in the name of a good meal cooked by loved one.

SUITE #221

## Sonuma: contents for all windows



Sebastián Lami Dozo, head of sales

Created in 2009, Sonuma is the distribution's arm of RTBF, the Belgian Public Television. The company handles a wide range of current programs and footage collection produced by the public broadcasters.

'2016 first semester has been an expansion one where our programs reached new prestigious customers as Nat Geo, TVE (Spain), TVN Poland or CanalPlay, thanks to our wildlife and current affairs documentaries, as well as our webseries', explains Sebastián Lami Dozo, head of sales.

'Our key market is France, but we are planning to extend our presence and activities to North and Eastern Europe with our documentaries, concerts and web series. For Latin America, we count on our exclusive concerts, and we know that we will reach Asia with them or our lifestyle programs as *A Brick in the Belly* or *Unusual Houses*. Next step is undoubtedly fiction series', he adds.

At NATPE Budapest, the company highlights the second season of the successful wildlife series *Extraordinary Africa*. Last year, the first season was sold to National Geographic Europe and TVE in Spain. 'We will present the episode *Odzala*, of *Extraordinary Africa II*, an amazing trip to Odzala Park, located in Congo Brazzaville'.

Other top products are *Jazz Legends*, which include 26 exclusive newly restored in 2K jazz concerts of John Coltrane, Louis Armstrong or Dizzy Gillespie to name but a few, newly restored rock concerts of Genesis in 1973, Black Sabbath in 1971 or U2 in 1981 and a crime series, and, last but not least, the zombie multi-awarded fictional web-series *Burkland*.



Extraordinary Africa, wildlife series

'All our clients approved our series, we have the top concerts, 2K quality for jazz and rock legends and two webseries with 12 international awards... we are in a unique moment and we expect to reach all TV windows with our new offer', completes Lami Dozo.

## Smilehood: expertise & 360° content

**Smilehood Media** (Argentina) attends NATPE Budapest headed by its director **Silvana D'Angelo**, well known in the region, due to her former experience in **Telefe** and **Dorimedia**. The company has become in recent years not only in the distribution of contents from Europe and Asia within Latin America, but also in a nexus between those regions, with a big capacity to adapt shows for the Latin market in order to improve the distribution.



Silvana D'Angelo, director

A good example of this, is the agreement that Smilehood has with **RTR** (Russia) to distribute its historical production in Latin America. The agreement started with the miniseries *Ekaterina* and has been expanded with new titles for 2016, such as the telenovela *La Cosaca* (140 episodes).

From its distribution side the company keeps pushing the three seasons of the *iDoTainment* and transmedia series *Creators*. Produced by **Aula365**, from **Pablo Aristizabal**, with services from **Pol-Ka** (Argentina), the series had a great performance on **Telefe** (Argentina), was sold to **Netflix** in Latin America, and includes strong digital presences through its virtual reality app.

Other new titles are the international version of *Panam & Circus* (3 seasons of 26x'30), a musical entertainment show written by **Laura Franco** and **Carlos Tarrío**, and with 15 consecutive years in the Argentinean TV. It's a show aimed to 0-8 kids, with a strong 360° development that searches to accompany childhood in a fun and educational way.

While *Alquimia para Ana* (**SDO Entertainment**) is a series developed for web and starred by **Eugenia Tobal** that follows a single woman with no children, working in a bar, who gets in charge of her best friend's children, after an accident that leaves them orphans. The series is produced by Tobal along with her partner **Loli Miraglia**.



Panam & Circus, kids show

## Total Syndication.com, a new marketplace experience



**Total Syndication.com** (Lebanon), an innovative endeavor that searches to integrate all marketable digital media content coming from a wide range of sources under a single interactive platform, launches this month a new platform where users will have access to a unique business experience, with several models and options:

*Showcase & Sell, Browse & Buy, and Exchange Creative Content for Best Price.*

Contents will be divided in four categories: *Videos, Articles, Photo*

*Stories and Research;* where writers, journalists, TV channels, as well as producers and production houses can acquire content and promote their production using easy yet advanced set of tools. Also, users will be able to syndicate, screen, evaluate, select, organize and acquire while sitting at your comfortable desk, enriching your grid and satisfying your audience with a valuable and versatile collection.

