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CENTRAL & EASTERN EUROPE ANNUAL SPECIAL ISSUE 2015
NEW EUROPE MARKET - NATPE EUROPE - KIEV MEDIA WEEK

NATPE EUROPE 2015, MORE CONFERENCES & EXHIBITORS



Rod Perth, President & CEO, NATPE, surrounded by NATPE team

For second year in a row, NATPE EUROPE is taking place at the Hilton Prague Hotel, Czech Republic, on June 22-25.

Rod Perth, President & CEO of NATPE is proud of the move from Budapest (Hungary) and confirmed for this edition more than 120 exhibitors from 25 countries, of which 20+ are attending for the first time. There are close to 250 buyers from 30 countries and, again, there are US Major screenings on the previous day and during the market.

'We see a great potential of growth in Central and Eastern Europe, that's why we are so excited for this second edition. All NATPE resources has been located in Prague to offer our exhibitors the best experience and business tools. This year we have increased the number of panels, following what we do in Miami,' says Perth, who is leaving NATPE on February 2016, after the Miami show.

Three big conferences have been confirmed on June 22. First, *Global TV Formats - What's Hot and What's Not?* presented by Keri Lewis Brown, managing director, K7 Media, and member of the FRAPA board.

Second, *Buying or Selling? Creating or Adapting?* with Luci Burnley, Small World IFT (UK); Pascal Dalton, Endemol Shine Group (UK); Jennifer Ebell, ITV Studios Global Entertainment (UK); Nathan Gibbs, Zodiak Media (UK); and Jerome Pichot, French TV (France).

And third, the *International Co-Productions: Partnerships That Are Taking Center Stage* panel with Claude Chelli, Capa Drama - Zodiak Media; Ben Donald, BBC Worldwide (UK); Simon Maxwell, Channel 4 (UK); Anne Mensah, Sky (UK). Moreover, it was confirmed the presence of British writer Adrian Hodges (*The Musketeers*, BBC), who offers a keynote breakfast session on June 23.

NATPE Europe has a difficult challenge to continue being the gateway for CEE market: it has more competition with markets taking place in Russia, Croatia and Ukraine; and, more importantly, it is organized in a region that has not totally recovered from 2008-2009 crises. It is well known that strategic markets such as Czech Republic and Hungary, among others, are still going through a delicate process to restore their original advertising pies, which have fallen 20-30% during the last five years. Now, the Russian economy is complicated because of the drop of oil price, and in Ukraine the war continues.

'Prague offers a great landscape to attend a tradeshow. During the market we have also organized the cocktail on the Sky Bar & Lounge and the Welcome Party, on Wednesday 24, sponsored by AXN Europe.'

'We have a great reputation as organizers, while the key decision makers choose this market to have a better understanding of CEE most recent trends, and the most important programming launches take place here, at NATPE Europe,' finalizes Perth, who concludes its presidency in February 2016

Fabrizio Ferrara



SCHEDULE

EVENT	DAY & TIME	PLACE
US STUDIOS SCREENINGS: WARNER BROS. INTERNATIONAL TELEVISION	JUNE 22, 9AM	ATLAS CINEMA
GLOBAL TV FORMATS - WHAT'S HOT AND WHAT'S NOT?	JUNE 22, 2.15PM	HILTON PRAGUE
BUYING OR SELLING? CREATING OR ADAPTING?	JUNE 22, 3PM	HILTON PRAGUE
INTERNATIONAL CO-PRODUCTIONS: PARTNERSHIPS THAT ARE TAKING CENTER STAGE	JUNE 22, 4PM	HILTON PRAGUE
TELEMUNDO SCREENING & COCKTAIL	JUNE 22, 6PM	HILTON PRAGUE
BREAKFAST KEYNOTE SESSION: A CHAT WITH ADRIAN HODGES	JUNE 23, 8.30AM	HILTON PRAGUE
US STUDIOS SCREENINGS: CBS STUDIOS INTERNATIONAL	JUNE 22, 8.30AM	ATLAS CINEMA
US STUDIOS SCREENINGS: NBCUNIVERSAL INTERNATIONAL TELEVISION	JUNE 22, 6PM	ATLAS CINEMA
COCKTAIL RECEPTION (SPONSORED BY NOVA, TV BARRANDOV AND APA)	JUNE 23, 6PM	CLOUD 9 SKY BAR & LOUNGE
WELCOME PARTY (SPONSORED BY AXN EUROPE)	JUNE 24, 6.30PM	MUNICIPAL HOUSE, REPUBLIC SQUARE



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CENTRAL & EASTERN EUROPE: NEW OPPORTUNITIES TO TAKE IN MIND



Central & Eastern European territories are not still recovered from the deep 2009 global crisis, which 6 years later continue keeping most of the markets with low advertisement levels, tightened incomes and investments. Though, the nations are progressively better, and considering what is happening at the international content market, now it is a very good time of opportunities, both inside the region and from CEE towards the world.

Just two months ago, MIPTV took place in Cannes and provided a rich picture of what must be considered. Last month, LA Screening, the event where Hollywood major studios introduced their new TV series and films to the world, confirmed the trends. So, let's see...

BUSINESS GAP BETWEEN AMERICA AND EUROPE

The main announcement of MIPTV was an international co-production alliance between **NBCUniversal International Television Productions** (USA), **RTL** (Germany) and **TF1** (France). They will produce 3 new original US-style procedural dramas, in English language, over the next 2 years.

What does make this agreement special? 'A gap in the market is open', explains **Chris Ottinger**, president global distribution, **MGM**. 'The U.S. domestic market has changed: with the competition of cable networks and **Netflix**, U.S. major dramas are more pay TV alike. Traditional

series, as procedural ones, are not so produced. But in Europe, many broadcasters require them, they prefer more episodic than serialized TV series. So, with smart deals as **NBC** ones, there are U.S. series with European touch. More co-production trans-regional projects between big players are to come'.

The same was told during MIPTV by **Tibor Forizs**, head of program acquisitions, **RTL Klub** (Hungary): 'We look for episodic series, which are very difficult to find. American series are not performing so well, the recent co production announcement between U.S.

major studios and European big players is a proof that they need to evolve to keep their position in the market'. The other Hungarian broadcaster, **Gabor Fisher**, head of acquisitions, **TV2**, pushed also: 'We want alternatives to American series, as Latin telenovelas in fiction and different formats as realities, game shows and constructed realities'. Turkish series took many regions the last years. Formats from Israel, the same. The market is more open now to any origin, and this means opportunities for emergent regions as Central & Eastern Europe, which handles young industries about own production and fresh ideas.

An independent producer said: 'We are fully focused on international co-production projects. In particular, there is a new trend in Europe: big players have new CEOs, sometimes from new production poles as Israel or India, that tell their teams not to watch U.S. studios to set up trends. "Go everywhere to take fresh ideas, and partners", it is said'.

A GREAT TIME FOR FICTION

The content market shows a double face about scripted vs. non scripted. On one side,



At MIPTV, NBCUniversal (USA), RTL (Germany) and TF1 (France) signed a co-production partnership for procedural TV series in USA: Fabrice Bailly, programming director, and Sophie Leveaux, artistic director & acquisitions, TF1; Joerg Graf, head of acquisitions, RTL; Michael Edelstein, president, NBCUniversal International TV Productions; Benoit Louvet, EVP, TF1; and Joann Alfano, EVP, scripted programming, NBCUniversal International TV Productions

This is a new big thing at the international content market: U.S. studios and European titans together, on co-production projects to fill gaps in TV station requirements.

when you talk with buyers, almost everybody buys entertainment formats. They are a direct answer to manage local production, they are quite fast and easy to produce. So, every TV station wants to produce in house this kind of formats.

But on the other side, fiction is in a great moment for big players that in the past were only dedicated to entertainment or factual, as format titans **Fremantlemedia**, **ITV**, **Zodiak**, **Shine Endemol**, etc., and factual pay TV channels as **A+E**, **Discovery**, etc. They say fiction is the new thing, the sector to grow further and better.

NEW OPPORTUNITIES FOR CEE PLAYERS

- BUSINESS GAP BETWEEN USA AND EUROPE
- GREAT MOMENT OF FICTION
- FRESH AND TWIST SEARCHES FROM CENTRAL MARKETS
- A MORE AND MORE GLOBAL MARKET
- DIGITAL PLATFORMS PUSH RULE CHANGES

RECOMMENDATIONS

- GO DEEPER ON PRODUCTION ALLIANCES
- CO-PRODUCTION DEALS BETWEEN MANY COUNTRIES
- STRENGTHEN RELATIONSHIPS WITH U.S. DOMESTIC AND WESTERN EUROPEAN TITANS
- OPEN BUSINESS TO EVERY REGION



CME Group: Silvia Majeská, head of TV, Markiza (Slovakia) Alex Ruzek, head of acquisitions, TV Nova, Czech Republic; a Disney actor; Sorina Big, acquisitions manager, Pro TV (Romania); Petra Bohustlavova, acquisitions executive at TV Nova (Czech Republic)

The multi-country media groups are an icon of CEE region. Now they are evolving to manage efficiently free TV, pay TV and new platforms.



HBO Central Europe: Martin Havlicek, acquisitions manager, Ondrej Zach, SVP programming & acquisitions, Dita Pavlickova-Krivská and Michaela Valtá-Wood, acquisition managers

Premium pay TV channels are producing high-end original content in CEE, later aired in other regions. Different countries are chosen to shot, especially Czech Republic.

MIPTV organization said this at its closing press release: 'Drama was a major conference strand, including a closed-door International Co-production Summit that was attended by more than 80 senior-level decision-makers'.

Mike Beale, EVP of Global Adaptations and Formats, **ITV Studios** (UK): 'Our renewed bet on fiction is working very well. Fiction represents more money at the end, a different quality impact and viewer loyalty for a certain time'. **Marc-Antoine D'Halluin**, CEO, **Zodiak Media** (UK): 'Trend is that scripted is growing faster market-wise: there are more opportunities to grow in that field'.

The big fiction move works better with co-production projects. **Joel Denton**, managing director, international content partnerships, **A+E Networks**: '**Vikings** is a co-production with Ireland. **Texas Rising** is a co-production with **ITV Studios** (UK), **The Return** with **Fremantlemedia**. We are a traditional factual player, but we see a good opportunity to expand our international business through dramas'.

Digital platforms feed strongly fiction business, as they are basically dedicated on scripted products. An important digital executive commented: '**Netflix** has changed its business the last two years, now it is more focused on TV series than films. Both **Amazon** and **Netflix** are betting strongly on original dramas, digital titans will have a good portion of drama market in some time'.

During LA Screenings, **PRENSARIO** checked new scripted opportunities for CEE companies in far, mainly producer regions as Latin America. Due to the huge success of Turkish series by late 2014 and 2015 in their countries, some Latin broadcasters are looking for options from 'other CEE countries', as Romania, Croatia, Greece, Russia.

Bigtitans as **Fremantlemedia** and **Fox International Channels** offered in LA Screenings for the first time, CEE TV series: Croatian ones the former, Turkish the latter.

FRESH & TWISTS ARE SEARCHED EVERYWHERE

Cross genre, cross region, both broadcasters and producers look for fresh products, with twists to escape from the 'lack of creativity' which it is experienced in the market, especially in entertainment. **Michael Schmidt**, CCO, **Red Arrow** (Germany): 'Our big challenge is to renew the realities to be authentic. They must have something different, or a twist, to be a new thing'.

This search takes entertainment players to genres not so used before. **Lisette van Diepen**, VP acquisitions, international production, **Sony**: 'Today we are focused on Real time dating shows, 'back in time' shows, and especially big studio game shows'. More MIPTV buyer opinions: 'There are more factual and cooking shows'. 'We see very risky projects, expensive but with a twist in concepts'. 'I see more exterior formats than studio ones, what it is good'. **Anastasia Korchagina**, head of acquisitions, **Friday TV** Russia: 'I look for formats about realities, some travel and cooking shows. No game shows'.

A GLOBAL MARKET, NOW FOR SURE

The trend that big central players are more open now to product from any origin, is a key factor but one more, within the progressive

THE STRONG MOMENT OF FICTION, FROM INSIDE

- IT GAINS FOCUS AT BIG FORMAT PLAYERS
- IT GAINS SPACE ON TRADITIONAL FACTUAL TV CHANNELS
- ONLINE TITANS ARE A STRONG ENGINE OF ORIGINAL PRODUCTION
- CO-PRODUCTION INITIATIVES BETWEEN VERY BIG PLAYERS
- THE DIFFERENCES BETWEEN USA AND WESTERN EUROPE OPEN NEW DOORS WORLDWIDE

ENTERTAINMENT FORMATS ON THE MOVE

- COOKING SHOWS
- REAL TIME DATING SHOWS
- 'BACK IN TIME' SHOWS
- CONSTRUCTED REALITIES
- OUTSIDE FORMATS VS. STUDIO ONES
- TRAVEL SHOWS

CEE: NEW REGIONS TO EXPAND BUSINESS

- LATIN AMERICA
- SOUTH EAST ASIA
- NORDIC COUNTRIES
- MIDDLE EAST
- AFRICA



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

The Hungarian broadcasters need episodic drama series, but most of the U.S. major offering are serialized ones. They are looking for fiction options in other origins.

CENTRAL & EASTERN EUROPE: NEW OPPORTUNITIES TO TAKE IN MIND



natpe.europe



Polish buyers: Adam Urbanowski, acquisition executive, TVN Turbo; Ewa Debrouska, head of film acquisitions department, TVP; Magdalena Chajewska, program buyer, TVP1; and Lukas Kluskiewicz, head of film editors, TVP2

Poland is one of the most attractive markets of CEE region: good annual growth, strong production pole and emerging local players

globalization of the content market.

During **MIPFormats** at MIPTV, it was stressed that Japanese companies have taken the lead in entertainment formats, with 6 titles strongly commented among the participants: 'They are the ones that are thinking *out of the box*', a big buyer said. At **MIPDoc**, 4K Full HD documentaries were the new big thing. Pubcasters as Austrian **ORF** and various Chinese companies were gaining market with this technology, especially with products focused on wildlife.

At MIPTV there was a strong focus on Nordic countries. Sweden, Denmark, Finland and Norway grouped together for the first time. 'The Nordic countries are a breeding ground for some of the hottest dramas, border-breaking formats, cutting-edge web series and frontline mobile innovation', said **Laurine Garaude**, director of TV division of **Reed Midem**.

Meanwhile, different emergent markets want to be a reference on certain market niches. **Maurice Boucher**, **Canadian Media Found**: 'Canada is investing strongly to be an icon in digital content. This includes Government and funding supports and a unique pool of digital talents'. **Marie Novakova**, **Ceska TV** (Czech Republic): 'We have good detective stories, with a good catalogue to promote output deals'. **Maria Dorokhina**, **Russia TV**: 'We are strong in film adaptations of famous novels and historical TV series'. Spain was highlighted by **The Wit** as the #1 scripted format exporter in Europe.

Patrick Zuchowicki, CEO **Basic Lead** (Discop): 'Africa is the region with fastest growth

now in content business: 70 million TV households, 95,5% of digital reach, Pay TV revenues of USD 6.22 billion TV content wholesale revenues of USD 3 billion, annual GDP growth 5.5%. Everything is to be done'.

SOMETHING ELSE ABOUT NEW MEDIA?

The new platforms are changing the market. **Nadav Palti**, CEO, **Dorimedia** (Israel): 'In our country, we had two VOD platforms —**Hot**, cable, and **Yes**, satellite— and from this year we have four

more, all OTT/IPTV: from **Celcom**, **Gollan**, **Partner** and one untold. We have to produce a lot of more content'.

Julián Rodríguez Montero, head of acquisitions **Grupo Telefonica**, Spain: 'We are very pleased with **Movistar Series**, our new non linear TV series channel. The idea is to have the brand-new series launched in USA, but to see in VOD, both TV and mobile. It is the first strong twisted offer from extended SVOD model'.

Bernd Reichart, CEO, **Vox** (RTL Germany): 'The DTT channels face a cross-roads: they need to be innovative to

make a difference, but they need to be classical to get the massive audiences. So, till now, most of the successful ones have big brands behind...'

Tarmo Kivikallio, head of programme acquisitions, at public broadcaster **YLE** Finland: 'We look for good young targeted products. As we offer also Internet services, we want to generate synergy between free TV and online'.

On the other hand, 4K is taking place. **Michel Chabrol**, director of marketing, innovation and digital cinema, **Eutelsat** (France): 'The leading countries at the technology are Japan, South Korea, USA and Europe. It is estimated that within the next 5-10 years, 4K will be consolidated with more content offering. Today,

there are only two channels operating: our **4K1** and **Fransat Ultra HD**. But this will change in the near future'.

What is needed to survive in the new multiscreen era? **Tim Pastore**, president, original programming & production, **National Geographic** Channels, USA: 'If content is the king, brand is the castle. Kings come and go, the castles stay. To survive, we need to actualize the power of our brand; brands play a huger role than ever before'.

A BRIEF TO THINK ABOUT

The different trends we've mentioned here are all good for CEE companies. The business gap opened between America and Europe, the great moment of fiction, the search for twists, a more global market... all of these are proper for



Turkey: Dogan Ercan and Idil Belly, from the distribution company Sera Films; Ozlem Ozsumbul, head of acquisitions, Kanal D; Manuela Caputi, sales at Mediaset Italia; and Burcin Ozpinar, acquisitions, Kanal D.

