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- Strong international players promoting business in Mexico
- Mexican content leadership in the world: telenovelas and beyond
- Market data and trends
- Business advantages and opportunities
- Television, theatrical, licensing, new media

# México

COUNTRY OF HONOUR 2014

30 years  
**mipcom**

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in Content Production for the Spanish-Speaking Market

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- Mexico produces creative content that impacts over 50 million Hispanics in the United States of America.
- Latin America is the area with the highest consumer growth and Mexico is one of its leading markets.
- Mexican television content is watched by more than one billion people in more than one hundred countries.
- Mexico represents an ideal production platform because it functions as a cultural and language interface and offers unique growth opportunities.



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- The creative and media industries sector in Mexico represents 3% of the GDP. It is the country's 5th strategic sector, just behind the aerospace, agriculture, food, and automotive sectors.

# MEXICO FOR THE WORLD

We are very proud of introducing this 'Mexico Country of Honour – Mipcom 2014' special issue, we have prepared after an official agreement with ProMexico, the Government entity in charge of the move this October in Cannes.

As we were also in charge of the 'Argentina Country of Honour' issue last year, after an agreement with INCAA, the designation confirms the leading position of Prensario both inside Latin America and, especially, as the main hub between Latin America and the world, from and towards.

Justly, we have two main aims at this edition: to show Mexican media industry boundaries to the world, with our usual target in buyers. And to describe the Mexican industry itself, who is who for business inside the country.

On one side, Mexico is well known as one

of the main content exporters of the world, with the famous 'telenovelas' on the head plus also TV series, kids programming, etc. Now, it is very strong in entertainment formats, the main private media groups have invested important amounts of money to develop the segment during the last years.

On the other side, Mexico is a land of big developments of formats, production and co-production projects. It is the second largest market in Latin America, but the first one in content acquisitions. It is always a great target for main big companies and public associations from the world.

So, this edition is a smart guide of the Mexican media industry. Through these pages, there are interviews to the head public media entities of the Mexican market, there is a map of the main TV channels, both private and public, and production companies, with interviews and outlines of their current pictures. There are exclusive reports and market researches, to understand better the Mexican market and its opportunities.

Welcome to Mexico, the 'Country of Honour' of Mipcom 2014.

*Nicolás Smirnov*  
Director Prensario International

## MIPCOM 2014: MAIN SCHEDULED EVENTS

Event	Day/Date	Place
MIPJunior opening cocktail party	Sat. 11, 7.30pm	Casino Palm
MIPJunior Snack & Screen	Sun 12, 12pm	Casino Palm
MIPCOM Pre-Opening Dinner In Honour of Mexico	Sun 12, 7.30pm	Carlton Hotel
MIPCOM Welcom Press Breakfast	Mon. 13, 8.30am	Blue lounge press & News hub Gare maritime
Fresh TV From Mexico (The Wit)	Mon. 13, 9.30am	Auditorium A
Mexico Media and Entertainment Landscape	Mon. 13, 10.10am	Auditorium A
View from the Top	Mon. 13, 10.50am	Auditorium A
MIPCOM Opening Cocktail Party	Mon. 13, 7pm	Hotel Martinez
Mexico Megasection: The Global Quest for Original Content	Tue. 14, 9am	Auditorium A
The Public Broadcasters Superpanel	Tue. 14, 9.50am	Auditorium A
Mexico Matchmaking	Tue. 14, 10.45am	Foyer Balcon, Gran Auditorium
LatAm Global Dealmaker Launch	Tue. 14, 12.30pm	Carlton Hotel

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Palais des Festivals  
Cannes, France  
Suite/Booth R9.A2

LEADING-EDGE  
THE LATIN MAJOR | Televisa

By FRANCISCO N. GONZÁLEZ DÍAZ,  
CEO OF PROMéxico

## IF IT IS CREATIVE, IT IS MEXICAN

In this new era of communications where content rules and is the king, Mexico is one of the most important global players and its success story is spreading quickly. Our blooming creative industries can be better described with results: they contribute up to 7% of our Gross Domestic Product. They are one of the most rapidly growing sectors in our economy, not just in terms of income generation, but also for job creation and export earnings. Mexico is the 18<sup>th</sup> largest exporter of creative goods in the world and the leading actor in Latin America. In fact, our audiovisual content is being watched by over one billion people around the world per year, in more than 100 nations.

Our country's main competitive advantages are led by the triple "I": Internal market, Infrastructure and Innovation.

Our attractive market is fostering our creative ecosystem. In 2013, Mexico ranked in the 13<sup>th</sup> place of the *Global Entertainment*

*ment and Media Outlook*, with a market value of 25 billion dollars. Mexican creative industries are expected to grow 9% and achieve 27 billion dollars for 2014. Mexico is also ranked among the 14 main video game markets worldwide, with an overall value of one billion dollars, which represents 1/3 of the total share in Latin America. In the film sector, Mexico also leads the way. It has the 10<sup>th</sup> largest box office revenue in the world and the highest in Latin America, with 900 million dollars in 2013 and over 230 million tickets sold, which equals to two tickets per every Mexican.

In addition, Mexico is a platform for reaching North America, which is the industry's largest market in the world; and a gateway to Latin America, one of the fastest growing consumer regions.

Our high-quality infrastructure, natural wonders and proximity to key international spots have turned us in the industry's destination of choice. We are recognized as the major location in Latin America for content production and creative producers, with the facilities and suppliers needed to realize any idea. Mexico has the largest water set in the world and offers more than 1,500 companies that provide the wide range of services requested by the industry.

Moreover, we have the major commercial broadcast television networks in Latin America and we also are the venue of independent networks that are creating new contents and cutting-edge approaches.

The combination of



our creativity and innovation are the key drivers of these industries, and has become the true source of our global leadership in this sector. The talent that emerges from Mexican game developers, filmmakers, TV producers, scriptwriters, publishers, musicians and designers, amongst others, are boosting our industry's success. Mexico is also renowned as a meeting point for creative professionals.

We are the second country with the highest share of labor force in the copyright industries, according to WIPO. Close to 125,000 students graduate each year from careers such as animation, digital design, filmmaking, communication in virtual media, image and sound design, just to name a few. We have the most important talent pool for this industry in Latin America that drives innovation to higher horizons.

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

Thus, in this new content era, Mexico is playing a leadership role in the sector. Being named country of honor this year for MIPCOM —the world's greatest international TV and film market— acknowledges our competitiveness, quality, talent and creativity. In the next few days, we will be showcasing Mexico's success story, led by our competitive advantages that have positioned our country as one of the most attractive destinations for the industry and the main creative hub for Latin America.



Francisco N. González Díaz, CEO of ProMéxico



# The Appeal Of Powerful Content

TELENOVELAS+SERIES+FORMATS

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## IMCINE: MEXICAN FILM AND AUDIOVISUAL INDUSTRY, A GREAT ENVIRONMENT TO WORK WITH

**Mexican Film Institute (IMCINE)** is a public agency that promotes the development of national film activity through stimulating creators, supporting production, fomenting the industry, promoting the distribution, transmission and dissemination of national cinema. It encourages the formation of audiences and development of audiovisual and film culture through festivals, showcases, expositions, cycles and various forums on Mexican film in the country and abroad.

State support for the Mexican film industry has become consolidated in the **Foprocine** and **Fidicine** funds, and the **Eficine** fiscal stimulus. These instruments have made it possible to maintain an annual average production of more than 100 national films over the past four years, in contrast to the nine features made in 1997, or the 14 produced in 2002. Thus, the State has participated in 75% of the national productions. On average, Imcine supports the production of 95 feature films a year through **Foprocine**, **Fidicine** and **Eficine**.

IMCINE grants stimuli for the creation and

production of short and feature films. In addition, through the *Stimulus for Creators Program*, it supports about 50 proposals a year, between screenplays and project development for features. To help filmmakers, a yearly call for entries is issued which, on average, benefits 20 projects. State calls for entries for the postproduction of short films are supported. In 2013, 360 shorts were produced in Mexico, many were made independently and by educational institutions.

For 2014, the sum of €2.8 million has been allocated, through **Eficine Distribution** to support Mexican film distribution. This economic stimulus promotes the creation of national distribution companies interested in distributing Mexican cinema, as well as independent distribution by the producers themselves. In 2013, 5,547 movie screens were counted in 604 complexes.

There are 8 exhibition chains (with more than one complex) and 69 independent movie theaters. Two companies (**Cinopolis** and **Cinemex**) account for 90% of the attendance in the country. While 10 digital screens were counted in 2007, less than 1% of the total, by 2013, these represented 68% of the screens in the country. In 2013, the average cost of admission was €2.6; for digital screening rooms, the average ticket prices were: for 3D, €4; for IMAX, €4.2, and for IMAX/3D, €5. In the first statistical review, about 300 film clubs were found throughout the country.

The number of festivals, showcases and film events in the country has increased significantly; the 10 festivals with several editions in 2000, grew to 77 by 2013. Almost all the states in the Mexican Republic have film festivals, with a broad range of thematic diversity.

### MIPCOM

Recently, IMCINE began a project aimed at increasing the participation of Mexican cinema on the international market through strategic support for the film community. The goal is to favor co-productions and open markets for distribution, in

order to enhance the image of our film industry worldwide.

The Institute has especially worked on the promotion films through participation in worldwide forums, festivals and film cycles held in other countries. Likewise, it participates in international film and TV markets, either with its presence or by means of video collections, to promote Mexican cinema, open marketing spaces and make known the new productions supported by the Institute. In addition, at these events, IMCINE is able to exhibit archival material, broaden and maintain the list of clients who frequently acquire national works, and discover new options for international distribution.

Mexico is a country whose film and audiovisual industry is consolidated. The production of high quality content with a broad diversity of subjects, genres and formats, gives it great commercial and cultural potential within the country and around the world.

Mexico is also a nation offering significant benefits and incentives for film and audiovisual production, both in terms of natural and architectural attributes, as well as production infrastructure and talent.

Mexico is an outstanding international partner for film production; it has world-class schools providing the industry with highly trained technical and artistic professionals; it holds the 5<sup>th</sup> place in the world in movie admissions; it is among the Ibero-American countries with the most funds and fiscal stimuli to promote production (€42.1 million a year); it has co-production agreements with the countries and regions with the most developed film industries (20 countries in the world).

It is one of the countries with the biggest film production in Ibero-America. According to **Rentrak**, in recent years, its films have been shown commercially in 42 countries on the five continents; in 2013, Mexican movies released abroad brought in revenue of €50 million; it is the Latin American country with the most films released abroad; Mexican motion pictures go to festivals and film events in over 52 countries each year; it has the greatest infrastructure of digital movie theaters in Ibero-America; and Mexican cinema has a potential market of 450 million Spanish speakers.



Jorge Sanchez, general director, IMCINE



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México  
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## COMEFILM: THE ADVANTAGES OF PRODUCING IN MEXICO

The MEXICAN INSTITUTE OF CINEMATOGRAPHY (IMCINE), through the MEXICAN FILM COMMISSION (COMEFILM) promotes the industrial and professional infrastructure of the country, the natural, architectural and historical sites for making audiovisuals. It has also initiated actions to promote and create new institutional ties with the film commissions in the various states of the Mexican Republic.

COMEFILM provides to audiovisual producers from Mexico and all over the world all that is necessary to film in the country, institutional contacts, specialized guides, incentives, specialized professional attention as well as all the required information in order to *Film In Mexico*.

The **FOPROCINE** is a fund designed for quality film production. It is a trust for the production or postproduction of fiction, documentary or animated features (75 minutes or more) in co-production. The candidates for the support must be Mexican production companies or individuals; the participation of foreign directors is subject to their link to a Mexican production company, as well as at least two years of legal residence in the country and a solid background in Mexican cinema.

**FOPROCINE** grants resources through co-

production contracts by means of venture capital or credit contracts. This fund support can be combined with that of **EFICINE 189**, but not with **FIDEICINE**.

This former one is a film investment and stimulus fund, a trust for the co-production, postproduction, distribution and exhibition of fiction or animated feature films (75 minutes or more), which offers its support through venture capital and credits. In addition, **FIDEICINE** offers other stimuli for commercial run and for outstanding performance at festivals nationally and abroad. If a company receives the support and the film recovered 100% of the support received, the company has a reserve equal to the sum previously granted to carry out your next project. **FIDEICINE's** support can be combined with **EFICINE 189**, but not with **FOPROCINE**.

**EFICINE 189** is a fiscal stimulus for taxpayers granted by Article 189 of the *ISR Law (Ley del Impuesto Sobre la Renta)* or Income Tax Law. **EFICINE** support the production or postproduction and distribution of fiction, documentary or animated feature films. Through **EFICINE**, taxpayers investing film projects in Mexico can obtain a fiscal credit equal to the sum of their investment, against their income tax due for the period for which the credit is granted. Each project cannot receive more than USD 1.5 million.

The State's instruments for supporting the film industry will exercise a total of USD 64 million of the 2014 budget. According to the *Operational Guidelines* of these funds, participation in the projects may not exceed 49% of the production budget by **FIDEICINE**, and up to 80% in the case of **FOPROCINE**. **EFICINE's** participation may be up to USD 1.5 million or a maximum of 80% of the cost of the project.

The **PROAV** is an incentive program for high-impact film and audiovisual industry. Launched in March 2010, it is designed to complement existing policies aimed at boosting and strengthening the film and audiovisual industry in Mexico.

It is a comprehensive, three-pronged support mechanism: a) a *Specialized Service Platform* including all the government agencies at the federal level that are involved with the film and audiovisual industry; b) foreign productions are entitled to apply for a VAT return —paid

VAT in Mexico is of 16%—; it is available for all types of production regardless of budget, while it is important to note that not all Mexican expenses are subject to VAT or VAT only and, usually, VAT return represents approximately 9-12% of the total expenses; c) direct financial reimbursements of up to 7.5% of the budget spent in Mexico: it is available for Mexican and foreign films and audiovisual projects with a minimum spend of USD 3 million in production costs or USD 0.7 million in post-production expenses.

A combination of both production and post-production costs may be applicable in which case the minimum will be of USD 5.3 million. The sum of both the fiscal (VAT return) and financial incentives (cash reimbursement) will be capped at 17.5% of the budget spent in Mexico. Therefore, the difference between the VAT return and the 17.5% cap will come in the form of a cash rebate from an independent fund managed by **ProMexico**, the federal government institution in charge of attracting foreign investment to our country.

In 2010 the first three projects benefited by **PROAV** were announced: *How I spent my summer vacation*; *Cristiada*; and *Houba! Le Marsupilami et L'Orquidée de Chicxulub*.

**ATA CARNET** is a customs document that allows the temporary import and export in or securing payment of customs duties on goods, which are not of perishable nature. These goods must be re-imported to the country of origin in the maximum period set (1 year). Usually goods for exhibition displays and commercial equipment for production and conducting professionals work. No need to travel within the European Union with the exception of the Canary Islands, Ceuta, Melilla and the DOM-TOM French. Issuing Body: Chambers of Commerce.

Lastly, the **VAT 0% Incentive Foreign Production Work**: foreign productions are entitled to claim back the VAT at the end of your shoot, provide they have registered the project with the Ministry of Finance through a Mexican company legally established and familiar with their tax payments. This mechanism is approximately 3 years but it use is relatively recent.



Lorenza Manrique Mansour, Production Cinematographic Support Director, COMEFILM



# MEXICO, A CULTURE ON ITS OWN

With over 112 million of inhabitants, Mexico is the second most populated country and the second largest economy of Latin America, as well as a key destination for international investments for all segments of business. This, due to its important domestic market, competitive costs, working force and high tech production capability.

Mexico also represents access to the US market, being part of the largest free trade zone of the world: the North American Free Trade Agreement (NAFTA) accounts for almost USD 18.7 trillion in annual trade. The United Nations Conference on Trade and Development (UNCTAD) considers Mexico one of the seven most attractive countries of the world concerning investments.

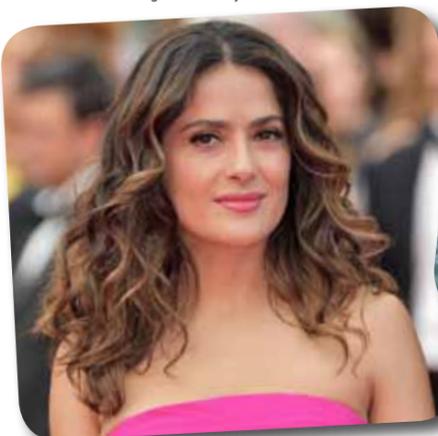
The average age of the population is 26 years and the Economically Active Population is of 50.2 million (INEGI, I-2013), 64% of the total. Mexico is the world's fourth largest exporter of light vehicles, just after Japan, Germany and South Korea. It is also an important logistics and aerospace manufacturing hub in Latin America. Regarding Internet technologies, it is the third-largest service supplier globally, following India and The Philippines (Gartner 2012). About 23% of all software projects in the region are assigned to Mexico.

Samsung, Panasonic and LG have manufacturing presence in the country, which is the first exporter of flat screen TVs in the world. In addition, it is the 5<sup>th</sup> largest global exporter of computers and the 10<sup>th</sup> of mobile phones.

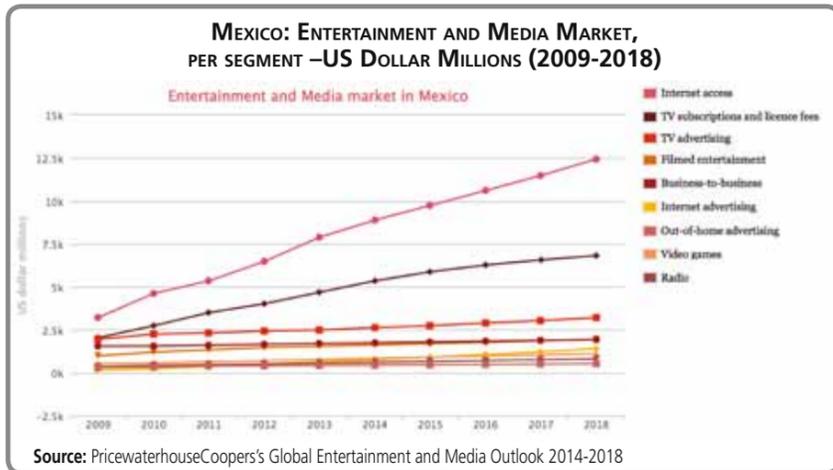
## CREATIVE INDUSTRY

Mexico is a major power regarding TV content production and the main creative content

Mexican and American actress, director and producer Salma Haiek is a big star in Hollywood



Thalia is one of the most well known Mexican telenovela actresses in the world, with lead roles in *Marimar* and *Maria la del Barrio*, produced in early '90



exporter in Latin America (*Creative Economy Report 2010*, UNESCO). It is the only one in the region among the top 20 creative-goods exporting countries in the world.

The nation produces over 100,000 hours of TV every year. These contents are exported to over 100 countries and translated into more than 30 languages. Mexico produces creative content that impacts over 50 million Hispanics in the US. It is the 6<sup>th</sup> major exporter of animation, videogames, software and digital content.

In 2013, over 1 billion people in more than 100 countries watched Mexican audiovisual product. In that year, 1,418 economic units (companies) were registered in Mexico as producing programming for cable or satellite TV systems, films and video, animation, VFX and

digital services (INEGI, Mexico).

The nation has what it takes to attract investments in this area. Its alignment and the establishment of a comprehensive strategy aimed at strengthening its creative industries have led it towards achieving this goal. It has a plethora of awe-inspiring locations: it is the world's 4<sup>th</sup> most bio-diverse country, with a state-of-the-art content production infrastructure; availability of talented and skilled people; it offers competitive costs and provides industry-tailored incentives; it has a geostrategic location and connectivity, and an outstanding film-friendly environment.

At this time, the creative and media industry in Mexico represents 7% of the Gross Domestic Product (GDP). It is the 5<sup>th</sup> largest strategic industry, following aerospace, agriculture, food and automotive industries, with sales of over 20 billion US dollars and an average growing annual ratio of 8.3%, the biggest in North America. The Mexican media and entertainment market is one of the fastest growing sectors in North America: in 2013, box office revenues reached USD 831 million, 7.1% more than in 2011.

The first *Creative Digital City* will be hosted in Guadalajara, Jalisco (such as *Mediapolis* in Singapore or *Lyon Vise Digital Cluster* in France), and will be the largest production center in the world for Spanish content production. Cinema and videogames have generated over 30,000 direct jobs. The United Nations Development Program (UNDP) considers Ciudad de Mexico as one of the main goods- and creative services production pole, fueled by a new generation of innovative university students and professionals.

## GEOGRAPHY, CULTURE AND LANGUAGE

The Spanish-speaking population is one of the fastest growing segments of the entertainment industry. Mexico is an ideal production platform because it acts as a cultural and language interface and offers unique growth opportunities.

PricewaterhouseCoopers's *Global Entertainment and Media Outlook 2014-2018* reports that the global media and entertainment industries have recorded sales surpassing USD 1.7 trillion a year; Latin America is the area with the highest consumer growth and Mexico one of its leading markets.

Due to its market value, Mexico is ranked 13<sup>th</sup> worldwide in the entertainment and advertising industry. It is estimated that the entertainment and advertising industry in Mexico will reach a market value of over USD 27 billion in 2014, a 9.5% increase compared to 2013, when it reached USD 24.7 billion. The US has the highest market value for this industry at USD 598.5 billion, followed by Japan with USD 170.2 billion and China with USD 147.3 billion.

There are 400 million Spanish-speaking people in the world. By 2050, the number is expected to reach 530 million, of whom close to one

third will be located in the US. Spanish is the third most widely spoken language in the world, after English and Mandarin (CSN Intelligence for Global Business).

Mexico has many cultural worldwide-recognized personalities/brands. In painting, **Frida Kahlo** and **Diego Rivera**; as expressions of folk music, the mariachi, bolero and ranchera genres; in rock, bands such as *Mana*, *Cafe Tacuba*, *Julietta Venegas*. In cinema, exponents of the *Cine de Oro Mexicano* (Mexican Golden Cinema) from the '40 y '50, such as pioneers **Anthony Quinn** (awarded two Oscars) and **Mario Moreno Reyes**, better known as *Cantinflas*, the "Mexican Charles Chaplin". And **Roberto Gomez Bolaños**, creator of "El Chavo del Ocho", one of the most important kids properties from **Televisa**.

There are also big hits on Mexican cinema with award-winning and nominated directors, producers and actors, including **Guillermo del Toro** (*Pan's Labyrinth*), **Alejandro González Iñárritu** (*Babel*) and **Alfonso Cuarón**, **Diego Luna** (*And your mother too*), **Gael García Bernal** (*Amores Perros*) and **Salma Haiek**.

## TELEVISION

In 1939, Mexican-born engineer **Guillermo González Camarena** developed color TV. In 1946 he achieved the first color transmission at his lab, opening the way for Mexico turning into a big audiovisual content producer for the world, with telenovelas as one of its most famed specialties.

In 2017 the country will celebrate the 60<sup>th</sup> Anniversary of this genre, well known all over the globe with important actors and actress being recognized at many worldwide markets, becoming TV stars. Singer and actress **Thalia** has been an outstanding case: she has been the lead character at *Marimar* (1994), *Maria la del Barrio* (1995) and *Rosalinda* (1999), which are among the top telenovelas exports in history. She is also a successful and internationally awarded singer.

**Veronica Castro** (*Los Ricos También Lloran*), **Victoria Ruffo** (*El Triunfo del Amor*), **Aracely Arámbula** (*La Patrona*, **Telemundo**), **Sandra Echeverría** (*Marina*, **Telemundo**) and **Maite Perroni** (*La Gata*, **Televisa**) are also renowned actresses, among many more.

Regarding actors, **Rogelio Guerra** (*Azul Tequila*), **Gonzalo Vega** (*Cuna de Lobos*),

**Fernando Colunga** (*La Usurpadora*) y **Eduardo Yañez** (*Corazon Salvaje*). Also, **Gabriel Porras**, **Eugenio Siller** and **Rafael Amaya** who have built an enormous career at **Univision** and **Telemundo**, starring the largest audience TV hits in the US and several other international markets, with titles such as *The Queen of the South*, *Queen of Hearts* and two seasons of *Lords of the Skies*.

Kid product such as *El Chavo del Ocho* are among the most renowned Mexican brand of all times, with great footprints across Latin America, USA and Europe. Produced from 1971 to 1990, it is estimated that at least 30 million people have watched this series in at least 90 countries, having been a huge success in Chile, Peru, Argentina, the US (becoming the most watched Hispanic show), and Brazil, where *Chaves* has been an important show on **Silvio Santos'** broadcaster **SBT**.

**Televisa** and **TV Azteca**, delivering nationwide and local broadcast TV channels, are the two largest private television groups in Mexico; they also hold pay TV networks, among other key assets. **Cadenatres**, operated by **Grupo Imagen Multimedia** (**Grupo Empresarial Angeles**) is the third-largest private TV network. Public TV is equally strong: **Canal Once** (Instituto Politécnico Nacional), **Canal 22** (Consejo Nacional para la Cultura y las Artes), **TV UNAM** (Universidad Nacional Autónoma de México) and the recently established **Sistema Público de Radiodifusión del Estado Mexicano** (formerly OPMA), created by the **Federal Telecommunication and Broadcast Law**, are some of its outlets.



*Cantinflas* and *El Chavo del Ocho* are two of the top Mexican TV shows that have represented the Mexican culture abroad

## GRUPO TELEVISIA: THE DNA OF MEXICAN CONTENT

EMILIO AZCARRAGA JEAN started its career in 1988 as operations director of Channel 12 in Tijuana; two years later was promoted as VP of Programming at GRUPO TELEVISIA, and in 1996 become COO and responsible of all the company operation. In 1997 he took over the presidency of the biggest Mexican media conglomerate, when he was only 29 years old.

Under Emilio Azcarraga Jean leadership, Grupo Televisa has duplicated its operations and has been able to consolidate its businesses not only in Mexico but also in a global scale through strategic alliances in the US, China, Brazil and France. With telenovelas as its main TV format, the company produces over 90,000 hours of original content per year in Spanish, later exported to over 130 countries.

It operates three of the largest TV networks in Mexico: Canal 2, Canal 5 and Gala TV, as well as the local news channel FOROtv (covering Mexico City and the Metropolitan area). Through Televisa Networks it operates 24 pay TV networks in Mexico and abroad (50 feeds) reaching 37 million households on three different continents.

Others assets include football (Club America, Rayos del Necaxa and the Estadio Azteca stadium), music, radio (Televisa Radio), print media (Editorial Televisa) consumer products, cinema, live shows (OCESA), digital media (Televisa Interactive Media) and telecom-

munications Bestel. It has also held 50% of Iusacell, which is being sold back to Grupo Salinas, which controls the remaining 50%.