'**TotalSyndication.com** is not only a marketing platform and a direct sales agent, but also a cultural exchange hub, a syndication center, and a media & press forum advanced B2B distributor agent', explains **Isam Ayyad**, CEO.

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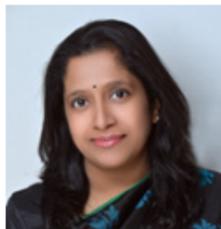
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VIEWING BOX 41

## ZEE: scripted dramas and factual



Sunita Uchil, global head syndication

**Zee Entertainment Enterprises Ltd.** (ZEEL) is one of the largest producer and aggregator of Hindi programming with a library of over 210,000 hours of TV content and rights to +3,500 movie titles from top Indian studios featuring iconic film stars.

The two brands **ZEEL** is managing worldwide are **Zee Bollyworld** that hosts a large compilation of premium Indian entertainment content, and **Z Living** (US), a lifestyle network focusing on living well with over 1,500 hours of original content in English about fitness, cooking, lifestyle and travel.

At NATPE Budapest, the company highlights the period drama *Ek tha Raja Ek thi Rani* (220x'30), a royal tale of how a simple girl, conquers the heart of the mighty Rana Indravadhan Singh Deo. In animation, it stands *Happy Aur Lucky* (52x'30), a comedy series involving two spirited countryside neighbors for whom life is all about fun-n-games and pulling each other's legs.

From the slate of movies, **ZEEL** recommends *Sairat* an epic love story of a young couple from a village in Maharashtra, against the backdrop of a still prevalent caste system, while heading the slate of food & travel is *Good Food America* (39x'30), a series that goes on a coast-to-coast culinary adventure and explores the tastiest and healthiest foods in America.



Happy Aur Lucky, new animated series

Lastly are the fitness series *Bolly-Blast* (52x'30), a Bollywood based exercise series that uses Indian principles, along with latest dance party moves, and the reality and factual *I Beat the Odds* (13x'30), which tells real-life stories of medical crisis and diseases cured by natural and holistic treatments.

## Somos, a bridge between Latin America and the world



Somos in Cannes: Francisco and Mariana Villanueva, Iván Morales and José Espinal

During the last years, **Somos Distribution** (USA), the company led by **Luis Villanueva**, CEO, has become a bridge between Latin America and Europe, thanks to the focus on the search of contents from new territories with global appeal.

'We seek and select the best content of every genre, wherever created, to place it through Latin American and the US Hispanic market. That makes us the most effective distribution bridge between the United States, Europe, Asia and the thriving markets of Latin America, including the USH market', explains **Villanueva**.

Continues: 'We are proud of our track record placing hits such as the Catalan series *Merlin* and *Infidels*, the Greek drama *Stolen Dreams*, and,

## Cisneros expands to new territories



Marcello Coltro, EVP content distribution, CMD



Cristobal Ponte, exclusive independent representative for Europe & MENA, CMD

**Cisneros Media Distribution** (CMD) promotes at NATPE Budapest its brand new slate of dramas and formats, as well as realities and original productions that will surprise the CEE buyers.

**Cristobal Ponte**, exclusive independent representative for Europe & MENA, recommends *Just Looking* (120x'60), an innovative format that has the flexibility of being a telenovela or a drama series; the series *The Sex Sense* (13x'60), where four very distinct couples on the brink of breakup, struggle to survive, followed by *End of Days* (4x'30); *Deadly Sins* (14x'60), and the telenovela *Separated by Love* (120x'60).