Turkey has turned to a production titan of CEE and CIS regions. Its TV series have conquered many territories, and now the offer also includes entertainment formats

any emergent territory, but especially for fresh creators. Latin American players, for instance, are expanding themselves again to deal with any top international project. The same can take place with CEE producers and distributors.

Both at **Natpe Europe** and **Kiew Media Week**, the main CEE regional events, it'd be important to go deeper about production and co-production alliances, to build new liasons with global players and format titans, and in particular with new regions, because at any place good business can be generated. Undoubtedly, the game is very open these days, with scored options for everybody. Don't stay quiet.

Nicolás Smirnoff

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DIGITAL TV GROWS IN HOUSEHOLDS & REVENUES



About 455 million digital homes were added around the world between end-2010 and end-2014, according to a latest report from Digital TV Research. This took the digital TV household total for the 138 countries covered in the Digital TV World Databook report to 1,045 million. Digital TV penetration climbed from 40.5% at end-2010 to 67.2% by end-2014.

However, there were still 509 million analog TV households (terrestrial and cable) by end-2014, although this was down from 866 million at end-2010. There were 322 million analog terrestrial homes (down by 304 million since 2010) and 187 million analog cable ones (down by 149 million) at end-2014.

Of the digital TV household additions between 2010 and 2014, 287 million were in the Asia Pacific region; more than doubling its total to 513 million. China became the largest digital TV household nation in 2010, rising to 285 million digital TV homes (27% of the world's total) by end-2014.

The number of pay TV subscribers (analog and digital) reached 878 million by 2014, up from 718 million in 2010. Asia Pacific increased by 106 million — or two thirds of the global additions - during this period to bring its total to half a billion. North America (111 million) was the second largest region, although its 2014 figure was lower than in 2010.

China had the most pay TV subs by end-2014 (254 million, up by 59 million on 2010). India added 28 million pay TV subs, with Brazil (10 million more), Mexico (6 million) and Indonesia (4 million) also showing strong growth. However, pay TV subscriber numbers fell in Italy, the US and France. Pay TV revenues (subscriptions and on-demand revenues from movies and TV episodes)

crossed USD 200 billion in 2014, up by 14.5% from USD 176 billion in 2010.

Cable (analog and digital combined) generated the highest revenues by platform, with USD 92 billion in 2014. However, cable TV revenues are falling. IPTV revenues reached USD 19.8 billion in 2014, up by USD 10

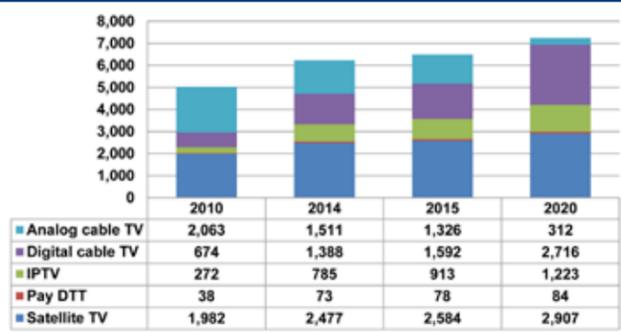
billion on 2010. North America generates about half the world's total pay TV revenues. In fact, the US recorded revenues in 2014 nearly ten times as high as second placed China. US added USD 6.1 billion in revenues between 2010 and 2014, followed by Brazil with USD 3 billion more and China (USD 2.5 billion extra).

Another report from Digital TV Research indicated earlier this year that digital pay TV revenues rocket in Eastern Europe. 'Despite the incessant gloomy economic and political news from the region, pay TV revenues in Eastern Europe will be 45% higher in 2020 (USD 7,269 million) than in 2010 (USD 5,029 million)', it stands.

However, the fifth edition of the Digital TV Eastern Europe Forecasts report states that increase will only be 17% between 2014 and 2020 — although this is still an increase of USD 1 billion. Digital Pay TV revenues will increase by USD 4 billion between 2010 and 2020 to USD 7 billion.

They will increase by 47% (or USD 2.2 billion) between 2014 and 2020. Digital cable revenues will more than double between 2014 and 2020, with IPTV up by 56% and pay DTT up by 53%. However, satellite TV revenues (the main earner) will only grow by 17% over the same period. The number of digital pay TV subscribers will increase from 25.8 million (20.7% of TV households) in 2010 to 51 million (40%)

EASTERN EUROPE PAY TV REVENUES BY PLATFORM (USD MILLION)



Source: Digital TV Research

in 2014 and onto 76.7 million (59.4%) by 2020.

Simon Murray, principal analyst: 'Pay TV analysis in Eastern Europe has long been distorted by the legacy of analog cable. Many homes traditionally received a limited number of channels for a very small fee over analog networks. These subscribers are rapidly converting — mostly to digital cable but also to IPTV, satellite TV and DTT.'

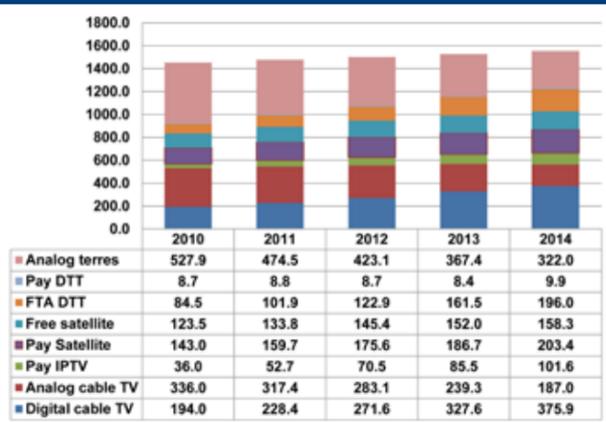
Total cable subscriptions will fall by 8.9 million between 2010 and 2020. Digital cable subs will grow from 4.6 million to 27.6 million, but analog subs will fall from 36.8 million to 4.9 million over the same period. Overall cable penetration will reach a quarter of TV households by 2020, down from a third in 2010.

Cable TV revenues will hardly grow between 2014 and 2020, despite more homes taking the more expensive digital packages. Digital cable TV revenues will more than double to USD 2.7 billion, with analog cable TV falling from USD 1.5 billion to USD 0.3 billion.

Pay TV will be taken by 63.2% of the region's TV homes in 2020, up from 50.1% at end-2010, but only up from 60.9% at end-2014. This converts to 19 million more pay TV subscribers between 2010 and 2020, with Russia supplying about 12 million of this total. Pay TV penetration in 2020 will range from 89% in Estonia to only 25% in the Ukraine.

Russia will contribute USD 2.29 billion (31%) to the pay TV revenues in 2020 — overtaking Poland in 2015. Russia will be responsible for nearly two-thirds of the region's USD 1 billion additional pay TV revenues between 2014 and 2020. At the other end of the scale, Estonia and Slovenia will experience falling pay TV revenues between 2014 and 2020. Furthermore, Bosnia, Hungary, Latvia, Lithuania, Poland, Romania and Slovakia will grow by less than 5%.

GLOBAL TV HOUSEHOLDS BY PLATFORM (MILLION)



Source: Digital TV Research

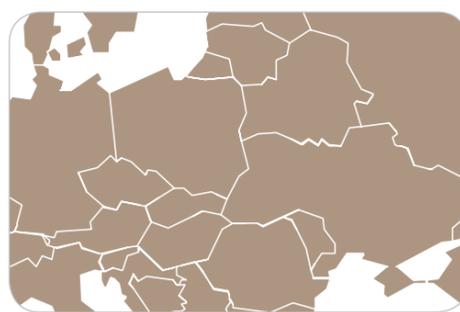


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LEADING-EDGE THE LATIN MAJOR Televisa

NEW CHANNELS, SVOD AND CO-PRODUCTIONS IN CEE

Sources: CEETV.net, the companies, etc.



TVP & ZDF

Polish pubcaster TVP is working with German counterpart ZDF on a new documentary project focused on the thousand-years German-Polish relations. The project will have four episodes and is a co-production between TVP1, ZDF and 3Sat. The main author of the cycle is Polish-German documentary filmmaker and producer **Andrzej Klamt**; the series has been planned for 2016.



PROSIEBENSAT.1 TV

ProSiebenSat.1 TV (Germany) announced an open call to the international TV market to submit proposals for the development of international co-production of scripted series. The process is opened for global writers, showrunners and production companies, and the broadcaster aims to invest in the development of up to fifteen projects no later than the end of 2015.

In particular, the company is scouting for episodic, returning prime time series (procedurals as crime, medical, romantic comedies, etc.). Early stage concepts for exceptional serialized "must-see-TV" miniseries and series introducing a significant German angle. All entries should present a strong potential for an international market.

Koby Gal-Raday, SVP Int'l co-production & documentaries: 'We aim to become a creative home for leading showrunners and production companies and a leading force in creating new high quality original programming suitable for our local audiences and audiences around the world.'



Koby Gal-Raday, SVP International Co-Production & Documentaries

MODERN TIMES GROUP

MTG's free-TV channel TV3 and online streaming service Viaplay will co-produce a new Nordic original drama series with the working title *Black Widows* (8x'60), adapted of the Finnish drama series of the same name from 2013. Shooting will begin this summer, and the series will premiere in Sweden, Norway and Denmark in 2016. One of the lead characters will be played by the Swedish Hollywood star **Peter Stormare**.



Morten Mogensen Chief Content Officer MTG Free-TV Scandinavia

'Cross-border drama have increased in popularity quite a lot in recent years, and with *Black Widows* we have a winning drama concept for multiple platforms in multiple countries', says **Morten Mogensen** Chief Content Officer MTG Free-TV Scandinavia.



Black Widows

TV JOJ SLOVAKIA

JOJ's new movie channel **Joj Cinema** was launched on June 15, distributed by **Skylink**. Additionally, the new kids network **Tuki** has received the license by the Slovak broadcasting council RVR, and is already available on **Slovak Telecom's Magio TV**. JOJ has another kids channel, **Rik**, which was launched earlier this year.



CHANNEL ONE RUSSIA

Perviy (Channel One) has announced the expansion of its online series service **kino.1tv.ru**. The users will get full access to the archive after paying a monthly fee of 300 rubles (€5), while having to spend extra for premiere content. The number of series available is currently 15, but will soon reach 50; one of them is *Aquarius*. Upon paying a monthly fee of 350 rubles (€6), the users will not only be able to watch the new series, but also have access to the entire library. According to the website, it already has around 20.000 purchases since its creation.



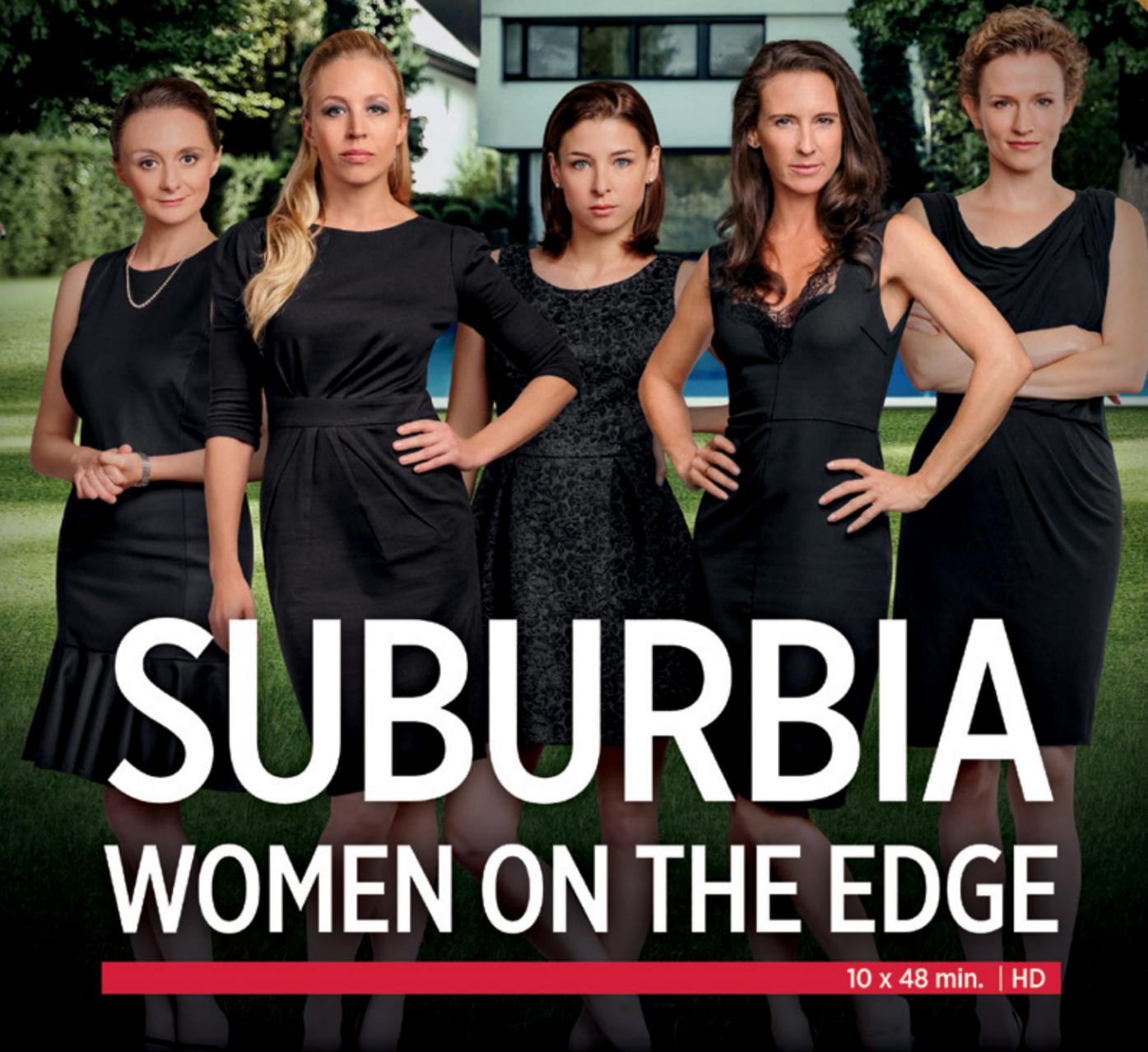
ETV ESTONIA

ERR's Russian-speaking channel **ETV+** will start broadcasting in Estonia at the end of September. The programming strategy of the channel will be confirmed by the end of the summer. In Estonia around 25% of the population is Russian-speaking, so the group allocated €2.5 million for the creation of a Russian-speaking channel. The launch was set for fall 2015.

The Development Director of ETV+ **Janek Luts** said that the channel still has not cleared out its programming strategy. A more accurate programming schedule will be announced in August. The programming grid would contain news and entertainment shows, and stories about people who work and live in the country.



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ORIGINAL AND THEMATIC CONTENT, KEYS TO GROW IN THE CZECH REPUBLIC



For the second year, PRENSARIO develops a special report about the TV industry in Czech Republic by interviewing the top broadcasting groups, the commercial NOVA GROUP (CME), PRIMA FTV (MTG) and BARRANDOV GROUP, and the pubcaster CESKA TELEVISE (CT). They highlight the most successful shows of 1H 2015, new programs for the fall, the growth of digital media, as well as general trends & consumers' behave.

According to a report from Deloitte published during the first days of this month, the gross domestic product (GDP) in Czech Republic increased by 2.8% in the first three months of 2015, and the year-on-year (YoY) growth rate climbed to 3.9%, which offers a good context and potential for the rest of the year.

Compared to other countries, the Czech Republic is also doing very well in terms of the current dynamics of growth. 'The promising beginning indicates that GDP growth should be between 3-4% throughout this whole year. Romania is the only country that boasts a higher YoY growth (4.2%) at the moment, based on the results from the comparison of countries that have already published their GDP data for the first quarter', indicated David Marek, Chief Economits, Deloitte.

ADVERTISING

The Czech market is one of the strongest in Central Europe with a global ad investment of Kč 65,7 billion (USD 2,7 billion) in 2014, according to Nielsen Admosphere. Television is the strongest media with 47% of the total, Press



ALEX RUZEK, DIRECTOR OF TV CHANNELS AND PROGRAMMING, TV NOVA



MILAN FRIDRICH, PROGRAMMING DIRECTOR, CESKA TELEVISE



MAREK SINGER, MTG EVP OF THE GROUP'S CENTRAL EUROPEAN BROADCASTING OPERATIONS, AND CEO OF PRIMA



MARCELA HRDÁ, GENERAL DIRECTOR, VICE CHAIRMAN OF THE BOARD OF DIRECTORS, TV BARRANDOV

conglomerate that enjoys the vice-leadership in the country, getting closer to its main commercial competitor. It runs six TV channels: ČT1, ČT2 (documentary, movies, TV series), ČT24 (news), ČT Sports, CT:D (kids channel) and CT art.

Milan Fridrich, programming director: 'Our position inside the Czech TV market was stable and strong in 2014 and during the first five months of this year. The top shows of this season on ČT1 have been the crime series *Vraždy v kruh* and *Případ pro exorcistu*, as well as the late night show *Všechno party*, while in ČT2 we have sport content, movies and documentaries such as *Přiběh lidu Kalahari*'.