Grupo Televisa also owns 14.6% of Spanish media group Imagina, and has an international joint venture with Lionsgate on Pantelion Films to distribute movies in the US Hispanic market: the alliance (2011-2016) is planned to roll out 8 to 10 movies a year.

Televisa has also a strategic deal with Univision Communications, the most important media group within the US Hispanic market with two broadcast TV networks: Univision and UniMás, as well as cable networks Galavisión (+ six channels), Univision Studios, Univision Local Media (62 TV & radio stations) and Univision Interactive Media. Currently, it holds a 38% stake at Univision (after converting debt into equity) and will be the main content provider until 2025. The group has increased its share of Univision audiovisual revenues from 9.36% to 11.91% in 2010, and to be raised to 16.22% effective December 2017.

'We went from being highly-dependent on the advertising market in Mexico, to the leading Spanish-language media corporation in the world and an active participant at Mexico's growing telecommunications industry. In the process, we have significantly enhanced our potential as a diversified media and telecommunications corporation.'

These words from Emilio Azcarraga Jean, CEO of Grupo Televisa (\*), show the great moment of the biggest Mexican media conglomerate. 'We built a very strong balance sheet, broadened our presence in key geographies, reached new markets with our content and our production expertise, significantly expanded our telecom infrastructure, grew our pay TV offerings, and became a provider of voice and data services in the markets that we serve. The economic potential of both of Televisa's key markets, Mexico and the Hispanic in the US, is rapidly growing and the outlook is very favorable', he remarks.

In its home country, Televisa has close to 70% of the broadcast TV market, in terms of audience and



11° Brandon Tartikoff Legacy Award at Natpe Miami 2014: Emilio Azcarraga Jean, Grupo Televisa; Lauren Zalaznick, NBCUniversal; Rod Perth, CEO, Natpe; Lilly Tartikoff Karatz; Jon Feltheimer, Lionsgate; and James L. Brooks, creator of The Simpsons



Emilio Azcarraga Jean, president and CEO, Grupo Televisa, receiving the Personality of the Year awards from Reed Midem CEO, Paul Zilk

advertising. It is also a key player in the telecommunication industry by operating the leading DTH provider, SKY (in partnership with DirecTV), as well as cable operators Cablevision, Cablevision Monterrey-TVI, Cablemas and Cablecom, accounting for close to 60% of the Mexican Pay TV market.

### FUTURE

'Even though the Mexican economy grew at a very modest pace in 2013, the resilience of our advertising customer base, the success of our content in Mexico and beyond (through Televisa Internacional), and the healthy consumer appetite for our video, voice, and data services allowed us to deliver solid growth in Consolidated Revenues and Operating Segment Income of 6.5% and 5.1%, respectively', stated Azcarraga Jean.

And he concludes: 'Mexico has undergone significant structural reforms, many of which were long overdue. Their effect will not be immediate, but these changes will have a dramatic impact on the economy, on consumer demand, and on the households that we serve. With the Federal Telecommunication and Broadcasting Law we will face increased competition from the new channels. But the new regulation is also opening great opportunities in the telecommunications sector, an industry where we have invested over USD 5 billion over the last six years.'

(\* The information and data to produce this article was taken from the Annual Report of Grupo Televisa and its official website



Emilio Azcarraga Jean, president and CEO, Grupo Televisa



## GRUPO SALINAS, EXPANDING TO NEW FRONTIERS

Created by entrepreneur **Ricardo B. Salinas Pliego**, **Grupo Salinas** is the second largest broadcasting corporation in Mexico with annual revenue of approximately USD 7 billion and USD 1.3 billion in EBITDA through media (**Azteca**, **Azteca America**, **AZ TVdePaga**), retail, financial services, telecommunications and Internet, insurance and banking.

**Grupo Salinas** companies operate in Mexico, the US, Brazil, Colombia, El Salvador, Guatemala, Honduras, Peru, and Panama. **Azteca**, now managed by its CEO **Mario San Roman** (see interview with him in this edition), was founded in 1993, when an investor group, led by **Mr. Salinas**, bought two national television licenses from the Mexican government.

Under his leadership, **Azteca** ended Mexico's long-standing television monopoly through the successful nationwide positioning of **Azteca Siete** and **Azteca Trece** (300 plus owned stations). **Azteca** is one of the world's largest producers of Spanish-language TV programming, with an output of over 10,000 hours of content per year.

The family-oriented **Azteca Trece** and the mid-to high-income and youth-focused **Azteca Siete** cover 97% and 95% of Mexican TV households, respectively. **Azteca Siete** has produced in-house 29% of its programming hours in 2013, including news,

entertainment, sports and movies, while **Azteca Trece**, focused on the mid-income Mexican families, has produced in-house 70% of its lineup including its main genre, *telenovelas*, six of which have been produced for prime time and have been the most watched contents on the channel.

The company also runs **Proyecto 40**, an over-the-air UHF channel that delivers cultural, social, economic and political Mexican opinion leaders together. And it has recently re-launched its Pay TV networks portfolio under the brand **AZ TVdePaga**, offering channels **AZ Mundo**, **AZ Click**, **AZ Corazon** and **AZ Cinema**.

In 2001, **Azteca** released **Azteca America**, the fastest growing network in the US: the company, led by its CEO **Manuel Abud**, has affiliated stations in 70 cities, where 91% of Hispanics live. Moreover, **Grupo Salinas** operates several networks in Central America: **Channel 31** and **Channel 35** in Guatemala (**Azteca Guate**); **Channel 44** in Honduras; and **Channel 12** (El Salvador) and **Channel 9** (Costa Rica) through **AS Media**, headed by **Raimundo Alonso**.

'**Grupo Salinas** is composed of dynamic, fast-growing, and technologically advanced companies focused on creating shareholder value and improving society through excellence. We promote economic development in the countries where we operate by making technology accessible to all levels of society', highlights **Ricardo Salinas Pliego**, CEO of the group (\*).

The group is also involved in the production, co-production and distribution of *telenovelas* and series for its channels 13 and 7. This content is exported through **Comarex**, **Azteca's** international sales agent.

In the past it has closed a deal with **MGM**, which broadcast throughout Latin America two in-house produced drama miniseries: *Drenaje Profundo* and *Al Caer la Noche* (aired by



With the action miniseries *Drenaje Profundo*, **Azteca** diversified its content strategy. It was broadcast on **Azteca Siete** and **MGM** throughout Latin America

**Azteca Siete** in Mexico). It has also produced comedy *Lucho en Familia* and two seasons of *The Lieutenant*, trying to make a difference the Mexican market. With **TV Globo** (Brazil) it has co-produce *Between Love and Desire* (based on Mexican *telenovela Mad Love*), shot in Canada and Mexico and with good ratings levels.

In 2012, **Azteca** opened new studios to produce *telenovelas*. In the inaugural speech **Mr. Salinas** highlighted interesting concepts: '20 years ago we received a company that was losing money and, since then, we have created one of the most competitive Mexican companies in our country and abroad. We are going through moments of huge competition in the Mexican market and we believe it is not a matter of a third, fourth, fifth or "n" network to come. Today, competition is on the Internet and in more than 100 channels on Pay TV. There, great contents will make the difference' (\*\*).

A significant phrase from **Salinas Pliego** is: 'Content is the king, while distribution is the queen. Both live in the castle, which is the technology.'

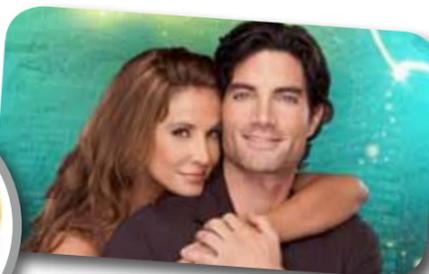
In the Mexican telecommunication market, **Grupo Salinas** controls since 2003 **Iusacell** and is repurchasing from **Grupo Televisa** the 50% this company acquired in 2011. It also runs *Triple Play* company **TotalPlay** covering Mexico City and its Metropolitan Area, as well as some regions such as **Guadalajara**, **Toluca de Lerdo** and **Cuernavaca**.

There is international growth, too. The company has expanded through **Azteca Comunicaciones**: this division operates a fiber optic network of 34,000 kilometers in Mexico and Colombia and it was recently awarded a contract in Peru to build and operate a network of 13,000 km that will unify all the capital cities across the Peruvian territory. With an investment of USD 760 million, the aim of **Azteca Comunicaciones Peru** is to increase Internet coverage in that nation from 25% to 80%.

(\*). The information and data to produce this article was taken from the Annual Report of **Grupo Salinas**, from the official websites of **Azteca** and **Ricardo Salinas Pliego**

(\*\*) Extracts from **Mr. Salinas** speech during the inauguration of the new studios in 2012.

Source: **El Universal**



*Between love and desire* was a co-production between **Azteca** and **TV Globo**: it was shot in Canada and Mexico and had good ratings

# MVS

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LATINO

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# MEXICO, AN EXCITING TELEVISION MARKET

The Mexican market is the second largest of Latin America, with yearly advertising billings of over USD 5.8 billion (Spend-Check+, estimated 2014), with two television groups Grupo Televisa and Grupo Salinas-Azteca accounting for most of the television advertising market share. The government is now calling for two new nationwide digital broadcast networks, with decisions expected by 2015.

As it is happening with most of the TV market of the world, Mexican TV is currently undergoing a transformation in the way it produces and distributes content, with new multiplatform formats offering programming and developing new watching practices. Free TV, Pay TV and Online TV are updating their offerings for the digital era.

According to the Instituto Nacional de Estadística y Geografía (National Institute of Statistics and Geography, INEGI) 95% of the Mexican homes had a TV set in 2013, while the average TV consumption was over two hours a day (IBOPE).

## MEDIA GROUPS

Grupo Televisa is the largest Spanish-language programming producer in the world, with over 93,000 hours of content rolled out in 2013; its exports amounted to USD 463 million through licensing and syndication in 1Q14. The company has operations in several aspects of business: Free TV, with three nationwide TV channels and one local station in Mexico City, and Pay TV.

It is also a key player in the telecommunication market, controlling four cable MSOs Cablevision, Cablemas, TVI and Cablecom;

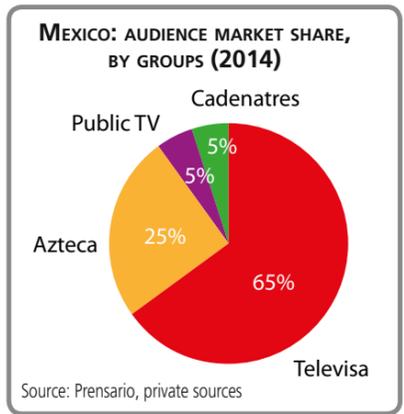
DTH operation Sky, and telco Bestel. It owns 50% of mobile telephony operator Iusacell, too, and OTT service VEO, launched in 2013. Other assets include soccer teams, music, radio, magazines, consumer products, cinema, live shows, digital media, and more (more information on Emilio Azcárraga Jean's interview in this edition).

Grupo Salinas is the second largest media conglomerate. It has also assets in various business branches industries both, in Mexico and abroad. Created by Mexican entrepreneur Ricardo B. Salinas, it controls Azteca, Azteca America (US Hispanic network), Grupo Iusacell (50%, with Televisa) and Totalplay, a Triple Play operator in Mexico (more information on Ricardo Salinas Pliego interview).

Grupo Empresarial Angeles is the third largest private media group in Mexico. It is controlled by Olegario Vazquez Raña and Olegario Vazquez Aldir with inroads in the tourism, health and finance industries. The company owns Grupo Imagen, a communication unit that expands into TV, press, radio and Internet. It owns the free TV channel Cadenatres, as well as the second-oldest newspaper in Mexico, Excélsior (100,000 copies sold per day); online news TV channel Excélsior TV, and 20 radio stations with over 70 affiliates in Mexico and the Southern US.

Grupo Multimedios is the largest media conglomerate in Northeastern Mexico involved in television (Multimedios Television), radio, telecommunications (TVI-Multimedios Redes, where Televisa has 60% of the equity), outdoor advertising, publishing (newspapers and books) and movie theatres.

MVS Comunicaciones is also an important Pay TV market. Founded in the '60, it is owned by Joaquín Vargas Guajardo and his family, and operates Dish Mexico, the second largest Mexican DTH platform—in partnership with EchoStar Corp., which owns 49% of the company—as well as MMDS system MasTV.



## BROADCAST TV

Televisa has built three national networks: its flagship Canal de las Estrellas-Channel 2, Channel 5 and Gala TV-Channel 9, as well as broadcasting programming through 20 more regional and local stations (Televisa Regional), including FOROtv in Mexico City. According to public information, the coverage in terms of population of Televisa's free-to-air TV stations is 92% for Channel 2; 85% for Channel 5 and 70% for Channel 9.

Azteca is another leading producer of Spanish-language TV programming and main competitor of Televisa. It runs two national TV networks in Mexico, Azteca Trece and Azteca Siete, with more than 300 owned and operated outlets across the country (total coverage of 90%). All in all, Grupo Salinas' networks have 180 licenses, including a local and an affiliate station, Proyecto 40 (since 2012 available con DTT and reaching 9 million homes nationwide), and accounts 39% of the total TV licenses in the country.

Originally a local network at Mexico City, Cadenatres has achieved significant national coverage through affiliate stations in Ciudad Juárez, Mexicali and Nogales, as well as pay TV national distribution. It is considered the third-largest television organization with strong own production of news programming and fiction series, this through an alliance with top fiction independent producer Argos Television. According to a source from the network, Cadenatres has 5% of the national audience share.

Multimedios Television manages 13 analog and digital outlets: seven in Monterrey, Ciudad Victoria, Leon, Matamoros, Nuevo Laredo, Tampico and Torreon, and six stations in

USA. Canal 12, located in Monterrey, Nuevo Leon is its flagship station. Its programming features locally-covered news, sports, children shows and general audience programming. The group produces daily over 20 hours of programming.

## PAY TV

Televisa Networks is the main Pay TV programmer in México with 24 own and third party networks and 50 feeds covering all genres. In 2013 the company reached its audience levels by launching 25 new shows through its channels, producing +22,000 hours of original contents and 500 hours of exclusive content for digital and social media.

Recently launched AZ TVdePaga produces and distributes (through international sales agent Comarex) four pay TV networks: AZ Mundo (formerly Azteca International), AZ Corazon (formerly Azteca Novelas) AZ Click (for young people) and AZ Cinema (movies).

MVS Television operates a package of six Pay TV networks, including 52MX (general entertainment covering Mexico and US), Cinelatino (movies), Exa TV (music), Multi-premier (erotic movies and series), MC (movies, series, sports) and Claro Sports (owned by America Movil, operated by MVS). Multimedios Television is also an important player here with Milenio Television (news), Multimedios Deportes (sports), Telediario (news) and Teleritmo (music) with a total of 13 TV and Pay TV channels in Mexico and the U.S.

Many independent cable operators obtain programming from PCTV, originally an association of independents, with huge distribution and production facilities (including pay channels TVC Networks, distributed to its affiliates) now controlled by MSO Megacable, the largest single cable operator in Mexico (1.2 million of subscribers). More information about these two companies appears in the following articles.

LAMAC published a report—elaborated by IPSOS— about the perception of TV by the Mexican audience, based on a sample of 77 TV channels, 72 of them pay TV and 5 broadcast TV. According to this paper, 51% of the viewers polled find pay TV channels to be of a 'high quality'. Another finding is that they do not relate 'high quality' with 'high audience': while the average pay TV channel ratings was 0.06%, the 'high quality' qualification average was 45%. Viewers believe documentaries

(history, science, technology), series, news and kids programming are 'high quality' genres, while telenovelas are found to be 'low quality'.

## AUDIENCE

Pay TV is gaining market but it so far its audience is not measured on a nationwide range. Local industry sources highlighted that national data is mainly available concerning broadcast TV, which accounts for most advertising billings.

No official data from Nielsen Ibope Mexico's Television Audience Measurement was available at the time this report was made. Only audience measurements on nationwide networks 2, 5 and 9 (Televisa), and 7 and 13 (Azteca) are available at the company website. There is no information regarding Pay TV or Public TV channels.

Research by Private Advisor Consulting Team reveals that sources agree on considering that the broadcast channels operated by Televisa and Azteca gather close to 90% of the total audience share in Mexico, with 65% and 25%, respectively. The remaining 10% is attributed to private channel Cadenatres and Public TV networks Canal Once, Canal 22, TV UNAM and Una Voz Con Todos, among others, in equal parts, it is believed.

It has not been possible to compare Pay TV figures against broadcast TV data, in order to assign market shares on a national basis. But, a report by the Latin American Multichannel Advertising Council (LAMAC) states that between 2010 and 2013 the Average Time Spent (ATS) on the Pay TV channels members of the entity in Mexico has shown a growth of 20% at most of the demographic segments. The pay TV networks that are not members of LAMAC grew 14% and broadcast TV expanded by 3%.

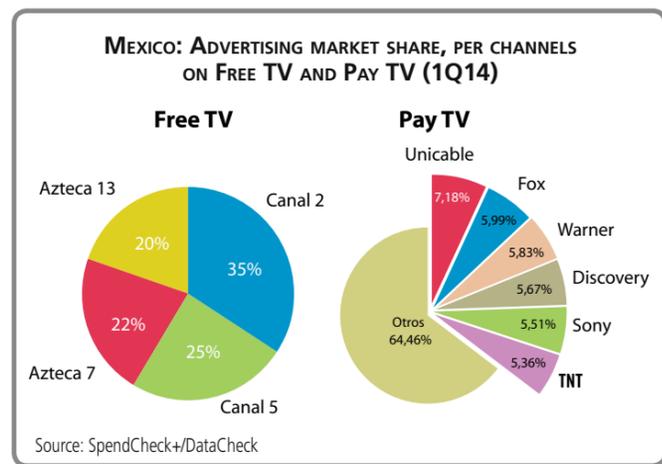
In another report, LAMAC asserts that the broadcast TV annual average rating has

dropped 3% from 2008 to 2011, while Pay TV audience grew 42%. Concerning audience share, while terrestrial TV dropped 7%, pay grew 36% in the same time period.

Another industry source explained: 'It must be said that the Pay TV audience is growing a lot in Mexico, but the incumbent audience measurement company IBOPE does not have an accurate measurement on Pay TV or DTT channels, where Public TV is growing strongly. That's why most of the advertising industry relies on the Private broadcast TV ratings data'. The Public TV national audience market share is estimated by some at 5% to 7%, while other less optimistic sources mentioned 3%-4%.

## ADVERTISING

TV advertising accounts for around 65% of overall advertising revenues, reaching (at rate card prices) USD 3.8 billion by 2014, a



## MEXICO: TOP 3 PROGRAMS, BY CHANNEL (JULY 2014)

Source: Nielsen IBOPE Mexico

CANAL 2		
Pos.	PROGRAM	GENRE
1	LO QUE LA VIDA ME ROBÓ	TELENOVELAS
2	HASTA EL FIN DEL MUNDO TE AMARÉ	TELENOVELAS
3	MI CORAZÓN ES TUYO	TELENOVELAS

CANAL 5		
Pos.	PROGRAM	GENRE
1	RÁPIDOS Y FURIOSOS 5IN CONTROL	MOVIES
2	FSI HOLANDA VS ARGENTINA	SPORTS
3	QUÉ PASÓ AYER 2	MOVIES

AZTECA 7		
Pos.	PROGRAM	GENRE
1	UP UNA AVENTURA DE ALTURA	MOVIES
2	PLANETA DE LOS SIMIOS REVOLUCIÓN	MOVIES
3	FSI HOLANDA VS ARGENTINA	SPORTS

CANAL 9-GALA TV		
Pos.	PROGRAM	GENRE
1	LA REINA DEL SUR	TELENOVELAS
2	DECISIONES EXTREMAS	DRAMA SERIES
3	REINA DE CORAZONES	TELENOVELAS

AZTECA 13		
Pos.	PROGRAM	GENRE
1	FSI ALEMANIA VS ARGENTINA	SPORTS
2	AVENIDA BRASIL	TELENOVELAS
3	HECHOS NOCHE	NEWS

The original data from the source does not include audience information, just the position and genre

MEXICO, AN EXCITING TELEVISION MARKET



5% growth compared to 2013. This, according to data provided by *SpendCheck+* from DataCheck USA (data: 24x7, in real time 80+ categories and 700+ brands and products – *Digital Video Fingerprint*).

The same source points out that during the first half of 2014, over 1.25 million of advertising insertions have been detected at Mexican TV. 'This means that broadcast TV accounts for a 78% share and Pay TV takes 22%. Considering the data by outlets, *Azteca's* networks (7 & 13 in Mexico City) have a larger number of insertions in comparison to *Televisa's* (channels 2 & 5 in Mexico City). On Pay TV the top three networks are Discovery Channel, Fox and History', it adds.

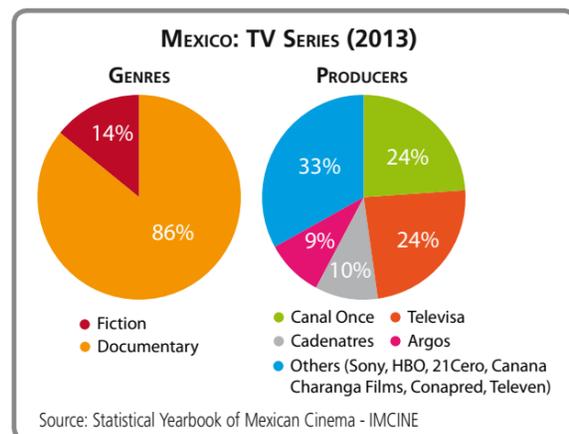
DataCheck did not have available investment data in US dollars for the first half of 2014, but it reported in April the figures for the 1Q: *Televisa's* channels 2 & 5 took over 58% of the market, while *Azteca's* 7 & 13 had 42% of the total. Regarding Pay TV (USD 93.4 million in 1Q 14), six channels account for 36% of the total investment: *Televisa's Unicable* (USD 6.7 million), *Fox* (USD 5.6 million), *Warner* (USD 5.45 million), *Discovery Channel* (USD 5.3 million), *Sony* (USD 5.14 million) and *TNT* (USD 5 million).

PROGRAMMING GENRES

Telenovelas are the king of fiction content in Mexico; they are not only successful within the country but also at many international markets. *Televisa* and *Azteca* are its major producers, with in-house production teams that do not depend on independent production companies. In addition, *Argos Television*, is an independent player that also produces telenovelas and series for *Cadenatres* in Mexico, *Telemundo* in the US Hispanic and for pan-regional networks in Latin America.

The *Statistical Yearbook* by IMCINE describes: 'TV series used to be produced only by the networks; but, in the last years new players have appeared. That's the case of *Argos Comunicacion*, which was the fourth largest producer in 2013, trailing networks *Televisa*, *Canal Once* and *Cadenatres*'.

Regarding genres, fiction is the one that calls for the largest audience, while non-fiction series are mainly aired on specialized channels (Public TV). In terms of production output measured by hours of programming, in 2013 86% of the total were documentaries and 14% fiction series, according to the same study.



PUBLIC TV

The *Sistema Público de Radiodifusión del Estado Mexicano* (Public Broadcasting System of the Mexican State), gathering 32 Public TV with the main goal of providing a non-profit broadcasting service, was created along with the *Federal Telecommunication & Broadcast Law* enacted in July.

At present, it operates 16 stations in 14 Mexican states covering 56% of the national population. Local state governments run 24 channels, while 4 are federal channels operated from Mexico City, and another 4 depend on Public universities.

A Government board —including a Chairman and representatives from the Secretariats of Government, Public Education, Health and three representatives from a Citizen Counsel — as well as the Mexican President, *Enrique Peña Nieto*, are in charge of the administration and management of the *SPR*, which cannot broadcast commercial messages and ad sales, but could receive donations or sponsorships (Art. 4 of the Law).

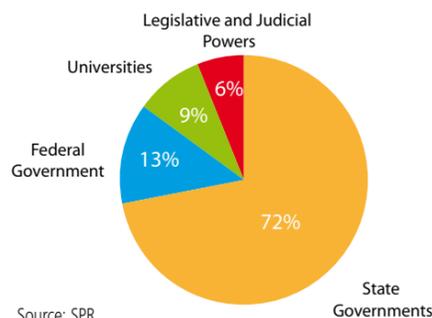
Regarding programming, its content promote independent and cultural productions to support the integration of minorities, seeking the largest audience possible, both social and geographically. A very important obligation is to promote and invest in the production and distribution of diverse content that reflects all the segments of the Mexican society. As a result of digitization —the switch-off in Mexico has been set for December 31, 2015—it is expected that public TV will achieve better coverage in the near future.

The three main public TV players at a national level are *Canal Once*, the oldest public TV station in Latin America, operated by the *Instituto Politécnico Nacional*, reaching 70% of the population; *Canal 22*, from *CONACULTA*, Consejo Nacional de la Cultura, reaching 58% of households, equivalent to 39 million people; and *TV UNAM*, Universidad Nacional Autónoma de México.

Network *Red de Radiodifusoras y Televisoras Educativas y Culturales de México* (the "Red") operates 60 TV and radio stations —including *Once*, *22* and *TV UNAM*— throughout the country and it is considered the third largest after *Televisa* and *Azteca*.

The *Congress* and *Judiciary* channels are in operation, too, as well as the *Educational Television Network* (*Televisión Educativa*), including *Ingenio TV*, *Aprende* and *Red Edusat*, which operates six educational channels: *Telesecundaria*, *TV Docencia*, *Telebachillerato*, *Tele México*, *TV Universidad* and *Telesecundaria*.

MEXICO: TYPES OF PUBLIC TV CHANNELS



CANAL 22

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## CANAL ONCE, SOCIAL RESPONSIBILITY IN THE DIGITAL ERA

After 55 years on air, **Canal Once** of the **Instituto Politécnico Nacional** from Mexico is one of the first public networks in Latin America. **Enriqueta Cabrera**, its Director, explains to PRENSARIO: 'We reach 70% of the Mexican population with free TV, and are present in almost 500 Pay TV operators all around the country. Also, we cover USA and part of Canada with special programming at our international channel, and we have two digital channels with exclusive content for kids and young people.'

'We are prepared for the analog switch-off in 2015, so that all TV productions are in HD. Furthermore, we are working to have our equipment, facilities, and video library fully digitized. In addition, we work on a multiplatform offer with varied contents for a mixed audience, both in tastes and ages. We have two websites, content on **YouTube** and **iTunes**, a **Canal Once** podcast, and an iOS app for our VOD contents,' she adds.

### PROGRAMMING

The network has steadily increased its original production, investing 70% of the 2013 budget in the development of fiction series together with independent producer companies. Some of them are *El diván de Valentina*, *Bienes Raíces*,

*XY*, *Los Minondo*, *Pacientes*, *Paramédicos* and *Soy tu Fan*, among others.