CMD has just announced an agreement that will see **Peace Point Rights** as the exclusive distributor for the company's unscripted titles in Canada, UK, France, Monaco, Andorra, French-speaking Belgium, Germany, Austria, Switzerland, Lichtenstein, Baltics, Balkans, CIS, Australia and New Zealand. Initial titles include the news special *End of Days*, children's educational series *Super Genius*, celebrity entertainment series *Talk the Walk*, Olympic documentary series *Flame of Passion*, and the reality series' *SHAK* and *XRC*.

**Marcello Coltro**, EVP content distribution, CMD: 'We are now expanding into markets and countries where our previous library was not relevant to local media outlets. Today, thanks to our new creative content business unit **Mobius.Lab Productions**, we are able to enlist and cater to a wide range of new clients in a variety of languages, and **Peace Point's** expertise and relationships are key in securing the successful placement of this catalog in these markets'.

what has become a big success in the region, Turkish productions'.

Among the top Turkish dramas are *Mercy* (88x'45), about a true hero who has overcome the blows dealt by her mean family and the big city; *The Poor Boy and the Rich Girl* (226x'45), centered on an extremely wealthy person that goes wild when his youngest daughter introduces him a very ordinary and silly looking man 'potential husband'; *Ezel*, about a man betrayed by his loved ones that comes back for revenge and *Gummus*, among others.

'Moreover, we have been well served placing U.S. produced content like *11-11 En mi cuadra nada cuadra* and *MMA* productions. The success of bringing new content to Latin markets has helped us gain recognition as a leading distributor who is in the cutting edge of the market both with European and Asian producers and our broadcasting clients; and our portfolio continues to grow adding new products from regions like Poland, Portugal and India. We look forward to bridging the gap and bringing together our producers and broadcasters', completes Villanueva.

VIEWING BOX 44



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## Comarex, a new era begins



Marcel Vinay Jr., CEO

**Comarex** (México) has begun in early 2016, a new phase as independent distributor. **Marcel Vinay, Jr.**, CEO: "We have very good seals, assortment of products and a strong commercial structure, with global reach. Now that we are not focused on a single product, several business opportunities and development projects enhance".

As part of the commercial structure of the company, **Carmen Pizano** is in charge of Latin America and Spain, **Martha Contreras** in charge of Asia; **Adela Velazco**, Eastern Europe and Africa, and **Alejandro Vinay** Central America.

In concordance with the new possibilities that appeared, the company has extended its agreement with **Mediaset** (Italy), not only distributing their content in Latin America, but adding Africa and Asia as key regions. Some of the titles include *Tuscan Passion* (80x'45), a story about conspiracies, secrets, unspeakable sins and brothers competing for the love of a woman, the crime and mafia series *Into The Woods* (8x'45) and *A Matter Of Respect* (48x'50), and the romantic series *Elisa* (68x'50).

From **Canal 13** (Chile), **Comarex** has the exclusive rights of its scripted catalogue with successes such as the comedy *Veinteñero a los 40* (70x'45), a series that follows a man who awakes after being in a coma for 27 years, *Valió la Pena* (95x'45) and *Chipe Libre* (107x'45), but series from **Canal Once** (Mexico), **Studio 100** (Germany), **Croton** (China) and some teen titles from **Nickelodeon**, such as *Yo soy Frankie* (except Latin America) and *Grachi* (worldwide).



*Veinteñero a los 40*, comedy series from Canal 13 (Chile)

Lastly, from **Comarex** independent offer, the cooking competition *KTF: From Kitchen to Fame* ('30); *The Prey*, about a number of killings in a coastal city, and the thriller series *Dirty Art*, both available as format.

## Sociograph Neuromarketing: a new way to understand the audience

**Sociograph Neuromarketing** is the first company with its own and exclusive neuroscientific system to determine the effectiveness of communication. All of this, aimed at increasing profitability and satisfaction of our clients.

As a company since 2013 together with the support of Scientifics and top entrepreneurs, it offers a customized service from its current offices headquartered in Valladolid, Palencia, and Mexico D.F. This latter, as the first office operating in Latin America.