Regarding trends, he stands: 'News and sport are strong in live sessions, while fiction is mainly crime series. The late night shows and big entertainment shows, such as *Dancing with the stars*, works very well, too. Domestic national production with Czech actors and Czech reality leads the market'.

Fridrich concludes: 'We are public TV group and we have limited other services — Internet, mobile, etc. — for only platform to put TV content through new distribution ways to audience: our website ceskatelevize.cz, the iPlayer ivysilani.cz, tablet and mobile applications and HbbTV'.

The third biggest group is Prima FTV, owned by Modern Times Group, operating four FTA channels, Prima, Prima LOVE, Prima ZOOM and Prima COOL, a wide online portfolio, and last year we began publishing the printed food magazine Prima FRESH.

Prima Group had an average primetime rating of 21.07% for 15+ and 21.18% for 15-65, and over the course of the entire day the shares

with 27%, Internet with 10%, Radio with 9% and Out of Home with 7%, according to the last report from Admosphere (February 2015).

However, different sources from the market consulted by PRENSARIO agreed that from the total expenditure, it must be considered the half of it after saves, fees for agencies, etc. This means that TV in a whole received in 2014 close to USD 650 million.

A report from the Association for Internet Advertisement (SPIR) adds: 'Compared to 2013 there was in 2014 an increase of 10% on Internet advertising expenditure, mainly due to investment growth in search ads, banner display advertising and video'.

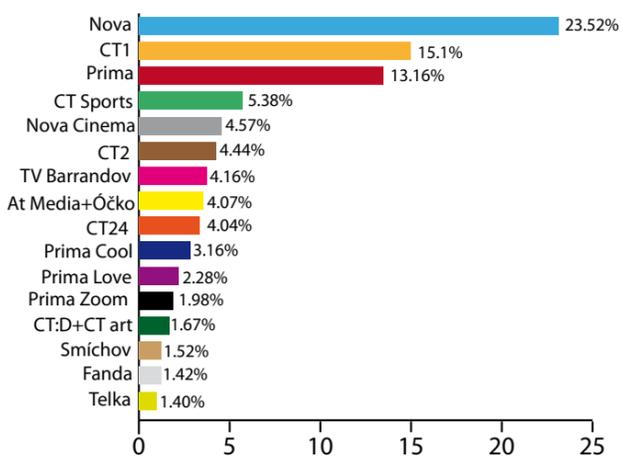
Even the expectations for next years are optimistic, the CEE region could be affected by the Russian/Ukrainian crisis (the fall in the oil prices and war, respectively). For instance, ZenithOptimedia has reduced its global forecasts for ad spend growth in 2015 and 2016 by 0.5% and 0.3%, respectively, due

primarily to the deepening recession in Russia and Ukraine which has expanded to Belarus, as well as a slowdown in growth in China.

THE PROTAGONISTS

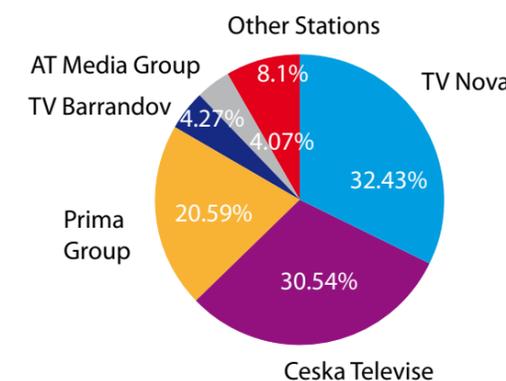
The Nova Group, the broadcasting company owned by CME, continues to be the leading group in Czech Republic. It operates a portfolio of six TV channels: TV Nova, four thematic channels, Nova Cinema (movies), FANDA (crime & drama), SMÍCHOV (comedies), TELKA (original production archive), and a premium channel, NOVA Sport (1.4 million of

CZECH REPUBLIC: AUDIENCE SHARE 15+, PER TV CHANNELS – ALL DAY (JAN-MAY 2015)



Source: ATO – Nielsen-Admosphere

CZECH REPUBLIC: AUDIENCE SHARE 15+, PER TV GROUPS - ALL DAY (JAN-MAY 2015)



Source: ATO – Nielsen-Admosphere

viewers in Czech Republic and Slovakia), apart from a subscription and advertising video on demand services, as well as a number of websites. The audience share of the whole group was almost 43% in prime time in the sales target 15-54 (Q1 2015), and market share reached 60% in 2014. Audience share of the four thematic channels grew year-on-year (YoY) and they currently deliver over 12% share in prime time in the sales target 15-54 (Q1 2015).

Alex Ruzek, director of TV Channels and Programming: 'Among our top shows are news, local fiction series and local entertainment shows. Our main TV news this year has reached more than 40% audience share in our main sales target group 15-54 with more than 2 million viewers each week in group 4+'. The highlight of the spring season is our original crime series, *Police Modrava*, exceeding 40% audience share in our main sales target group 15-54 with more than 2 million viewers each week in group 4+'.

'The docu-reality show *Wife Swap* is also attracting a large audience in its seventh season, with nearly 40% share in our main target group so far this year. Our key programming pillars remain our long running local fiction series *Rose Garden Medical 2*, watched by 35% of the audience in the target group 15-54, and our daily soap *The Street* with 38% share in the same target group. Both are finishing their 10th season of broadcasting and remain popular with audiences', she adds.

'As in most countries, local content is the driver of audience in the Czech Republic TV market. We also note growing importance of thematic channels in an increasingly fragmented market. The local market is certainly not immune to the worldwide trend of online content viewing and time shifting, where we are happy to provide our audiences with the online subscription VOD service VOYO. Additionally, we provide our viewers an AVOD catch-up service on NOVA Plus, augmented by new content created exclusively for the website', concludes Ruzek.

Ceska Televise is the pubcaster



The docu-reality show *Wife Swap* is attracting a large audience in its seventh season on TV Nova, with nearly 40% share in its main target group



The top show of this season on ČT1 has been the crime series *Vraždy v kruh*



Prima successfully launched last year the series *Svatby v Benátkách* (*Wedding in Venice*), whose first episode was watched by 982.000 viewers in 15+ (share 24.60%)

are 20.59% in 15+ and 20.52% in 15-65. (January to May, source: ATO-Mediaresearch). **Prima** achieves on average 14.31% share in primetime in target group 15+; **Prima COOL** is targeted to younger people, and its primetime share is 3.16% in 15+; for young men, M 15-44, its popularity is higher, and the average primetime share is around 7.52%; **Prima LOVE** targets women but has now a broader schedule and the ratings are around 2.06% for 15+; an the newest channel is the documentary channel **Prima ZOOM**, which is watched in primetime by 1.46% of viewers in 15+.

Marek Singer, CEO at **Prima FTV**, describes

the top shows on air: 'Our most successful formats over the last seasons are original Czech series, news, cooking reality show *Prostřeno!* (*Come Dine with Me*) and cooking shows with famous Czech chef Zdeněk Pohlreich, or the entertaining show *Máme rádi Česko* (*I Love My Country*).

'Last year we successfully launched two new series: *Svatby v Benátkách* (*Wedding in Venice*), whose first episode was watched by 982.000 viewers in 15+ (share 24.60%). The series *Vinaři* (*Vinemakers*) achieved phenomenal success: the first episode was watched by 1,9 million viewers in 15+ (share 44.2%), and the average ratings of the first series achieved 1,14 million viewers in 15+ (26.29 % share).'

'In the spring season, the best ratings were achieved by the show *Všechny moje lásky* (*All My Loves*), which has an average of share of 14.81% in 15+ (an average of 625,000 viewers in 15+). *Prima News* maintains stable, high ratings – on average during the fall season (September-December 2014) a share of 20.55% and 702.000

in 15+, and in the spring season (January to May 2015) a share of 21.79% and 747.000 in 15+.

'In the fall season the average results of the *Prostřeno!* show amounted to a share of 28.36% and 743.000 in 15+, and in this year's spring season a share of 26.36% and 714.000 in 15+. There will be several new shows launched for the fall 2015 season', he completes.

Singer continues: 'Generally, viewers want to watch interesting stories; thus, when it comes to commissioning shows, the decisive factor for us is the attractiveness of the story, and we prefer to commission original creations, which Czech TV viewers prefer.'

'The Czech Republic is currently finding itself in an interesting situation where viewers' habits are increasingly beginning to change. Traditional broadcasters thus have to think about what alternative entertainment to offer viewers for whom conventional TV broadcasts are becoming less interesting. This is a trend that has been seen in Western Europe and America for several years.'

'There are a number of VOD services on the Czech market that are trying to reach viewers who want this kind of video content consumption. However, there are still many viewers for whom linear TV is the first or only choice of TV consumption. According to the shares results, we can see what attracts viewers to linear TV the most, and it is definitely local content, in particular shows and the news.'

'We do not consider Pay TV a direct competition for our portfolio of channels. In the field of VOD services, we operate the **Prima PLAY** video service, which exclusively offers original creations from the **Prima Group**, as well as foreign shows and movies that we broadcast on TV free of charge.'

'Our video library contains about 80% of documentary filmmaking for **Prima ZOOM** broadcasts, and we possess the catch-up rights to it. In addition to the content that was broadcast on TV, **Prima PLAY** also offers content which is only available online. In the past this was a very successful Danish version of the reality show *Hotel Paradise*, on whose success we would like to build in the coming weeks and introduce a Russian version of this reality show.'

'An upcoming big attraction will also be the significant expansion of documentary



The American Letters



The Zodiac Murders



Princess and the Scribe



Herbarium II



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Little Man



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CZECH REPUBLIC: TOP 20 SHOWS (MAY 2015)

Pos.	PROGRAM	CHANNEL	RATING	THOUSANDS (000)
1	POLICIE MODRAVA	NOVA	26.8%	2318
2	MS V HOKEJI 2015: ČESKO - FINSKO	ČT SPORT	26.2%	2262
3	POLICIE MODRAVA	NOVA	25.9%	2241
4	POLICIE MODRAVA	NOVA	25.2%	2181
5	POLICIE MODRAVA	NOVA	25.2%	2178
6	POLICIE MODRAVA	NOVA	25.2%	2177
7	MS V HOKEJI 2015: KANADA - ČESKO	ČT SPORT	23.2%	2003
8	POČASÍ	NOVA	22.1%	1913
9	MS V HOKEJI 2015: LOTYŠSKO - ČESKO	ČT SPORT	21.5%	1857
10	POČASÍ	NOVA	21.5%	1857
11	MS V HOKEJI 2015: ČESKO - USA	ČT SPORT	21.1%	1821
12	SPORTOVNÍ NOVINY	NOVA	20.8%	1801
13	SPORTOVNÍ NOVINY	NOVA	20.3%	1759
14	TELEVIZNÍ NOVINY	NOVA	20.1%	1737
15	POČASÍ	NOVA	20.1%	1737
16	TELEVIZNÍ NOVINY	NOVA	20.1%	1737
17	TELEVIZNÍ NOVINY	NOVA	19.7%	1704
18	TELEVIZNÍ NOVINY	NOVA	19.7%	1704
19	SPORTOVNÍ NOVINY	NOVA	19.6%	1695
20	MS V HOKEJI 2015: ČESKO - ŠVÉDSKO	ČT SPORT	19.5%	1684

Source: ATO – Mediaresearch



TV Barrandov milestone of last year has been the launch of its first drama series *Stopy života (Signs of life)* from the psychiatric medical practice

filmmaking, as hundreds of titles from MTG's Viasat's factual pay-TV channels will be added to our offer. Lastly, we are looking at broadening our digital offering', concludes Singer.

Launched in 2009, **Barrandov Televizní Studio** is the fourth and youngest TV group in the Czech Republic, composed by **TV Barrandov**, as well as the two recent launched TV channels **KINO Barrandov** and **Barrandov PLUS**.

Marcela Hrdá, general director and vice chairman of the Board of Directors, explains: 'Our audience are mainly women in their middle age. The success of **TV Barrandov** is based on its own production and suitably chosen acquisitions.'

In April and May 2015 we launched these two new TV channels targeting new audience groups: **KINO Barrandov** is a movie channel for whole families, while **Barrandov PLUS** targets mothers and children during the day and adults in the evening.'

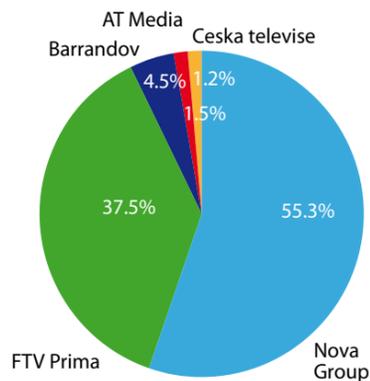
'**Barrandov Group** ranked 4th on the TV market and 3rd among commercial TV stations, and it has a stable position on the TV market. Its total share (adults 15+) is now about 6%', she adds.

Among the top shows, it offers programming is based on in-house entertaining shows, talk shows and contests, which are currently 21 % of the content, and acquisitions (German movies, series, Turkish series, romantic movies, woman thrillers etc.).

'The most popular programs are the talk shows *Sejdeme se na Cibulce*, *Exkluziv Kateřiny Brožové*, and the entertainment shows *Kurňa, co to je* and *Vtip za stovku*, as well as the magazine about the celebrities' life *Barrandovská Sedmička*, prime time movies and weekend afternoon romantic series. In 2014 **TV Barrandov** launched its first drama series *Stopy života (Signs of life)* from the psychiatric medical practice.'

Continues **Hrdá**: 'In the few past years two significant waves emerged in the Czech Republic: original crime and detective series and series from the medical sphere connected to Czech environment and reflecting real domestic affairs. We reacted to this trend by starting the new series *Soudkyně Barbara (Judge Barbara)*, an early evening daily format in which the judge solves common civil disputes. Despite a strong competition in this broadcasting time the series

CZECH REPUBLIC: ADVERTISING MARKET SHARE



Source: Nielsen-Admosphere (2014)

has found its audience quickly.'

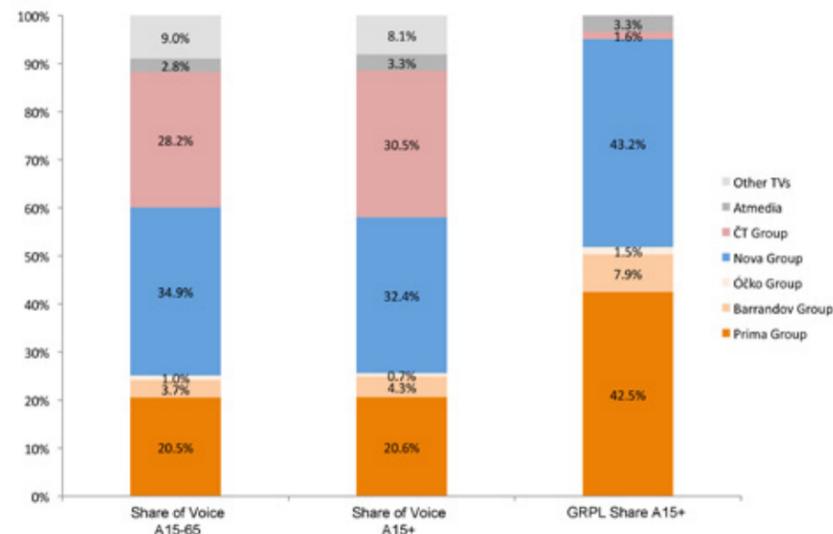
'Another trend in TV broadcasting are culinary shows. From our point of view the TV market has been fully saturated in this area over the past months, therefore we chose not to offer a culinary programme during the spring programme scheme, but we consider the new format in the future.'

'Thanks to terrestrial broadcasting the **Barrandov Group** has significant accessibility over the Czech Republic. On the other hand we recognized the increased trend to get the TV signal from the satellite and IPTV platforms. We expect IPTV, which is at this moment marginal on our TV market, will increase its market share.'

'According to the peplemeter data the audience still prefers linear watching. The overall time of watching TV is stable in the long-term period. For those who can't watch the program in the broadcasting time there is a possibility to watch the program again in our video-archive on **barrandov.tv**. But again, we expect the audience will look for the new add services, and also in case such services will be in the paid area.'

'In the next season, **Barrandov Group** is going to boost the in-house production. We will continue to produce the series *Stopy života (Signs of life)* and, in addition to this, we currently develop two new series. Along with **KINO Barrandov** and **Barrandov PLUS** we are launching this summer the fourth channel of the group, **Barrandov MUZIKA**, that will offer musical production', finalizes **Hrdá**.

CZECH REPUBLIC: GROSS ADVERTISING EXPENDITURE, PER MEDIA



Source: Nielsen Admosphere (TV: ATO-Nielsen Admosphere, Internet: SPIR-Nielsen Admosphere, 2014)



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1+1 MEDIA GROUP: 'UKRAINE WITNESSES THE BOOM OF SERIES PRODUCTION'

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

Aleksander Tkachenko, CEO of the group, explains to PRENSARIO: 'Nowadays Ukraine is going through a kind of revolution. Recently, imported Russian series were taking around 75% of prime-time, but now this number had dropped up to 20%'.



projects including the adaptation of world top shows, such as *X-Factor*, *The Voice* and others.