In 2013 **Canal Once** co-produced three series: the second season of *Niño Santo* and *Alguien Más*, with **Canana**, producer company owned by **Diego Luna**, **Gael García Bernal** and **Pablo Cruz**; and *Crónica de Castas*. 'This year we are working on two series, one for teenagers and the other one for kids. The first series is the sequel of *Kipatla*, but with a new name, while the second one is a thriller for school children. The second season of *Paramedicos* concluded the development stage, envisaging a possible new production in 2015,' she further comments.

Regarding documentaries, it is worth mentioning *Historia de la Educación en México* and *Maestros* (7 episodes); *Historias de Vida* walks the path of important people in Mexico, and *Antropológicas* (33 episodes) is about local anthropology, archeology, and history. Also, *Cronicas y relatos de México* and *Elogio de la Cocina Mexicana*. In terms of kids-youth and preschool, there's the 26th season of game show *A la Cachi Cachi Porra*, kids magazine *Pie Rojo*; and *Central Once*, a slot produced and directed by young people, which mixes music, interviews, and entertainment.

Only 7% of the budget goes to acquisitions. Among them, *Downton Abbey* (BBC), whose fourth season premiered in August, and *Pilares de la Tierra* (Tandem).

**Cabrera** continues: 'We have the cultural insights news show *Aquí nos tocó vivir*, hosted by Cristina Pacheco, which has been broadcast for more than 35 years and recognized by the Unesco as *Memoria del Mundo* (Memory of the World). In 2013 we re-

organized our news programs, that feature three daily editions from Monday to Friday, and the addition of opinion slots *Mexico Social*, *Primer Plano*, *Espiral*, and *Dinero y Poder*.'

Canal Once has sought to "strengthen a strategic" relationship with regional broadcasters through the **Televisión América Latina** (TAL) net and the signing of an agreement with the **Asociación de Televisoras Educativas y Culturales Iberoamericanas** (ATEI), that allows diffusion of the contents on an electronic platform to Latin America and Spain, and the exchange of projects and ideas within the assemblies and forums that are part of the organization.

'*Los Colores del Fútbol* is a project for which we co-produced 47 short documentaries together with producers from Brazil, Colombia, Bolivia, Jordan, Japan, Germany, South Korea, Sweden, among others, and were released during the *World Cup Brazil 2014*,' says Cabrera.

### MIPCOM

'**ProMexico** might be a great ally for the public TV, not only in terms of promotion of the content produced in Mexico or the injection of international capital for its production, but also the insertion of our industry in a world that demands high quality standards, creativity and production,' she highlights.

'Its drive will encourage the independent production, the creation of a global market for Mexican public TV shows, and will contribute to join forces of co-production among countries,' she adds.

'Mexico has been a benchmark in Latin America and the world TV production industry since mid last century. We have to take advantage of this status and the new technologies to fully participate in the global dynamic arena. We will keep interacting with broadcasters from different countries, producing high quality contents, opening horizons and consolidating as a broadcaster with social responsibility in the digital television era,' **Cabrera** concludes.



Enriqueta Cabrera,  
Canal Once's Director



Cronicas y relatos de Mexico,  
documentary



The series *Alguien Más* and *Niño Santo* (second season) are two co-productions with Diego Luna and Gael García Bernal's Canana



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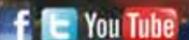
el Canal Cultural de los Universitarios

**TV UNAM** es el canal cultural de la Universidad Nacional Autónoma de México, la universidad más importante de América Latina. A pesar de ser uno de los canales de televisión más jóvenes de México, ha logrado convertirse en un referente de la televisión cultural en Iberoamérica.

Su programación reúne una producción propia de amplia diversidad temática y gran calidad de realización, junto con una muestra muy representativa de la mejor televisión cultural del mundo.



tvunam.unam.mx



## CANAL 22: PUBLIC TV FOR EXPORT

At Churubusco Studios offices, PRENSARIO interviews **Raul Cremoux**, General Director of **Canal 22** from Mexico, with **Ana Cruz**, Production and Programming Assistant Manager, and **Gastón García**, Corporate Image Director.

The executive highlights the network current vision and what it means to be a public channel in Mexico: 'Being a public broadcaster is a huge commitment, as the interest is not focused on advertisers. The purpose and vision are oriented to the national audience. It's an honorable responsibility to bring the best quality programming, both in-house and acquired.'



Gastón García, Corporate Image Director, Ana Cruz, Production and Programming Assistant Manager, and Raúl Cremoux, General Director

'However, our mission is not currently being accomplished, as we should reach all corners of the country. Nowadays, we only reach 39 million Mexicans, which represents one third of the total. Consequently, we have much to do and we have to do it together, not only with the resources provided by the government, but also with our own.'

'We've been 16 months at the general direction, and we have established five aspiring lines of action. Firstly, we want higher quality production; secondly, national coverage; and thirdly, representation of our national identity (when you look at the **BBC** you think of the UK, or **NHK** is Japan). Curiously though, watching American commercial TV we think about the USA, but it is not the best.'

The fourth line of action is the digital agenda or, in **Cremoux's** words, 'to produce in a different way'. He explains: 'Thanks to smartphones, human beings communicate in a different way, and we have to adapt to this

scenario by doing more close-ups. People express their needs in short films and videos, and we have to roll out co-productions to include them.'

'The fifth line of action appears with the new legislation, and the role we will play in the new media environment in Mexico, where **Canal 22** may be the seed of a new cultural network. We already have the Public TV, University TV or the Instituto Politecnico's Canal Once. We will not change them or the State, but a cultural TV might represent ourselves.'

**Cremoux** further says: 'Nobody ignores that there are hot spots of violence in the country. As the government, we agree that culture and its diffusion are big deterrents of these evils. We are trying to communicate with a younger audience, 10-20 years old, which we did not reach up to now.'

And **García** adds: 'We created a high-quality kids programming slot and a strategy for the Internet with success stories, such as conversations on social networks during the *Sochi 2013 Olympic Games*, where we outperformed private broadcasters. And it was about non-sporting issues, with two teams telling stories about cities. We have social audience metrics, which is different from ratings.'

**Ana Cruz**, Production and Programming Assistant Manager, comments on: 'The effort is devoted to have the best we are able to produce, both technical and financially. We seek to innovate, as at *Primer Acto*, aimed at the theater, or *Instinto Animal*, that is not a pet show, but a wider conceptualization about animals company, as sentient living beings.'

'We have 30% of in-house production, a small percentage of co-production and a majority of acquired programming. Here, we want to bring the best of public TV from other countries with a cultural approach, beyond the mere entertainment. Last year, we had the first public TV meeting, where representatives from 12 countries from every continent



Documentary *Frida Kahlo* is one of the latest productions of Canal 22, with a view to the international market



*Primer Acto* and *Instinto Animal*, different concepts for TV

joined to know what happens in other latitudes, their understanding of "public function", how they manage to survive and how they have other resources that may be difficult to think about.'

'For example, the **BBC** has a budget of more than €5.100 million. We have €9 million and we try to make the most out of every cent. In terms of co-productions, we focus our work on research and production script, and we allow ourselves to work together with big producer companies for documentaries. **TVE** (Spain) proposed us to work together,' he points out.

'With the arrival of Raul, we started to export our productions. At MIPTV, in April, we released new series with big names of Mexican art, composed by 10 episodes to bring the world the images of **Frida Kahlo**, **Diego Rivera**, **Orozco**, **Octavio Paz** and **Juan Carlos Rubio**, among others, produced by well-known Mexican documentary filmmakers. The goal is to show the diversity of our culture to the most demanding public. We have been producing HD for five years and two years ago we digitalized 18,000 hours of our video library; there are still another 10,000 hours.'

Regarding the role of **ProMexico** for MIPCOM 2014, the executives assert: 'It is admirable and very honorable that the Ministry of Economy has achieved to put Mexico at the 'Country of Honor' spot, at the most important audiovisual market in the world, and we have to take advantage of it.'

# Inspiring entertainment from FremantleMedia Mexico



## TV UNAM, THE CULTURAL MEXICAN TV CHANNEL

Belonged to the **Universidad Nacional Autónoma de México**, TV UNAM is one of the three most important public TV channels in Mexico celebrating nine years in operations this 2014.

Through **Red Edusat**, it reaches by satellite most of Mexican homes, and after the agreement with the **Mexican Public Broadcasting System** (formerly OPMA), it now covers through DTT signal 16 cities (56% of the total audience). Since 2013, the channel website can be accessed from any mobile device, and since next year it will reach all the national territory

through **DirecTV** and cable systems that have not included the TV network before, having presence in more than 400 cities.

**Ernesto Velazquez Briseño**, general director, explains: 'TV UNAM has been recognized national and internationally because we have privileged the local artistic expressions, as well as the habits of the students, increasing their participation in the projects and TV programs.'

It produces 33% of its programming in house, while 33% comes from third-party producers—programming exchanges deals—and the remaining 34% are acquisitions. Top pro-



Ernesto Velazquez Briseño, general director



Entre dos mundos and El Penacho de Moctezuma, two of the main documentaries from TV UNAM

ductions are *El Pueblo Mexicano* and the investigation program *Observatorio 2012*, as well as the documentaries *Entre dos mundos*, *La historia de Gonzalo Guerrero*, *El Penacho de Moctezuma*, *Plumaria del Mexico antiguo* (co-produced with Austrian Public TV channel ORF) and *Maestros detras de las ideas*.

'We have strengthen our international presence. We host twice the Semifinal of the *Emmy International Awards* in the categories of "Art and Documentary" programs', explains **Velazquez Briseño**, who has also been president of the board of **ATEI**, Educational and Cultural Television Association of Ibero America. It has also been a president of **La Red** (2005-2007) and has created **Alianza Mexicana de Televisoras Universitarias**.

'TV UNAM has collaborated with the most important European public broadcasters, such as **ARTE** (France), **Rai** (Italy), **BBC** (UK), **TV3** and **Canal Vasco** (Spain), **PBS** (USA) and **RTVF** (Belgium), and the Latin American **Encuentro** and **Construir TV** (Argentina); **TV Ciudad** (Uruguay) and **Canal 15** (Costa Rica)', concludes the executive.

'The channel has received over 300 awards, including "Best Cultural Channel in Ibero America" by the **Universidad Carlos III** (Madrid, Spain); the Oscar in 2008 for *Pedro y el Lobo* (co-production with **Breakthrough Films UK**); Premio Mundo Latino for *Entre dos mundos...* on the Festival Internacional de Cine Latinoamericano (Trieste, Italy 2013); 13 Premios Nacionales del Club de Periodistas de Mexico and 3 Premios Nacionales de Periodismo by the Consejo Ciudadano, including the 2012 edition for the series *El pueblo mexicano*', concludes **Velazquez Briseño**.

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## UNA VOZ CON TODOS, PUBLIC DIGITAL TV



Una Voz Con Todos is a digital public TV channel operated by the **Sistema Público de Radiodifusión del Estado Mexicano** (Public Broadcasting System of the Mexican State), whose main goal is to enrich and increase public TV coverage in Mexico. It offers cultural, educational and civic programming and aims to create a new space where diversity can take place.

Since March 2014 it has begun broadcast simultaneously on national free TV and pay TV, which has allowed having full coverage of the Mexican audience. This goal was possible because of the Federal Telecommunication & Broadcasting Law dispositions, *must offer* and *must carry*. Moreover, at the channel website ([unavozcontodos.mx](http://unavozcontodos.mx)), the audience has access to its contents by streaming or VOD service.

By the end of this year, it will have 26 retransmission stations offering in house productions, co-productions and international acquisitions. The line up features news, science/investigation, culture/art programming. From January to June it has produced or co-produced 14 series with 299 episodes, adding 391.5 hours to the programming heritage of the "Sistema".

The main ones are *Arte por todos* (urban cultural expressions), *Novedad de la Patrica. Patria Adentro* (showing the different Mexican regions), *Ciencia en la Ciudad* (scientific discoveries, recognized in 2013 by the **Consejo Nacional de Ciencia y Tecnología**, CONACYT) and two seasons of *Maestros Olvidados*. Also, the series *Mexico Tropical* (music), *¿Por que en Mexico?* (foreigners living in Mexico), *Uruguay 52* (cinema), *Coleccionista* (fiction series about history), among others.

The channel has strategic alliances with international providers such as **DW** (Germany), **BBC** (UK), **Discovery** (USA), **TVE** and **TV3** (Spain), **TV UNAM** (Mexico), as well as regional public TV entity **Televisión América Latina** (Red TAL) to exchange content and technologies that provide a 'global vision' to Mexicans.

## LA RED: THE THIRD NATIONAL TV NETWORK



Juan Octavio Pavon, Director at Radiotelevision de Veracruz, was named president of La Red for the period 2013-2015

The **Red de Radiodifusoras y Televisoras Educativas y Culturales de México** (La Red) was created on November 2005 and gathers 64 affiliated TV channels, of which 63 are Public TV & Radio systems —governmental, educational institution, cultural and civil entities— and **SATMEX**, an eventual partner in an honorary capacity.

It was launched to make possible the coordination and mutual collaboration between all these radio and TV

## MEXIQUENSE TV CELEBRATES 30 YEARS



The **Sistema de Radio y Televisión Mexiquense** (Mexiquense TV) was the first Public State-Owned TV station with national coverage in HD: on free TV (**Canal 34** y **Canal 34.1 HD** in Valle de Mexico y Mexico City; **Canal 12** y **Canal 12.1 HD** on Valle de Toluca); with Pay TV it reaches more than 25 Mexican states (**Cablevision**, **TotalPlay**, **Megacable** and **SKY**; and US/Canada with **Mexicanal**; America with **SATMEX**); and Internet it reaches all the world.

'Our main purpose is to broadcast the Mexican society culture and promote our identity.

We generate high quality original production that has allowed our channel to reach wider audiences in Mexico and abroad', explains **Lucila Orive**, managing director.

Its main shows are *MXQ Noticias* (three editions), *De Buenas, Porque Soy Mujer*, *Telediario Crónica*, *MXQ Deportes*, *Esfera Pública*, *La Báscula*, *Retuit*, *Cinescape*, *100% Gruperio*, *Fondo para que no caigas* and *Va en Serio*. 'Over 65% of our line up is produced in-house, especially series. The most populous and economically powerful State of the country has a universal vision, so we also broadcast series from England, US, Korea, Spain, Germany, etc., which balance our programming offer', adds **Orive**.

'The public TV market in Mexico has become stronger in the last years and the audience is choosing us to entertain them. We are not interested in ratings, but we do want to be close to the audience... the future will be better if the Public TV is permitted to broadcast advertising, which will allow us to compete in a national scenario.'

**Orive** concludes: 'We are very excited about our participation at MIPCOM. On September 26 we will be celebrating our 30<sup>th</sup> Anniversary as the most important Public State-Owned TV in Mexico. In November we will be closer to digitalization. The worldwide community will acquaint us and a big business window will be opened in Mexico for them.'



Lucila I. Orive G., managing director

channels. These media depend on the Government and state organisms such as federal institutions and public and private universities. The network covers an estimated audience of 25 million of viewers and radio listeners in 30 federative entities, which has made **La Red** as the third national broadcast network.

**Juan Octavio Pavon**, director at **Radiotelevision de Veracruz** (RTV), was named president of **La Red** in December 2013 for the period 2013-2015. 'We are going through a key moment: the transition to DTT and a new regulation scenario that we hope will give us the necessary tools to reinforce and impulse public media', he highlights.



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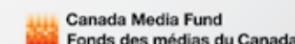
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## AZTECA: MOVING TO MULTIPLATFORM BUSINESS, AND BEYOND

'Azteca is not a TV station any more. That's why a couple of years ago we've changed our name from 'TV Azteca' to just 'Azteca'. We are now a multiplatform and multi-business company, even we are not any more just a content producer. Big news is that we've set up **Azteca Communications Colombia**, to build more than 20,000 km of fiber optic in the country. We have also a similar license in Peru. The ADN of **Salinas Group** is to reinvent ourselves every time.'

**Mario San Roman**, CEO of **Azteca**, stresses the evolution of the group: 'We are buying many TV stations in different countries, betting strongly on pay TV business, redesigning TV channels, and entering new businesses as fiber optic services. This is what you have to do nowadays to grow significantly. Genre twists, good ideas about new programming, are little changes for the moment of our TV business. A big growth comes through business diversification.'

'About content business, our focus now is to produce high quality contents for TV + new platforms: Internet, mo-

bile, etc. Today, 10% of our production is for new media. We are producing shorter stories, easy to understand, with a good hook to catch fast the audience. We have short *novela* series, sports, music channels, beauty channels... comparing to TV, you have to producer smaller but many more projects.'

'On broadcast TV, our big news has been a total re-launch of **Channel 13**, renewing the logo, its global image, the scheduling of programs, etc. Even we've changed the executives in charge, now **Rodrigo Fernandez** is the general manager of both **Channel 7** and **13**. With these, we are looking for better synergy between our channels. We are now producing strong original content for the two TV channels.'

'TV is a *Fortune Wheel*. You are not so clever when you are up, and you are not so silly when you are down. Sometimes you are right and others you are simply lucky... with the same program you can have success or a failure depending on context details. Mexican TV is one of the most competitive markets of the world. We produce 20,000 hours of programming per year, very few countries manage these levels of production.'

'The new thing in TV programming is to integrate TV with digital & social networks, generating real time communications with the audience, different ways of interactions. Many people mention the format *Rising Star*, but I am talking about **Bravo** with its chef programs. The future is towards there, with *Second Screen* applications, multiplatform developments. The big challenge is to monetize what you do in new media. To produce is easy, to put on air is easy. The difficult matter is to get fresh money for it.'

'I don't see a dark future for free TV, though. With the new media the audience is atomized in many options, this is a fact. But free TV will continue as the unique option to get strong market share, and its portion of the market will be valued better than in the past. This is happening in the U.S. market, for instance, the ad minute prices are higher than ever.



Mario San Roman, CEO of Azteca



Siempre tuya Acapulco, a big success telenovela on Azteca Trece



El hormiguero is an interview show broadcast on Azteca Siete



La Isla it is a very successful reality show on Azteca 7

A 20% market share today is far difficult to get that a 30% in the past.

Telenovelas or TV series? 'Press loves this discussion, but for us the *Telenovela* is and will be the king. The main successful fictions in Latin America are telenovelas, it is the most profitable genre for us. The TV series are more expensive and too short to make business ride. The U.S. market is another story, they can afford a cost of USD 800,000 or more per episode, within a 13-episode weekly model. In our region we call 'TV series' to 60-80-episode programs that in fact are 'telenovela-series'. This said, I agree that in the future, telenovelas will be shorter, 80 episodes or so, because it will be difficult to keep the audience so long with the same thing.'

'Also, the broadcasters will proceed with more syndicated TV, co-productions, often internationally. In house production turns to get bigger, very expensive, and they won't be able to afford it on their own. Free TV needs to make a difference vs. the other screen options. Both for free and even pay TV, the other big challenge from now will be to keep the young audiences, against the digital platforms. It is difficult, but we can do it. **Azteca** is very successful in young series and realities. Here we have one of the biggest disputes for the media future.'

## TELEvisa: 'WE ARE MUCH MORE THAN BROADCAST TV'

**José "Pepe" Bastón**, VP of Television and Contents, **Grupo Televisa**, explains to PRENSARIO: 'Quality and consistency are the "name of the game". The fact that we are today, and have been for decades, a leader in the Mexican television market, is the result of both. Over the past six decades, we have produced more than 800 telenovelas and most of them have had great success not only in Mexico but also in over 50 countries.'

These telenovelas have helped to create a global brand for **Televisa**. 'Today, nobody in the world can talk about telenovelas without mentioning us. The same goes for series, comedy shows, variety shows, newscast, and sports coverage. Thanks to the preference of the audience, advertisers clearly prefer investing in our productions. They not only get the best value for their investment, but also they feel "identified" with our content, with our stories and with our talent.'

'**Televisa** is much more than broadcast TV. We have 24 cable networks, digital platforms, and all kind of audiovisual productions. We work to consolidate four pillars: 1) digital platforms; 2) specific content for native digital audiences; 3) strategic alliances; 4) world-class technological support.'

Close to 100% of the flagship network **Channel 2-Canal de las Estrellas** programming is produced by **Televisa**. 'We have our main newscasts and five new episodes of our telenovelas every single weekday. It targets the whole family, with special emphasis on women. Our telenovelas are our key programs and concentrate the majority of the audience and ad dollars', describes **Bastón**.

**Channel 5** targets younger audiences, from children and teens in the morning and early afternoon, evolving into a more adult alternative in the evening and night: 'We are producing new content for prime time that targets young adults that demand a much more interactive experience. The new shows include a digital component, and we also program international series and films from **Warner, Sony, Paramount, Fox, Viacom** and **Lionsgate**', he says.

**Channel 4-FOROTV** is a very different proposal. 'Most of the shows are newscasts or news related, but we have also incorporated cultural programs, political debates and editorials from

intellectuals and key participants of our cultural and political life. And **Channel 9-Gala TV** offers alternative programming for women: we have the rights for Mexico to broadcast content from **Telemundo** and other platforms, such as pay TV, and we also have reruns of our most important shows', he completes.

'Audiences have been evolving and are now more demanding. We have to provide them with better stories, more sophisticated characters, wittier dialogues, and the ability to interact with the content through the Internet and social media sites. We continue to complement our offer with third party content that is relevant to our audiences and advertisers.'

'We are completely involved in co-productions, both in the production and financial side. This is an interesting area of growth and one that will satisfy the demand of our audiences and advertisers. We are facing new regulations in Mexico and our plan is to adapt to them. We are concentrated in the quality of our content: a good content will always be the key to compete', he concludes.

### DIGITAL

During **IAB Conecta 2014**, held in August in Mexico, **Bastón** highlighted: 'Our objective is to be a worldwide leader in production and distribution of Spanish-language content for all existing platforms and the future to come. Since three years ago we have initiated a deep transformation in how we think the digital world: our efforts have transformed from a simple business unit to become the DNA of our content production.'

**Televisadeportes.com, noticierostelevisa.com**, TV and entertainment integrate **Televisa's** digital ecosystem. 'We are adding some properties from the free and pay TV channels to specific



La Gata, The Color of Passion, La Malquerida and My heart is yours are top rated telenovelas on Canal de las Estrellas. This genre concentrates the majority of the audience and ad dollars

niches such as music, cinema, radio, movie production, editorial, etc. Our key product, the telenovela, must become 100% digital in order to be able to be consumed

anytime, anywhere', he added.

**Bastón** announced a multiannual and multiplatform deal with **MiTu** to produce digital content for the young Hispanic and English audiences. **MiTu** has over 43 million of subscriptions in the world, +400 million visits per month and 1,300 associated channels.



José Bastón, VP of Television and Contents, Grupo Televisa

## CADENATRES: HOW TO BECOME AN ALTERNATIVE

After acquiring radio frequencies and newspaper **EXCÉLSIOR** —the second oldest in Mexico with 100,000 units sold per day—, **GRUPO EMPRESARIAL ANGELES (GEA)** bought TV channel **CADENATRES** in 2007 and redefined its strategy by founding **GRUPO IMAGEN MULTIMEDIA (GIM)**, which manages GEA's interest in the communication business. The group also added new business areas, such as First Division football team **Los Gallos Blancos de Querétaro**.

**Rodrigo Bastida**, GIM's Communications Director, explains: 'With all these assets consolidated and growing, GIM launched in 2013 the Pay TV news network **Excélsior TV**. With its three main pillars: news, sports, and entertainment, **Cadenatres** competes directly with the main TV channels of Mexico. After hard research work on programming and lineup we found that the audience was looking for something different.'

Series such as *Behind Everywoman (Las Aparicio)* were very 'well received' by audiences, says **Bastida**, who adds: 'It was a ratings achievement and has allowed us to be a true option to the market, promoting the TV offer in Mexico. It was produced by **Argos Comunicación** and globally distributed by **Telemundo International (USA)**'.

**Cadenatres** has a co-production deal with **Televen (Venezuela)**. The three productions following this alliance are broadcast by **Telemundo International**: the first two were *Bittersweet* and *Nora*, which will be premiered in Mexico in February 2015. 'Though we have followed our agreement to the letter, we are now in a stand-by position as for the third

project due to the social and political situation in Venezuela,' explains Scripted Series Executive Producer **Eric Reid**.

**Cadenatres** also reached a deal with **Fox International Channels Latin America** to carry out some productions together through **Argos**. Moreover, some Mexican series were broadcast on the US Hispanic network **MundoFox**: *El Octavo Mandamiento*, *Fortuna*, *Infames*, and *Las Trampas del Deseo*.

Important shows on **Cadenatres** are the news programs *CN3 Tercera Emisión* with **Francisco Zea** (9pm), a series from **RCN (Colombia)**, *Alias*, *El Mexicano*, and *Infames*, which has generated many debates inside the Mexican society. A backward-looking series slot, with titles like *Señorita Cometa*, *Get Smart*, *Bewitched* and *I Dream of Jeannie*, is broadcast from Monday to Friday 3pm-5pm.

'We have a permanent interaction with our viewers through the social media, from where we take information about what they want to watch,' further comments **Bastida**, how adds: 'We have announced our next original production *Amor sin reserva*, a drama series co-developed with **Corazon TV** with an intense plot and a story about couple relationships. All in all, we have a varied grid, including news shows such as *Ya ni llorar es bueno* and *Mikorte Informativo*, and scripted series with a different language and focus.'



Eric Reid, Cadenatres's Scripted Series Executive Producer, and Rodrigo Bastida, Grupo Imagen Multimedia's Communications Director

'People want to see other things on TV, to talk about different topics and to communicate in a different way. We have a content strategy for them: we are focused on building an "active audience" behind the screen. We expect them to get involved with our content,' says **Bastida**.

**Reid** comments that the channel maintains a balance of 50-50 on own-produced and acquired content. 'We clearly see an evolution in the programs we generate and produce in house. We aim to create unusual genres on the melodrama, as the physiological thriller, tragedy, hilarious comedy, etc. Those genres have always existed, but were never produced in the Mexican market,' he concludes.

**Cadenatres** is prepared for the new Digital TV networks to be licensed in Mexico: 'When the new players arrive, we will see a pretty interesting battle. There is much expectation about what is going to happen. We see a trend of "fragmentation" of the audiences: there will be more and more diversified content and the TV channels will find new niches.'

### DIGITAL

**Reid** and **Bastida** agree that the digital offer has grown a lot in Mexico. 'There is a compulsive consumption of TV programs on Internet, which has changed the paradigms of the industry: a company like **Netflix** has an immediate offer of 13 episodes or a new series. There are risky and intelligent shows on those platforms. And thus a new audience is created: one that can pay an additional TV service, thanks to a faster Internet connection.'