It began with the fieldwork developed by **Jose Luis Martínez Herrador**, Professor of Developmental Psychology at the University of Salamanca, who patented a technology called *Sociograph* that allow to measure the attentional and the emotional processes of groups. These credentials cap-

## Mediaset: factual with twist

**Mediaset Distribution**, international arm of the main private broadcaster of Italy, launches three new titles at NATPE Budapest, including two brand unscripted formats.

**Manuela Caputi**, head of **Mediaset Distribution**: "At this market we have the factual series *Rocco to a rescue*, a kind of tutorial where famous Italian ex porn star **Rocco Siffredi** helps couples in crisis. Actually, as he lives in Budapest, he is attending the market on June 28".

**Canale 5** factual entertainment series *The Siffredi Family* (8x'50) is another a scripted reality series focused on his daily life with his family at home in Budapest and his new business activity, the Boot camp, a real school where 16 aspiring men and women will learn all the tricks of the porn industry. Lastly, the late night uncensored series *Siffredi Late Night Academy*.

The distributor launches a totally different genre series, *Mr Brown, English Course*, a hidden camera show with sketches and funny segments led by an ironic character **Mr Brown**, ready to teach English. And *Donna Avventura* is a factual series where a group of 6 girls travel around the world finding new culture and traditions.

*Now I am the boss* gives the possibility to transform your idea in a real concrete business. In terms of scripted, the company presents the new drama *A Sicilian Story*, broadcasted by **Canale 5** and set in Sicily where a courageous Colonel fights against Cosa Nostra a mafia organization.

"We also have *Task Force 45* (8x100"), launched last MIPTV and set in Afghanistan where the Head of a Special Italian Unit who finds love while taking a delicate operation", completes **Caputi**.



Manuela Caputi, head of distribution



*The Siffredi Family*



Sociograph Neuromarketing was officially launched at MIPTV; Elena Martín Guerra, co-founder & COO, and Daniel Ramos Morales, international manager

ured the attention of software manufacturer **ICON Multimedia** that obtained the patent, and then developed together. **Elena Martín Guerra**, an expert in communication and neuromarketing, was in charge of the management of the company.

Launched officially at last MIPTV, **Sociograph Neuromarketing** evolves its business to the analysis of communication with an exclusive system. The firm has shown exponential growth backed up by large portfolios of clients, who trust on its know how and the wide ratio of successes obtained in all the cases.

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Docu-reality PrimeTime 8x50' + LateNight 20x22'

### ROCCO TO THE RESCUE

Reality 12x50'

### MR BROWN ENGLISH COURSE

Sketch-com / Candid Camera 2 Seasons - 40x12'

### DONNAVENTURA

Docu-Reality 16 Season - 149x45'



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Hynek Chudarek, director of sales, Czech TV; Sylvia Edelmann, acquisition manager, Arri Media (Germany); Erika Tothová, head of acquisitions, JOJ Slovakia; Lubos Kriz, head of Telexport/Czech TV; Elza Strapková, acquisition manager, TV Markiza (Slovakia); and Peter Adamik and Eva Dzurovcinova, both acquisition executives from JOJ Slovakia



Vaclav Kvasnicka, program acquisitions; Alena Blahosova, feature films and series acquisitions, and Daniel Macho, chief editor, non-fiction acquisitions, all from Česká Televize (Czech Republic)



Prima, Czech Republic, at NBCUniversal: Eliska Martynkova, programming, Roman Mrázek, programme director, and Zdenka Chrzova, acquisitions



Barrandov Group, Czech Republic: Jaromir Soukup, CEO, chairman of the board with his wife; Josef Hehejik, director of finance, operation and internal audits; Frantisek Borovsky, director of programming; Marcela Hrda, general director, vice chairman of board; and Lukas Soukup, director of acquisition



Ester Honysova and Branislav Volak, from production & distribution company Bohemia Motion Pictures (Czech Republic) with Elza Strapkova, manager of acquisitions, and Peter Chalupa, head of acquisitions, Markiza (Slovakia)