'These days we witness the boom of production of the series in different genres: comedian, soap operas, etc. Basically, it is the emergence of Ukrainian series production industry, this is the main trend. Fortunately, we have an experience in production of Ukrainian series, because about a quarter or even 30%

The executive highlights that Ukrainian channels have 'successfully' mastered the genre of entertainment format and news. He continues: 'We have an experience of creating high-quality

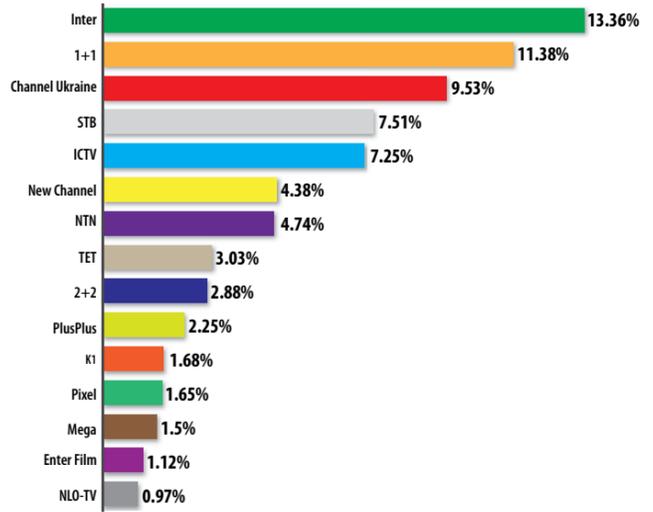
of Russian series were produced in Ukraine. But it's still a new step for us'.

Regarding the plans of expansion, Tkachenko remarks: 'Situation with the television business in Ukraine is not so positive. Most channels are unprofitable. There was a serious devaluation of the hryvnia, so we need to focus on the own production and on cheapening of the product on our resources'.

And he concludes: 'From the business point of view there are just a few oppor-

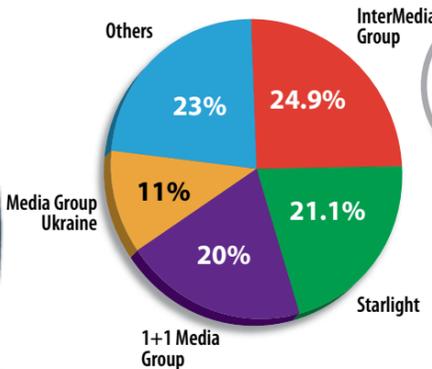
tunities: receiving payment from cable operators, but we don't have this practice in Ukraine; and the opportunity to sell our products abroad'.

UKRAINE: AUDIENCE SHARE, PER TV CHANNELS (JAN-MAY 2015)



Source: Nielsen peplemeter panel - Target audience - People 4+

UKRAINE: AUDIENCE SHARE, PER TV GROUPS (JAN-MAY 2015)



Source: Nielsen peplemeter panel - Target audience - People 4+

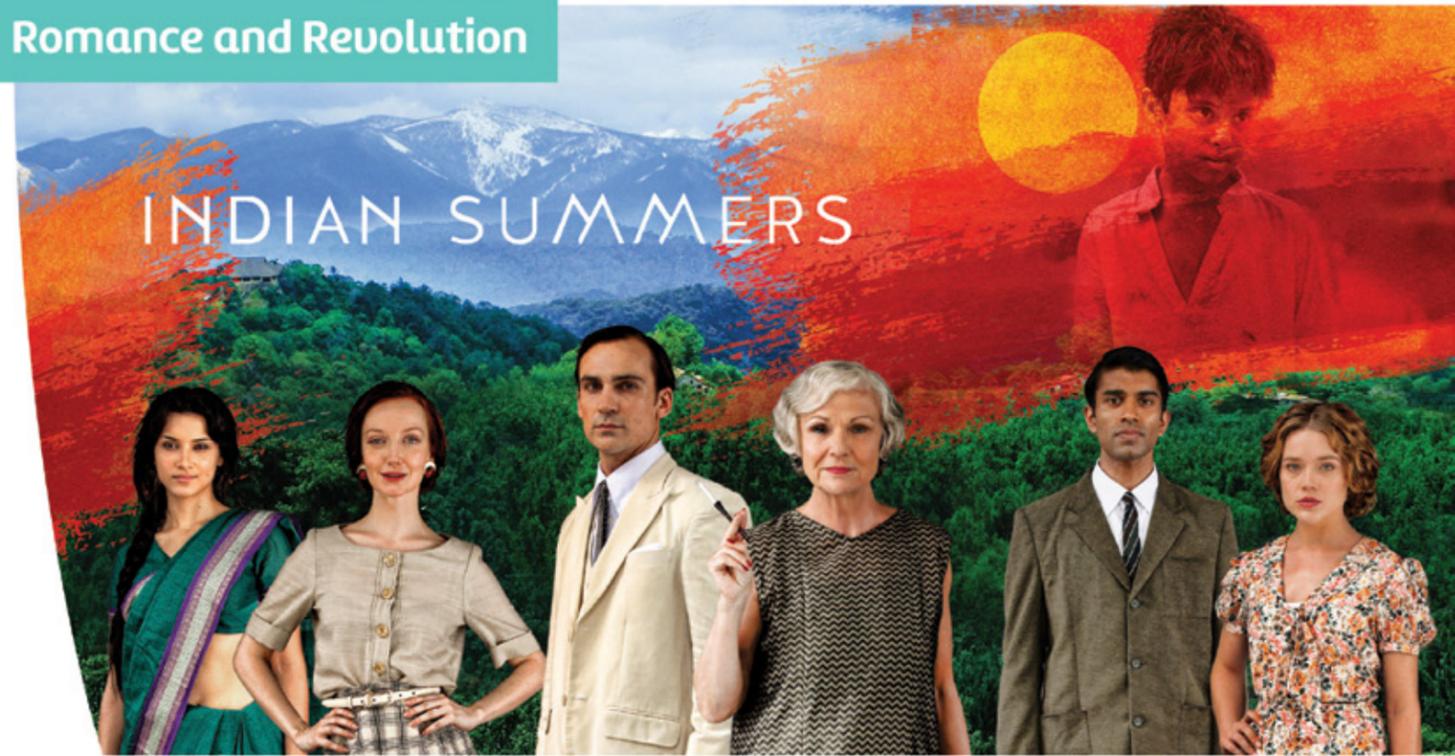


Some of the top shows on 1+1 are the original series *The last moskal*, the third season of *The Voice* and the late night show *Vecherniy Kvarstal*



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TV2, HUNGARY: 'CHALLENGES, EVER GROWING COMPETITION AND DEMANDING BUSINESS LANDSCAPE'

'TV2 Group has gone through many changes and continues its transformation, which has taken a toll on various lines of business and of course, as a result, on performance. In spite of the challenges, ever growing competition and demanding business landscape, it has maintained a strong overall second position with 17% share in total individuals target group.'

Shadia Nugud, programming director at TV2, describes to PRENSARIO the moment of the Hungarian broadcaster, and continues: 'TV2 has a 13,24% market share (all day/total individuals) and successfully manages to maintain a 0,47% gap to #1. It is a strong leader in daytime/weekdays and alternates on weekends. The challenge lays in weekday prime time.'

'The Hungarian TV market is quite fragmented. The viewers have an ever-growing choice of Hungarian language channels and they are becoming more and more willing to switch in search of more targeted entertainment on cable channels thus slowly eroding digital-terrestrial general entertainment channels. TV viewers are still most keen on weekly event shows, "shiny floor" entertainment, such as Keshet

International's singing, talent or competition shows *Rising Star* (18-59: 22,91% share) and *MasterClass* (18-59: 22,26% share) and



Shadia Nugud, programming director, TV2

Endemol's *Your Face Sounds Familiar* (18-59: 29,59% share)'.
 'We had one of the most successful adaptations of *Rising Star*: the finale involved more viewers than the competition's *XFactor*'s Finale (in 4+), which was a great achievement. In 2014 our most successful show was *Your Face Sounds Familiar*, which won a number of renowned industry awards. The third season is currently in pre-production, and will be on air this Fall. Our kids' talent show, *MasterClass* is a slot winner. Local daily scripted series are also attractive for Hungarian viewers: *Jóban Rosszban* (18-59: 14,83% share) regularly performs above the channel's average', she completes.

About the market, Nugud says: 'Audiences continue to choose quality entertainment shows and game shows, and local productions are always what our viewers appreciate and have an emotional connection with. That's why shows like the above mentioned, or daily local productions like *Fish On The Cake*, *Boom!* and *Money Drop* perform exceptionally well.'

'Our audience is shifting even further towards good quality series and movies, so we are working on a library with titles from Fox, Sony, Paramount and NBCUniversal, as well as independent distributors. Our viewers have also developed quite a taste for telenovelas that drive our daytime performance, so we are on the lookout for a new long running hot title. Lastly, we observe a skew towards social experimentation in reality and scripted reality shows, but we are still testing a few formats', she adds.

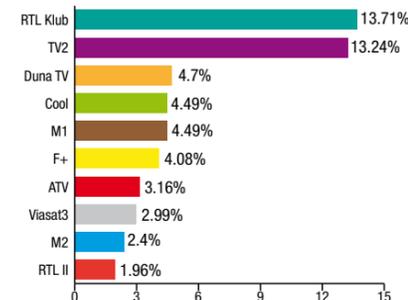
Regarding digital, she comments: 'With *Rising Star* we introduced interactivity in Hungary. It was a huge success and it has changed the Hungarian second screen experience completely. The feedback was incredibly positive: app downloads were over 512,000 and there were almost 17 million votes during the show, in a country of 10 million inhabitants.'

'The production used plenty of interactive features as well, like the Instagram audition, the tweets section, thematic voting. As for the social media, we used every digital channel and tried to create as much buzz as possible. This was the channel's biggest digital accomplishment and most definitely contributed to the *Rising Star* success story in Hungary.'

'By focusing both on B2C and B2B areas in our digital strategy helps strengthen our brands, increase the revenue potential and broaden our target audience/user base. We will try to expand the level of online presence in

future shows and step into other digital areas such as mobile interactivity, online streaming and personalized content services. *TV2 Player* mobile app is alive since this month and will come equipped with instant access to shows and series, filtering options, archives, EPG, prize games, etc.. We are also working on a new app that will stream our morning show to different audio streaming services.'

HUNGARY: AVERAGE SHARES, BY NETWORKS – ALL DAY / TOTAL INDIVIDUALS (JAN-MAY 2015)



Source: Nielsen Audience Measurement / TV2 Research

future shows and step into other digital areas such as mobile interactivity, online streaming and personalized content services. *TV2 Player* mobile app is alive since this month and will come equipped with instant access to shows and series, filtering options, archives, EPG, prize games, etc.. We are also working on a new app that will stream our morning show to different audio streaming services.'

'Lastly, this Fall we are going to implement a voting system for our third season of *Your Face Sounds Familiar*. Meanwhile the *TV2.hu* redesign is in the making and we would like to launch a news portal based on our daily news services *Tények*, with additional contextual content. Our goal is to set the domestic trends with all of these developments', concludes Nugud.



Rising Star (Keshet) was a huge success and it has changed the Hungarian second screen experience



The series *Jóban Rosszban* (18-59) reaches 14,83% share and regularly performs above the channel's average

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RTL CROATIA, EXPANDING IN ALL BUSINESS SEGMENTS

RTL Hrvatska is the second largest broadcasting conglomerate in Croatia, operating the national free to air channels RTL Televizija, RTL2 and RTL Kockica (kids), the Pay TV channels RTL Living, RTL Crime, RTL Passion that reach over 50% of the Croatian homes, and the VOD platform RTL Sada

On 15 May 2014, RTL Group appointed Henning Tewes as the new CEO and, after one year leading the company, he describes to PRENSARIO:

‘Taking into consideration RTL channels in Croatia as a group, I am happy to say that we were the only ones in the territory that had in 2015 to date growth in comparison to the previous year. In Croatia RTL Group achieved 25,4% share in average in all day (YDT)’

The main shows it has had in the first half of the year were 3,2,1 Kuhaj (3,2,1 Cook!), the first format created by RTL Croatia, and in 2015 it had a successful second season regardless of the strong competition on other channels. ‘We have entered once more into co-production and successfully launched X Factor that is currently still on air. Wheel of Fortune and Shopping Queen had proved to be great formats once again and have worked well with all audiences’, adds Tewes.

About general trends



The own created cooking show 3,2,1 Kuhaj was not only a success in Croatia, where it had a successful second season, but it is also being offered to the international market

in the local TV market, the executive comments: ‘Local productions are the most requested shows but, as in other territories, not everything can be locally produced. Foreign product is still very much needed. Serialized fiction is by far the best thing to have on air – risky, but the risk pays off most of the times’.

‘We must not forget about the secondary generation channels where we have a majority of finished US product and as secondary channels, perform extremely well. The best possible sitcom line up attracts many of our younger and urban viewers... and for the youngest ones, as we operate the only FTA children channel in Croatia, RTL Kockica. In addition, classical long running series are very likely to be shown on late night slots on the main channels’.

Tewes refers to the ‘Turkish trend’, and he explains: ‘On prime time, the Turkish series are now much less dominant than in previous years and is coming to an end, perhaps not fully but at least, in the sense of not dominating the schedules of big broadcasters. As in most Southern European territories, serialized locally produced fiction is what attracts viewers the most. They seem to like to escape their reality every day and find their comfort, safety and fun in the stories we create for them’.

As many other broadcasters in Central and Eastern Europe, RTL Croatia has set up an international sales division, headed by Dragana



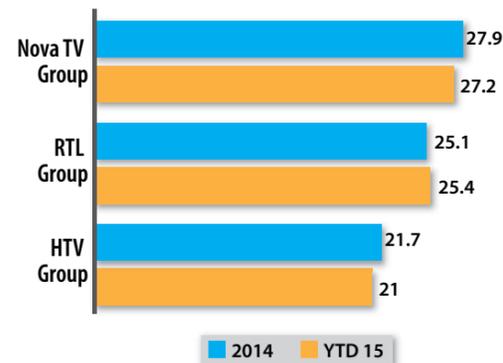
Wheel of Fortune has proven to be a great and very successful format in Croatia

Kos, program acquisitions and sales manager, which is being very successful in the distribution of own developed drama series, sitcoms, formats and quiz shows.

‘We have recently sold our daily drama Vatre Ivanjske (Midsummer Fire), a beautiful fairy tale mixed with soap, to Bosnia and Herzegovina and Kriza (Middle age crisis), a witty sitcom about a group of middle aged men and the ridiculous situations they create for themselves, to Macedonia and Montenegro’, says the executive.

‘3,2,1 Kuhaj (3,2,1 Cook!), our great entertaining cooking show, had spectacular ratings and critiques. After two seasons, we are proud to offer it to other territories. Most of the programs we sell as both finished and format program and we are confident that these shows will be as successful elsewhere as they were in Croatia’, concludes Tewes, who has been part of a panel earlier this month held during the New Europe Market in Dubrovnik, Croatia.

CROATIA: RATING, PER TV CHANNELS (2014 vs. YTD 2015)



Source: AGB Nielsen Media Research



Henning Tewes, CEO, RTL Hrvatska

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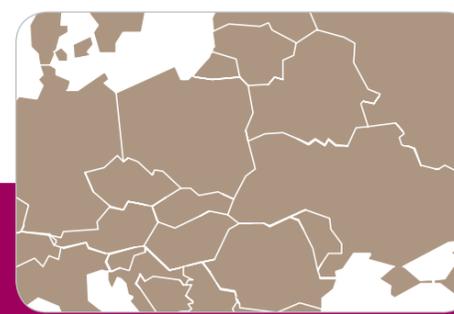
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NEW EUROPE MARKET, FOR THE THIRD YEAR IN CROATIA



As one of the newly created markets in Central and Eastern Europe, the **New Europe Market (NEM)** is one of the fastest growing tradeshow gathering media industry professionals from this region, organized by **MediaVision**. Annually held in Hotel Dubrovnik Palace located in this beautiful Croatian seaside city, the market had its third edition on June 9-11, 2015, with great results.

NEM hosts a series of thematic panels, where professionals get informed about the latest trends in the field. Over 10 conferences were organized over the three-days convention, most of them about TV, but also about OTT, content production, new business opportunities, etc.

On Day 1, the panel *Pay Me My Money Down* with **Saša Runjić**, Croatian Television; **Saša Kramar**, **Iskon**; and **Guy Bisson**, **Ampere Analysis**, entered a debate about the relation between the classic networks and new platforms, moderated by **Nikola Francetić**, **Telekom Austria Group**.

On *Pay-TV Avoiding The Pinch*, with **Scott Ehrlich**, **QYOU**; **Christina Foley**, **Playboy TV UK**; and **György Bálint**, **AMC Networks** for Central Europe, moderated by **Vedran Perišić**, **Fight Channel**, was agreed that the new platforms have 'more and more' need to produce original content despite the financial problems in the market.