'We are focused to create 360° scripted series, as well. It is important to have an online offer because when the audiences like a show they look for it anywhere. We have some creative executives thinking in new scripted formats for Internet. We'd like to be aggressive in this field. It is a matter of time,' conclude **Reid** and **Bastida**.



*Mikorte Informativo* is an innovative news show with monkey-hosts

*Amor Sin Reserva*, co-developed with **Corazon TV**, is the new own produced series from **Cadenatres** that has entered production last May

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## TELEVISA NETWORKS: 'A BIGGER DEMAND COMES WITH NEW CHALLENGES'

Televisa Networks is not only the main Pay TV programmer from Mexico with 24 own and third party networks covering all genres, but also one of the two largest companies of this segment in Latin America (along with Globosat in Brazil). It operates more than 50 feeds and channels in Spanish, English and Portuguese.

'In 2013, we exceeded our maximum audience levels by launching 25 new shows through its channels, producing +22,000 hours of original contents and 500 hours of exclusive content for digital and social media,' explains Bruce Boren, VP.

In September 2013, the company partnered UFC to develop UFC Network that is 100% dedicated to MMA for Latin America, and is now available in 12 countries. It has also produced the reality *The Ultimate Fighter*, broadcast live in Mexico. 'UFC Network has positioned us as one of the leaders in sports programming with

fastest growth in the world and strengthens Televisa's sports offer significantly,' he says.

'We are also focused on Golden Premier, born from the idea of enhancing Golden's brand and become a premium channel in Latin America. We developed a package of movies, series and events to have access to that growth in the region.' The executive highlights TDN coverage of *FIFA World Cup Brazil 2014* with the transmissions of 40 matches—10 exclusively—and related programs: 'We almost tripled the audience levels reached in comparison with *South Africa 2010*,' he remarks.

'Pay TV industry has grown strongly in terms of content and audience. Every day there are more people willing to pay for a TV subscription. This commits us to continue investing in production to keep us as one of the leaders of this entertainment industry. This increasing demand comes with new challenges: it is very important to identify and produce what the audience wants. We produce almost all of our content, and that allows us to develop specific products.'

BOOTH: #R9.A2



Bruce Boren, VP at Televisa Networks

Boren also sees new opportunities through the HD channels and OTT services: 'We are ready to create content for new distribution platforms.' Televisa Networks runs 9 HD networks: TDN HD, Golden HD, Canal de las Estrellas HD, De Película HD, Telehit HD, Golden Premier (two), UFC Network HD and Unicable HD. 'Growth will continue to rise and HD will be the new standard,' he emphasizes.

'For the 2H 14, we will improve the quality of our original content and continue to produce for Latin America. Unicable Latinoamerica is a very dynamic channel with own productions, series from Latin America, lifestyle content and bullfights. It is very important not only acquired ready-made series, subtitle and dub them...'

'We want to offer the most complete content to our subscribers. After periods of expansion, it is wise to consolidate, strengthen and learn new business. Also continue to develop strategies to continue the growth of our on demand channels UFC and Golden Premier,' concludes Boren.



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## AZ TVdePAGA: AZTECA EXPANDS ITS PAY TV BUSINESS



Fidela Navarro, director, AZ TVdePaga

Mexican **Azteca** is revamping and expanding its international pay TV operation, now branded **AZ TVdePaga**, and a strategy focused on carrying more in-house product, reports **Marcel Vinay, Jr.**, CEO of **Comarex**, international sales agent for Azteca's networks. The executive in charge of this new division is **Fidela Navarro**.

Channel **Azteca International** has been re-branded **AZ Mundo**, while **AztecaNovelas** is now **AZ Corazón** and features, in addition to its traditional and highly rated telenovelas, content

especially prepared for this channel that is expected to result highly attractive to its audience.

**AZ Click**, launched on September 15, aims at young audiences—an average of 20 years old—with content featuring 'hip people, celebrities, travel and movies—explains **Vinay Jr.**—the content is 100% produced by **Azteca**, we already have available a library of more than 1,800 hours of programming and see that the Latin American cable operators are enthusiastic about this type of fare'.

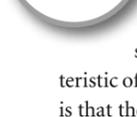
Last but not least, **AZ Cinema** is a channel fully devoted to Mexican movies that will not be available at any other medium. We have secured all the rights to these titles', concludes.

**Navarro** comments: 'We will produce over 1,800 hours of original contents a year. It is a portfolio of 4 networks without sub-brands, in HD and content available for our VOD partners. An essential characteristic of **AZ TVdePaga**

is that the networks will be in Spanish and without international acquisitions'.



AZ TVdePaga launch: Laura Zarate, Raul Mendoza, Marcel Vinay Jr., CEO, Comarex; Milena Celis, Fidela Navarro, Hortensia Espitaletta, Cesar Heredia, Jorge Gutierrez and Pablo Zehle



## PCTV, SERVICES FOR THE PAY TV INDUSTRY



Enrique Yamuni, chairman of the board and Jorge Tanaka, general director, PCTV

**Productora y Comercializadora de Television (PCTV)**, created in the '90s as a vehicle of content acquisition and distribution for the Pay TV operators, is currently an important player at the pay television field, providing downlink and uplink satellite signal services, as well as production facilities and a connections with hundreds of cable operators in more than 1,000 cities throughout the nation, reaching more than 5 million households. The company will be celebrating its 25th anniversary next year.

**Megacable**, Mexico's third largest pay TV operator and the largest single cable MSO—1.2 million subscribers—recently acquired last 70% of PCTV shares. **Enrique Yamuni**, director general at Megacable, has been appointed Chairman of the Board at PCTV, with **Jorge Tanaka** as general director is, replacing former executive **Julio Di-Bella**.

PCTV's teleport fully-digitized MPEG4 facilities can handle more than 28,000 hours of programming; at present it handles more than 60 pay TV signals—among them international channels such as **Discovery**, **Disney/ESPN** and **MCA**, as well as local networks **Teleformula**, **Cadenatres**, **KW**, and in-house produced **TVC Networks**, among others.

It also operates full-fledged production facilities, with three mobile units fitted with eight cameras for live transmission, non-linear editing systems and advanced graphic design equipment currently available.

PCTV's **TVC Networks** is a business unit dedicated to develop, produce and distribute in-house audiovisual contents for its cable networks **TVC**, **Platino**, **Pánico** and **Cine Mexicano**, which have been and continue being useful to cable operators within Mexico interested in offering their subscriber channels with programming focused on local needs.



**MVS Television** operates a package of six Pay TV networks, including **52MX** (general entertainment covering Mexico and US), **Cinelatino** (movies), **Exa TV** (music), **Multipremier** (erotic movies and series), **MC** (movies, series, sports) and **Claro Sports**

(owned by **America Movil**, operated by **MVS**).

The premium Spanish-language movie channel **Cinelatino** is co-owned with **Hemisphere Media Group** (73% **InterMedia Partners** and 27% **Azteca Acquisitions**

**Corp.**), which also owns **WAPA TV** (Puerto Rico) and **WAPA America** (US cable network).

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## THE AGENCY, GOING FORWARDS



Erik Zuckermann, CEO

The Agency is an entertainment, talent, and literary agency that represents artists and companies from all facets of the entertainment industry, including recognized actors (over 50), writers, directors and producers, as well as production companies, content creators, TV networks, ad agencies and consumer brands, including Fox, FIC, MundoFox, Azteca, CAA, WME, ABC, Lemon Films, FoxTelecolombia, Argos, Telemundo and Cadenatres.

Erik Zuckermann, CEO: 'We create and identify opportunities for a global roster of individual and corporate clients, and provide strategic consulting services and integrated media solutions to companies inside and outside of the entertainment field. Several of our actors have been working in different productions in Mexico, Latin America and the US Hispanic market.'



Among others, Tony Dalton and Nailea Norvid (Sr. Avila, HBO); Marco Treviño (Antonio Banderas' movie *The 33* about the Chilean miners); Tessa Ia (*El Capitan*, MundoFox); and Erik Hayser (*Camelia La Texana* and *Los Miserables* with Aracely Arambula, both for Telemundo).

'We closed a development deal for a TV series for Fox Studios US that has been developed in house, as well as other development contracts for the writers we represent in Mexico and Latin America. Regarding finished product, we have licensed the TV series *Paramedicos* (13x'60, Lemon Films) to MundoFox, as well as *El Albergue* (140x'60, Adicta Films) and *La Clínica* (115x'60, Adicta Films) from Gustavo Loza to MundoFox', he adds.

'We aim to grow in the quantity and quality of the talent we represent and identify the next generation of content creators and emerging stars. With just two years in the market, The Agency has become one of the largest agencies in Mexico and Latin America. We are working in two projects or more as formats or productions deals in Mexico and Latin America.'

'There is a growing opportunity for Latin content and talent in the US market. We are getting more requests and we believe it is a trend that will continue. We are exploring venturing into the music market and we have entered into the advertising arena. We acquired 50% of a company named 140 caracteres, which amplifies advertising messages on Twitter to a base of almost 30 million people in Mexico and LatAm.'

Zuckermann concludes about Mexico: 'It is becoming a hub of talent and content for the whole region, and the US market. Domestic competition will increase with the two new national broadcasters, and a growing Pay TV market. We are establishing ourselves as a business development resource for TV and film companies seeking to scale their business through licensing, production and distribution deals, as well as a strategic liaison between content creators, talent and the media companies.'

## INJAUS: STORY WRITERS



Pablo Orden, CEO



Injaus is a literary agency that specializes in the best and most daring story writers in Latin America. 'Today's TV demands interesting content that captures the audience in the first episode, and at Injaus, we are dedicated to identify the writers who can generate these types of stories. The idea of the company is that the producer can come to us to find the characters and dramatic lines they need without having to review many script options', explains Pablo Orden, CEO.

'After the great reception from Latin America, we now seek to open the international market knowing that we have different, exciting and engaging stories, backed by the success and global experience of our authors. We are sure that our scripts will be well accepted as other territories and are open to many types of business models (flat fee, co-production, special orders, etc).'

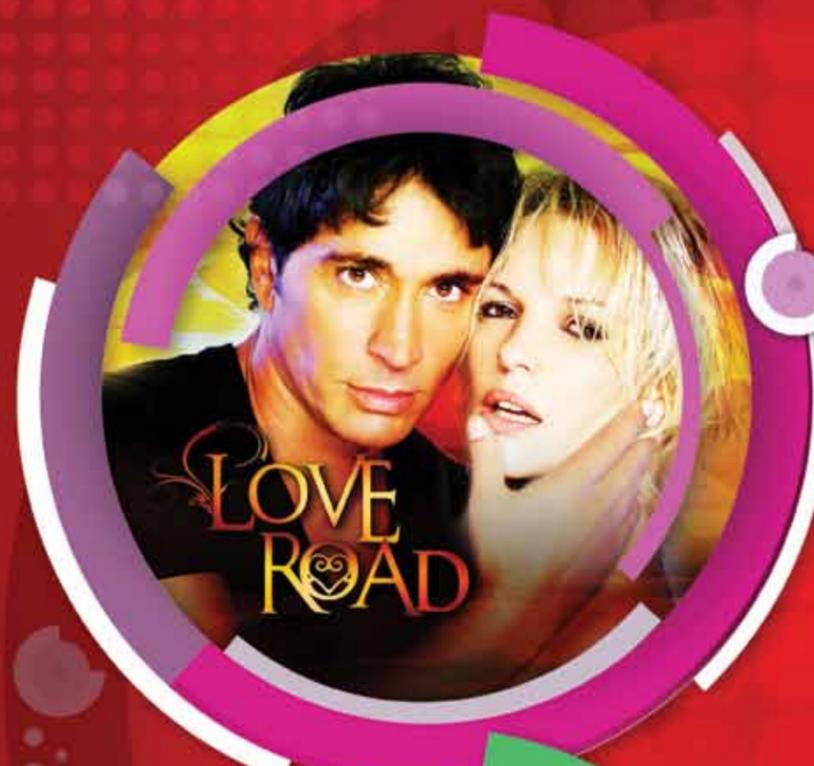
'Our clients include Azteca, Televisa, Fox International, Sony, FOX USA, TVE and many others. Internationally, we have had active presence at trade markets such as MIPTV, MIPCOM, NATPE and LA Screenings for many years with good results and comments from our customers.'

Regarding the Mexican market, Orden concludes: 'Although telenovelas were born in Cuba, it was Mexico who brought the genre to all the corners of the world, making laugh, mourn and follow daily the stories that have moved whole nations. Mexico is the thermometer of Latin America and the world's guide to telenovelas. Here is where the tone, style and subjects of international success telenovelas is established. More than 50 million Hispanics in the USA are loyal followers of the Mexican productions, making the Hispanic networks true competitors against the Anglo market.'

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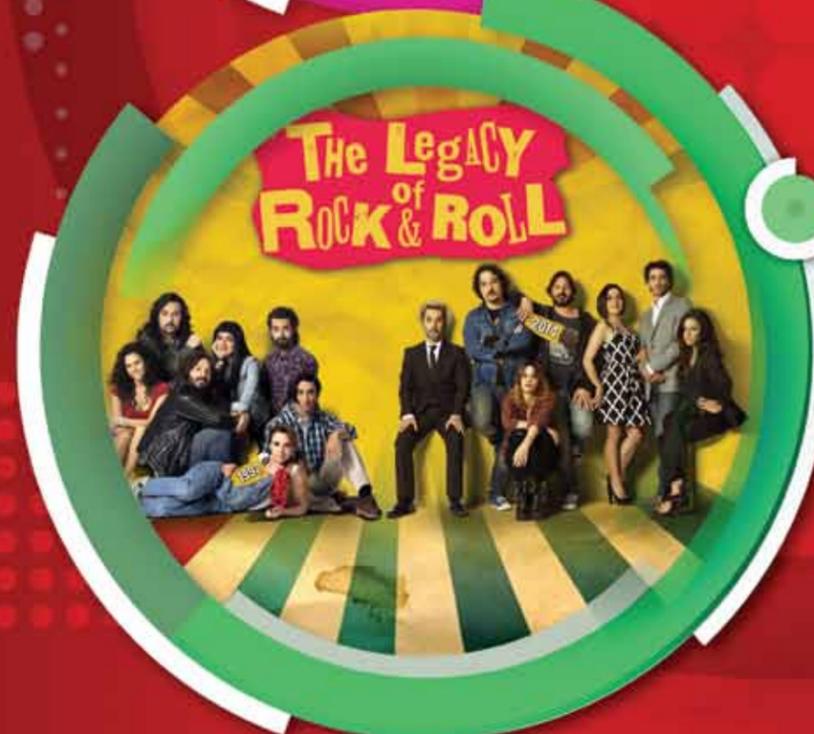


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# MEXICAN FILMS, BOOMING FIGURES

The Mexican film sector will be worth USD 1.95 billion by 2018, compared to USD 1.55 billion in 2013, according to PRICEWATERHOUSE COOPERS' GLOBAL ENTERTAINMENT AND MEDIA OUTLOOK 2014-2018, thus becoming one of the most dynamic drivers of the Mexican audiovisual industry.

With 248 million total admissions sold last year, Mexico is now the best production platform and the largest theatre box office market in Latin America (it surpassed Brazil in 2008).

In 2013, Mexican movies achieved a market share of 12.8% with 30.1 million viewers and revenue reaching USD 93 million, the highest figures in recent history for domestic films. The titles taking first and second place in the list of the top ten national films in terms of attendance since the year 2000 have been *Instructions not Included*, with 15.2 million admissions, and *Nosotros los Nobles*, with 7.1 million tickets sold. Almost half of the movies are romantic and family comedies.

'Thanks to its attractive and modern commercial exhibition infrastructure and other environmental factors, Mexico amounts to more than half the total of movie theater admissions in Latin America. Its production sector has been growing as a result of a USD 20 million tax incentive program launched in 2010, intended to both support local talent and encourage inward investment', remarks the paper *Roadmap for the Creative Industry* from PwC and ProMexico.

The local film industry has three areas of opportunity to be targeted, in order to consoli-

Mexican director Alfonso Cuarón was awarded with two Oscars in 2014 for "Best Director" and "Best Film Editing" for *Gravity* (2013), starred by George Clooney and Sandra Bullock

date the sector as a competent business model, with international focus. 'First, it is necessary to produce or acquire intellectual property that can attract and interest audiences. Second, it is necessary to reexamine the distribution rules of box office revenue: in 2009, for every Mexican peso obtained, 60% was for exhibitors, the rest having been distributed among distributors and producers. This, excluding investment in advertisement and distributor copies of the film, which often leaves producers with less than 10% of what is earned during the traditional exhibition process.

'Third, the Mexican industry depends heavily on box office results. Industry players must be encouraged to consider alternatives to the large screen, in other words, other formats',

released at theatres and later made available on DVD was 16% with an average time of 3 months between each window. The percentage of Mexican movies released on legal digital platforms was 10%, while 30% appeared on illegal digital platforms, resulting in 7.1 million downloads.

IMCINE's report describes: 'An important aspect in the analysis of the exhibition of Mexican films is the low number of prints with which they are launched, unlike Hollywood movies, which cover most of the screens in the country. The success of the domestic films released with 400 prints or more in 2013 is illuminating.'

'Genre is a key factor in attracting audience interest and a central element in designing

## MEXICAN FILMS WITH THE HIGHEST ATTENDANCE (2000-2013)

FILM	DIRECTOR/S	YEAR	ATTENDANCE (MILLIONS)	REVENUE (MILLIONS)
NO SE ACEPTAN DEVOLUCIONES	EUGENIO DERBEZ	2013	15.2	600.3
NOSOTROS LOS NOBLES	GARY ALAZRAKY	2013	7.1	340.3
EL CRIMEN DEL PADRE AMARO	CARLOS CARRERA	2002	5.2	162.2
UNA PELÍCULA DE HUEVOS	GABRIEL RIVA PALACIO/RODOLFO RIVA PALACIO	2006	4	142.3
Y TU MAMÁ TAMBIÉN	ALFONSO CUARÓN	2001	3.5	101.7
AMORES PERROS	ALEJANDRO GONZÁLEZ IÑARRITU	2000	3.3	95.2
KILÓMETRO 31	RIGOBERTO CASTAÑEDA	2007	3.2	118.9
OTRA PELÍCULAS DE HUEVOS	GABRIEL RIVA PALACIO/RODOLFO RIVA PALACIO	2009	3.1	113.6
RUDO Y CURSI	CARLOS CUARÓN	2008	3	127.9
NO ERES TÚ, SOY YO	ALEJANDRO SPRINGALL	2010	2.9	125.8

Source: Imcine with data from Rentrak

concludes the study.

According to the Mexican Film Institute (IMCINE), 126 Mexican films were produced in 2013, the highest level since 1959. Per data from the UNESCO, this places Mexico among the countries with the largest number of movies produced per year in the world. Sixty percent of the outcome was debut films, 25% documentaries, and less than 5% movies.

Box office revenues reached USD 912 million in 2013, according to IMCINE's *Statistical Yearbook of Mexican Cinema*. 'Attendance to Mexican movies was 30.1 million at 600 movie theaters; the average annual admission tickets per person stood at 2.1. There were 364 releases, of which 101 were Mexican; 126 local movies were produced in total, compared to 28 made in 2000. Mexican films accounted for 12% of the total national attendance, a 4% jump over 2012, it describes.

Of the total Mexican movies, 70% were supported in some way by the State. 5,064 movies were aired on broadcast TV, among them 1,379 local titles. The percentage of Mexican movies

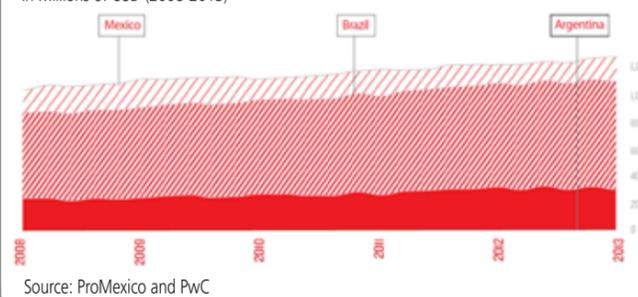
advertising campaigns. In 2013, according to Rentrak, about 40% of the Mexican releases were drama movies; comedy represented almost 20%. It is significant that the three most successful pictures of the year were comedies, and one of them, the highest grossing in recent history.'

'About 25% of the domestic films launched during the year were nonfiction works, which have overcome the prejudice of commercial exhibitors, often achieving great success. There was only one animated movie, in contrast to previous years. Horror and science fiction were poorly represented, too.'

Distribution is another big challenge. In 2013, Cinépolis, Warner Bros, Alphaville, Videocine, and Nueva Era, among others, carried out the commercial distribution of Mexican cinema. Walt Disney & Warner Bros obtained each 16% of the total box office revenue; Universal achieved 13%, and Paramount, Sony and Videocine, took in 9% each. The other distributors operating in Mexico shared the rest of the outcome.

## FILM MARKETS IN MEXICO, BRAZIL AND ARGENTINA

In Millions of USD (2008-2013)



Source: ProMexico and PwC

'As for the cultural circuits, the Cineteca Nacional performed outstandingly in 2013, distributing close to 20 titles, both at its main facilities as well as in other theatres in various cities. The movies distributed independently deserve a special mention: 10 titles were placed at commercial chains and alternative circuits during the year.'

## INTERNATIONAL

In 2013, Mexican movies obtained 127 international awards at film festivals around the world. Among the most outstanding recognitions, Amat Escalante was named "Best Director" at the Cannes Festival; Fernando Eimbcke, was "Best Director" at the San Sebastian Festival. *La jaula de oro* (coproduced with Spain) was the film achieving the most awards: 21. *Heli* obtained seven while *Los insolitos peces gato* took six. Mexican films won awards at festivals and film exhibitions in 32 countries, the Ibero-American countries granting the largest recognitions were Spain, Cuba, Argentina and Uruguay; in Europe, the countries most honoring Mexican movies were France and Italy.

Mexico has great contemporary film directors, such as Guillermo del Toro (*Pan's Labyrinth*), Alejandro González Iñárritu (*Babel*) and Alfonso Cuarón, all of them nominated to the Oscars in several categories. Cuarón was awarded two Oscars for "Best Director" and "Best Film Editing" for *Gravity* (2013), starred by George Clooney and Sandra Bullock.

## MEXICO: DIGITAL DISTRIBUTION BY PLATFORMS (2013)

PLATFORM	TOTAL OFFERING	MEXICAN FILMS	MEXICAN VIDEOHOMES AND/OR TV MOVIES
NETFLIX	2.164	139	8
ITUNES	2.58	56	1
CLAROVIDEO	1.43	87	70
CINÉPOLIS CINECLICK	1.98	62	2
VUDÚ	4.076	38	3
GOOGLE PLAY	1.519	9	0
VEO	754	29	0
YUZU-TV	47	0	0
CRACKLE	142	0	0
TOTALMOVIE (*)	427	11	0
TOTAL	15.119	431	84

Source: Imcine with data from Internet Sites

Right after broadcasting six episodes, US FX's has confirmed a second season of horror series *The Strain*, created by

Del Toro and Carlton Cuse (*Lost*) and based on the book trilogy written by the Mexican director. Production will start in November, the series being expected to be premiered in 2015. *The Strain*, having achieved the best 2014 premiere on cable TV in the US with 8 million viewers, is a drama series about vampires starred by Corey Stoll (*House of Cards*). Since its launch it has had an average TV audience of between 2 to 3 million viewers, this figure growing when time-shifting watching is considered.

It is worth mentioning well-known actors and producers Diego Luna (*And your mother too*), Gael García Bernal (*Amores Perros*) and Salma Haiek, whose lead role in *Frida* received 8 nominations and 2 awards in different international film festivals. Luna and García Bernal own production company Canana.

Movies such as *Dune*, *Titanic*, *Master and Commander: The Far Side of the World*, *Sur la Piste du Marsupilami*, *Colombiana*, *Elysium*, *On the Road* and *All is Lost* have been produced in Mexico. Co-productions are very important, as well: over the past six years, 15% of Mexican films (over 115) have been international co-productions with countries such as the US (27), Spain (23), Colombia (12) and Argentina (11). Other partnership nations were France, Chile, Canada, Holland, Denmark and Peru. *El Laberinto del Fauno*, *Luz Silenciosa*, *El Crimen del Padre Amaro*, *Biutiful*, *Colosio*, *También llueve* and *No* were some of the outstanding results of co-production deals.

During 2009-2013, Mexican movies were released at commercial theatres in 41 countries, a growth of more than 100%. 'Domestic releases did not only increase by over 50%, but also reached new audiences with one film screened in the Dominican Republic and two in Hong Kong. Presence in US grew significantly, rising from 5 to 17 new releases; in France, from 3 the previous year to 8



Eugenio Derbez's *Instructions Not Included* became Mexico's biggest ever box office hit with 15.2 million of tickets sold



Directed by Alejandro González Iñárritu, *Babel* was an international co-production between Mexico, France and US starring Brad Pitt, Cate Blanchette and Mexican actor Gael García Bernal. It won the Golden Globe for "Best Drama Movie" in 2007 and was nominated seven times for the Oscars

in 2013; Argentina (5), Brazil and Ecuador (4), explains IMCINE's report.

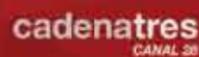
## PLATFORMS

An IBOPE survey places feature films as the second most watched content on TV, after telenovelas. The number of films aired each broadcast TV channel varies greatly: Azteca 7 and Televisa's Canal 5 compete for a similar audience profile, and have shown most of the films during 2013, followed by Televisa's Canal 2, Azteca 13, the rest of each group's channels (FOROtv and Canal 9-Gala TV at Televisa, Azteca's Proyecto 40, and commercial channel Cadenatres) and Public TV networks.

'Ratings depend on the channel, schedule, previous and following programs, reputation of the film when it was released at theatres, and the number of reruns. Reruns are not always negative, as shown by the multiple rebroadcasts of films from the *Golden Age of Mexican Cinema* or the blockbusters from the US. Only one domestic film appeared among the top 20 movies with the highest audience on broadcast TV in 2013, *Voces inocentes*, reaching the eleventh place. While private TV aired more movies, Public TV is a natural vehicle for the diffusion of Mexican films.'

In Mexico, DVDs are still one of the outstanding means for watching films. According to the National Institute of Statistics and Geography (INEGI), about 80 % of homes in the country have a DVD player, which makes this the second means of accessing movies, after broadcast TV. As for Blu-ray players and HD TVs, they are increasingly affordable to the general population, gaining weight as a distribution window.

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## ARGOS: 'WE WANT THE TV WE DESERVE'

BOOTH # C16.A5/P0.B1

PRENSARIO interviews **Epigmenio Ibarra**, journalist, director, producer and owner of **Argos Comunicacion**, one of the largest TV content producers in Mexico: 'The TV screen is a very powerful instrument. We aim to create the TV we deserve. TV has to be a window-mirror and not a hole to escape from reality. We have the responsibility to develop a TV that serves life, nurtures emotionally, brings good references/examples, and transforms audiences and the world.'