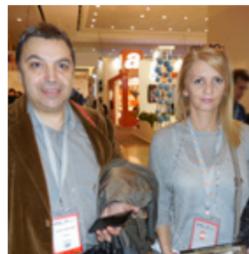
CME buyers from CEE: Pavel Vrabec, Pop TV (Slovenia); Matthias Settele, Markiza (Slovakia); Stella Litou, ProTV (Romania); Silvia Porubská, Markiza (Slovakia); Alex Ruzec, TV Nova (Czech Republic); Branko Cakarmi, Pop TV (Slovenia); and Petra Bhusilavová, TV Nova (Czech Republic)



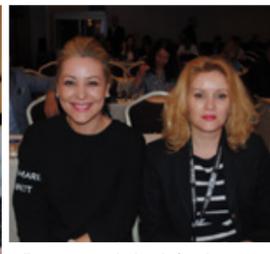
Marta Nowakowska, TV/VOD License, Kino Swiat (Poland) with Karolina Paknerova, content specialist, and TV Nova, and Lukas Krpata, scheduling manager, Fanda/TV Nova, both from Czech Republic



Rod Perth, former Chairman & CEO, NATPE, surrounded by John Rossiter, general manager, and Lyle Stewart, SVP, AXN Central Europe during last NATPE Europe in Czech Republic



Alfa TV, Macedonia: Ljubomir Nikolovski, program director, and Simonida Kazic, CEO



Albania: Jerina Lalaj, head of marketing, Vizion Plus, and Enkela Qinami, TV programming director, Tring, the OTT platform from the same group



Dragana Banjac, programming manager, Alternativa Televizija, and Dzenan Priganica, program manager, Plus, both from Bosnia Herzegovina, with Tatjana Pavlovic, acquisitions & sales, Antenna Group (Greece)



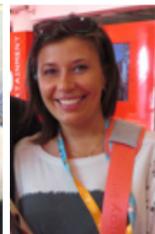
Greece: Stamos Protosaltis, production executive at Hellas TV, with Natassa Veroni, program & acquisitions, and Grec Cokinakis, cinema channels and VOD section manager, both from OTE



Star TV Greece: Elena Paschlidou and Gina Dimitriadis



Ivan Agutenkov, CEO, international distribution, and Mikhail Kovalchuk, managing director, Signal Media (Russia)



Alexandra But, head of international, Russian World Studios (Russia)



Leonard Yanovsky, president & CEO, Intra Communication (Russia), and Viktor Mirsky, general producer, Film UA (Ukraine) (Russia)



Roman Sahaidak, deputy marketing director, Megogo (Ukraine)



Telewizja Polska: Ewa Dqbrowska, head of programme acquisitions; Lukasz Kluskiewicz, head of film department TVP2; Magdalena Chajewska, head of film department TVP1; and Barbara Siwa, sales manager, KDR Film Studio



Markus Tellenbach, CEO, TVN Group (Poland)



Christian Anting, TVN board member, managing director, digital & e-commerce



Marek Barta, acquisitions, HBO Europe; Krisztina Darok, program manager, HBO Netherlands; Lidija Milojkovic, acquisitions, HBO Europe



AS Kanal 2, Estonia: Marqus Paas, Research Manager; Kai Gahler, acquisitions executive and Olle Mime, programming director



The Beta Brunch (Germany) had top attendance of buyers: Jaanus Noomets and Kai Gahler, acquisition executives from Kanal 2 (Estonia), with Junita Budvytienė, head of acquisitions, and Rolandas Maskoliunas, acquisition manager, both from LRT Lithuania



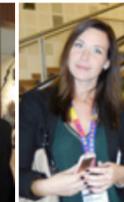
LNK TV, Lithuania: Daiva Andra-de Gonzalez, head of content, and Jolanta Jasiene, acquisition manager



Liutauras Elkimavicius, development director LNK Group, Lithuania



RTL Hungary: Tibor Forizs, director of content acquisitions



RTL Hungary: Nikolett Blau, acquisitions manager



Blanka Póth, format & co-production manager, and Eva Kozma, business administration executive, RTL Klub (Hungary); Michelle Payne, VP regional sales, CBS; and Balazs Szabo, senior acquisition executive, Sony Pictures Networks Central Europe