On *Sports rights – Is it worth it?* the experts **Bruno Kovačević**, **Croatian Television**; **Vuk Mitrović**, **Pitch International**; **Amory Schwartz**, **QYOU International**; and

moderator **Ivan Blažičko**, **Sports Dimension**, pointed out that, even though the national networks can no longer provide the ever expensive rights for sports events, 'they will always be sold to new platforms'. Lastly, *A match made out of coproduction heaven* featured world's top producers, **Tom Fontana** (*Oz* and *Borgia*), **Bonita Pietila** (*The Simpsons*), **Nigel McCrery** (*Silent Witness*) and **Peter Naderman** (producer of the *Millenium* trilogy).

The second day was initiated by a salutation from **Apostolos Triantafyllou**, a senior CEE and Central Asia sales VP of the leading satellite operator **Eutelsat**, who described Eastern Europe as one of the 'more dynamic markets' in the world where trends are 'followed actively'.

The first panel *FTAs beating the economic slup* was headed by **Henning Tewes**, **RTL**



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



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



Pay Me My Money Down: moderator **Nikola Francetić**, Head of Group Content, Media and Broadcasting, Telekom Austria Group; **Saša Runjić**, Programme Director, Croatian Radiotelevision; **Saša Kramar**, Chief Executive Officer, Iskon; and **Guy Bisson**, Research Director, Ampere Analysis



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

Croatia; **Pete Smith**, **Antenna International** (Greece); and **Pavel Stanchev**, **BTV Media Group** (Bulgaria), and the focus was on the analysis of the market with regards to the economic crisis that Croatia, Greece and Bulgaria experienced. *Is sky the limit?* was dedicated to satellite technology and how the price adjusts to the markets. Moderator of the debate was **Robert Despot**, **Croatian**



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



Pay TV Avoiding The Pinch: moderator **Vedran Perišić**, COO, FightChannel / Head of Sales, Whoa; **Scott Ehrlich**, CEO, The QYOU; **Christina Foley**, director of Sales & Marketing, Playboy TV UK/Benelux; and **György Bálint**, Head of Key Account, AMC Networks Central Europe

Telekom, along with **Triantafyllou**, **Thomas Staneker**, **Deutsche Telekom**, and **Francetić**.

Will second screen always play second fiddle? was moderated by **Irena Battelino**, **Telekom Slovenija**; **Aleks Habdank**, **MTG**; **Richard John Brešković**, **Croatian Telekom**; **Adrian Ježina**, **Vipnet**, and **Kramar** (Iskon). 'Second screen devices don't deserve a prefix, which they have, and that they should be called additional tools because there is a great potential for the market and their development', agreed.

Tim Daly, main actor in *Madam Secretary*, gave an interview to **Antonija Mandić**, organized by SVOD provider **Pickbox**. And the last panel of the market was *Creative Hubs: What can we learn from them?* gathered **Daniela Matei**, **FremantleMedia**; **Izzet Pinto**, **Global Agency** (Turkey); **Simon Shalgosky**, **Keshet UK Productions**; and **Girts Licis**, **MTG**; and moderated by **Igor Stoimenov**, from Belgrade's **B92**.



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

SPECIAL INTERVIEW | TECHNOLOGY

EUTELSAT: 'THE CHALLENGE TODAY IS THE EVOLUTION OF TV ITSELF'



APOSTOLOS TRIANTAFYLLOU, EUTELSAT's SVP of Sales for CE Europe and Euroasia headed the panel *Is SKY THE LIMIT?* at NEM, where he discussed the satellite technology stands today in a race with telcos and other providers. In this interview he talked about the pros of satellite technology, as well as its challenges, and he accentuated the importance of the CEE region for the company.



Apostolos Triantafyllou, SVP of Sales, CE Europe & Central Asia, Eutelsat

'The best is yet to come in the satellite business. We have been around for over 30 years, and have pioneered many initiatives. Today, satellites play a vital role, distributing longstanding applications like video and efficiently connecting even the most remote locations to the Internet with High Throughput Satellites (HTS). And they are present at every live event and every emergency in every part of the world. From our perspective, satellites have a strong and solid future ahead', remarked **Apostolos Triantafyllou**, Eutelsat's SVP of Sales for CE Europe and Euroasia.

'Satellite technology is a core infrastructure from the sky. Competition comes from terrestrial technologies, like fiber, IP networks, etc. although we believe they all have a place in the market, because we are complementary, satellite feeding terrestrial headends and reaching the many users beyond terrestrial with direct-to-home television and broadband. Satellites play an important role in the economic part of the investment. They can connect countries more quickly, more easily and more cost efficiently, as opposed to terrestrial networks that requires physical interventions and offer progressive build-out, targeting first the most densely populated areas.'

Regarding **Eutelsat** position on today's DTH market, he commented: 'DTH means that channels are received direct to home with a small domestic antenna. Broadcast satellites are addressing hundreds of millions of viewers across continents. In Europe today, for example, there are over 200 million homes receiving satellite while in the United States the number is even higher. The second reason why this is such a significant market is that DTH is mostly pay TV. When there is pay TV there is compelling content that attracts viewers. So naturally, satellite customers focus on DTH because it's a proven business model and the most significant application of video distribution.'

'The challenge today is the evolution of television itself. The TV world has changed in many aspects - how we watch it, from pay TV to portal devices and mobile television, moving from old cable TV services, transitioning to high definition TV. Satellites can cope with these new trends. We closely follow developments, are improving our satellites, improving our signal strength and our on-ground technologies to accompany these changes in the industry.'

'Eutelsat is proud to be the strongest player in the CEE region. We invested time, satellites, years, and we have given this region all our attention. We replace our satellites with improved ones and we listen to our clients' needs, as well as the needs of their users. By needs, I mean where the population is, what kind of satellite service gives our clients value for money, how ground technologies — antennas, TVs, STB— develop and how satellites can stay ahead of the game.'

'The biggest challenge is to be able to maintain over time a sincere commercial relation with our partners and cope with the challenges in their business whether it is technology, structural changes or market situations. But so far, without being arrogant we did well and continue developing along them.'

MTG: 'CEE REGION IS ALWAYS AT THE TOP OF OUR MIND'



Aleks Habdank, COO, Pay-TV emerging markets

Aleks Habdank, COO, Pay-TV Emerging Markets, at MTG was interviewed by Dana Mirkovic, PR manager of the New Europe Market. The executive participated in the panel *Will Second Screen Always Play Second Fiddle?* discussing the influence second screen on ratings, ad sales and social engagement.

'MTG has always strongly believed in emerging markets, and whilst the economic situation differs from country to country, overall all the pay-TV markets continue to grow as all countries are digitalizing. This is great for us as we want to be the leading digital entertainer in each of our major markets.'

Aleks Habdank, COO, Pay-TV emerging markets, MTG describes the digital & pay TV growth in the emergin markets, and continues:



Successful programming on MTG Pay TV networks: *Forbidden History* (Like A Shot), *Timber Kings: Passion* (Shane Geddes) and *Paul O'Grady* (Battersea Dog Home)

'Our pay-TV channels consisting of the Viasat factual brands and TV1000 movie channels are going from strength to strength following our successful rebrand last year. We're steadily growing subscription numbers in most markets and of course also have added the youth brand *Trace* last year too. The content of our pay-TV channels is stronger than ever as we continue to invest in more stand-out as well as locally relevant content, with over 60% of our titles being completely new and exclusive to the markets.'

'The geopolitical situation in Russia and Ukraine has of course affected us, but we're still the number one channel operator in Russia and have just signed a new exciting distribution agreement with Kyivstar in Ukraine in digital. When it comes to free-TV, our media houses are either the largest or second largest in the Baltics, Bulgaria and Czech. We're also the majority shareholder in the *prodco Paprika Latino*, which is present in nine countries in the region.'

'When we acquire content and plan the schedules, the CEE region is always top of our mind. Being part of an international group gives us the strength and the connections to buy and pre-buy content that is relevant for the region. We also localise feeds, for example in Poland we have dedicated feeds allowing us to focus exclusively on the needs of that territory.'

'Our experience in the market and research shows that the audiences in CEE like well researched factual programming. *Viasat History* is performing very well in its target group and beyond: *WWII Air Crash Detectives* or *Like a Shot's Wicked Inventions*, which we helped finance, that will premiere later this year with episodes filmed in Poland and Slovakia.'

Regarding digital, Habdank remarks: 'Digital means so many things to different people, companies and sectors. But I think its important to think about it from the perspective of the consumer and start from there. The rollout of fast broadband allied with connected devices is giving viewers much more choice and convenience in what they access and how, and so control.'

'On demand viewing has taken over



15 years to be fully adopted and enter into the mainstream, again no doubt helped by fast broadband, as well as younger viewers; whilst at *Virgin Media*, where we generated over 1 billion VOD views every year, which if treated as a channel put it as third largest channel after *BBC1* and *ITV1*.'

'In the UK where I live, 98% of the TV viewing still happens on a TV so its future looks safe for a while longer. Having said that, one cannot deny that there is an emerging shift driven by the penetration of connected devices as well as younger digital generation. So also a platform operator, understanding the challenges of our distribution partners, all of our channels come with full catch-up and multi-screen rights so the pay-TV operators are free to offer time-shifted or live viewing on the go.'

'I don't think anyone has found the magic formula yet for one all-encompassing *second screen* service. However, you cannot deny that it is coming, especially given the high broadband speed connectivity in our markets. Many operators have created their own applications, and equally some shows and channels have created very good apps to enhance the viewing experience and interaction, but as of yet it is a fragmented market.'

So we work with the all the market, and most importantly follow the consumer trends to ensure we are front of mind and relevant for our viewers.'

'For a service to work it needs to add value to the viewing experience, and be reliable and easy to navigate and explore, and so find the content you are interested in. All of our pay-TV programming comes with complete with meta-data, synopsis and pictures, so if any service provider wants create a TV guide service, we have everything translated and ready to use.'

'What's much more important than a second screen app is having multi-screen and catch-up rights for the programming; like MTG does so third party operators have a ready-available TV Everywhere product for mobile devices,' concludes Habdank.

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PRIMA TV IN ROMANIA, A DIVERSIFIED AND HIGHLY NICHED MARKET



Simona Mazilescu, COO, Prima Broadcasting Group

Prima Broadcasting Group is one of the top media conglomerates in Romania, operating **Prima TV** since 1997, which airs local and international formats ranging from reality-shows to live talent programs. It also runs both printed and digital outlets, amongst which the most successful quality newspaper and digital platform and the number one tabloid on the market.

The broadcaster was the first television to air in Romania an internationally acclaimed format *Big Brother*. Also the first to air a renowned reality show and it is the only Romanian broadcaster who created and distributed internationally a local format.

Simona Mazilescu, COO, Prima Broadcasting Group, comments: 'Throughout the years, our network is amongst the top 5 commercial broadcasters in Romania. The top shows include the longest running reality-show in Romania *Wife Swap* (*Schimb de mame*), the longest

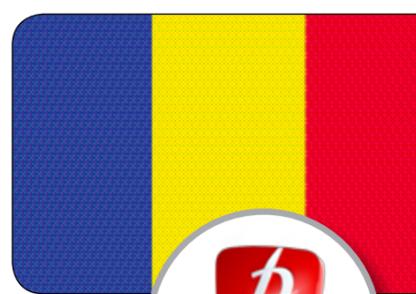
running sitcom, *Loonies* (*Trasnitii*), satirical show *Bickering Chronicle* (*Cronica Carcotasilor*) and the stations' news broadcasts.'

'We offer the Romanian public a mix of locally produced formats (60% of current programming) and international acquisitions (40% of current programming) that are in line with current demands of audiences.'

About the market, she explains: 'The Romanian TV market is highly competitive, having 60+ local channels and a vast international offer. The market is, furthermore, extremely diversified and highly niched in its offerings. However, consumption of TV products is still high in Romania, as compared to other European countries.'

'In terms of programming local players are focusing on international formats and reality shows. **Prima TV's** main programming philosophy is in line with the audiences' preferences: reality shows, comedies, movies, telenovelas and a good mix of local and international content.'

Regarding digital media, **Mazilescu** remarks: 'Digital media is a strategic priority for our management and we are developing a number of innovative projects in this field ranging from interactive shows to on-demand offers. Our main focus is on providing the consumer with a complete experience and on creating a diverse and extensive portfolio for our advertisers. We currently have a very strong presence on all social media outlets and a good position with our online offerings.'



The top shows on Prima TV include the longest running reality-show *Wife Swap* and the satirical show *Bickering Chronicle*



She finalizes about the future plans: 'As the Romanian TV market evolves and as digital media created an opportune environment for disruptive innovations, **Prima TV's** strategical outlook includes an expansion of its current online and on-air portfolio.'

'In the second quarter of 2015, we will continue to focus on broadcasting real stories about real people, as part of the station's new programming philosophy. Reality-shows, game-shows and other innovative formats will be part of our autumn programming', concludes the executive.

INES TURTURICA RETURNS TO PRIMA TV

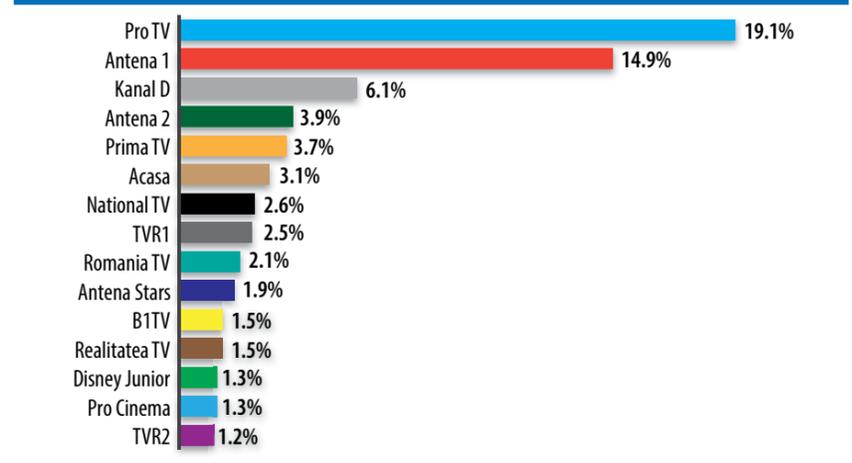
Ines Turturica, a highly skilled executive in the content acquisition field, returned last April to **Prima TV**, where she had worked 18 years ago. Appointed as acquisition director, the executive's main focus is looking after new series and telenovelas from Latin America.



Ines Turturica, acquisition director

She has an extensive experience in the Romanian TV industry. Before **Prima TV**, **Turturica** has been acquisitions director at **ACASA TV**, the female-oriented network from CME group in Romania. 'Our main objective for Prima is to diversify its programming grid', remarks the executive to **PRENSARIO**, prior to **NATPE Europe**.

ROMANIA: MARKET SHARE, PER CHANNELS 18-49 URBAN/ALL DAY



Source: Kantar Media, Aramdata SRL (2014)

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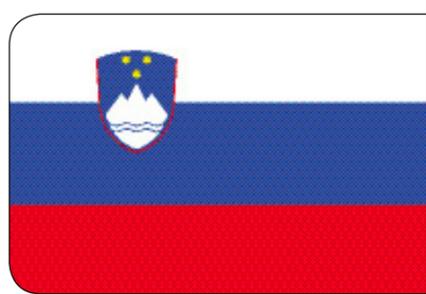
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PRO PLUS, SLOVENIA: FACING THE FRAGMENTATION OF THE AUDIENCE'S PREFERENCES

Pro Plus is the leading media company in Slovenia with 18 years in operations. In 2015 the top 5 performing local productions in the country (target 18-54) were all produced by the broadcaster. And not only for television, also the top web content.



Branko Čakarmiš, program director: 'Our leadership results from the quality of programming on our channels, excellent execution of producing local shows and the distribution of content on multiple platforms. Average prime-time audience share for the whole group was 46% between January 1st to April 30, according to AGB Nielsen Media Research'.

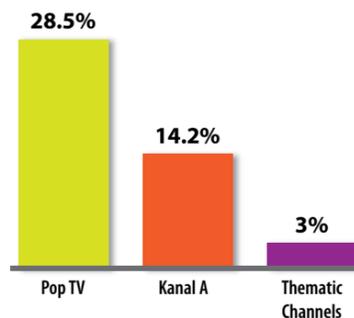


Pro Plus operates Pop TV and Kanal A, as well as through the thematic TV channels, BRIO, KINO and OTO. It has a significant online presence where it pushes the boundaries journalism through 24ur.com, Slovenia's most visited website, 7 specialized web portals, and the first VOD, Voyo.

Locally produced programming includes the top rated news shows 24UR and the afternoon and evening edition, weekly current affairs shows Confirmed! and Epilogue. Reality and entertainment is also very popular and stands as a strong pillar on Pop TV.