**Argos** was created in 1994 by **Ibarra**, his wife **Veronica Velasco**, **Hernan Vera** and the journalist **Carlos Payan Vélver**. It has produced *Expediente 13/22/30* and the telenovela *Nada Personal* (1996) both for **Azteca**. 'This telenovela inaugurated a new language in Mexican TV, which was accustomed to Venezuelan and Brazilian products. With our new approach, we have created a new audience. *Mirada de Mujer* (**Azteca**) beat **Televisa** for the first time on prime time', he says.

During the last 20 years, **Argos** has produced 16 telenovelas, 15 series and more than 18,000 hours of live TV, with an annual average of 500 hours of fiction content. It has also



Three seasons of the series *Capadocia* were produced for HBO Latin America



*Señora Acero* was produced by Argos in Mexico for Telemundo in the US Hispanic

produced and co-produced 18 movies. 'Our productions are being broadcast in 52 countries, globally. In Mexico, we have produced 880 hours for **Cadenatres** (*Behind every woman*) and for international partners (more information on the report "Mexican audiovisual content expands across the globe").'

'We are maybe the only Mexican independent *prodco* with a *One Stop Shop*, six mobile units, own studios, etc. We can generate from a simple idea to the ready-made version for export. We will build a new production center with four new studios which will be added to the two we have in Tlalnepantla and the two in **Estudios Churubusco**'.

'The Mexican market is closed and complicated to work in because the two biggest companies made the mistake of concentrating production and distribution. The big goal from **Ricardo Salinas Pliego** (**Grupo Salinas** CEO) was to open production to independent houses.'

'We hope that the new networks to come understand that it is necessary to allow independents to offer their production services, as they will need a lot of time and money to invest in new human resources (and train them), infrastructure and equipments to produce fiction, which will make their business inviable', he highlights.

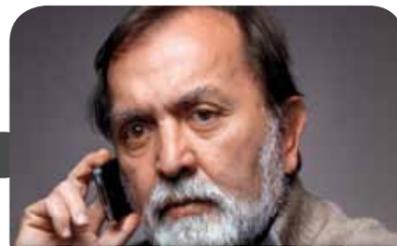
'The market is about to change, and we have a big opportunity: to generate a new TV model. The biggest conglomerates must dedicate their efforts to distribute a TV network, and let us do our business. We are willing to co-produce with them, co-invest in new ideas and offer all our values to make more successful projects.'

'If the Mexican market takes this way, the growth could be exponential. I hope that the newcomers notice this reality and do something to change it. There are lots of independent producers ready to work with them. The audience will also notice the change in the screen.'

### INTERNATIONAL

'Our production values and love for what

BY ANGELES PEREZ AGUIRRE,  
PRENSARIO MEDIA CORRESPONDENT IN MEXICO



Epigmenio Ibarra, CEO

we do have allowed us to work with the most important networks in Latin America and US Hispanic. *Capadocia* has three seasons on **HBO**, *The Return* and *Lord of the Skies* (two seasons) are on **Telemundo**. *Futbol Picante*, *Los Capitanes* and *Sports Center* have been produced during the last 10 years for **ESPN Deportes** for which we have provided technicians, infrastructure and broadcast service for US, Mexico and abroad. We have created new audiences and we can work with companies that share our vision. **HBO** and **Telemundo** (it has closed a deal up to 2020) produce contents with a different approach: they are much more realistic and are closer to reality.'

For the US Hispanic network, it has just finished *The Impostor*, *Lord of the Skies II*, as well as *The Miserables* and *Señora Acero*, produced in Mexico for Telemundo in the US Hispanic. 'We are looking for new international partners, so we strongly thank **Pro-Mexico's** efforts and support to help independent Mexican players to expand to other latitudes this MIPCOM', comments **Ibarra**.

**Argos** has closed a deal with Spanish **Filmanova** to develop four projects: *Aislados*, about a suicide society that lives in an island; *Lazaro*, which narrates some financial scandals, *Las Campanas de Quetaro*, historical series about Mexican emperor Maximiliano. The project that inaugurates this alliance is the political thriller miniseries *Cortar el Puente* (6x'60), made in collaboration with **Meridiano 89** (El Salvador). The thriller is based on the life of the Jesuit philosopher **Ignacio Ellacuria** killed during Salvadorian Civil War in the '80s.

'We want to have a more active presence in Europe, especially in Spain (because of the language), Germany (because of the resources), and France (because of the focus). It is time for independent producers to expand to other horizons. We have a 360° vision and flexibility: if an European company wants to come to Mexico to produce, we can give them the best infrastructure, team and equipments, to conclude the project in time and cost-effectively', concludes **Ibarra**.

## EL MALL: 'SERVICE, QUALITY, CREATIVITY AND INNOVATION'

**Pedro Torres**, a renowned Mexican producer and founder of **El Mall**, resume to PRENSARIO the origins of the company: 'El Mall is a 100% Mexican company, with an established track record as creator and producer of content and entertainment for multiplatforms, and that put us as leaders in the local market with an accelerated international growth due to an aggressive business diversification.'

In addition to its talents and a modern infrastructure, **Torres** recognizes the value of the service, quality, creativity and innovation as the main pillars of the company that today has created a new concept of global communication: *Social, Media and Content Shops*.

Over the years, **El Mall** has managed to become a 'spearhead' in technological innovation and content in Mexico, thanks to a group of specialized work units called *shops*, dedicated to offer always a solution with added

value appropriate to the customer's needs.

Among the most recognized productions of **Torres** are the adaptation for Televisa of three seasons of *Killer Women* (**Pol-ka**, Argentina); a detective series with a strong presence of local culture, *El Equipo*; an historical series focused on the Mexican Revolution, *El Vuelo del Aguila*; *Big Brother Mexico* (**Endemol**); and *Gossip Girl Acapulco*, produced in 2013 after signing a partnership with **Warner Bros.** (USA) for the adaptation of the US series. It was premiered on **Televisa Networks's Golden Premier**.

Regarding to the local market, **Torres** concludes: 'Mexico offers ideal conditions for the production and content creation. There are more and more opportunities and a greater support to Mexican creative industries from



Pedro Torres, founder, El Mall



*Gossip Girl Acapulco*

governmental entities. Mexico is a country rich in locations, gastronomy, but especially in creative and innovative ideas, allowing us to compete with other global creative potencies.'

## CANANA: MOVIES AND TV SERIES



Diego Luna, Julian Levin, Pablo Cruz and Gael Garcia Bernal, partners at Canana

**Canana** is an independent production company founded in 2005 by Mexican top actors **Diego Luna**, **Gael Garcia Bernal**, **Pablo Cruz** and **Julian Levin**. It has mainly developed movies, TV series, documentaries and branded content, telling stories

that 'respect the current context and entity of the country', it was said from the company.

Since 2010, it began to explore new creative formats. In col-

laboration with **Canal Once**, a successful path of TV productions started, finding a good response from the audience and addressing a wide variety of themes and genres on screen. The co-productions were two seasons *Niño Santo* (also broadcast on **iSat** within Latin America) and *Alguien Mas*. Other shows are *I'm your fan* (season two)

The movie sales are done through **Mundial**, a joint venture between Hollywood production financing and distribution company **IM Global** and **Canana**. It focuses exclusively on worldwide sales of Latin and Ibero American cinema and provides a full service international distribution platform for Latin American filmmakers.

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## FREMANTLEMEDIA MEXICO: AUTHENTIC



Adrian Santucho, CEO, FremantleMedia US Hispanic, Mexico and Pan-Regional

**FremantleMedia**, one of the largest UK and worldwide producers and content exporter, is a key player in the Mexican market, which is strategic for the company plans of expansion in the US Hispanic and Latin American markets.

**Adrian Santucho**, CEO of this division that is also in charge of the panregional network business: 'We attest the incredible production capacity of Mexico to offer authentic content and high quality standards, not only for their local industry but for other Latin American

territories. **FM Mexico** has been at the center of our panregional production and have been developing and producing content in this country for over 13 years.'

In the last 30 years, the Mexican TV industry has undergone a steady process of consolidation amongst key Latin American players. Broadcasters have developed its own identity and at the same time the ability to quickly understand the changes throughout its market; focused on innovation, programming renews and strong pan-regional presence strategies, Mexico has opened the door to our trendsetting formats,' adds **Santucho**.

'Thanks to our commitment to provide fresh and high quality content, Mexican broadcasters have transmitted successful local versions of our big formats *Family Feud* (100 Mexicanos Dijeron), *X Factor* (El Factor X), *Poker Face* (Doble Cara), *Password* (Password La Palabra Secreta), *Boxing Glove* (El Guantazo), etc. In 2014 we will produce Mexico's *Got Talent* (Mexico tiene talento), a big show that sets **Guinness Record** for *World's Most Successful TV*

*Format* and has an extremely loyal following across the world.'

Concludes Santucho: 'We are in a partnership evaluation stage in order to find the best co-production partners throughout the region. Strategic and valuable alliances will enhance our practices to develop quality and original content for pan-regional and local markets in Latin America.'



FremantleMedia Mexico is producing the local version of Mexico's *Got Talent* for Azteca Trece

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## FIC LATIN AMERICA, FOCUS IN MEXICO



Gonzalo Fiure, FIC Latam, Epigmenio Ibarra, Argos Comunicacion, and Eric Reid, Cadenatres

**Fox International Channels (FIC) Latin America** has a large presence in the Mexican market, especially through the production and acquisition deals it has closed last year with **Cadenatres** and **Argos Comunicacion** to broadcast its 100% Mexican content in Latin America, through its panregional networks, and in US, through **MundoFox**.

The deal includes more than 800 hours of contents with titles such as *Infames*, *El Octavo Mandamiento* and *Fortuna*, which were broadcast in Mexico by **Cadenatres** and in the US Hispanic market by **MundoFox**. Among them, it must be highlighted the series *Dos Lunas*, which has a tremendous success all across Latin America, and will have a second season.

**Gonzalo Fiure**, Chief Content Officer, **FIC Latin America**: 'Both Mexican companies are synonymous of high quality content that is in perfect consonance with our programming offer in Latin America. We will continue focusing on original productions made in Mexico.'

**Epigmenio Ibarra**, general director, **Argos**: 'This deal represent to us a real possibility of consolidating a production line distinguished for its quality and story. We aim to break paradigms of traditional melodrama, following the audience in Latin America and US, which is looking for new horizon on fiction productions.'

**Eric Reid**, Scripted Series Executive Producer, **Cadenatres**: 'There are new Mexican and Latin American audiences that change constantly. So this deal has allowed us to meet them, and generate the TV products of the future: we aim to produce relevant social content, without putting aside the entertainment.'



The first season of *Dos Lunas* was a success in Latin America and US, and it will have a second series

BOOTH #C16.A5

## ADICTA FILMS



**Adicta Film** is a production company dedicated to the development and production of content for the Mexican film and TV industry. In the recent years, the company has focused on the development of TV series for different players, such as **Televisa**, **Fox International Channels** and **Cadenatres**.

For instance, it has produced *Heroes from the North* (seasons 1, 2, 3) for **Televisa**, which was the most successful Spanish-language

Mexican comedy TV series in the US and Mexico in the last decade. It tells the story of a Mexican band, from their early beginnings to their rise to stardom.

Also, *Chloroform* (2011), a drama TV series based on the world of box, as well as the sitcoms *The Shelter* (2012), about an atypical family full of lazy people who struggle to make a living; and *The Clinic* (2013), about a mental health institution (psychiatric hospital) and the people who live there.

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## BLUEPRINT, THE NEW FACE OF THE ORIGINAL CONTENT

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Raul Campos Delgado, CEO



With just a few years in the market, **Blueprint** has become a promising company with huge potential in the entertainment industry. This new media content producer offers both canned content and original concepts that seek to conquer new platforms. Through innovation and creativity as the main tool, the company is responsible of giving form and substance to all the material that it offers in a catalogue that presents to the market an exciting range of genres and formats.

Focusing on finding new roads and different proposals, **Blueprint** has developed more than 70 formats covering multiple genres and themes. Actually they are in the process of developing three comedies, one drama, one game show, two thrillers, two telenovelas and one historical series, all trying to find a twist in the entertainment industry.

Among the most active clients are the Mexican broadcaster **Proyecto 40**, where the company launched the first *late-night show* in the world for digital celebrities. Its success is reflected in the production of a second season and, probably, a third one.

On the other side, it closed an output deal for an extreme sports channel, for who are producing more than 500 original episodes for different series that will expose the human side in a world full of adrenaline. These canned series are available for different platforms.

In August the company positioned in the international market after concluding a deal through **Comarex** with **Hub Media**, who has acquired the rights to license a series of original formats in Asian territories, increasing the exposure of the products in different territories.

'In **Blueprint** we understand creativity as the most important asset of our business. We are expanding to multiple platforms and territories; through a vision that prioritizes innovation with the flexibility to develop content in any genre, for any platform and all kind of audiences', affirms **Raul Campos**, CEO of the company.

## LEMON FILMS, TRULY INDEPENDENT

**Lemon Group** has produced TV series for **Televisa**, **Canal Once**, **Sony**, **HBO**, **Bimbo** and **PepsiCo**, as well as movies, documentaries, videoclips, and content for other formats and platforms. It is a great example of how independent production is growing in Mexico. 'We have a great team, including directors, photographers, post producers, among others, totaling 45 employees', explains **Urtzi Alejandro Alamo**, producer at **Lemon Films**, who was part of the Mexican delegation at MIPTV and is now attending MIPCOM.

'We have produced + 60 commercials

## CAPONETO: BRANDED CONTENT & FORMATS

BOOTH #C16.A5

**Caponeto** is a Mexican-based *prodcos* founded in 2009 by Argentine producer & director **Diego Martinez Ulanosky**. It has +20 employees in Mexico City, and presence in Buenos Aires, Colombia and Los Angeles.

The executive has built a wide experience since he has been working until 2009 at **MTV Mexico**: '**Caponeto** generates and produces new formats for TV and other platforms, as well as movies and branded content'. In the past, he has developed big shows such as the scripted series *Soy tu Fan*, *Kid's Choice Awards Mexico* and *MTV Game Awards*.

Branded content is a good way the company has founded to expand abroad: 'We have produced scripted content for **Axe**, **Old Spice**, **Rexona**, as well as **Google/YouTube**. All of the formats created have been really successful, with millions of true views and high production values'. On a panregional level, it has developed content for **A&E Ole Networks** (*Un dia en la vida*, *El Luchador*, *Una Idea History*), **Viacom** (*Joystickeros* was a top rated show on **MTV Mexico**). 'With **Endemol** we produced *Instinto Asesino*, *10 años menos* and *Comunidades Extremas* (**Discovery**) and with **Navajo** we produced *Manifiesto* for **Glitz**', he says.

**Caponeto** is working in 3 main projects: one period series and two non-scripted series. 'One is a Mexican adaptation of a US series; the second one is a co-production with an LA-based producer. We are also looking for investments for a documentary movie that Mexico will co-produce with The Philippines, and we have developed a docu-reality called *Embarazados*, which is a 360° project including a series + two miniseries, as well as a book and apps'.

Lastly, the company is aiming to make available some formats to international clients. 'We are analyzing if we are going to do it by ourselves or through a distributor since we have received many offers to buy our original content. Mexico is a key market to do new things, with a lot of talent and great production values, so we will bet our best in this new stage of the company', he concludes.



Diego Martinez Ulanosky, CEO, Caponeto

CAPONETO



Embarazados is a 360° docu-reality, including a series + miniseries, a book and apps

BOOTH #C16.A5

(awarded with many *Cannes Lions*), two series, three movies: a total of 40 hours annually. We attend the MIPs because the TV business has become very important for the group and we want to generate alternative sources of incomes and reach new clients and markets', he says. **Lemon Films** has co-produced with the **Mexican Red Cross** two seasons of *Paramedicos*, which was a success on **Canal Once**. It has also produce **HBO** series *Señor Avila*, and regularly works for **Discovery**, **Televisa** and **Azteca**. But we believe that a true expansion will come if we get into the international co-production business: we are able to generate projects in many genres, such as fiction, animation, documentaries, etc. It is a great moment for Mexico in the international market', concludes **Alamo**.

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## RENDERFARM, TRANSMEDIA PRODUCTS AND SERVICES

Based in Mexico City and founded in 2006, **Renderfarm Studios** has always promoted "quality" as a key characteristic of its contents, which includes cinematic, trailers for videogames, VFX, 3D animation for cine and TV. 'All these designed with a *transmedia* strategy', remarks **Fausto Cantu**, CEO.

He continues: 'We seek to position our contents and production services in the international market: the quality obtained in the recent years has allowed us to develop creative

content for any platform or device. We have experience in generating cinematic for publishers in the US, outsourcing arts for **The Unipro Group** (UK), **Carrefour** (Spain) and **EpicFX**. Nowadays, we have an alliance with **Gridmarkets** (Singapore) to make the first **Renderfarm** on the cloud'.

**Cantu** concludes: 'Mexico's animation industry is growing steadily with over 120 studios. The main universities of the country are implementing animation and digital content



Fausto Cantu, CEO

careers, while the Government is pushing different initiatives and the ecosystem is growing and adapting to compete in the worldwide market'.

## CAMALEON FILMS



**Camaleon Films** gathers a group of companies dedicated to the production of TV shows, advertising, production and postproduction services in Mexico, as well as Spanish (neutral) dubbing and digital production (augmented reality, rich media, digital BTL, apps and web development). The firm has fully equipped video and audio studios.

Among its top products, it brings to Cannes the travel and cooking program *From Plate to Mouth* (13x24, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the format *The Great Idea* (13x45, Full HD), a reality show that promotes talent in all areas of production, conducted by a famous host looking forward to create her own TV series.

## FACET SCHOOL



**Facet School** provides training and postproduction services in VFX (compositing) for TV and film. Company's experienced staff has honed its skills in some of the best visual effects studios worldwide. It creates visual effects for TV and film in collaboration with the main VFX studios around the globe.

Its team is formed by specialized professionals in advanced rotoscoping, paint out and compositing techniques, with a vast experience in the Canadian industry and working for big Hollywood films in award winning productions such as: *Batman: The Dark Knight*, *District 9*, *The Twilight Saga: Eclipse*, *Transformers: Dark of the Moon*, *Tron: Legacy*, *Pacific Rim*, and, more recently, *Maleficent* and *Sin City: A Dame to Kill For*.

## CORAZON FILMS



**Eckehardt von Damm** is the founder and general director of **Corazon Films**, a company dedicated to produce movies in Mexico and Latin America. 'We create the company in 2008 along with other Mexican entrepreneurs, and now is among the most prolific independent distribution companies in our country', explains **von Damm**.

'We support independent producers that need distribution for its movies. We distribute over 30 titles a year, all genres and formats. Our working team is formed by executives that have worked in the movie industry and they have one main objective: to support commercial and alternative movies for all audiences', concludes the executive.

Among the most important titles, it can be mentioned *Cartas a Julieta* (2010), *Sammy* (2010), *Presagio* (2009), *Sin Escape* (2011), and *Crepusculo: La Saga* (2008, 2009, 2010, 2011, 2012).

## MANTARRAYA



Established in Mexico City in 1998, **Mantarraya Producciones** is an independent film production company that seeks to be a platform for the new generation of filmmakers, of which it has earned a reputation for promoting new talents. It has produced 23 films, out of which 14 were debuts. It is the Mexican production company with more participation in *Cannes Film Festival*, including 8 invitations and 6 appearances in the *Official Selection*, 4 of these in the prestigious *Cannes Film Festival Competition*.

## ARTE MECÁNICA



**Arte Mecánica** is a production house with over 11 years of experience in cinema. Recently, the company started to distribute film titles and also to produce TV content. Some of the most recent productions are: *The compass leads the Dead*, *Days of Grace* (winner of 8 Ariel Awards), and the documentary films *Cyclo* and *9 months 9 days*.

## BYG STUDIO



Film and TV postproduction, **Byg Studio** is based in Mexico City and offers a wide range of specialized services including editing, color grading, animation, compositing and VFX. It has provided services for the series *Two Moons* (first season 2014 has 5 episodes), *Heroes of the North* (three seasons, 52 episodes in total), *Paramedics* (first season, 2013), *Chloroform* (first season 2012), and the movies *Pulling strings*, *Visitors* and *The Forgotten*.

## FILM TANK



**Film Tank** creates audiovisual content, feature films, TV series and web series, including *The Maid* ("Best Foreign Film" and "Best Foreign Actress" at the Sundance Film), *Norteado* (San Sebastian Film Festival), *La Sirga* (Cannes Film Festival), *Chalan* (first Mexican film premiered via streaming in Mexico).

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# MEXICO FOR THE WORLD: TELENOVELAS ARE JUST THE FIRST COURSE

Mexico is a leading performer in the world-wide audiovisual industry as the main Spanish-language content exporter. Its two main representatives are **TELEvisa INTERNACIONAL** and **COMAREX/AZTECA**, but other players are gaining strength at the global market.

With the enactment of the *Federal Telecommunication & Broadcasting Law*, —which calls for the launching of two new digital nationwide TV networks— and the secondary regulation that creates the **Public Broadcast System of the Mexican State**, the Mexican Federal Government in hands of President **Enrique Peña Nieto**, is seeking to open and expand the Mexican TV market, both locally and globally.

At MIPTV in April, Governmental agency **ProMexico** supported the participation of +30 companies. The goal is to create an alternative vehicle for international distribution of products and services, where Mexico has a lot to offer, and to expand the Mexican audiovisual properties through new players. At this MIPCOM, where Mexico is the “Country of Honor”, more than 90 Mexican companies are expected to attend.

**Karla Mawcinnitt Bueno**, ProMexico’s communication and image general coordinator, comments: ‘MIPTV and MIPCOM are a fundamental platform to strengthen and drive internationally the Mexican industry concerning TV, content and new media. Mexico has become one of the most competitive destinations to develop digital content and the leading exporter of creative goods in Latin America.’

‘Altogether, the media industry represents 7% of the Gross Domestic Product (GDP), which makes it the fifth most strategic industry in the country. Mexico is living its best moment in terms of the world audiovisual

industry, due, to a large extent, to the rapid growth the sector has experienced in the last few years. In 2013 alone, the country exported content to more than a hundred countries, producing content that impacts more than 50 million Hispanics in the US.’

‘Mexico has an ample supply of quality services, comprising more than 1,500 companies from film producers to post-production effects, software and video game developers. In addition to the production in 2013 of more than 300 Mexican short films and over 100 films, Mexico also stands in second place in the subscription television market in Latin America’, she concludes.

## INTERNATIONAL SUCCESS

PRENSARIO had access to information from **Eurodata’s Key facts on Mexican Exports** report, s being unveiled at this MIPCOM: among its international launches in 2012, 87% of Mexican exports were telenovelas. In 2013, telenovelas accounted for 67% of the Mexican TV exports (source: Eurodata TV Worldwide/NOTA/Relevant partners).

The most recent success is *The Black Widow*, produced by **RTI** for **Televisa** and Colombian **Caracol TV** is the most recent success; it has been the first to be aired simultaneously with the US Hispanic market: being a series about Colombian drug dealer Griselda Blanco, has had a huge success in February 2014 reaching 5.8 million viewers at its simulcast opening on Univision’s networks **Univision**, **UniMas** and **Galavisión** (cable).

‘Simultaneous broadcast has been being



Fernando Perez Gavilan, VP, Televisa Internacional



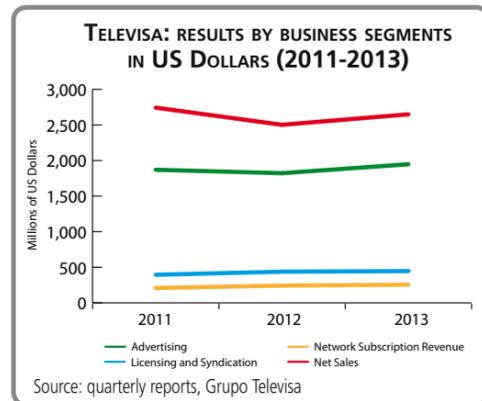
Marcel Vinay Jr., CEO Comarex, international sales agent for Azteca



Ana Celia Urquidi, director, Argos Television



Karla Mawcinnitt Bueno, communication and image general coordinator, ProMexico



used for several years by international broadcasters for global launches of series. We are noticing more and more simulcast releases at a local level, by the different channels of a same broadcasting group’, explains **Sahar Bagheri**, International TV Formats & Contents Director at **Eurodata TV Worldwide**; she will be hosting at MIPCOM the panel *Media and Entertainment landscape in Mexico* with **Emilio Azcarraga Jean**, CEO, **Grupo Televisa**, and **Mario San Roman**, CEO, **Azteca** on Monday October, 13.

## TOP PLAYERS

**Grupo Televisa** is very well known on an international level through its global distribution division **Televisa Internacional**, directed by its VP, **Fernando Perez Gavila** (more information at his interview in this edition). It exports its programs and formats to TV networks around the world. In the US, it distributes its content through **Univision** under a *Programming License Agreement* (PLA), which has been extended in 2010 to at least 2025, and resulted in royalties to **Televisa** of USD 273.2 million in 2013. **Televisa’s** royalty rate from **Univision** is set to increase from the current 11.91% to 16.22% by December 2017.

Televisa content, and especially *telenovelas*, reaches millions of people around the world. In 2013, the division

such as *Corazon en Condominio* and *Prohibido Amar* to Asia, or *A love to remember* to Europe.

**Aztecas’s** all time top 20 products ranked by international sales are: *Belinda*, *Bellezas Indomables*, *Catalina y Sebastian*, *Cielo Rojo*, *Cuando Seas Mia*, *Drenaje Profundo*, *La Duda*, *La Fuerza del Destino*, *La Heredera*, *La Hija del Jardinero*,

*La Loba*, *What Women Keep in Silence* (sold to over 150 territories, with great results particularly at **Chilevision**, in Chile), *Mientras Haya Vida*, *Mirada de Mujer*, *Ni Una Vez Mas*, *Pasion Morena*, *Pobre Diabla*, *Por ti*, *Se Busca un Hombre* and *Un Nuevo Amor*.

**Argos Comunicacion**, directed by **Epigenio Ibarra**, CEO, is a third Mexican player that has been working with the most important global players as a production company.

‘We have a deal from 2012 up to 2020 with **Telemundo Internacional** (USA), who distributes globally the productions we create for them. On average, we produce over 260 hours of contents for export per year’, explains to PRENSARIO **Ana Celia Urquidi**, director at **Argos Television**. The company has also co-productions agreements with other companies, such as pan regional networks **MTV** and **HBO**, and US Hispanic network **MundoFox**.