János Wisinger, director of production Iko Production; Joboru Katalin, head of acquisitions; Fisher Gabor, programming director of Cable Portfolio; and Okros Gergely, program and creative director, all from TV2 Group



UPC Hungary (Liberty Media), at NBCUniversal: Luca Kalocsai, VOD expert, Mania Toth and Josef Benes, acquisitions



Mihai Mos, head of TV and VOD, A Company (Hungary)



National TV Romania: Diana Stanciu, acquisitions analyst, Anamaria Popa, acquisitions manager, Adrian Mohut, sales manager, and Larisa Mohut, acquisitions coordinator



Ranka Horvat, editor-buyer, HRT (Croatia); Nick Pawsey, head of acquisitions, Antenna Group (Greece); Louise Padfield-Wilkins, and Emma Jeffery, formats, BBC Worldwide (UK)



Nova TV, Croatia: Nina Mikola, head of acquisitions, Zrinka Jancob, director of programming, and George Makris, program director



Filip Zunec, head of acquisitions, RTL Croatia



National State TV and Radio Company, Belarus: Kiryl Kazakou, general producer, and Helen Radevich, director of acquisitions and licensing programs department



Turkey: Dogan Ercan and Idil Belly, from the distribution company Sera Films (Turkey); Ozlem Ozsumbul, head of acquisitions, Kanal D; Manuela Caputi, sales at Mediaset Italia; and Burcin Ozpinar, acquisitions, Kanal D. Because of the recent success of Matter of Respect the Turkish broadcaster is producing a second season for 2015



Turk Telecom, the second largest telecommunication company in Turkey: Elif Tatoglu, content acquisition group manager, and Mehmet Demirhan, TV Cinema and Thematic Content Director



Turkey: Senay Filiztekin Turan, head of drama acquisitions, Global Agency, and Tunay Ergin, foreign formats & movie acquisitions manager, FOX TV



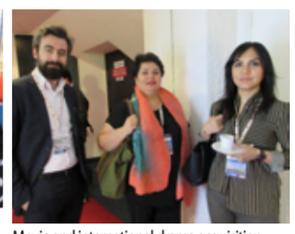
Baris Turanli, programme manager, Kanal Turk; Can Arca, CEO, Arca Media; Gaye Arman Bickacioglu, acquisitions manager, Kanal Turk; and Kaan Tolga Degirmenci, business development coordinator, and Burcu Herguvenç, director, Ay Yapim



Kanal 7, Turkey: Hilal Yurt, acquisitions specialist, and Yesim Sezdirmez, head of program planning acquisitions



Turkey: Pelin Dogru, acquisitions director, of the leading broadcaster Star TV (second from the left) with Humeyra Dasdan, creative director, Ebru Erkal Kip, general programming coordinator, and Irem Akdere, acquisitions and development director, at the production company Arti Film



Movie and international drama acquisition deputy managers of ATV Turkey: Saffet Arslan, Pinar Canbaz, and Mehmet Karyilmaz



Andjela Petrovic, acquisitions, and Ljupka Trifunovic, acquisitions at Dexin Film (Serbia) with Melissa Pillow, sales director for Europe, Telemundo Internacional



Georgian Public Broadcaster, Georgia: Giorgi Gachechiladze, general producer, and Kakhaber Sonishvili, deputy general director in finance

BY NICOLÁS SMIRNOFF AND RODRIGO CANTISANO



## LA Screenings 2016: disruptive ventures are needed

LA Screenings, the event where Hollywood 'major' Studios introduce their new feature films and TV series to 1500 worldwide programmers, has finished today in Los Angeles with a mixed outcome. On one hand, content business is healthy and has many good things to do from now. On the other hand, it was not a great year about product, and buyers urge studios to add innovative proposals that let them drive the new times.