KanalA, focus on male audience, broadcasts local news, sports, movies and entertainment shows as well as international formats. The

SLOVENIA: PRO PLUS TV CHANNELS AUDIENCE SHARE (1Q 2015)



Source: AGB Nielsen Media Research (Slovenia)

newshow *World on Kanal A* is the most viewed show in its time slot as well as one of the most viewed daily show in the country (AGB Nielsen Media Research). It also live broadcast of sport events like the *Moto GP* and from autumn 2015 on *Champions League* and *UEFA Europa League*. 'The spring season of *Your Face Sounds Familiar* on average delivered a 54% audience share on Pop TV and is by far the most watched show in Slovenia this spring. On *Monday Wishes*, where the host fulfils a broad range of viewer's wishes, had a 34% audience share and from its beginning was the #1 choice. *MasterChef Slovenia* (31% share) and *Perfect wedding* (25% share) delivered great results from Wednesday until Thursday and Saturday, respectively. *Big Brother* on Kanal A is the most watched reality show in Slovenia this spring', adds Čakarmiš.

'With these results, we are confident in our autumn formats. The daily reality series, *Restaurant's Looking for a Boss* and popular show *Slovenia's Got Talent* are two highlights that will no doubt again be audience favorites in Slovenia', he adds.

Regarding the market, the executive says: 'Despite its size (population of only 2 million), the Slovenian TV market is very competitive. There is strong competition among local broadcasters as well as high cable, satellite and IPTV penetration, which presents a great opportunity for pan-regional subscription channels. This is resulting in continued fragmentation of audience's preferences'.

'Our answer to this trend are 3 thematic subscription channels, OTO for kids, BRIO



Restaurant's Looking for a Boss and *Slovenia's Got Talent* are two highlights that are audience favorites in the



Branko Čakarmiš, program director, Pro Plus



The spring season of *Your Face Sounds Familiar* on average delivered a 54% audience share on Pop TV and is by far the most watched show in Slovenia this spring

for women and KINO with a great variety of movies. But key programming trends remain the same: daily reality and talent shows are generating the highest audience interest'.

And he concludes: 'Digital and traditional media are working hand in hand. At least they do in the case of Pop TV. Linear channels, and especially local content, are key to the growth of digital media, and are designed for multiplatform usage on Voyo for every lifestyle with a huge choice of content for all ages and tastes. We're always looking to expand our library and diversify our offers with previews and exclusive content, from sports, films, and local fiction series'.



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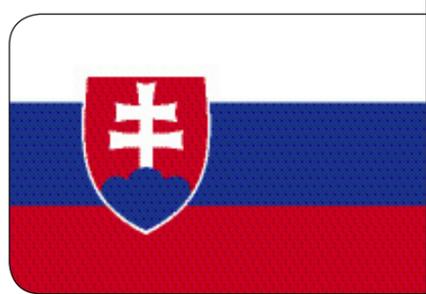


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MARKÍZA, SLOVAKIA: 'THE COMEDY GENRE IS BACK'

TV Markíza has been the leading channel in the Slovak market since its launch in 1996. It is a full format TV channel targeting mainstream audiences at the age of 12-54. In 2009 it has launched two secondary channels: **Doma**, built mainly on romantic and crime series and quality movies, and **Dajto** that is a comedy, movie and sports channel focusing on entertainment, adrenalin and action.

The **Markíza Group** with its three networks has maintained its leading position in Slovakia despite the growing competition in the market. 'The trend is more hours of local fiction series produced by Slovak channels, which is leading to better quality and new creativity in storytelling', highlights **Silvia Majeska**, head of programming, TV Markíza.

And she explains: 'Our programming offer is a complementary mix – locally produced content consisting of news, fiction series and entertainment shows dominates on **Markíza** prime time slots whereas foreign movies and international series are key for the smaller channels **Doma** and **Dajto**'.

Regarding the top shows, the executive describes: 'The comedy genre is back with great success on **Markíza**: we aired new comedy series *Horná Dolná (In the Middle of Nowhere)* with almost a 50 % audience share (Spring 2015) and continued with new epi-

sodes of sketch show *Kredenc (Cupboard)*'.

Entertainment shows also keep attracting Slovaks 'if well produced', says Majeska, and she adds: 'Chart Show, based on RTL format *Ultimate Chart Show*, has been winning the slot on Wednesdays with over 30 % audience share (Spring 2015, **Markíza**) so we plan more new episodes along with the comedy formats'.

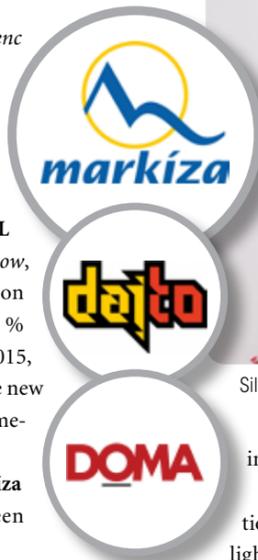
The main news on **Markíza** *Televízne noviny* has been



Markíza aired in Spring the new comedy series *Horná Dolná (In the Middle of Nowhere)* with almost a 50% audience share

historically the highest rated program on the market. In addition, long-running local fiction series deliver solid results and are the backbone of our weekly schedule in access and prime time. In this area, we are going to launch a new romantic series this fall.

'Also, a new season of *Idols*, which will be coproduced with our Czech sister channel, TV Nova, will be back in September together with season 6 of our reality show, *The Farm*. We believe it is our balanced mix that counts for maintaining the leadership and we aim for continued success



Silvia Majeska, head of programming, TV Markíza

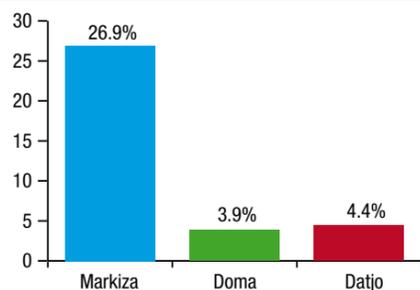
in all parts of the content spectrum'. 'Our audience is looking for local fiction series with local actors and themes, light entertainment, and reality shows. From foreign products, it is mainly blockbuster action, adventure movies and international crime and comedy series, either from US or Europe, which add the color and variety to the programming mix'.

About digital, she concludes: 'With growing popularity of VOD consumption, we believe local content is key for our market as foreign titles are massively accessible through existing platforms or piracy. Our audience can access our local content via a variety of platforms, from catch up service in both AVOD and SVOD models, or our video archive application which has over 130,000 downloads. Free to air broadcast, however, still remains the core of our business'.



The main news on Markíza *Televízne noviny* has been historically the highest rated program on the market

SLOVAKIA: MARKIZA GROUP OF CHANNELS AUDIENCE SHARE (1Q 2015)



Source: PMT/ TNS SK (Slovakia)



25 EPS X 45' READY FOR DELIVERY
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UKRAINE GETS STRONGER ON FORMATS



Docudrama *Mystical Tales* airs in Latvia, whereas Lithuanian broadcaster has acquired new seasons of the show.

Totally 141 new non-scripted formats have been acquired and adapted during last 10 years in Ukraine by 6 major Ukrainian TV channels, **Inter, STB, 1+1, Ukraine, ICTV** and **Novy Channel**. The notable increase in the quantity of formats' acquisition was observed in 2006, the peak of format adaptations was reached in 2011, followed by the recession period caused by the self-identification of Ukrainian TV channels who finally defined their line-ups structures and found demands of their target audience.

Many acquired formats were prolonged for further seasons as well as broadcasters started experimenting with their own original TV shows creation. Game shows, reality and talent shows are among the most frequently adapted non-scripted formats by Top-6 Ukrainian TV channels. International format hits lead the Top-10 of the most successful shows of Ukrainian TV: *The Voice, X-Factor, Got Talent, Wife Swap, The Bachelor*, etc. These shows were aired for 5 and more seasons, performing the highest TV ratings.

Iryna Kostyuk, producer at **FILM.UA**, explains: 'Ukrainian Television industry faced the new challenge: the audience became more demanding, being offered the whole variety of new formats simultaneously. Format adaptations decreased their life period to 2-3 seasons on air and were closed, being considered unsuccessful. To keep the viewers involved, TV channels are challenged to surprise them with



VICTORIA YARMOSHCHUK, CEO, MEDIA RESOURCES MANAGEMENT

'Into addition to the global TV tendencies connected with the ways and habits of the content consumption, nowadays Ukrainian TV market enters the era of transformation in terms of broadcasters' scheduling policies'



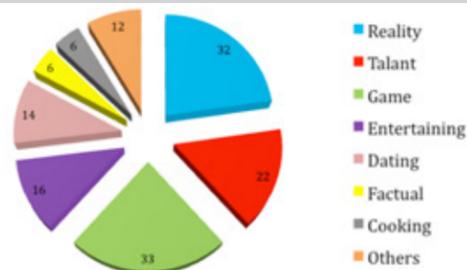
IRYNA KOSTYUK, PRODUCER, FILM.UA

'Ukrainian Television industry faced the new challenge: the audience became more demanding, being offered the whole variety of new formats simultaneously'

new content of exceptional quality, as Ukrainian versions of *The Voice* and *X-Factor* are acknowledged as the most successful ones in the world'.

It stands to mention that Ukrainian TV in recent years becomes well known not just for international formats' acquisitions. The original Ukrainian formats have been launched successfully and aired for number of seasons in highly competitive environment. Until 2014 Ukrainian formats were not identified and presented to international audience at global market level, but appearance of **UA Formats** catalogue, initiated by **Kostyuk**, changed the situation. **UA Formats** is basically a complete catalogue of almost all Ukrainian formats ever made on local TV with a one common feature – a great success story of broadcast: either in terms of ratings, number of seasons on air or number of local adaptations in the CIS territories or all of those factors combined. This catalogue currently

INTERNATIONAL FORMATS ADAPTATIONS IN UKRAINE (ONLY NEW LAUNCHES), 2005-2014

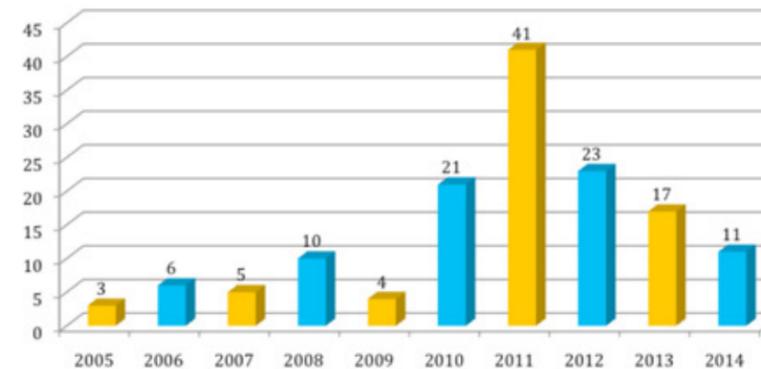


Source: Media Resources Management

includes 19 original titles available for licensing to any territory of the world.

Ukrainian emerging format market has already gained an ambitious goal: for the first time the local format of TV series (*The Sniffer*, produced by **FILM.UA**) had been sold to European broadcaster **TF1** (France) and its production is already launched. Reality format *Daddy's House* went travelling to Poland, original format of the most successful Ukrainian TV show *Take the Mike* was picked up for international distribution by **Echo Rights** after **UA Formats** catalogue was presented at **KIEV MEDIA WEEK** in 2014. *Jail Birds* (by

GENRES OF FORMAT ADAPTATIONS IN UKRAINE, 2005-2014



Source: Media Resources Management

FILM.UA reality show was adapted in Russia and added into **Sparks Networks** catalogue, while other Ukrainian title listed in Swedish distributor's lineup, *Crack Them Up* (produced by **Studio Kvartal 95**) is already licensed to France, Belgium, Italy, Germany, Lithuania, China, Australia, Vietnam, Russia, Belorussia, Kazakhstan, etc.

Produced by **Star Media** *Go Dance!* format was sold to China, USA, France, Norway and Russia. Docudrama *Mystical Tales* airs in Latvia, whereas Lithuanian broadcaster has acquired new seasons of the show. Earlier **FILM.UA Distribution** has sold format rights to *Mystical Tales* to Bulgarian Nova TV while Belgian distributor **Crazy Cow** has picked up rights to the format for the territory of Benelux, Germany, Austria, Scandinavia and French-speaking Switzerland.

Moreover a range of Ukrainian original formats have been also sold to Russia and other CIS territories. For instance: *The Auditor* format was adapted by Russian TV channel **Pyatnitsa**, *Everything's Gonna Be Alright* was sold to **CTC Media**, etc., some shows like *Save Our Family*, *School Of Parenting*, *Wardrobe* and others were sold as readymade to a number of the territories.

It is worth to mention that not only formats business but the whole Ukrainian TV market faces great challenges these day. **Victoria Yarmoshchuk**, CEO at **Media Resources**

Management (organizer of **KIEV MEDIA WEEK**), adds: 'Into addition to the global TV tendencies connected with the ways and habits of the content consumption, nowadays Ukrainian TV market enters the era of transformation in terms of broadcasters' scheduling policies'.

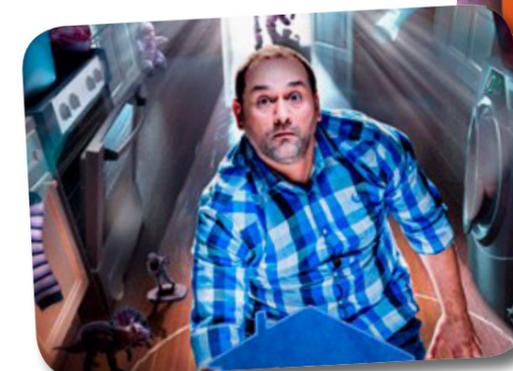
'From the 4th of June 2015 some amendments to the Law on Broadcasting came into the force, which reduce significantly the quantity of Russian-produced content in the air of Ukrainian TV channels (traditionally Russian content took very significant part of the air of Ukrainian TV channels). Moreover this year Ukrainian Parliament voted for the reduction of TV ads on the air of the Ukrainian broadcasters from 20% to 15%. So we can see really great prospective for the international distributors at the Ukrainian market caused by increased



Reality format *Daddy's House* went travelling to Poland, original format of the most successful Ukrainian TV show *Take the Mike* was picked up for international distribution by **Echo Rights** after **UA Formats** catalogue was presented at **KIEV MEDIA WEEK** in 2014



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KIEV MEDIA WEEK 2015

MEDIA BUSINESS IN THE ERA OF TRANSFORMATIONS: CHALLENGES, PROSPECTS, OPPORTUNITIES



Victoria Yarmoshchuk, CEO, Media Resources Management, organizer of KMW

The cover theme of the 5th edition of KIEV MEDIA WEEK, held on September 7-11 in Hyatt Kiev, Ukraine, is *Media Business in the Era of Transformations: Challenges, Prospects, Opportunities*. Held in the Ukrainian capital city, the market offers an important business-networking platform for media industry professionals from CEE, including Ukraine and CIS region, as well as traditional meeting point for top players of TV, movie, new media and other media



businesses from all over the world.

Along with traditional range of events during the tradeshow (*Ukrainian Content Market; Format Show, Kiev Co-Production Meetings, Film Business, Television as Business, Pay TV in Ukraine, LIONS Creativity Days Case Studies*), it offers a unique line-up dedicated to the most challenging issues of the local

media industry.

Reinvent Ukraine puts special focus on new cooperation and co-production opportunities between CEE and Ukraine: it hosts a delegation from Poland, Czech Republic, Romania, Croatia, as well as from Baltic States and Turkey who discuss co-production opportunities with Ukrainian partners. *New Legislation In Forth And Upcoming Trade Regulation Of Ukrainian TV And Media Sphere* unveils the burning issues as legislative ban for some kinds of audiovisual content in Ukraine and upcoming regulations targeted on facilitation and improvement of Ukrainian investment and co-production climate.

'New emphasis of media forum and program modified according to the cover theme of KMW 2015 allow us to discuss current issues in the industry and find the



answer to the most important question today: *How should CIS region media business develop under the new order of things?*, comments **Victoria Yarmoshchuk**, CEO **Media Resources Management**, organizer of the show.

EVENT	DAY & DATE
PRESS CONFERENCE	SEP. 7, 10-11AM
FORMAT SHOW CONFERENCE	SEP. 7, 11:30AM-6.30PM
UKRAINIAN CONTENT MARKET	SEP. 8, 9AM-6PM
KIEV CO-PRODUCTION MEETINGS FORUM	SEP. 8, 10AM-3PM
PAY TV IN UKRAINE CONFERENCE	SEP. 8, 11AM-6PM
UKRAINIAN CONTENT MARKET	SEP. 9, 9AM-6PM
FILM BUSINESS CONFERENCE	SEP. 9, 9:30AM-6PM
UKRAINIAN CONTENT MARKET	SEP. 10, 9AM-3PM
TELEVISION AS BUSINESS CONFERENCE	SEP. 10, 10AM-6PM
LIONS CREATIVITY DAYS CASE STUDIES	SEP. 11, 1-6PM



SUCCESSFUL SERIES

SOMEONE ELSE

13x60 min.



CRASH OF CLASSES

9x60 min.

PARAMÉDICS

Season 1 & 2
26x60 min.



FIC CEE: 'WE ARE WITNESS OF A GOLDEN ERA OF TV WITH GREAT SHOWS AND NEW DEVICES'



Carlos Ortega, EVP of Central and Eastern Europe, FOX International Channels



Vectra with a combination of shows from FOX and FOX Comedy. Poland is the third country to launch this service after Finland and Greece.