The best-known product from **Argos** sold at the international market through **Telemundo Internacional** have been so far *Precious Rose*, *The Return*, *Lord of the Skies* (two seasons), *The Impostor* and *Camelia, la texana*. *Señora Acero* and *Los Miserables*, two of the biggest releases of **Telemundo** at this MIPCOM, will be premiered soon on **Telemundo Network**.

**Urquidi** adds that ‘in Mexico, we produced for **Cadenatres** *Behind Everywoman*, *El Octavo Mandamiento*, *Fortune* and *Infames*; with **Sony** we co-produced *Bienvenida Realidad* and *El Sexo Debil*, also for **Cadentres**, and *Dos Lunas* was produced for **MundoFox**. With **HBO** we have developed and produced three seasons of



Azteca: one of the most successful international adaptations of *What Women Keep in Silence* was in Chilevision (Chile)



*Los Miserables* is a high budget production from Argos for Telemundo Network in the US Hispanic. The international division of Telemundo is launching it this MIPCOM

*Capadocia*. **Netflix** is offering across all Latin America our series *Camelia, la texana*. **Argos’** product has been sold to the US, Central Europe, Colombia, Argentina, Venezuela, Puerto Rico, Peru, and Spain.

Mexico’s Public TV is moving fast in this business segment, too. It has become familiar to see buyers from **TV UNAM**, **Canal Once**, and **Canal 22** in Cannes during MIPTV and MIPCOM; but, since MIPTV 2014 (with the support of **ProMexico**) they are also promoting its historical, cultural and educational documentaries, series and movies to the global market.

For instance, **Canal 22** is emphasizing its documentary series focused on big personalities of Mexican culture, such as **Frida Khalo** and **Diego Rivera**, among others. Same for **TV UNAM** with the series *Penacho de Moctezuma*, one of the most important pieces of the Pre-Hispanic culture, a co-production with Austrian Public broadcaster **ORF**. **Canal Once** is producing with **Lemon Films** the second season of its successful drama series *Paramedicos*, with assistance by the **Mexican Red Cross**.



*The Dark Widow*, the series about the Colombian drug dealer Griselda Blanco produced RTI for Televisa and Caracol TV (Colombia), was a huge success (a 5.8 million viewers premier last February) in US by a simulcast on Univision’s networks: Univision, UniMas and Galavisión (cable)



## MEXICAN PRODUCTIONS IN THE INTERNATIONAL MARKET (2014)

COUNTRY	CHANNEL	FORMAT	LAUNCH	DEVELOPMENT	DISTRIBUTOR	INDIVIDUALS	YOUNG ADULTS	INDIVIDUALS	YOUNG ADULTS
IRELAND	RTE TWO	DEVIANT MAIDS	15.7-14	USA/MEXICO	DISNEY MEDIA	8.2	11.3	7.2	8.2
USA	TELEMUNDO	CAMELIA, LA TEXANA	25.3-14	USA/MEXICO	TELEMUNDO	1.6	2.6	1.1	1.4
USA	TELEMUNDO	THE IMPOSTOR	14.1-14	USA/MEXICO	TELEMUNDO	1.5	2.2	1.1	1.4
USA	UNIMAS	THE DARK WIDOW	23.2-14	MEXICO/COLOMBIA	TELEvisa/CARACOL	1.4	2.2	0.6	0.9
USA	UNIVISION	QUE POBRES TAN RICOS	6.1-14	MEXICO	TELEvisa	3.2	4.2	2.9	4

Source: Eurodata TV Worldwide/NOTA/Relevant partners

## TELEvisa INTERNACIONAL: THE NAME OF SPANISH-LANGUAGE CONTENT

Televisa Internacional is the face of Grupo Televisa in the world. Through the leadership of its VP, **Fernando Perez Gavilan**, this strategic division has allowed the giant media company to take its content to a global scale.

But not only its finished and successful telenovelas, which are on air in over hundred countries in the world, but also a growing business area, entertainment formats, in which the company has closed a strategic joint-venture with **La Competencia** (Spain) and deals with other providers, to built a strong slate of formats available for global clients.

For instance, *Everybody and their brother* was not only a success in Mexico, but after its launch in 2013 it has been optioned in over 30 territories worldwide. This format and others, such as the celebrity show *Dolphins with the Stars* (sold in Portugal and Russia, and optioned in The Netherlands, France and Italy), *Project Adan & Eva*, game show *Wacky Old Game* and the quiz show *Push it*, have allowed **Televisa Internacional** to gain markets, where the traditional telenovela is not demanded: The Netherlands, UK, Germany, etc.

The company is also betting on co-production partnerships: *La CQ* or *Miss XV* were successful teen series co-produced with **Cartoon Network** and **Viacom**, respectively, while *Se-*



Tatiana Rodriguez, Migdalis Silva and JC Acosta, all them from Viacom Media Networks Latin America (center) with Mauricio Bailon, New Projects Director, and Fernando Perez Gavilan, VP at Televisa Internacional



Jose "Pepe" Baston, VP of Television and Content, and Fernando Perez Gavilan, International VP, Televisa, announced two deals with Mexican actor and producer Diego Luna (Canana) and Patricio Willis, president, RTI Producciones

*ñorita Polvora* is the most recent co-production with **Sony Pictures Television**, and *The Black Widow* and *Shot of Grace* were done with the

BOOTH: #R9.A2



Felipe Boshell and Alejandro Toro, co-productions at Caracol TV Colombia (borders); Gonzalo Cordoba, president, and Lisette Osorio, VP International, Caracol TV; Fernando Perez Gavilan, VP, Televisa Internacional, and Antonio Alonso, general director, Planning and International Productions, Televisa. After the success of *The Black Widow*, both companies have co-produced the action series *Shot of Grace*



The sales and marketing team of Televisa Internacional-Europe, headed by Ricardo Ehrsam, general director, Asia and Europe, Claudia Sahab, director, for Europe, Sebastian Vibes, director of new business Europe (the three last from left to right)



Mario and Carlos Castro, director of sales for Asia and Africa, and general sales director (borders), with Pedro Font, president & CEO, Global Media Distribution, formerly distributor of Televisa's product for more than 15 years.

leading Colombian TV network **Caracol TV**.

Back in 2012, the company closed a strategic agreement with **RTI Producciones** for the US Hispanic market: **Patricio Willis'** production company agreed in producing two hours of telenovelas for 52 weeks for **UniMas**, the #3 network in that market, owned by **Univision Communications**. The first title of that deal was *La Madame* (50 episodes), followed by *The Goat*, based on the novel *La Fiesta del Chivo* (Mario Vargas Llosa) whose grand premiere was on September 23 simulcast across **UniMas** and **UVideos** digital platform.



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## AZTECA/COMAREX: DIVERSIFICATION IN ALL SENSES

Founded over 30 years ago, **Comarex** has adapted and evolved bringing new programming in all genres to the entertainment industry by distributing +42,000 hours annually in over 110 countries. Its catalogue is composed of **Azteca's** telenovelas and series, feature films, documentaries, game shows (from **Azteca**, as well), sports, kids programming, news, music, reality shows and mobile content.

Apart from Azteca's content and pay TV networks (with the brand new division **AZ TVdePaga**, which has an exclusive article in this edition), **Comarex** is the sales representative in Latin America for **Mediaset Distribution** (Italy) and **Studio100 Media** (Belgium). For some European territories, Asia and Africa, it distributes a couple original series from **MTV Networks** and **HBO Latin America**.

**Marcel Vinay Jr.**, CEO: 'We are a complete offer with the best Mexican content, including series, miniseries, reality shows, as well as production done in Latin America that can be broadcast in any TV channel in the world. **Comarex** has become a key distribution arm with series such as *The Lieutenant* or *Drowning City*, or the formats *Soy tu doble*, *La Academia* and *La Academia Kids*'.

Historically, the top products exported from **Comarex/Azteca** are the telenovelas *Once you*



The big celebration of Marcel Vinay Hill 45 years in the industry during LA Screenings 2012. Pictured with his wife Rocio and his sons Alejandro y Marcel Vinay Jr., CEO de Comarex, and his wife Gabriela



The launch of Romanza+ for Africa: Cristobal Ponte and Cesar Diaz, Cisneros Media Distribution (USA, borders) with Marcel Vinay and Adela Velazco, from Azteca/Comarex (Mexico) and Craig Kelly, CEO of Africa XP Channel (South Africa, center)



YBhg Datuk Haji Md. Afendi Datuk Haji Hamdan, Chairman at FINAS (Malaysia), and Khairul Anwar Salleh, VP, Malay Customer Business, Astro (above), with Datin Zaiton Muhd Jiwa, CEO, Global Station (Malaysia), Agnes Rozario, VP of Content Group, Astro, and Marcel Vinay Hill, VP International, Azteca (all below)

*are mine, Daniela, Under a Red Sky, The Gaze of a Woman, A love to Remember*, as well as the series *What Women Keep in Silence*, sold in both format and ready made to over 150 territories. One of the most successful adaptations was in **Chilevision** (Chile).

Also, the entertainment format *La Academia*, which was very successful in Asia: Malaysia, Thailand, Azerbaijan, Indonesia and Singapore, as well as Paraguay, Central America and US. The kids version, *La Academia Kids*, was recently sold to **SCTV** in Indonesia.

During MIPTV 2014, **Comarex** closed a strategic deal with Malaysian satellite broadcaster **Astro**. Both have signed a *Memorandum of Understanding* (MoU) to co-produce in Malaysia three Latin *telenovelas* in three years, through the local production company **Global Station**. In August, the companies announced the first adaptation of **Azteca's** hit telenovela *A Love To Remember*; production commenced that month with a Fall 2014 premiere on **Astro**.

**Astro** had produced in the past two **Azteca** telenovelas, but this time it is a co-production and the two players will share the distribution of the new products, even in Asian countries. The **National Film Development Corporation Malaysia** (FINAS), a government entity that promotes Malaysia in the global market, will provide 30% cash rebate of total production.

With **Cisneros Media Group** (USA) it joined **AfricaXP** (South Africa) to launch **Africa Romanza+**, a 24 hours TV channel focused on *telenovelas* and Latin series, doubled to English language. **AfricaXP** manages now 5 channels in Africa, where there are 500 broadcasters in 56 territories.



The talent show *La Academia Kids* was recently sold to **SCTV** in Indonesia



*A Love To Remember* is a very successful telenovela from Comarex/Azteca, which will be adapted in Malaysia, co-produced by Global Station and to be premiered in Fall 2014 on satellite broadcaster Astro



Produced by Benjamin Salinas, *The Lieutenant* is a top rated series, broadcast on Azteca Sieta and sold in many international markets



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## CELULOIDE, A NEW WAY OF DISTRIBUTION IS COMING

Almost ten years have passed since the establishment of Mexican company **Celuloide** and since last January, **Luis Gadea** was named CEO. He explains to **PRENSARIO**: 'The first decision was to become a content distributor for all platforms. We began looking for catalogs' to represent, and we started with **Alebrije Productions**, owner of **Estudio México Films** and **Alta Vista Films**, headed by **Monica Lozano**, one of the most talented and successful producers in the Mexican movies industry.

Among others, **Lozano** has produced *Instructions not Included* —the top grossing Mexican movie of all times—, *Amores Perros*, *Por la Libre*, *Amar te Duele* and *Paradas Continuas*. **Alebrije** also represents huge US movies (*American Pie*, *Blair Witch Project* and *Butterfly Efect*). Says **Gadea**: 'This alliance allow us to enter into the distribution sector with more than 150 titles for all medias'.

In a second phase, Celuloide established **Digital Content Brokers (DCB)**, whose main objective is to deliver content anytime, anywhere, any platform. 'We became an **iTunes** aggregator in Mexico. By the end of 2014 we expect to have more than 100 titles available at the



Tiempos Felices

**iTunes** store, and by 2015 we expect to be the top aggregator in the region', adds the executive.

'We expect to establish new alliances at Mipcom, which will enable us to have our contents available worldwide. Our main goal is the specialization on digital platforms and thus become the leading independent distributor of Hispanic movies for that specific niche'.

**Celuloide** also has a production and distribution agreement with **Alejandro Franco's Sentido Comun** (*Warp TV*, *Day after*, *Music time* and the show *Sessions with Alejandro Franco*, broadcast in **Sony** and **E! Entertainment TV**). *Sessions* (8 season, 13x'60) features international guests such as *Blondie* and *The XX*, and is available for all territories. 'We are releasing the music documentary *For Those About To Rock ... The story of Rodrigo y Gabriela*, produced by **Franco's** team simultaneously in both Spanish and English'.

It has closed and output deal with **BBC**, including home video, some digital windows and ancillary rights. 'Last August we launched our home video division and concluded with the *Dr. Who* worldwide tour at the Metropolitan Theatre in Mexico City with the assistance of the main characters and having all the tickets sold out in only two days'.

In the production area, the success of *El Fantastico Mundo de Juan Orol* stands out with 63 awards. 'Our production continues to expand headed by **Alejandro Blazquez**, founder of **Celuloide**. During 1Q 2015, our second feature film, the romantic comedy *Tiempos Felices* will be released and it will be distributed by **Cinepolis** in Mexico and Latin America. During 2Q



Luis Gadea, CEO at Celuloide

2015 we will start shooting our third feature film *El entierro del Güiro*'.

'We are in pre-production of the documentary *Fast Forward*, our most ambitious project up to date that will take place in 21 countries having the support of the Secretary General of the United Nations (UN), **Ban Ki-moon**; Executive Secretary of the UN Convention on Climate Change (UNFCCC), **Christiana Figueres** and the Secretary General of the Organization for Economic Cooperation and Development (OECD), **Jose Angel Gurría**. By the end of 2015 our plan will be shooting two films per year', remarks **Gadea**.

'We have also a team of writers headed by **Jorge Ramirez** and we are developing the series *El Lider* (60x'60) with the guidance of one of the largest Spanish-language content producers. In 2105 we are planning to launch two web channels: **Arterial TV**, for a youth audience (18-26 years) offering comedy, music and alternative content from the Mexican scene, and **Warp TV**, with mainstream and international contents. **Sentido Comun** will lead this project'.

**Gadea** concludes: 'In the film industry, we are living great times with more successful productions, bigger box offices and an audience willing to watch Mexican movies. To get the fim industry to this point, it has been crucial the support of the Mexican Government, through tax incentives and its organizations like **IMCINE** and **COMEFILM**. The unprecedented support of **ProMexico**, trough **Daniel Tamayo** and **Karla Mawcinitt**, is invaluable'.

## EXCELENCIA EN COMUNICACIONES Y TECNOLOGIA

**Excelencia en Comunicaciones y Tecnologia** (Excomunitec) is another important Mexican technology provider, with presence in the TV, cine and radio businesses for over 20 years. It is the exclusive distributor for Mexico of international manufacturers such as **Miranda**, **For.A**, **Vislink**, **Belden**, **Senneheiser**, **Telestream**, **Nevion**, among many others.

**Jorge Castañeda**, president, says: 'The first six months of the year have been very busy because

of the Football World Championship in Brazil and we have several projects running for the second half of the year. We will be consolidating our sales and technology supply'.

'Definitely, our main priority is to maintain the commercial relationship with **Grass Valley**, to be the exclusive distributor of their products in Mexico. We are venturing new areas and brands for the next years, after attending important markets such us NAB. We bring to Mexico



Jorge Castañeda, president at Excomunitec, with all Azteca Monterrey technology team during the last NAB

the best technology products, with special emphasis on TV channels', concludes the executive.

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## ON SCREEN FILMS, #1 CORPORATE SALES AND RETAIL IN MEXICO

Founded in 1990, **On Screen Films** has been related to the different areas of the entertainment industry in Mexico and Latin America. It is dedicated to movie rights, purchasing and selling different rights for DVD's, VHS, Free TV, Pay TV, corporate sales, etc.

Since September 2006, it has started its distribution to retail stores, videoclubs, department stores, specialized stores and bookstores, and by November 2007, it signed with **Televisa** a contract for the exclusivity of 384 titles from the *Golden Age of Mexican Cinema*. On December 2007 it closed a deal of exclusive distribution with **National Geographic** for all Latin-America, including DVD and digital, and it also has an agreement with Discovery to use all the catalogue including all brands.

'Actually, OSF is the #1 company in corporate sales and in retail with presence in Mexico with 39.9% of market share (source: Nielsen) besides having operations in South America through strategic alliances of product distribution and brand licensing', explains **Julio and Rodrigo Ruiz Sotelo**, heads of OSF.

'We also distribute films in the theatrical business and TV sales, with an important revenue and income coming from that part. We have developed an important product port-

folio with 4 important product lines: feature films, special interest and documentaries (SI&D), kids products and TV series and miniseries.

To strengthen and achieving growth targets OSF has established other strategic alliances with distributors that have been given their exclusivity such us **CD Systems**, (distributor in Colombia, Peru, Venezuela and Central America) and **Grupo Clarin** (newspaper and our distributor in Argentina in kiosks)

'Mexico is one of the Latin American countries with the greatest potential in TV shows. The analog signal was to be cut off no sooner than January 1, 2022. Today, all networks in Mexico have programming in HD', **Julio Ruiz Sotelo** says.

Regarding Netflix and other SVOD services, they explain: 'Although these services are still considered niche, 70% of Internet traffic in Mexico is for video consumption, which has launched a "price war" in this market. The content suppliers **Apple Store**, **iTunes** and Argentine free-movie streaming platform, **Cuevana**, were the first to reach the Mexican market in 2009, while **Netflix** (the leading with 68% of the



Julio and Rodrigo Ruiz Sotelo



market) entered in 2011 and was followed by **Walmart's Vudu** and **Sony's Crackle**. Then, TV, cinema operators and chains joined'.

'Of the three factors that determine the success of this market, content is the key, which has made the American **Netflix** has the highest market share (68%) despite having the highest cost of 99 pesos monthly. For broadcasters, the challenge is to compete with higher quality of information or providing telecommunication services to production companies like Netflix to use their network infrastructure', concludes **Ruiz Sotelo**.

At MIPCOM, the company looks for business and financing opportunities, to establish contacts, develop relationships and evaluate opportunities with media, market-driven projects with the objective of a mutually beneficial outcome, and to provide services and products, constant innovation.

## MAGNUM, AT THE TECHNOLOGY FOREFRONT



Antonio Casado y Jorge Camacho, de Magnum

Founded in 1981 by **Eng. Jorge Camacho**, **Magnum Digital** is one of the leading technology distributors in Mexico, working with top brands such us **Yamaha**, **LiveU**, **Sony**, **Sharp**, **PreSonus**, **Linear**

**Acoustic**, for Mexican broadcasters and Pay TV networks. Since 2004 **Lic. Jorge Camacho** heads the company, who has introduced new lines of audio and video products and brands, taking the company to a new level.

He explains: 'This year was very special because all the Mexican broadcasters have invested

in high-end technology because of the World Championship Brazil 2014. We will continue focusing on the new solutions and products that allow a better mobility and transmission, production and post-production facilities'.

'**LiveU** products offer our clients to have a better live news delivery with small costs in operations and transmission. Innovation and new technology implementation is our big difference in the Mexican market: we knew the needs of our clients, so we bring solutions on demand for their daily operation'.

Magnum continues to distribute 4K products from **Sony**, 3D live transmission from **LiveU**, audio systems from **Yamaha**, among others. 'As an integrator, we are always seeking for new technologies that allow us to offer better products to our clients', concludes **Camacho**.

## RECOGNITION AT TELEMUNDO

Recognized for being at the technology forefront, **Magnum Digital** president **Jorge Camacho**, received an award from Telemundo magazine director **Jose Antonio Fernandez** and **Canal 100**. 'If you don't bring a solution, you are part of the problem', warned **Camacho**.



Jorge Camacho, president at Magnum, received an award during Expo Telemundo in Mexico

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# TELECOMMUNICATIONS IN MEXICO: THE FUTURE AND ITS TWIST

The Mexican telecommunications industry had an active year in 2013 with the enactment of the Constitution amendment related to the area, followed in 2014 by the enactment of the Federal Telecommunications and Broadcast Law in July. Among other decisions, the Congress approved and President Enrique Peña Nieto enacted a new regulation framework for telecommunications and television, including the creation of a new, more powerful regulator, the Instituto Federal de Telecomunicaciones (Federal Telecommunications Institute, IFT), with a mandate to promote competition in the Mexican telecoms market.

While the pay television industry has been growing at a good rate—in the order of 10 per cent per year—in the past years, the future of broadcast television and its role within the general telecommunications order is to be defined by the Federal Telecommunications and Broadcast Law, which applies since August 13, 2014.

Mexico President Enrique Peña Nieto enacted on July 13, 2014 the new regulation framework put in writing by the Executive and approved by Congress. At that moment, the President underscored its four major goals: allow a larger percentage of the population to access Internet, more efficient and affordable telecommunications services, and more competition concerning radio and television.

One of the key points of the regulation is that those Mexican broadcast TV stations featuring at least 20 per cent of local production will be allowed to increase their commercial time by 2 per cent (Art. 247) while those featuring at least 20 per cent of independently produced local fare (Art. 248) will be allowed an additional 5 per cent.

The legislation also rules that 'the licensees



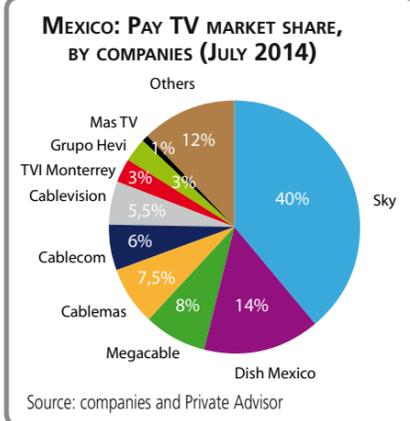
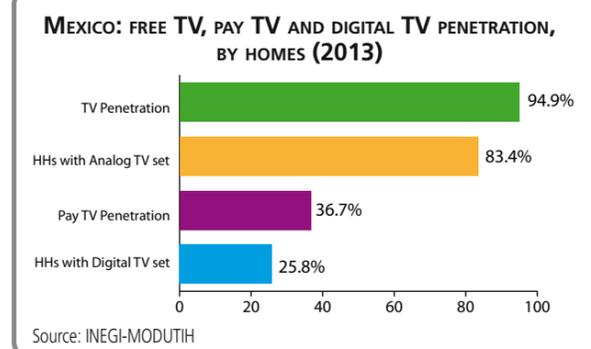
Mexico President Enrique Peña Nieto enacted on July 13, 2014 the new regulation framework put in writing by the Executive and approved by Congress

must encourage local and national artistic values and Mexican culture expressions, according to their programming structure. Programming including personal appearances must assign preference to Mexican personalities (Art. 248). Finally, Art. 250 asserts that the Federal Executive will apply financial support to 'promote the production of national product and independent national product'.

## NEW BROADCAST TV NETWORKS

The new law calls for two new digital broadcast TV networks that will compete on a national level with the channels produced on a national and local level by private networks Televisa (Channels 2,4 and 5 and 9 in Mexico City) and TV Azteca (Channels 7,13 and 40 in Mexico City), as well as the Red de Radiodifusoras y Televisoras Educativas y Culturales de México (a network of 60 TV public, educational and cultural TV and radio stations), considered the third largest in Mexico.

Other TV stations with total or partial coverage of the country are Cadenatres (Grupo Imagen), Public DTT network Una Voz Con Todos, operated by the Sistema Publico de Radiodifusión del Estado Mexicano (formerly OPMA), and public TV stations Canal Once, Canal 22 and TV UNAM, which are now part of the Red.



The bidding process held by the IFT started on September 2, 2014 after several groups interested in submitting proposals for the 246 broadcast television slots to be applied to the two new networks requested more time to develop a business plan that would comply with the new Telecommunications and Broadcast Law.

According to the schedule established by the IFT, the decision will be made by mid 2015. The IFT has estimated that each of the new digital TV networks will require about USD 65 million in investments, to which a guarantee of about USD 30-35 million must be added. National or international investors are able to participate in this process, with a cap of 49 per cent of the equity.

The IFT considers that each of the new networks will be able to acquire a 8.5 per cent of

the advertising market share after five years of operation. Televisa's and TV Azteca's channels currently account for some 90 per cent of the TV advertising pie in Mexico.

## TV AND DTT

According to the IFT, Mexico had 1,043 registered television stations by April 2014. Of them, 708 were broadcast TV stations and 335 DTT outlets, commercial and non-profit. The Instituto reports that the Mexican "administrative divisions" (States) with the largest number of television stations are Sonora (89 analog and 13 DTT), Oaxaca (56 vs. 13), Tamaulipas (36 vs. 26), Chihuahua (40 vs. 15), Chiapas (37 vs. 14), followed by Nuevo Leon, Guanajuato, Michoacan. Mexico City, the nation's Federal District, had 24 stations.

By May 2014 there were 337 DTT channels licensed in the country. Of these, 162 were in operation, 146 were digital "mirrors" and 7 were straightforward DTT permissions. Research by IFT in five cities of the north of Mexico (Monterrey, Reynosa, Matamoros, Nuevo Laredo and Ciudad Juarez) revealed that between 54% and 77% of their households received only broadcast TV beams. In these households the penetration level of DTT ranged from 22% to 43%.

In March 2014 the Mexican government started distributing free digital TV sets to low-income households as a first step towards the analog TV "switch-off" in five cities by November 26, 2014 and a nationwide migration by December 31, 2015. The initial part of this plan has been fulfilled in June by distributing 120,000 sets in the cities of Monterrey, Ciudad Juarez, Nuevo Laredo, Reynosa and Matamoros to households included in the subsidy plans operated by the Secretaría de Desarrollo Social (Social Development Secretariat, Sedesol). One set per household has been assigned; those families currently subscribed to pay TV have been excluded.

According to official data, a total of 13.8 million TV sets will be distributed, at a cost estimated at 26 billion Mexican pesos, equivalent to some USD 2 billion. The goal is that 90 per cent of the Mexican households must be capable of receiving digital TV signals by the analog switch-off date.

## PAY TV

Mexico is currently the second-largest Latin American pay TV market; Brazil has a

larger number of subscribers due to its higher population, but its pay TV penetration index is lower than Mexico's, which reached 16.01 million subscribers by August 2014.

DTH leads the market in terms of technology, with 8.66 million subscribers; during the first seven months of 2014 it has expanded by 10%, a lower level than in the past; in 3Q2013 it has grown 11.7% per year. By comparison, cable TV grew at a faster pace: 17.6% per year, reaching 7.3 million subscribers by August 2014 and a 46.11% market share. Wireless pay TV delivered through MMDS signals has been losing subscribers in the past years—most of them migrating to DTH—and dropped to 130,000 households. The overall cable TV growth prospects are positive, in the order of 11%, in addition to strong progress regarding Internet access and digital telephony.

Regarding players, with the recent acquisition of Cablecom, Grupo Televisa enlarges its presence in the market, where it also controls Sky, the DTH and leading Pay TV provider in Mexico and Central America, and cable operators Cablevision, Cablevision Monterrey (TVI) and Cablemas. It total, it accounts for 60% of the market.