It was not a good year because some studios introduced quite few new TV series, but especially, buyers said that a couple of screenings have looked like 5-10 years ago, as if 'Netflix didn't exist yet'. Just one-hour dramas, or half-hour comedies... 'Though we've been asking for more traditional free TV series (procedural, episodic, etc.) everybody needs the next step at the same time', a European broadcaster said.

As it was seen last April at MIPTV, global content market roars about disruptive trends: digital era, co-productions, big independent dramas, short contents, virtual reality series, contents for online gaming platforms as eSports. So, U.S. studios could add to their usual series, multiple screen contents, 10x10' big budget series as the ones Vivendi's Studio+ announced in Cannes, 3D or VR fictions including a partnership with Samsung to provide goggles.



India and Malaysia: Akhil Mehra, director Star India; Chen Kheng On, content, and Marie Lee, associate, both from TM Malasia; the actor Michael Weatherly (Bull, CBS); Dharmesh Gandhi, content English Channels, Yogesh Manwani and Keishnan Kutty, acquisition managers, all from Star India



France: Astrid Barbot, general manager at Disney France, with Christina Bovillet and Berengere Terouanne, both acquisitions managers at broadcaster M6

To make a difference, studios continue taking famous brands of feature films or former TV hits, to make new TV series. The idea is good because it calls the attention within the ocean of options. Every studio has at least one or two pieces of these: "24" and "Prison Break" in Fox, "Taken" in NBCUniversal, "Lethal Weapon", "Training Day" and "Time after time" in Warner, etc. But not always they were well commented by buyers: CBS's 'MacGyver', the home-made genius of the eighties, is difficult to carry to current digital times.

The most evolved proposals showed this year have been two niches: first, 'event' series, which are based in strong brands, are shorter than standard series and are thought for just one season, as "24 Legacy" and "Prison Break" from Fox. And second, regional productions, where studios adapt their series to local versions in different territories, or produce original fictions based on local famous people, etc.

The 'event' series are cute because they are a new genre, and something different from the past. They join the family around the TV set. Regional productions attend most of the requirements from buyers: they are American and local product at the same time, and most of them apply for free TV and the different windows. Sony, Disney and Fox are very devoted to regional productions, in Russia, Spain, Turkey, Latin America, Asia, etc.

Michael Schmidt, EVP content development of Red Arrow (Germany): 'For the big European players, to produce fiction in the U.S. market is a great opportunity of growth. We have output deals with the studios, but many product can't be used. So... why don't we produce together? We need American product, but we can have it as we want. We are analyzing co-productions with different regions'.



Mediaset Italia: Zeldia Stewart, head of acquisitions; Imma Petrosino, acquisitions manager; Lucia del Prete, deputy of acquisitions; and Andrea Piazza, acquisitions



Gerhard Zeiler, president, Turner International, with Armando Nuñez, Jr., president, global distribution at CBS, Markus Frerker, COO, and Ruediger Böess, EVP programming acquisitions, both from broadcaster ProSiebenSat.1 (Germany)



South Korea and Japan: Takuya Wakizaka, senior manager programming, DLife (Japan); Abil Shin, programming manager, and Christine Baek, senior manager, both from Sky TV (Korea), Kyoko Kiriyama, manager, acquisitions & programming, Disney Japan, and Toshiharu Tanio, multiplatform programming at Nippon TV (Japan)

Digital platforms continue gaining relevance. They already take from 20 to 30 percent of total buy of content. The new big thing for them is original content, and last years U.S. studios have been producing especially for them. Lionsgate got many successful products, for instance. Netflix, Hulu and YouTube lead the trend.

But broadcasters strike back. They are launching their own VOD services, they produce content for these systems as the first window and, in some regions, they don't license their contents to Netflix any more. From now, a new maze of alliances will emerge, defining production, distribution and exposure of contents.



South Africa: Marlon Davids, general manager, and Mark Rosen, COO, both the group of channels ETV, with Jocelyne Muhutu-Rémy, from Disney Africa

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