Continues Ortega: 'The Walking Dead is one of our main franchises (6th season to be premiered in October, 24 hours later than the US). We have just premiered on FOX Wayward Pines (M. Night Shyamalan) with Matt Dillon, and we have Empire, a

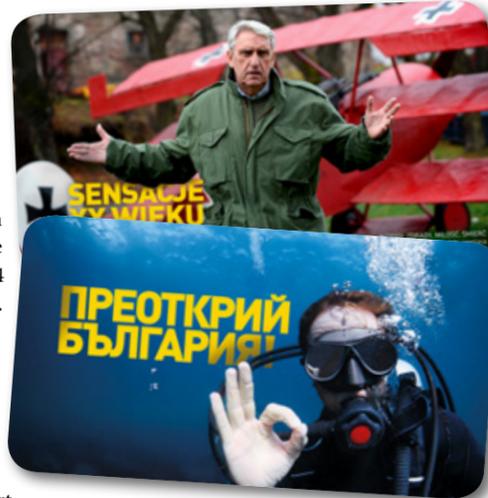
20th Century Fox production that has increase to the top of the ratings in US. Next year, we will add Outcast (Robert Kirkman, The Walking Dead), scheduled for a new global premier in 2016'.

Regarding local productions, FIC has advanced with factual projects, mainly for National Geographic. 'In Poland, we have developed several local projects including Poland's Toughest, where a Polish boxing and kickboxing champion undergoes challenges assigned to people working in tough conditions'.

Night truckers is about a group of oversize cargo trucks' drivers fighting against time to safely transport the load to the destination, and Sensations of 20th Century is a co-production with TVP based in one of the most acclaimed documentary (1983). 'NGC Poland and TVP have collaborated to give the title a new life with new episodes about such events as the unknown activities of Heinrich Himmler - Hitler's greatest enemy, and the Polish cryptologists breaking Germany's encryption machine Enigma', he says.

'We also have a local version of the NGC's franchise World's Smart Cities series, implemented with the support of ad sales partners in Romania with an episode focused on Bucharest, and we have premiered in May the second season of Explore Bulgaria, a multimedia project fully developed for NGC in this market funded by sponsors. Due to the success of the first season (six 12-minute films, 360° communication campaign, online, events and social media activities), the current new season has been extended to 30 minutes. We have new versions of this format planned for Croatia, Serbia and Slovenia', remarks Ortega.

'Although it changes across the regions and



National Geographic Channels has co-produced with TVP Poland Sensations of 20th Century, based in one of the most acclaimed documentaries (1983), while in Bulgaria it has developed the multimedia project Explore Bulgaria whose second season was premiered last May

each market has its own peculiarities, TV is stronger in CEE. We cannot think in a competition with the digital platforms, but in a deeper collaboration with them as our main allies. Non-linear services, provided by our affiliates' catch-up services or by us in collaboration with them are giving us new opportunities to increase our commitments, to affiliates and audience'.

'Nowadays, audiences look for the latest on TV. The impact of series such as The Walking Dead, Wayward Pines or Empire answers to our strategy of combining exclusives premieres with strong promotional support. We are witness of a golden era of TV with many great shows to watch and new devices to being watched, what means more time dedicated to TV than ever. In this context, our perspectives for the CEE region are as good as they are for our business worldwide. At regional level, we will keep on working close with our affiliates to follow with the extension of our portfolio and the commercialization of our content'.

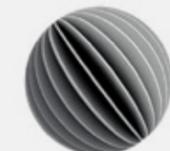
'Among the new launches, Nat Geo People is dedicated to real stories and will arrive to Poland next October. Our non-linear services FOX Play and Nat Geo Play will launch in Blizoo (Bulgaria) with a combined catch-up service that features favorite series and shows from FOX, FOX Life, FOX Crime, NGC and 24Kitchen', concludes Ortega.

WINNING THE 9:00 PM TIMESLOT SINCE ITS DEBUT!



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- 24Kitchen
- FOX comedy
- FOXCRIME
- FOX life
- NATIONAL GEOGRAPHIC CHANNEL
- NAT GEO WILD
- NAT GEO people

FILMBOX INTERNATIONAL EXPANDS WITH A FOCUS ON 4K

BERK UZIVEL, executive director of FilmBox International, tells CEETV's **GEORGI R. CHAKAROV** how his company is expanding its business in the CEE and the rest of the world with key investments in 4K.

CEETV: SPI International has been a leading supplier of movies and TV programs for over 20 years. You also operate more than 30 FilmBox brand channels, a VOD library, and Stopklatka.pl. What is the core of your business?

BU: While the distribution of movies and TV content to major TV networks in CEE is still an important part of our business, we have become a global broadcasting company that offers a wide range of Pay TV channels all over the world. In addition to FilmBox movie channels, our portfolio also includes two sports channels — FightBox and FastnFunBox —, a documentary channel — DocuBox —, a fashion channel — FashionBox —, a music channel — 360TuneBox —, MadScreenBox with live interactive games as well as two adult channels — Eroxx and Eroxxx —. Moreover, we developed a number of apps under the FilmBox Live brand to make our channels and the related VOD content available on any Internet-connected device.

CEETV: During MIPTV you announced the launch of 4K FunBox UHD. What other priorities you have set and what kind of 4K content you are planning to produce/acquire?

BU: Making 4K content available to TV viewers is in fact one of our top priorities. 4K FunBox UHD is the first one, but we plan to develop more in the future. While acquiring more UHD content we also began to produce our own content. We started with recording live MMA events in native 4K but eventually we want to produce UHD programming cover-



FilmBox has launched 4K FunBox UHD at MIPTV and confirmed that 4K content is one of its major priorities for the upcoming years

ing music and other types of entertainment.

CEETV: Have you planned the launch of new channels in Europe? Or perhaps acquire already operating channels?

BU: We are localizing our existing English-language channels in order to offer more local feeds in the countries where we already operate, namely in Poland, Bulgaria, Romania, Bulgaria and in the Adria region. We are launching a number of FilmBox movie channels in Serbia, Bosnia and Herzegovina, Montenegro, Croatia, Albania and Macedonia. Our goal is to create a wide portfolio of localized thematic channels offering sports, lifestyle, music and interactive family programming so that local viewers can enjoy top quality entertainment content in their language.

CEETV: What is your digital strategy? Will you add more services like Stopklatka in other countries as well?

BU: Our digital strategy is focused on our flagship VOD service FilmBox Live that offers access to both our linear channels and our content library on multiple screens. The service is available all over the world in the form of apps developed for Smart TV platforms, mobile networks and game consoles. Recently we launched an online VOD/PPV service fightboxlive.com so that fans of martial arts sports can enjoy live broadcast of MMA and kickboxing events. In many cases FilmBox Live is a complimentary service that we make available to the subscribers of our FilmBox premium TV packages. Our strategy is to create FilmBox Universe, an interactive, multi-screen environment where the subscriber can enjoy linear TV channels, a huge VOD library as well as interactive gaming content along with 4K programming on their TV screens and anytime, anywhere on any internet-connected device.

CEETV: Give us details about your Kino LG 4K project in Poland? Have you planned to launch it in other countries as well?

BU: Kino LG 4K in Poland is a pilot project. We developed a service boasting a library of 30 movies, which can be streamed in UHD quality via FilmBox Live app



Berk Uzivel, executive director

on all 2014 LG Smart TV 4K models. We hope to extend our collaboration with LG onto other markets. UHD versions of the movies presented in the LG 4k library have been engineered by CRE, an SPI-owned technology company specializing in digital remastering and preservation of movies. While developing the 4k project for LG we came up with the technology applied which allows home subscribers to stream 4K content from the FilmBox Live VOD service using broadband Internet and mobile networks.

CEETV: You own Kino Polska TV, which you plan to become the leading player in the CEE market. Tell us more about the company's strategy in the region?

BU: Kino Polska TV is the largest company in the SPI International Group. It is also our operation hub employing close to 200 people in such areas as broadcasting, programming, editing, licensing, marketing, accounting and post-production. Thanks to the technological and human resources gathered in Warsaw we are able to run and grow our business not only across the CEE but also globally.

CEETV: Last month you announced the launch of four of your channels in Indonesia. What other territories will you expand to in the upcoming months?

BU: This was a major step, and we plan to continue expanding the distribution of our channels in Asia. We are also planning to introduce our channels in Israel. We launched 8 channels on Crystal TV (Ghana) and we are close to sign new distribution agreements in other African markets. We are also working on bringing our channels to South America, by securing a formal approval from Ancine, the Brazilian regulatory body, to launch 9 FilmBox brand channels there.

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Natpe Europe, Viewing Box #3

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ALL3MEDIA, RE-CONSTRUCTING REALITIES



Natalia Sterlikova, format sales executive, all3media



Felix Wesseler, director of business development & communications, Filmpool

Doubt in Bulgaria and Romania, explains **Sterlikova**, who highlights *Berlin Models* as one of the top products of the slate.

'The series is the ground-breaking new constructed reality soap opera set in the glamorous world of fashion. More than just fiction, *Berlin Models* sees real models and stylists make up the cast of both professional and amateur actors, giving a unique glimpse into the world of the "beautiful people", she adds.

The format is produced by **Filmpool**, one of the three top production studios of the group specialized in scripted, non-scripted, factual, entertainment, game and music shows for Germany's major broadcasters.



Since the incorporation of **Natalia Sterlikova** as format sales executive at **all3media international** (UK), the company has grown on its offer of reconstructed reality formats, a genre that mixes fiction with reality created by **Filmpool**, a German-based production company owned by **all3media**.

'Reconstructed reality remains one of our strongest genres across Central and Eastern Europe; over 3,500 hours have been produced across 10 territories within CEE over the last 3 years. In addition to recommissions of Filmpool's *Families at the Crossroads* in 5 territories there will be launches of new series *Niedrig and Kuhnt* in Ukraine and *Cases of*

TOP CONSTRUCTED REALITIES SOLD ACROSS CENTRAL AND EASTERN EUROPE

Hungary	RTL Klub	Day & Night
Czech Rep.	Prima TV	Families at the Crossroads
Bulgaria	Nova TV	Cases of Doubt Families at the Crossroads
Ukraine	ICTV	Niedrig & Kuhnt
Romania	Prima TV	Cases of Doubt
Poland	Polsat	Cases of Doubt Families at the Crossroads Private Investigators in Action
Estonia	TV3	Families at the Crossroads
Latvia	TV3	Families at the Crossroads



Berlin Models, new constructed reality

realities in Hungary (**RTL Klub**), Czech (**Prima TV**), Bulgaria (**Nova TV**), Ukraine (**ICTV**), Romania (**Prima TV**), Poland (**Polsat**), Estonia (**TV3**) and Latvia (**TV3**), among others, and we are confident that we will achieve new markets very soon.'

ALL3MEDIA EXPANDS ITS SALES TEAM FOR CEE

All3media International (UK) has expanded its sales team with the appointment of **Elise Woolfe** as Senior Sales Executive for Central and Eastern European.



The executive assists for first to NATPE Europe with a diverse slate of quality drama and engaging factual slate headed by *Partners in Crime* (6x'60), a major new TV adaptation from the works of **Agatha Christie**, with a contemporary twist. While *Red Rock* ('30) is a continuing drama based around a busy police station.



Red Rock, new drama

The executive also recommends in Prague *Chrisley Knows Best* (32x'30), centered in the life of Atlanta's first family of fabulous, and *Safe House* (4x'60), a major new returnable mini-series starred by **Christopher Eccleston** (*The Leftovers*, *Thor: The Dark World*, *Accused*), **Marsha Thomason** (*White Collar*) and **Pater-son Joseph** (*The Leftovers*).



Safe House (4x'60), new returnable mini-series

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WHAT'S UP IN POLAND?

The Polish TV market is dominated by three groups: the public broadcasting corporation **Telewizja Polska (TVP)** and the commercial television groups **TVN** and **Polsat**. The country remains one of the biggest cable television markets, with almost 100 nationwide channels and was one of the latest countries in Europe to experience the digital television transition, as the final switch-off occurred in July 2013. 2014 has also been a significant year for the Polish TV sector since the time shifted viewing and catch-up TV started to be measured on TV sets in February.

The same as last year, all of the four most-watched channels are significantly losing audiences in 2014: the public channel **TVP1** still leads the market, closely followed by the private channels **Polsat**, **TVN** and **TVP2**. Nevertheless, the commercial channel **TV**



The best performing audience for a sport competition in 2014 was the Men's Individual Large Hill Ski Jumping of the Sochi Olympics that gathered more than 10 million viewers in front of their TV screens and a 59.3% market share

POLAND: BEST PERFORMING CHANNELS – TOTAL DAY, INDIVIDUALS

Channel	2014	2013	Change
TVP1	12.3	13.2	-0.9
POLSAT	11.7	12.2	-0.5
TVN	11.7	12.5	-0.8
TVP2	3.5	4.4	-0.9
TVN7	3.5	3.5	0.0
TVP	3.0	3.1	-0.1
TVN24	3.0	3.1	-0.1
TVP	2.7	3.0	-0.3
TV4	2.7	2.8	-0.1
PC	2.7	2.8	-0.1
OTHERS	37.9	37.9	-

Puls, owned by the group **Telewizja Puls** and **TVN7**'s audience remained stable compared to the previous year. Among the top 10 best performing channels, **TVP Info**, the thematic channel of TVP Group is the only one to see its audience increase (+0.3 point).

Polish viewers love watching TV and spend a lot of time in front of their screens! Indeed, the daily viewing time in Poland is increasing year after year and achieved 4 hours and 20 minutes in 2014 (+13 minutes VS. 2013, the highest increase in Europe). This result is above the world viewing time average, which remains stable at 3 hours and 13 minutes per day. In young adults aged 15 to 24 years old, the viewing time has remained at a similar level compared to 2013 with 1

hour and 54 minutes per day.

Each year, sport programming has boosted the TV performances in Poland, especially for **TVP1**, **TVP2** and **Polsat**. In 2014, football was both the most offered and the most consumed sport on TV followed by Winter Sports and the Olympics. For instance, the best performing audience for a sport competition in 2014 was the Men's Individual Large Hill Ski Jumping of the *Sochi Olympics* that gathered more than 10 million viewers in front of their TV screens and a 59.3% market share.

Over the 2014-2015 season, Polish TV channels launched many imported programs. However, in 2014, overall the most watched programs were mainly local, with a strong interest in series and local adaptations of reality formats.

Indeed, long-running local series remain very popular this year since *M Jak Milosc (L for Love)* was the most-watched program in 2014, gathering 7.5 million viewers. *Ranczo (The Ranch)* has also been one of the best performing shows in Poland for many years and attracted 6.5 million viewers in 2014.

Nevertheless, new local series have also found an audience in 2014. Indeed, the Polish sitcom *Przypadki Cezarego P*, blurring



Long-running local series remain very popular this year since TVP's *M Jak Milosc (L for Love)* was the most-watched program in 2014, gathering 7.5 million viewers

boundaries between reality and fiction and *Strazacy*, a series relating the story of a young man aspiring to become a firefighter were among the best performing launches of the mid-season 2014-2015.

However, among the new series launched over the mid-season 2014-2015, it is a Russian series that has encountered the best performances. *Talianka* takes place just after World War II and relates the story of an Italian cabaret dancer and her Russian pilot lover. Despite a slow launch on **TVP1**, the series found its audience and gathered 2.4 million viewers on average and a 15.6% market share.

On **TVN**, the local series *Szkola* about teenagers also achieved great results with a 16.3% market share on average. Besides, **TVN** also takes its inspiration from existing international scripted formats and has made its own local version. Indeed, the channel adapted the Israeli series *Little Mom*; however

the series did not meet the viewers' expectations.

On the entertainment side, Polish channels rely with success on local adaptations of strong brands. Indeed, new reality formats adapted in

Poland over the 2014-2015 season stand out for their good performances, such as *Mali Giganci*, the local adaptation of the Mexican reality show *Little Giants*. The show, which achieved a 22.4% market share on average (+60% up on the slot) on **TVN** was the best performing new launch of the 2014-2015 TV season in Poland.

Globally, **TVN**'s audience has enjoyed adaptations of reality formats since the Polish versions of the formats *Who Wants to Marry My Son?*, *Hollywood Wives* and *Hotel Hell* achieved great performances as well.

Besides, the British reality show *The Farmer Wants a Wife*, launched in September 2014 achieved great results with a 23.8% market share (+53% up on the slot) on **TVP1** and was the 2nd best performing new show of the season.

For a few years, the public **TVP Group** relied strongly on new factual programs. This season the group has emerged as a key player in the broadcast of documentaries and magazines in Poland since most of the



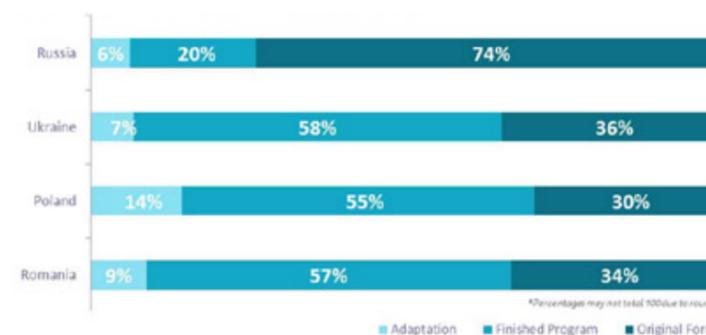
Mali Giganci is the Polish adaptation of the Mexican reality show *Little Giants*, which achieved a 22.4% market share on average (+60% up on the slot) on **TVN** was the best performing new launch of the 2014-2015 TV season in Poland

new factual programs launched were aired on the **TVP Group** over the 2014-2015 season.