Futuresource Consulting revealed that Mexican consumers have spent USD 4.2 billion in TV entertainment during 2013—9 per cent more than in 2012—, and this is expected to grow 10% this year. 'The biggest increases were on Pay TV: with 2 million new subscribers, the disbursement was USD 2.9 billion. Blu-ray has grown 15% and placed Mexico as the fifth global market during 2013'.

Digital video grew 95% reaching USD 86 million and will reach USD 360 million by 2018. SVOD represented 66% of the expenses in digital video during 2013. For 2014, it is expected to grow 70%. This is the result of a better broadband network in Mexico, which



Gabriel Contreras Saldivar, president of the Instituto Federal de Telecomunicaciones (IFT), and the Secretary of Communications and Transports (SCT), Gerardo Ruiz Esparza

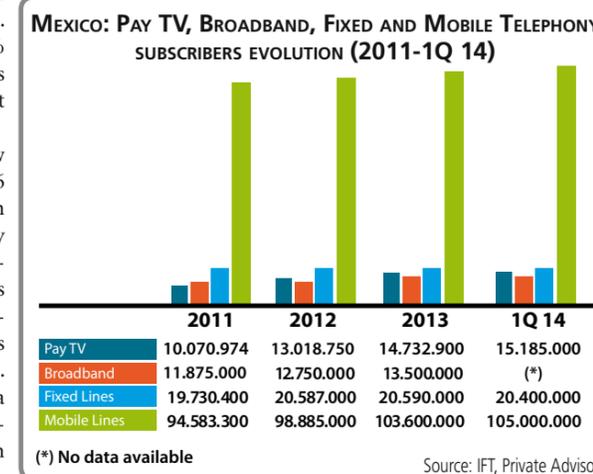
now has a penetration of over 50%, concludes.

## BROADBAND

The IFT has addressed a number of issues that will have a direct impact on the Internet market in Mexico. These include an auction of spectrum slots at the 700 MHz band, as well as ruling which operators should be considered dominant in each sector and decide about additional specific restrictions they should face.

Data from IFT reveals 13.5 million fixed broadband subscribers for 2013; no updates have been available for 2014. The penetration of the service among individuals is 11%, by households 33%, considered "low figures" if compared to the rest of Latin American countries. IFT Chief Commissioner Gerardo Ruiz Esparza said in July that with the new Law this situation will change in the near future: 'The regulation will allow more competition, new players and a larger availability of offers for users'.

According to PricewaterhouseCoopers' Global Entertainment and Media Outlook 2014-2018, growth of the Internet access market will come mainly from mobile Internet, which will increase at a compounded annual growth rate (CAGR) of 18.7% between 2013 and 2018, to reach 58.8 million by end-2018, up from 24.9 million at end 2013, says the report.



## TELECOMMUNICATIONS IN MEXICO: THE FUTURE AND ITS TWIST

The number of wired broadband connections will increase at a CAGR of 3.3% over the same period, to reach 19 million by end 2018. Mobile Internet access revenue will surpass wireline broadband revenue in 2015 to account for USD 7.5 billion by 2018, representing 60% of the total Internet access revenues at that time, concludes the study.

### TELEPHONY

The cable TV industry has been able to gain market share at the wireline telephony field. It is considered that there is still much room to grow, compared to other nations where the use of wireline telephony has declined in the past few years. The fact that Wi-Fi is increasingly being applied to voice and data mobile telecommunications is moving the cable operators to provide access not only within their home region but also through alliances with other operators in different parts of the country.

The IFT has reported that, concerning mobile telephony, Mexico has added some 3 million users in 1Q2014, reaching a total of 105 million active lines.

Recent news concerning telephony are that **America Movil** has decided to disinvest from part of its local assets while Spanish **Telefonica** has been holding talks with local telco **Iusacell**, controlled by **Grupo Salinas** and **Televisa**. **Telefonica** is already operating in Mexico through **Movistar**, the second largest provider (with a 20% market share) after **America Movil's Telcel**, which holds some 70% of the market. **Ricardo Salinas Pliego**, head of **Grupo Salinas** (and **Azteca**), denied being interested in selling the **Grupo Salinas** equity in **Iusacell**, a provider that accounts for some 6% of the market. **America Movil's** goal would be to reduce its market share to less than 50% after part of its assets are spun-off and sold to another company.

The Mobile Virtual Network Operator (MVNO) field is another segment for growth. Following **Megacable**, **Maxcom** y **Virgin Mobile**, British prepaid telephony operator **Lyca**

**mobile** announced in August that will it exploit the license obtained from the IFT earlier this year, using **Telefonica's** infrastructure to launch its service in Mexico, its first operation in Latin America. **Lycamobile** provided services to 30 million clients in 17 countries around the world in 2013.

With 25 years of experience in the long distance prepaid market, Mexican company **Ekofon** has launched in September its mobile services under the brand **Cierto**, using **Telefonica's** network, with an investment of USD 10 million.

### OTT

Over The Top programming providers are arising as relevant competitors to linear pay television in Mexico. According to consulting company The CIU, there are eight major providers of this type of service, including **Netflix**; **Crackle** (controlled by **Sony**); **Vudu** (**Walmart**); **ClaroVideo** (operated by **DLA**, a company controlled by **America Movil**); **iTunes Movies** (**Apple**); **Klick** (by movie theatre operator **Cinepolis**, controlled by **Grupo Ramirez**) and **VEO** (**Televisa**). **Sony Networks Entertainment International** announced in June the launching of **Video Unlimited**, a rental and sell-through online service available to game consoles **PS4**, **PS3** and **PS Vita**, as well as **SmartPhones** and **Xperia** tablets, **Bravia** TV sets and **Blu-Ray** players if connected to Internet. It may be also reached on Windows-operated PC's.

While services differ among various providers, all of them offer local content as well as foreign movies and series, available as rental or sell-through. Some of the services offer **Televisa** and **Azteca** content. According to The CIU, **Netflix** is a dominant player with 68% of the total subscriber base; **Digital TV Research** estimated **Netflix** had 640,000 subscribers by June 2014. Per The CIU, **ClaroVideo** has 10% of the market; **iTunes** accounts for 8%; **VEO-Televisa** 6% and other vendors reach 6% of this particular market.

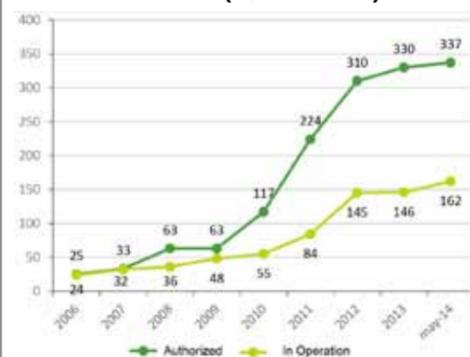
### VIDEOGAMES

There are over 100 companies in Mexico dedicated to create and produce videogames, according to the **Camara Nacional de la In-**



Emilio Azcarraga Jean, CEO of Grupo Televisa, Ricardo Salinas Pliego, CEO of Grupo Salinas

MEXICO: DTT CHANNELS AUTHORIZED AND IN OPERATION (2006-MAY 14)



Source: Infraestructura de estaciones de TV - IFT

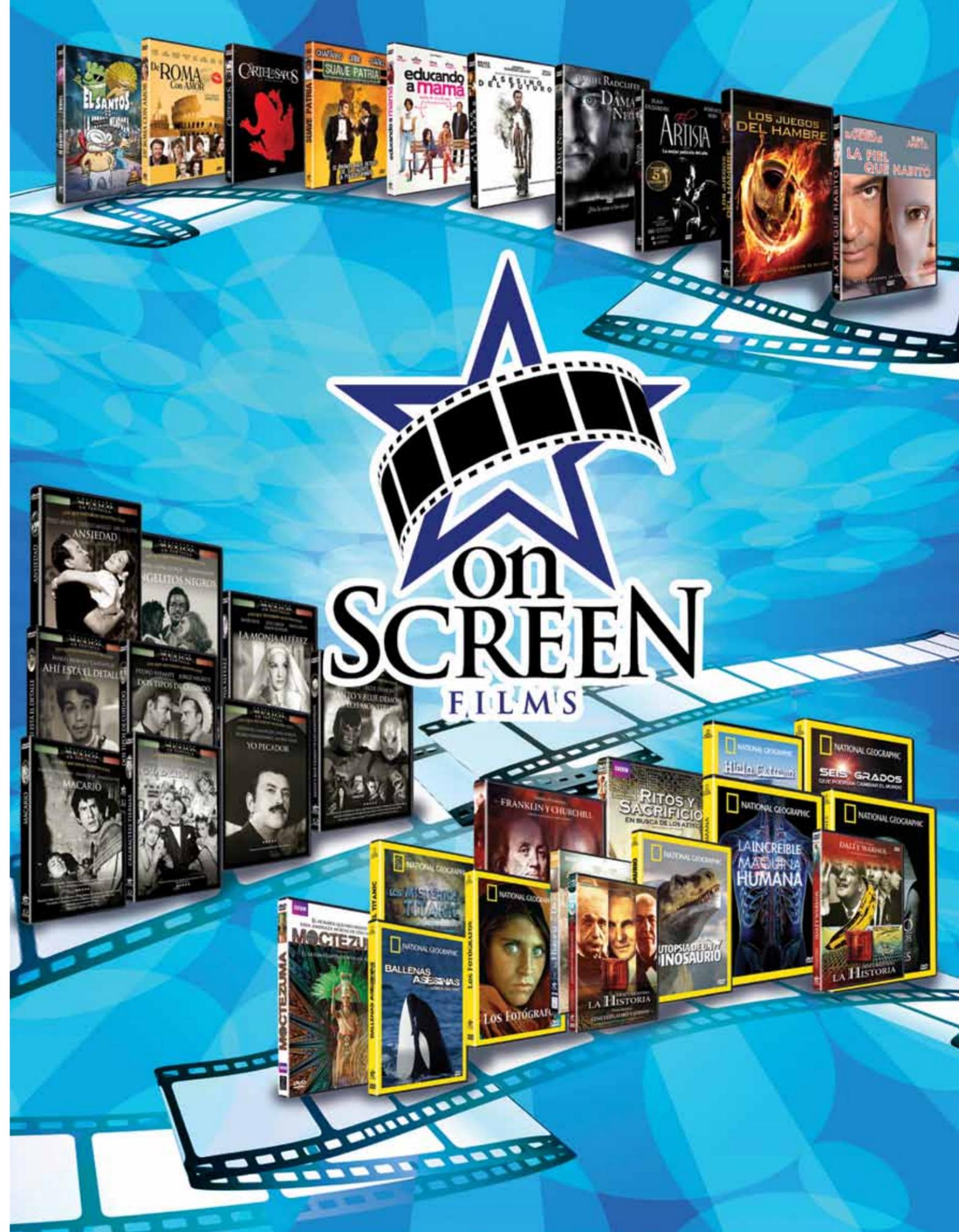
**ustria Electronica, de Telecomunicaciones y Tecnologias de la Informacion** (National Chamber of the Electronic, Telecommunication and TI, CANIETI).

A report by **PricewaterhouseCoopers & ProMexico** titled *Designed in Mexico Roadmap for the Creative Industry* report states that in Mexico the video game industry experienced strong growth during time period 2004-2009 (22.9%), reaching USD 698 million in 2009. **PwC** indicates that, by 2013, industry revenue was worth USD 773 million, an additional 11% expansion. These figures place Mexico among the top 15 video game markets in the world; in addition, being the largest market in Latin America, it accounts for 50% of the total, followed by Brazil (26%), Argentina (8%), Chile (7%) Colombia (5%) and Venezuela (4%).

Mexico's total video games revenues are expected to grow by a annual rate of 7.7% to reach USD 1.12 billion in 2018, according to the *Global Entertainment and Media Outlook 2014-2018* from **PwC**, which adds: "The total videogame consumer revenues are spearheaded by console and mobile playing: total console game revenues in 2013 were at USD 327 million while mobile game revenues were at USD 297 million, jointly accounting for 81% of the total of videogame revenues."



Carlos Slim's America Movil has strong presence in mobile telephony and broadband markets



# THE EVOLVING MEXICAN ANIMATION INDUSTRY

Mexican animation is going through a great momentum. The industry, which has 15 years approximately, is now mature with high-end executives and creatives leading the way. Moreover, there is a clear international vision to expand to new markets, by building strategic worldwide alliances. There are more producers and more companies providing services related to animation, visual effects and post production.

There are three main companies consolidated in the local and international market: the pioneer Anima Studios (founded by Fernando de Fuentes and Jose Carlos de Letona), Huevo Cartoon y Animex (founded by Ricardo Arnaiz). All of them were dedicated to the animated movie production, as it is the only segment that is receiving support from the Mexican state.



Anima Estudios: Don Gato y su pandilla, a record-breaking Mexican animation movie



Un gallo con muchos huevos, the third film from HuevoCartoon



La Revolución de Juan Escopeta, movie from Animex



Gyroscoopik: Cantinflas project includes: a TV series, a movie, apps and licensing

But since two years ago, Anima Studios is betting more in TV, through its own international division—in charge of Gaston Cami, VP International Sales—and also betting on international co-productions. The average number of animated movies premiered in Mexico is one and a half, while the best year was 2011 with three: Don Gato y su Pandilla and La Leyenda de la Llorona (Anima Estudios) and La Revolución de Juan Escopeta (Animex).

‘Regarding cost, animation is not so expensive to produce in Mexico, but in the last year the quality has improved a lot. And now, international and successful companies are watching Mexico to generate high-end animation for worldwide distribution’, explains to Prensario a local source that knows very well the animation business.

‘The animation industry expansion and consolidation has a strong relation with the support from the National Cinematography Institute (IMCINE) through its different lines of promotion. Trust for Quality Film Production (FOPROCINE) and FIDECINE have supported the production of animated films’, says ProMexico/PwC’s Roadmap to the Creative Industry.

ANIMEX and ANIMA Studios produce audiovisual content that places Mexico on the map of production and contract manufacturing of this type of entertainment product. The former one has achieved its current position thanks to the production of a franchise-style TV series: the animated El Chavo del 8, which has had a huge impact on the Mexican and Latin American markets and is being exported to other regions and markets around the

world, while ANIMEX has created entertaining feature films with a classic animation style that have been widely accepted by their audiences.

Don Gato y su pandilla was sold to 25 countries including UK (£4 million and positioned in the TOP 5 for five weeks), and Turkey. Now it is still among the TOP 5 of Mexican movies, and it was the most viewed Mexican movie in 2012.

HuevoCartoon produces web, TV and movie content in 2D, 3D and CGI animation, as well as live-action. Certified by Toom Boom, it offers great opportunities of co-production and animation development with both technically and creatively talented animation artists.

It has released two movies, Una Pelicula de Huevos (2006) y Otra Pelicula de Huevos (2009) that are in the top 10 features of Mexican box office success. Their third film is currently in production of Un Gallo con Muchos Huevos, it is the first Mexican 3D and CGI movie, and will be premier before 2014 ends. They have released more than 500 animated clips through Internet and a TV shows, which has been aired in the US and Latin America.

Gyroscoopik Studios is focused on 3D Animation, motion capture services and VFX outsourcing and production. In conjunction with Primetime Management Group, the company aims to develop and create interactive, animated content for children. The new projects include the production of Cantinflas, one of the most successful Latin character and the one with record sales around the world in the history as well as new four properties for children that are currently in development and seeking partners.

‘We are working in one of the most ambitious project in Latin America in the last years: the animated series of one of the most well known Mexican comedian Mario Moreno Cantinflas, which first three seasons (26x’11), including a song for each episode, a licensing guide and apps for personal devices. An animated movie and the global licensing are also considered in the project’, explains to Prensario Yoanpablo Perez Anaya, CEO/Producer at Gyroscoopik.

## ANIMA: TELEVISION, DIGITAL, DISTRIBUTION

BOOTH #C16.A 5



Jose Carlos Garcia de Letona, EVP, and Gaston Cami, VP of International Sales and Co-productions.

Founded in 2002, Anima Estudios is a pioneer in Mexico and the leading animation studio in Latin America. It has developed and produced more than 12 movies, 3 animated TV series, and it is now betting on the digital business. It also manages several YouTube channels and it is producing content exclusively for Internet.

Jose Carlos Garcia de Letona, EVP and one of Anima founders, explains: ‘We are celebrating 12 years with several new business initiatives. Apart from the appointment of Gaston Cami, as VP of International Sales, we recently opened Anima Kitchent in Spain, created by us and many Spanish entertainment executives with the objective of generating new IPs; produce own content, represent Anima’s interests in Europe and fulfill co-production opportunities.’

‘We have evolved from being an animation studio to become a complete entertainment company focused on the international market. We are working towards expanding our catalog by adding third-party properties in the near future. Our main highlights for MIPCOM are Teenage Fairytale Dropouts and the CGI movie Wicked Flying Monkeys. It is an exceptional time: we are reinforcing our communication and marketing strategies as well as creating even more productions. We are working towards consolidating Anima’s presence in the US and European markets’, explains Cami.

‘We have always been related to the best animated Mexican cinema with huge successes such as Don Gato y su Pandilla (Top Cat)—released theatrically in 25 countries, and among the Top 5 most successful Mexican movies of the history—, Kung fu Magoo (co-production with Dreamworks Classics), as well as La ley-

enda de la Llorona; its sequel La Leyenda de las Momias, currently in production, will be the third movie in the franchise; which will be released theatrically in Latin America by Videocine this month’, both executive comment.

Regarding TV, Cami continues: ‘Teenage Fairytale Dropouts was licensed to Gloob Brazil, and to the OTT systems DLA (www.clarovideo.com) and Netflix in Latin America. And our international distributor 9 Story (Canada) has closed deals in Asia (HBO and Sun Network India), Pacific (ABC Australia), Europe (Orlando Kids Croatia, TVE Spain, Noga Israel), and the USA (The Hub), among others.

Since 2006 the company produces for Televisa and Grupo Chespirito the animated series El Chavo—one of the highest rated shows in Latin American, on Free TV and Pay TV through Cartoon Network and Televisa Networks’ kids channel Tiin—and it has recently begun production of El Chapulin Colorado Animated Series, based on another character created by Mexican legend Roberto Gomez Bolaños.

The big news for 2015 is the release of Don Gato, el inicio de la pandilla (Top Cat Begins), an ambitious CG movie to be released in August 2015, distributed in Mexico and worldwide by Warner Bros. ‘We have three movies in production and four original TV series in development and preproduction’, they add.

The digital land-

scape is one of the most important segments in which Anima is putting special emphasis towards growth. Garcia de Letona concludes: ‘Through Kick-O’s we will intensify our presence in this market. It is an app, videogame, but also non-dialogued short episodes (10x’1’30) for all devices’, while Cami confirms that Televisa took the distribution in Spain and Latin America (300,000 downloads), while Korean company Blue Pin is doing the release in the rest of the world’. Several other projects are underway for web specific content and mobile apps.



TV series Teenage Fairytale Dropouts was recently licensed to Gloob Brazil, and to the OTT systems DLA and Netflix in Latin America



Kick-O's is a 360° concept that includes an app, a videogame and short episodes for TV



Wicked Flying Monkeys is the next big theatrical release to be premiered before 2014 ends

# ANIMATION FROM SPAIN

>

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## TCP, BEYOND LICENSING



Maca Rotter, executive director, Televisa Consumer Products

'Licensing industry itself is one of the most important business areas making a challenging and competitive scenario each day. We can find new plans and strategies from the main players all the time, but also, from "nobody"—not to underestimate the new players within their ideas—that from one day to another, may become big phenomena, but is hard to "see" them coming.'

**Maca Rotter Alday**, executive director, **Televisa Consumer Products (TCP)**, adds: 'Our first objective is to develop a better and more accurate vision of what is happening in the different markets and that would have an impact in the licensing industry, from TV and entertainment, movies, fashion to the apps ever-changing game market. The importance of analyzing the big picture gives us an idea of what would be the next "new big thing".'

'After more than 12 years, we are now relying in the creation of new IPs that will be translated in more revenues with projects born inside the company. After the successful story of *El Chavo animated series* (+135 episodes) we will launch *El Chapulin Colorado* in 2015, now under production and one of the top priorities.'

It is a primary matter of **TCP** to work in 'new business models', says **Rotter**, who exemplifies: '*Hablando Sola* was born from a book and now is a **Facebook** fan page with more than 2mm followers and a **YouTube** channel just launched in a very successful daily growing licensing development in LatAm, US, Spain and Greece.'

'It is still very important the emotional link between the character/brand and people, but since the media has changed and consumer models have been transformed, engagement values and brand loyalty are facts that can be reached through BTL experiences to our consumers, now is more universal and immediate.'

'Not all worldwide properties had the same path to reach their audiences, but it is a fact that a license program can help to reach new audiences. Sometimes the important thing is to be very careful with strategies of how to launch it: toys and apparel... then accessories and stationary... or digital and collectables first, then toys... it depends on each property and its content.'

And concludes: 'A licensing program closes a cycle with the audience and the content emotional link with them, so they can touch and take-home their favorite characters of a specific show or movie. Worldwide properties find success many times not only because they have licenses, but how they are talking to this specific audience. It is a matter of experience and of expertise in the territory.'

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*Hablando Sola*: from a book to a Facebook fan page of 2mm followers and a YouTube channel



## EXIM: 'WE KNOW THE TARGET'

**Exim** has always been recognized in the market as an agency that looks for 'differentiation' and an 'aggressive approach' in terms of maximizing business opportunities. Since its beginning, back 32 years ago in Argentina, **Elias Hofman**, founder & president, in order to succeed in acquiring the rights of certain brands and get business going, had to develop an aggressive strategy to help licensors to secure exposure for their brands on terrestrial TV, which was something that competitors were not even thinking of doing at that time.

After that he continued with other activities such as *Stage Shows*, premium catalogues to supply promotions' needs and more recently a digital division. 'We have always tried to take the lead and innovate. Looking back, we have no doubt it has proven to be a successful strategy', says **Hofman**.

'The *momentum* requires something that can be easily explained in one word: focus. And total attention to our core business, licensing. We continue to work on our portfolio making sure we focus on strategic partnerships and properties that really resonate in Latin America. We aim to present and offer the best opportunities in different licensing areas such as entertainment, sports, arts, lifestyle, digital.'

'We will continue to explore other business opportunity together with third party companies, which are experts in those areas. Our established network and team of professionals should be focused primarily on licensing and building retail partnerships, while our business partners will continue to help us maximize other business opportunities.'

Brazil is the leading market for the company, followed by Mexico, where **Exim Group** have doubled investments in the last year, increasing the team with professional staff well acquainted to accelerate the growth in this key market. 'It will show great surprises in the years to come in the licensing development', he says.

'**Exim Colombia** is rapidly acquiring a leadership position for licensing and promotional activities being developed. Colombia has brought never before seen opportunities for our brands creating strong relation with retailers and increasing the licensing culture to a point that so far, we have had the opportunity to work with most of the A+ companies in that country.'

Concludes **Hofman**: 'A lot has been done, but the road is long and market gets more challenging day by day. Never be satisfied with what you achieve, because it all pales in comparison with what you are capable of doing in the future.'



Elias Hofman, founder & president



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## DUBBING HOUSE CELEBRATES ITS 10TH ANNIVERSARY

In 2014, the dubbing industry celebrates 70 years in Mexico: it started in 1944 when MGM came to the country to dub *La Luz que Agoniza* and the next year some Mexican actors traveled to New York to work for the movie *Eleven Anclas*.



Paola Felgueres, VP, at Dubbing House studios in Mexico City

Settled in 2004, **AF & Associates The Dubbing House** is a key player in this market, and led by its president, **Jorge G. Arregui**, it has become one of the main Mexican dubbing houses. With 29 years in business (19 of them formed in **Televisa**), he is a very well known face of the Mexican industry in the international markets, which have been attending with Dubbing House's VP, **Paola Felgueres**. Both are authorized voices to understand how this industry was built in Mexico, and they are celebrating the company's 10 anniversary this 2014.

'Most of the dubbing that has arrived to Latin America was Mexican. This industry is now consolidated and growing; but in the era of globalization, new countries such as Argentina and Colombia, have appeared as

dubbing hubs. Spanish dubbing has created a natural language that can be understood in all the countries, no matter the local *twists*. The biggest contribution from Mexico is that the industry here is becoming more and more modern every year', they explain.

**Dubbing House** was one of the pioneers companies encouraging other Mexicans to gather and attend the international markets as an umbrella (at the beginning it was **Mexico Voz e Imagen**). 'Fortunately, we got the support from **ProMexico** to be "County of Honour" this MIPCOM', says **Arregui**.



To show the strength of Mexican audiovisual industry, the executive describes: 'Today, 67,000 programs are produced annually in the world of which 55% are done here in Mexico. In our country there are over 30 dubbing companies, apart from independent studios, that generate close to 2,800 direct and 7,000 indirect jobs. Through the dubbing, Mexico exports culture'.

The company has dubbed programs into Náhuatl/Aztec (indigenous language) for educational TV networks, as well as the animated series *El Chavo* (dubbed into English), the Mexican movie *Top Cat* (**Anima Estudios**) and the iconic series *Señorita Cometa*. 'We have worked with international companies such as **NBCUniversal**, **FOX** (*Modern Family*), **Starz** (*Spartacus*, *Magic City*) and we have done some works in Portuguese', adds **Arregui**.

In Mexico there are more than 1,200 dubbing ac-



Jorge G. Arregui, President (center) with Cristina Flores, studio director, Rommy Mendoza, dubbing actress director, Francisco Colmenero, dubbing actor director and Diana Santos, dubbing actress director

tors. Among them, Dubbing House works with **Emilio Rafael Treviño**, a young actor that has dubbed programs and movies (*Mega Med*) for **Disney Channel** and **Disney XD**. 'Giving live to a character is like having two lives: the normal one (when I go to school) and the other one where I play the role. Determination and discipline are the key to successes', he stands.

With an emotional and sensual voice, **Rebeca Manriquez** is a dubbing actress with 37 years of career in TV, film and theatre. She is working on *Carrousel* (**SBT**) and *Rastros de Mentiras* (**Globo TV**), both from Brazil. In the past, she has worked on the series *Dallas*, *ER* (14 seasons), *Melrose Place*, *The Sopranos*, *True Blood* and *Six Feet Under*. 'Dubbing means reaching other audiences, including blind people, others that don't read fast, and small kids, etc.', she highlights.

**Pedro De Aguillon** has 40 years of experience on TV and film, and his father was one of the pioneers in dubbing in the '40. It has worked in *Modern Family*, *The Miller* and some **Netflix** series, as well as the movies *Captain America*, *Transformers*, *Lego*, *Cars*, etc. 'I had to adapt to the new technology because now everything is through computers. Dubbing is not only voice, but doing what the character is intending to express'.

**Diana Santos** has 58 years of experience. His father was the representative of **Walt Disney** in Mexico, and she has worked in several classics such as *101 Dalmatians*, *The Beauty and the Beast* and *Minnie Mouse*. Nowadays, she is one of **Dubbing House'** dubbing actress director. 'In this profession you must be an actor in order to transmit the acting with the voice, but without moving', she concludes.



Dubbing actors: Emilio Rafael Treviño, Rebecca Manriquez and Pedro de Aguillon

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## CAALIOPE: 'DUBBING IS A NEW LITERARY GENRE'



Carlos Sanchez, director, and Alicia Flores, managing director

The summer of 2004 was especially rainy in Mexico City, just as it has been the current season. While the rain was pouring down and heading into a heavy rain-fall, the tiresome executive of a dubbing studio, in between sips of coffee, made comments on this particular reasoning: "Today, dubbing

TV programs or movies has no difficulty. Anyone can do them, because the necessary equipment is cheaper and easier to manage. That is why now, we face more competition."



At the same time, **Carlos Sanchez**, the actual head of **Caaliope Dubbing And Distribution**, who listened carefully and with astonishment the words of his speaker, explained that every experience could be seized from person to person. They should have kept listening and applied their own story.

"Those old words would not have sounded so loud, if they had not been said by someone who worked for more than two decades in this business. It seemed that something was missed", he says, and **Alicia Flores**, chief executive at **Caaliope**, decoded really well: "Dubbing is not just a matter of managing equipment easy to get or purchase. It is above all, a job that requires talent. The Spanish language included in international TV and film industry productions, constitutes more than just a job, it reaches to a modern age of a new literary genre".

**Sanchez** and **Flores** founded the company in 2005: "We look for the constant improvement in quality of the use of Spanish: the right interpretation vs. another language. We take rigorous care of each genre and offer excellence in artistic management. We aim to bring the selection of the best Spanish dubbing actors, and the most sophisticated and adequate technical management".

"None of these was easy at all. Implementing this organization has required, and requires nowadays, 24 hours dedication that can only be achieved by loving what one does. Soon, we will be offering our clients



Caaliope team: Edgar Yañez, programming, Elizabeth Bueno, actors control; Santiago Vazquez, administration

up to date technology with new sound booths and an innovative 7.1 theatre. Likewise, Caaliope will begin a brand new line of work of television programs production', they conclude.

## BOXEL: ANIMATION, 3D, NEW MEDIA



Andres Reyes Botello, founder and managing director



From pre-production to CGI production, Tijuana-based **Boxel Studios** is a production company specialized on animated feature films, TV series, videogame cinematic or asset creation. Its in house capabilities allow **Boxel** to integrate content in new media like interactive story books or mobile games.

It is recognized by its high standards in processes, work ethic visual quality, as well as a strong understanding of the industry and the emerging technologies. '**Boxel Studios** lead-edge team of innovative professionals, carefully review your projects from all perspectives to recommend functional, and integrated solutions to help you meet specific goals and achieve more with your production budget', explains founder and managing director, **Andres Reyes Botello**.

**Boxel** offers different services, such as layout, 3D modeling, retopo, UV unwrapping and texturing, rigging, animation, lighting and shading and compositing. It has worked with local/regional partners such as the **Comite de Turismo y Convenciones de Tijuana (COTUCO)** and **Sintesis Comunicacion**; the national companies **Tunel Imaginario**, **Animex**, **El Taller de los Tipitos** and **Power Pet**; and with **Blindbit (Parana Films)**, **Viastarta**, **Olmos Production**, **Animex Latin Production**, **R&R Communications** and **Goldman Armor** in the international market.

**Reyes Botello** concludes: "Our growth has rapidly increased in a sustainable way. With every step we take, we aim at producing entertaining visual content. Our objective is to become one of the leading animation studios in Mexico".

## DON PORFIRIO: BRANDING SOLUTIONS

**Don Porfirio** is a motion graphics and broadcast design studio based in Mexico, specialized in branding solutions for TV networks and original content with special focus on design.

"We take our project from concept to execution always looking to generate new creative solutions and high impact animation. We are conformed by a talented group of visual artists, storytellers, illustrators, animators and designers who share the passion for great design", explains **Roberto Puig**, founder and creative director.



At MIPCOM, the company expects to meet new partners and possible clients, 'who might find in our services the branding and design solutions for their products and content, or who are looking to partner with a company as ours to achieve their goals'.

**Don Porfirio** and **Puig** have over 10 years of experience working in the international market with international companies such as **ABC**, **CBS Sports**, **NBC**, **ESPN**, **MLB Network**, **Much Music**, **Discovery Channel**, **Food Network**, **BBC Entertainment**, etc. "We also have experience in the domestic market with clients like **JTW**, **Ogilvy**, **BBDO Mexico**, **McCaann Mexico**, **Nike**, **Motorola**, **Nestlé**, **Bimbo**, **Mc Donald's**, **Televisa Deportes**, and many more.

"Mexico's animation and design landscape has grown and developed in a very positive way over the past years. At the present, it has a lot to offer to the International Markets and its creative companies are capable of

achieving the same level of quality that is seen and demanded overseas. Its lower production costs and geographic strategic location makes Mexico a very strong competitor among other countries that might offer the same services and outsourcing capabilities", concludes **Puig**.



Roberto Puig, founder and creative director, with Don Porfirio team

## Z GRUPO CREATIVO REBRANDS

**Z Grupo Creativo**, a group of Mexican writers specialized in the creation, development, commercialization and production of multiplatform concepts in both, fiction and entertainment, is attending MIPCOM to promote its services, while it has rebranded its image.



Designed by **Miguel Bribiesca**, the new logo is inspired in the ideas, how they take shape and are concreted. "The image shows an infinite universe of the imagination of creators and writers at **Z Grupo Creativo**. Moreover, it reflect the diversity and originality of its content", it was explained.



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# INTERNATIONAL PLAYERS & MEXICO

BOOTH #C16.A5

## TELEFILM/CMF: CANADIAN CONTENT TO THE NEXT LEVEL

Carole Brabant, executive director, **Telefilm**, explains: 'This MIPCOM we are working together with **CMF** on a series of B2B promotional and business development activities. Our objectives are to elevate global awareness of the quality and genres of Canadian-produced content in Canada and abroad.'

'We also aim to drive content export deals and inspire international production investment in Canada; create networking and match-making platforms to increase deal-making with Canadian companies; spotlight and promote Canadian talent; screen and showcase exemplary Canadian productions; and communicate the benefits of the rich and attractive audiovisual business climate in Canada,' she adds.

**Valerie Creighton**, president and CEO at **Canada Media Fund (CMF)**: 'In Cannes we will have world premiere screening of *The Book Negroes*, the anticipated TV adaptation of the award-winning novel by Canadian writer Lawrence Hill and filmed in Nova Scotia, Canada.'



*The Book Negroes* has the world premiere screening at MIPCOM

Presented by **Entertainment One**, producer **Clement Virgo** and key cast will attend the screening.'

**Telefilm** has had a Latin America strategy in place since 2012-2013. Explains **Brabant**: 'It includes striking business development partnerships with key festivals and markets in Latin American, such as the **Bogotá Audiovisual Market (BAM)**. As part of this priority, coproduction with this region for the last 5 years has resulted in USD 80 million in production volume as well as six feature films and 10 TV projects.'

In 2014, **CMF** is introducing a new program to provide matching fund contributions for co-development and/or coproduction of TV and digital media content with foreign partners. 'A budget of USD 2 million has been earmarked for this program,' comments **Creighton**, who completes: 'As part of this incentive, at **Rio-ContentMarket 2013**, together with **RioFilme** we announced an agreement to join efforts to support the co-development of TV projects and related digital media content.'

'We have also taken an active part in other key industry events in Latin America and around the world: *Sunny Side of the Doc* (France), *TV Business Encounters* (Argentina), etc. After MIPCOM, we will be speaking at *Anima'T* (Barcelona) about Canada's children's content industry,' comments **Creighton**.

'Together with the **Canadian Media Production Association (CMPA)**, **Manitoba Film &**



Carole Brabant, Telefilm Canada, and Valerie Creighton, Canada Media Found

**Music, OMDC (Ontario) and SODEC (Québec)**, we have partnered with the *San Sebastian Film Festival* (Spain) to organize a special *Canadian Focus* with over 10 Canadian producers taking part in the third annual *Europe-Latin America Co-Production Forum*, in order to build their international business networks and to foster their expertise on coproducing with Spanish-speaking countries,' adds **Brabant**.

**Creighton**: 'Mexico is an important market for us due to its mature audiovisual industry and effective financing structure. We want to do more in terms of coproduction. Over the last years, there has been four coproduction projects (two features, two TV projects) between both countries.' **Brabant**: 'Most notably was *The Boy Who Smells Like Fish*, directed by Analeine Cal y Mayor and produced by Toronto's **Niv Fichman**.

**Telefilm Canada** will again be present at the **Los Cabos International Film Festival** in Mexico. Since 2012, this event has hosted a forum for dialogue and collaboration between Mexican cinema and its North American cultural commercial partners. Formerly named the **Baja International Film Festival**, this year the Festival is holding its first-ever "Mexico-USA-Canada Coproduction Forum".'

TELEFILM CANADA

Canada Media Fund  
Fondo de medios de Canadá

## SONY PICTURES TELEVISION



Nathalie Lubensky, SVP & general manager

**Canal Sony** has recently premiered the 5th season of *Mexico's Next Top Model*, which will offer more interactivity to users, viewers and advertisers. Through social media and **Google Hangouts**, it will have new digital tools such as **TopModelLive.mx** that will allow audience to interact in real time during each episode, give their opinions, etc.

**Sony** and **AXN** have been launched on **Dish Mexico**, which has allowed the company to reach over 100 million of subscribers in

Latin America. 'Audiences are more and more social and like to share content and opinions with friend's,' says **Nathalie Lubensky**, SVP & general manager, **Sony Pictures Television Channels**, Latin America. Together with **A+E Networks**, **Sony** has launched in Mexico the network **Lifetime**. Focused on the female audience, the Pay TV channel is already available all across Latin America.

## TELEMUNDO INTERNATIONAL



Marcos Santana, Telemundo Internacional Diana Mejia-Jones, Campanario; Joe Uva, Telemundo; Sara Maldonado, protagonist of *Camelia la texana*; Jesus Torres, Telemundo; and Epigmenio Ibarra and his wife, Argos Comunicación

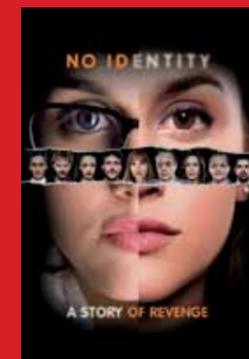
**Telemundo** has always been related to the Mexican audiovisual industry. Since 2009, and for 10 years, it has a deal with **Televisa** including two main areas: the Mexican company has the rights to broadcast its productions in Mexico through **Free TV (Canal 9-Gala TV)** and **Pay TV (Televisa Networks)**; and **Televisa Networks** distributes **Telemundo International Pay TV** channel in Mexico.

Regarding production, it has a big deal until 2020 with **Epigmenio Ibarra's** production company **Argos Comunicaciones**. The most recent production was the 60-episodes super series *Camelia la texana*, in which is also involved the production company **Campanario Entertainment**. **Telemundo Internacional** is also in charge of global distribution of **Argos' productions** like *Behind Every Woman*, etc.

# AUDIOVISUAL FROM SPAIN



MIPCOM'14  
RIVIERA HALL, R7.J11



▶ **The Secret of Old Bridge**  
Soap Opera, 1105 x 50'  
BOOMERANG TV

◀ **No Identity**  
Drama, 9 x 90'  
ATRESMEDIA

◀ **The Shower**  
Format, 90'  
SECUOYA C.D.

▶ **Remember When**  
TV Series, 234 x 75'  
GRUPO GANGA PRODUC.



▶ **Genocide in the Jungle**  
Documentary, 1 x 90'  
ONZA DISTRIBUTION

▼ **Pepe's Beach Club**  
Comedy, 10 x 70'  
MEDIASET ESPAÑA



▶ **Bandolera**  
Drama, 534 x 45'  
COMERCIAL TV

◀ **Jelly Jamm**  
Animation Series, 52 x 11'  
ANIMA KITCHENT



▶ **Majorca is not Magalluf!**  
Documentary, 60'  
RAYS OF SUNSHINE



▶ **I Know Who You Are**  
Drama, 20 x 45'  
FILMAX INTERNATIONAL



◀ **Bat Pat**  
Animation Series, 52 x 11'  
IMIRA ENTERTAINMENT



▶ **The Sea Chef**  
Documentary Series, 13 x 50'  
MEDINA MEDIA



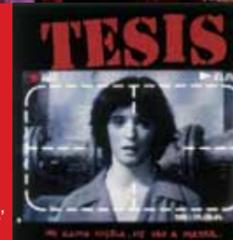
▼ **Don't Say It, Bring It!**  
Format / Game Show, 30'  
PHILEAS PRODUCTIONS



▶ **Foosball**  
Animation Film, 90'  
FILM FACTORY ENT.



▼ **Magic Mania**  
Children Prog., 26 x 12' or 13 x 24'  
VERALIA



▶ **Tesis**  
Feature Film, 126'  
SOGPAQ



## SMILEHOOD MEDIA: INTEGRAL PROPOSALS FOR PRODUCERS AND BUYERS



Silvana D'Angelo, director, Smilehood Media

**Smilehood Media** (Argentina) has established itself as a big player in the content industry. Focused in 360° and *transmedia* content, the company offers a differential and integral proposal to producers and buyers around the world that includes new *multi-screen* titles and interaction with original comedies, teen series, kid's entertainment and live-action, among other formats.

Describes **Silvana D'Angelo**, director: 'At **Smilehood Media**, division that includes the distribution and acquisition of content for international markets, we incorporate original and universal productions in order to satisfy the needs of international programmers, either of self-produced series, co-productions or our services as distribution company.'

'As producer, our expertise in animation content began with the production of the series *Plim Plim*, property that keeps achieving recognition both in Argentinean market and worldwide after its success in **Disney Junior Latam**. *Plim Plim* has been sold to over 35 territories including **Discovery Family** (USA), **Tiji Russia** and OTT services like **Netflix** (Latin America) and **DirectTV's** in USA, among others.'

Another of the highlights of the company's *Wake Up*, the teen series recently released on **E! Entertainment Television** that has over 50 songs of the Warner Chapell library. *Wake Up* is the creation of **Sebastian Mellino** (*Violetta*) for **Once Loops**, and consists of a weekly series of 13 episodes with a cast that includes Argentine, Mexican, Spanish and Colombian talent. The series will soon be available also for Netflix Latin America and DirecTV in the United States.

'Smilehood began to bet on the own production, reason because the company associated with the producer **NightSun** to realize the TV version of the web success *According to Roxi*, originally created as a series just for internet. We believe that the greatest merit of the series is that it was conceived as a second screen content, creating a loyal group of fans'

Concludes **D'Angelo**: 'We believe that this development model is going to be a pioneer for many producers now on. Today those who want to innovate in the *transmedia* area have a proven and successful format to do it. The show is oriented to the segment that advertisers target more: women; that is why we are so confident that not only will be one series but many around the world representing women of each culture and local humor.'



According to Roxi, originally created as an internet series will have its TV version

## DW, CONTINUOUS GROWTH IN MEXICO



Sylvia Viljoen, DW's Head of Distribution for America

Mexico is and remains a key market for us. After more than two years of **DW Latin America**, we have seen continuous growth throughout the country and a significant rise in brand recognition. For nearly a year, we have been offering schedule with a full 24 hours in Spanish for Latin America. This move has ensured that our viewers in Mexico and other Latin America countries have access to our brand of in-fotainment around the clock.

Our success with partners like **La Red**, which is celebrating its 20<sup>th</sup> anniversary this year, has shown us the power of working with quality partners. It has over 50 TV and radio stations as members all throughout Mexico and we have been with them from the very beginning. But we have also found great cable, DTH and IPTV partners like **Megacable**, **Cablevision**, **Sky** and **TotalPlay**. And we have seen lots of growth due to partnerships with organizations like **Sistema Publico de Radiodifusion del Estado Mexicano** (Mexican Public Broadcasting System), which is the newest public broadcaster to provide free TV nationwide.

We are looking to expand on this great network of partners and expand our cooperation with existing partners in Mexico. It is extremely important that we provide our target audience with content that is relevant to them. We have continued to adapt and change our offer

This year's MIPCOM features programming highlights that focus on discovery, such as the new series *Tasty Tales* and *On Island Time*. It's a great starting point for those who want to see what makes nature so extraordinary. We have also added new episodes to our series *The Mysteries of the Brain*. These are programming choices from **DW Transtel**, offered across all platforms, and especially popular with audiences in Mexico.



Tasty Tales

## PARAMOUNT PICTURES OPENS OFFICES IN MEXICO CITY

Formerly **Comarex** sales executive **Jesica Stescobich** was named director television licensing for Latin America at **Paramount Pictures**, which has opened offices in Mexico City to start direct distribution of its catalogue within Latin America. Stescobich reports to **Erica Adler**, SVP Latin America International Distribution, based in Los Angeles.

At the new buildings in Mexico City, the company manages sales for Pay TV networks, SVOD and Free TV channel for all the territories of the region. 'We are attending our clients directly, and our objective is to provide a more personalized service. We will be attending MIPCOM, meeting for the first time with Latin American companies, and probably MIPCan-cun in November', says **Stescobich**.



Jesica Stescobich, director television licensing, Latin America



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## EXIM ENTERTAINMENT/TECH: THE TARGET CONNECTION



Elias Hofman, president, Exim Entertainment/Exim Tech

'At Exim Entertainment we dedicated to create, produce and execute for all Latin America and Hispanic USA territory shows for the most successful children's characters in the industry, not without adding to

the innate potential of the brand our creativity and experience on the field.'

Elias Hofman, president Exim Entertainment, continues: 'We have taken steps to attack aggressively the key markets in the region, running our children Festivals and Live Events with characters like Peppa Pig, Strawberry Shortcake, Barney, Thomas The Tank, Fairly OddParents, Doki from Discovery Kids, Hello Kitty, etc.'

On the other hand, Exim Tech establishes a way of communication with consumers using

social media, which are great tools of price/value to generate highly effective contact. 'With InPulse Digital, partner in the implementation of digital strategies, we are in the process of launching three programs in 2H 2014, two with the most important major licensors of the industry. We also generate and implement monetization tools, mainly gaming and apps with our strategic partner QB9 (Grupo Clarin, Argentina); he says.

'The number of brands and licenses interacting in the market is huge. Many of them have excellent developments. Unfortunately only some of them are successful, meaning by success to be above the threshold of expectations raised by the licensors.'

'We must first, to develop our ability to analysis evaluating variables such as quality and quantity of content, appeal to consumers, strategic partners, direct and indirect competition, licensor's ability to communicate and promote



Doki and Hello Kitty, two of the most important brands managed by Exim

its license to the final consumer. Second, appeal to our sensibility and instinct to see the imperceptible, and try to imagine or figure out if the property will be successful... or not?'

'We take care of all these aspects by working in strategic partnerships. Our mission is to accompany the process throughout the life cycle of the brand, along with providing the best strategy to reach consumers, maximizing exposure and supporting licensing programs and promotions', remarks Diego Barassi, managing director, Exim Tech.

'Making a long story short, we create and implement meeting points off line and on line in order to achieve unique experiences, becoming somehow The Target Connection for the consumer', concludes Hofman.

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## POL-KA, EYES ON MEXICO

Founded in 1994 by **Adrian Suar** and **Fernando Blanco**, **Pol-ka Producciones** (Argentina) is one of the largest fiction production companies in South America with over 6,000 hours of drama, action and comedy series and telenovelas. In these 20 years, Pol-ka was able to consolidate and to create a prestigious brand in the Argentine and Latin America content industry.

In addition to the establishment of strategic partnerships with both networks, **Azteca** and **Televisa**, it has a special relationship with **Pedro Torres (El Mall)**, who was the producer of the Mexican version of *Killer Women*, and **Epigmenio Ibarra's Argos** managing director. And it is building bridges with **Cadenatres** and other major local production houses to open new business in Mexico.

At present, the company is producing the series *Violetta* for **Disney Channel** achieving success in both Latin America and Europe over its three seasons. Moreover, it was in charge of the production of *Epitafios*, as se-

ries produced for **HBO Latin America**, as well as local versions of *Desperate Housewives* for Argentina, Colombia, Ecuador, Brazil and US Hispanic.

### MEDIA BIZ, A LINK BETWEEN LATIN AMERICA AND US

Headquartered in Buenos Aires, **MediaBiz** is a sales agent led by **Alex Lagomarsino**, who manages worldwide **Pol-ka's** formats, as well as some titles from Latin American producers. The company also works with a *pool* of authors, writers and directors who represent in the international market.

He explains: 'Mexico is a leading market in the region, and we congratulate them for being this MIPCOM's *Country of Honour*. It is a key focus because of the turnovers that have generated to our company in 2014, and the opportunities that we found there for the development of co-productions with local producers and TV channels.'

In order to strengthen the link between the



The Mexican version of *Killer Women*, adapted and produced by Pedro Torres, CEO at El Mall

US and Latin America, **MediaBiz** has opened new offices in Los Angeles, hoping to 'highlight the growing interest and integration of the markets by the huge community of Mexicans in the US', says to **Lagomarsino**.

Pol-ka's productions have been adapted in countries like Russia, Spain, Italy, Colombia, Ecuador, Dominican Republic, Chile, Uruguay, Mexico, and USA, where **ABC Studios** has bought the first Argentine format to be adapted in that country: *Killer Woman*. **Sofia Vergara's LatinWe** produced the series, which was broadcast on **ABC** network at the very beginning of 2014.



Alex Lagomarsino, CEO

BOOTH #R9.A20

## TELEFE, REAL VALUE FOR THE MEXICAN TV MARKET



Daniel Otaola, content distribution manager

**Telefe International** (Argentina) has a long time building relationships in the Mexican TV market in three main business areas: selling contents, TV formats (Free TV) and ready made programming (Pay TV), and its 24-hours network **Telefe Internacional**, which is available in four Mexican operators: **Cablevision**, **Cablevision Monterrey-TVI**, **Axtel** and **Totalplay**.

Regarding formats, the distributor works with both Televisa and Azteca. While with the first one it has a three-year multiannual deal where the Mexican company picks up some selected titles, with the second one it has an 'on demand' deal and work on the company' regular content needs.

'Mexico is key market for us, and we will continue betting on it. It is not only the biggest Spanish-language market in Latin America, but also a big opportunity to take our the Mexican version of our formats to the US and the Latin American panregional market', explains **Daniel Otaola**, content distribution manager at **Telefe International**.

The most recent format sold to Televisa was *Sweet Love*, adapted as *Hasta el fin del mundo te amare*, broadcast on **Canal de las Estrellas** prime time (9pm), while *Graduates* was adapted by Azteca. The success of two telenovelas was so big that both channels adapted in different periods of time: *Los Roldan* was *Los Sanchez* (Azteca) and *Una familia con Suerte* (Televisa) and *Amor en Custodia* was also adapted two times: as *Amor en Custodia* (Azteca) and *Amores Verdaderos* (Televisa).

Along with these titles, other big successes in Televisa were *Muñeca Brava* (*Al Diablo con los*



*Hasta el fin del mundo te amare*, Mexican version of *Sweet Love*, which is on Canal de las Estrellas prime time



*Amor en Custodia*, Azteca's version, was one of the most successful formats from Telefe in Mexico

*Guapos*, Televisa), *Brothers & Sisters*, *Resistiré*, *Los Simuladores*, *The Successful Mr. & Ms. Pells*, *Amor Mio* and *Floricienta*. For Azteca it must be mentioned *Montecristo*, *Grande Pa* and the entertainment format *Just in Time*. About ready-made, most of the deals were with Pay TV networks: **MVS** (*Naranja y Media*, *Pone a Francella*, two seasons), **PCTV** (*Al Limite*), **Televisa Networks** (*Amor en custodia*, **RCN Colombia** version).

**Otaola** concludes: 'Mexican clients like Telefe contents because of three main things: the story, they were successful in Argentina, and they are easy to adapt. We, as a distributor, fulfil all the requirements of the Mexican market.'

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# MEXICAN BUYERS

## ACQUISITIONS EXECUTIVES ATTENDING THE INTERNATIONAL MARKET

Below: Elsa Vizcarra, VP Programming, Televisa; Belinda Mendez, president, and Maria Sanchez-Munoz, SVP, Liason, Latin America & Iberia, NBCUniversal; Karina y Ana Lidia Montoya, acquisitions, Televisa Networks; stand: Adrian Echegoyen, acquisitions, Jaime Aguilar-Alvarez, director, Film Division, Televisa; Carlos Sandoval, MD, VEO; and Rubén Jacome, deputy director, Corporate Image, Televisa



Programming and Acquisitions Azteca and Comarex: Roberto Romagnoli, VP Entertainment, Azteca; Rodrigo Fernandez, general director, Azteca; Pedro Lascrain, head of acquisitions, Azteca; Carmen Pizano, sales, Comarex; Guillermo Bouchot, programming director, Azteca; Tatiana Gallegos, acquisition manager; Ernesto Ramirez, sales, Comarex; and Ricardo Coeto, production director, Azteca



Televisa Networks: Fernando Muñoz, commercial director; Ana Lydia Montoya, acquisitions & programming, Televisa Networks; Bruce Boren, VP; Claudia Silva, sales at Televisa Internacional; and Karina Montoya, acquisitions & programming, Televisa Networks



Ana Maria Ramirez, director, and Carolina Rojas, programming manager, Cadenatres; Alejandro Vazquez Vela, general director, Content, and Ricardo de Leon, programming director, MVS Television



Canal Once: Mayolo Reyes Ballesteros, strategy director, and Rodrigo Moctezuma, head of content and acquisition



TV UNAM: Manuel Villanueva, sub director of Programming



Canal 22: Maria Isabel Vargas Prieto, director of programming, and Ana Cruz Navarro, sub-director of programming & production



Luis Alberto San Martin Rios y Valles, CEO, and Luis Alberto San Martin de Lama, manager, at new media/home video distribution company Multimusic/Tycoon, with Luis Gadea, CEO at distribution company Celuloide



David Laffane, director, The Agency; Eduardo Clemesha, formats director, Televisa; Erick Zuckerman, CEO, The Agency; and Carlos Sandoval, director general, at VEO/Televisa



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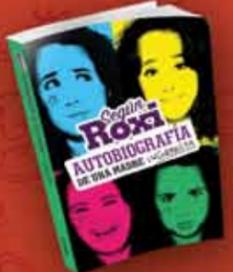
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