The Group's main channels **TVP1** and **TVP2** broadcasted various new documentaries and magazines about nature and wildlife, as well as lifestyle-oriented shows. Among these new programs, local creations dominated on **TVP1** with the documentary *Kuchenne Podboje Karolaka* about Polish cooking regional specialties and *Magazyn Rolniczy*, a spin-off of the long established farming magazine *Agrobiznes*. Both programs achieved good results on **TVP1**.

TVP2 on its side gathered good results with imported shows such as the Austrian French two-part documentary *Lions on The Move* that achieved great results with a 10.2% market share among All Individuals but also among young adults. The three-part British documentary *How to Grow a Planet*, launched last January, also achieved good performances on **TVP2**.

VOLUME OF NEW SHOWS BY FORMAT TYPES



Methodology: Basis: 4 territories, 30 channels. Mid-August 2014 – Mid-April 2015. Original format: program broadcast in the country it was developed in. Finished program: program broadcast in its original form (dubbed or subtitled), in a country other than the one it was developed in. Adaptation: program whose concept was adapted and remade in a country other than the one it was developed in.

Want to know more about ratings and programming trends in more than 100 territories worldwide? Please order Eurodata TV's "One TV Year in the World" and "International TV Trends" reports. To find out more about these reports and more, please contact Eric Lentulo: elentulo@eurodatatv.com Source: Eurodata TV Worldwide / Nielsen Television Audience Measurement Anna Ankri aankri@eurodatatv.com

TELEvisa IN CEE, A GROWING BUSINESS



Claudia Sahab, director of Europe, Televisa Internacional

The European division of **Televisa Internacional** (USA/Mexico) is going through a fantastic moment within CEE territories: apart from the increase of telenovela presence, it is gaining and establishing in new markets with its entertainment formats.

Claudia Sahab, director of Europe, explains: 'We have had a great first half of 2015, with new businesses taking place all over the region. We are happy with the results and full of projects to be confirmed soon in both, fiction and entertainment. This entertainment format area represents an enormous growth in terms of presence and volume of businesses all over Europe'.

In many strategic markets, such as Slovenia, Hungary, Poland, and the former Yugoslavian countries, the telenovela is getting stronger. She continues: 'We are the only latin provider in Slovenia with 2-3 slots on **Pop TV**, which is broadcasting *Shadows of the Past* and *My heart is yours* (based on Television Española format *Ana y Los Siete*).

This telenovela which mixes humor & comedy is our very first telenovela of this type ever place in Slovenia with two daily emissions and with very good results.

In Hungary, it is working with the biggest broadcasters: 'On **RTL Klub** we have *What Life Took from Me*, on **TV2** *Unforgivable* and *Italian Bride*, while with **Story 5** we have a first-look deal, from which it has picked up *My heart is yours* and *Shadows of the Past*'.

Poland is a great market for both genres. **TV4** has 1-2 slots for telenovelas, including *The Stray Cat* and *Wild at Heart*, while **TV Puls** has bought *What Life Took from Me*. Regarding entertainment, the local version of *Little Giants* on **TVN** has won every emission of the 10 weeks that last the show.



The Polish version of *Little Giants* on TVN achieved a 22.4% market share on average (+60% up on the slot) and it was the best performing new launch of the 2014-2015 TV season in Poland

'It was a huge success on Sunday prime time. **TVN**, in particular, and

Poland, in general, show great production levels and, along with it, formats are being heavily demanded for local versions. This is our first entertainment format deal in the country, and we are working on a second deal which will be confirmed soon', she remarks.

NATPE EUROPE SUITE #1008



Unforgivable & The Neighbor, new telenovelas at NATPE Europe

In Romania, the success is also double: *Dancing for a Dream* will have its 15th season in 2016 on **Pro TV**, and **Televisa Internacional** has brokered its first-ever sale on **Prima TV**: *Unforgivable* will be broadcast on the afternoon slot. 'We are so happy about both deals', adds **Sahab**.

The executive highlights the great momentum of the former Yugoslavian countries, where the distribution is in charge of **Dexin Films** (Serbia, Montenegro, Bosnia & Herzegovina and Kosovo). 'After a good 2014, when we re-opened a telenovela slot, **Pink TV** has acquired *Italian Bride*, and for Pay TV we have sold *Ugly Duckling*', she says.

Lastly, but not least there is an increasing number of deals for digital platforms. 'We have sold *Forever Yours* and *Miss Dynamite* (co-production with **Sony**) to **Digi Films** (VOD, Romania); *Course by the Sea* and *The Power of Destiny* to **Voyo** (Slovenia); *Infringement* and *The Tempest* for **Nova-Doma** (Croatia); and *A Woman of Steel* and *Teresa* for **TVN's** digital platform in Poland', concludes **Sahab**.

SOMOS, EXPERT ON TURKISH CONTENT



Luis Villanueva, CEO

Somos Distribution (USA) has taken a significant step as a distributor of Turkish series after a successful presence in LA Screenings. In a short term, the company initialed agreements with major producers and distributors, as **Echo Rights**, **Kanal D**, **TRT Sales** and, most recently, **Calinos Entertainment**.

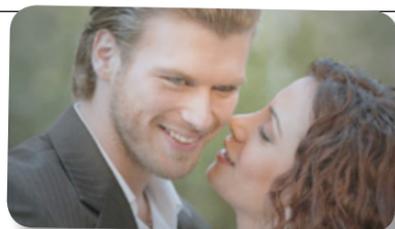
Its different business areas also show vitality: **Somos TV**, which operates several pay-TV signals in the US Hispanic market; **Somos Distribution**, which deals with the global distribution of content; **Somos Productions**, responsible for

generating production agreements and co-production; and are **Next**, focused on new media.

Describes Luis Villanueva, CEO: 'We are at an interesting moment, because we have been working for so long in the Turkish gender and finally is succeeding. We have the experience and knowledge; and people from the industry perceive us as expert on Turkish content and approach seeking material and opinions'

But Somos' catalog has other interesting things: from independent films to Hollywood to Turkish novels and elsewhere too. 'We are devoting ourselves to find alternatives', remarks Villanueva.

Among the new top titles, the executive highlights *Gumus*, on air in Chile with very good



Gumus, telenovela from Kanal D levels of audience. 'It's very interesting to see how the phenomenon starts its expansion. We close agreements in Peru and Bolivia, we have enough interest from 6 countries in Central America and we are very close in Uruguay.'

Other big bets from the company are *Kacak* (78x'45 & 80x'45), centered on the life of a man who finds that he can't escape from his past and is dragged back into a war with its former enemy of the mafia, and *The Poor Boy and the Rich Girl* (226x'45), the adaptation of the classic Turkish literature that follows a father, his youngest daughter and an ordinary boy.

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FICTION SERIES
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TELEMUNDO: SCREENING & COCKTAIL AT NATPE EUROPE

Telemundo International (USA) continues betting strongly on CEE, this year with a special event during NATPE Europe: with the presence of its president, **Marcos Santana**, the distributor organizes a *Screening & Cocktails* on Monday 22 at 6pm on Hilton Prague Hotel for CEE buyers, similar to what it does for the Latin community during NATPE Miami.



Marcos Santana, president

Melissa Pillow, VP of Sales for Europe: 'We are strong in 4 key markets: we have several titles on air in Slovakia, including the third rerun of our classic hit *Hidden Passion*; our telenovelas are also competing on different channels in Hungary; we have three titles on air in Romania with three more about to launch. We are on air on the largest broadcaster in the former Yugoslavia and also on its cable channels. Moreover, we are proud to be **Sony Entertainment Television's** selected provider of content for its Russian division.'

'Demand for our content began changing



Melissa Pillow, VP of Sales for Europe

from Free TV to pay TV channels, as Europe went digital and local series production increased for terrestrial broadcasters. This gave us additional opportunities, as well as a chance to sell our scripted formats there. For instance, our hit format *Missing* (TVN, Chile) has been produced in Bulgaria and licensed in Serbia.'

'We have renewed our long-standing contract with CME in Romania, for **Acasa**, while we have finalized negotiations for the format acquisition of our 2013 best seller, *The Return* in Ukraine, giving us great positioning in a country that is opening up more and more to Western content companies.'

The company is launching this market the brand of *Super Series*, a successful format in USA, which also helped earning its first International Emmy award. 'We are launching in Prague our next telenovela *Under the Same Sky*, a classic story that has great potential for the region, and the adaptation

NATPE EUROPE SUITE #1017



Under the Same Sky, new launch at NATPE Europe of **Disney Media Distribution**, filmed by **Vista Productions**, of the hit Chilean telenovela *Alicia's Maze*, available as both a ready-made and a format.

Continues **Pillow**: 'Ready-made sales differ according to the rights in question. Free TV lean toward more traditional telenovelas (*Land of Honor*), whereas cable and satellite seek something more dynamic, such as the *Super Series* or leading telenovelas from our 9pm slot (*The Return*). As for formats, there is demand for comedies/light series, a big change from the demand for thrillers, mysteries and police dramas in recent years.'

About digital, she concludes: 'We recently closed VOD deals for *The Impostor* in Hungary and *Land of Honor* in the Baltics. Since 2014, we have closed 4 deals with *Play* of TVN (Poland). There are several smaller deals that are associated with nearly every contract with linear TV. Due to these growth, at NATPE Europe, our SVP of International Business Development & Digital Media, **Xavier Aristimuño**, is attending the show.'

PROMEXICO, FROM MEXICO TO THE WORLD



ProMexico: Karla Mawcinitt Bueno, communication and image general coordinator, and Alain Faudoa Padilla, electronic, electric and telecommunication industries coordinator

Mexico is one of the most important global players in the audiovisual industry and through the governmental agency **ProMexico**, the country has set up an aggressive

plan of international expansion throughout 2015. 'Our audiovisual content is being watched by over 1 billion people around the world per year, in more than 100 nations', explains **Francisco Gonzalez Diaz**, CEO of **ProMexico**.

Mexican creative industries are expected to grow 9% and achieved USD 27 billion for 2014. 'The country offers attractive incentive schemes, created to attract international projects. Our incentives are amongst the most competitive ones and are designed to boost the local and foreign film and content sectors', he concludes.

TVN, FRESH & ORIGINAL ENTERTAINMENT



Alexis Piwonka and Ernesto Lombardi

Thanks to fresh and original entertainment formats, **Televisión Nacional de Chile** (Chile) has awakened the attention of the international market.

Ernesto Lombardi, International Business Manager, and **Alexis Piwonka**, sales and marketing: 'Our shows have a rhythm that fits perfect for some of the most demanding audiences in the world. At *Apuesto por ti*, for example, competitors must realize test that just a few are capable to execute. The format has been sold to Peru, Belgium, France, Spain and Argentina. In Ecuador the show was acquired by TC Mi Canal, where another format from TVN worked very well: *Calle 7*, a daily show of challenges

and coexistence aimed to young audiences.'

At *Juga 2* two teams of famous fight in sports games with skill and some mischief to get the money and make real the illusion of a contestant.

From the scripted slate the executives highlight new big projects, headed by *El Reemplazante*, a series that shows how a successful executive arrives to a social school to supply to the math teacher.

Los Archivos del Cardenal is a political series set in the Chile of the 80's, while the miniseries *Zamudio*, inspired in the book *Solos en la noche*, explores the familiar and personal history of Daniel Zamudio and his murderers, who became a symbol of homophobia in Chile.

Finally it's stand *La Chúcará*, the store of a woman that returns to her family's farm and must face her past, old flames and even discover secrets that marked her life.



La Chúcará, new love drama



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NBCUNIVERSAL, DRAMA AND MYSTERY



Belinda Menendez, President, NBCUniversal International Television Distribution & Universal Networks International

NBCUniversal International Television Distribution (USA) garnered very good reviews from buyers during its screening in Los Angeles, noting that it was one of the best screenings so far. In particular, buyers from the CEE region praised *Mr. Robot*, a thriller series centered on a young programmer who suffers from a debilitating antisocial disorder and decides that he can only connect to people by hacking them. Other

products that called the attentions of the buyers were *Heartbreaker*, designated as a new *Grey's Anatomy*, and *The Last Kingdom*, a drama co-produced with BBC America based on Bernard Cornwell's book series *The Saxon Stories*.

'NBC has managed to find a twist in the market. There are very few episodic products, and less procedural. It's okay to target young people, but most people watching free TV today are adults, and these products are aimed to them', highlighted to PRENSARIO some buyers during the NBC's screening in Los Angeles.

Other new product that called the attention among the buyers was the comedy *Hot & Bothered*, with **Eva Longoria** (*Desperate Housewives*). It's an American satire about the world of telenovelas. According to the Studio,

the public may like and see the show it as something close. The same felt buyers of pay TV.

Heading the slate is *12 Monkeys* (13x'60), series based on the 1995 **Terry Gilliam** film that follows the journey of a time traveler from the post-apocalyptic future who appears in present day on a mission to locate and eradicate the source of a deadly plague that will eventually decimate the human race.

The company keeps pushing the drama *Allegiance* (13x'60), about a young idealistic CIA analyst, *Devil's Playground* (6x'60), a sequel to the 1976 feature film, and the suspense drama *Dig* (1x'120 or 5x'60).



Mr. Robot, drama series

UNIVERSAL CINERGIA, IN CONSTANT GROWTH

Universal Cinergia, the high-tech dubbing studio based in Miami, Florida, that provides services for the worldwide TV industry keeps expanding itself.

With a 10,000 square foot building, the company founded by **Liliam Hernandez**, managing director, with her partner **Gema Lopez**, opened two new recording rooms in 2014.

'We completed a total of 8 room facilities in Miami, five in Mexico, one in Barcelona, one in Los Angeles and one in Paris. We set as aim to grow in translating content in Portuguese and open to new territories in China, Korea and Japan', explain the executives.

Since the very beginning the company has reinforced its strategy towards the international markets, by attending not only the main shows (MIPs, etc.) but also the regional events (Disco Istanbul, Natpe Europe) to gain new providers interested in reaching Latin America, Brazil or the US.

'We offer our services to international producers, channels and global distributors from every continent. Among our multilingual dubbing of native talents (French-Paris, Portuguese-Brazil & American -English) we are specialists in French. We worked for films, series, animations, documentaries, soap operas,



Gema Lopez and Liliam Hernandez

corporate presentations, and infomercials, etc., they add.

Universal Cinergia dubbed production meets the quality required for all majors' principal TV stations in the world. 'Will continue to meet several European at Natpe countries with much energy and fighting tirelessly, and yet our goal has not been achieved', complete **Hernandez and Lopez**.

STUDIOCANAL, NEW FRENCH-DANISH DRAMA

Apart from its leadership in the film industry, **Studiocanal** (France) has been consolidating as a premium European TV drama provider with the acquisition of **Tandem Communication** (Germany) in early 2012. Before MIPTV, the company has merged former **Tandem's** team to the newly created **Studiocanal TV**, which is from now on the international distribution arm.

The company recently acquired the worldwide distribution of *Rides Upon The Storm* (working title), a new, one-hour drama series, created by **Adam Price** (*Borgen*), produced by the Danish **pubcaster DR** (Denmark), in co-production with **ARTE** (France), **SAM Le Francais** (France) and **SAM Productions Aps** (Denmark).

Produced by **Camilla Hammerich** (*Borgen*) and with two seasons comprised of 10 episodes, it will start shooting in the Spring of 2016 and will premiere in 2017.

THE PRECIOUS PEARLS OF GLOBO

Globo TV International (Brazil) highlights

at Natpe its catalogue of telenovelas headed by *Precious Pearl* (110x'60), *Helena's Shadow* (75x'60), *Now Generation* (105x'60), *Empire* (160x'60) and *Fight or Love?* (120x'60). Other top titles from the company are the miniseries it stands *Doomed* (8x'60), *The Party* (20x'60), the comedy *Sweet Mother* (14x'30) and the dramas *The Hunter* (12x'60) and *Merciless* (10x'60), in 4K. Lastly are the featured films/miniseries *The Party Crashers* ('94), co-produced by **Globo Filmes, Teleimage, Warner Bros. Pictures, Riofilme, The Invisible Woman ('105) and *Trust* ('95).**

NATPE EUROPE BOOTH #1015



Helena's Shadow, new drama

READY MADE HIGH QUALITY PROGRAMMING



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Marion Camus Oberdorfer, Head of International Content Sales

ORF Enterprise (Austria) bets at NATPE Europe on its wide catalogue of fiction products, headed by the comedy series *Suburbia-Women on the Edge* (10x'48) that is specially promoting to its CEE clients. It also offers factual, leisure & lifestyle and kids programming.

Marion Camus Oberdorfer, Head of International Content Sales: 'As one of the main markets for us as an European distributor, Natpe Europe is always a very special market and we eagerly look forward to present our new top-series such as the brand new episodes of our thrilling

crime series *Four Women and a Funeral* and *Tatort - Scene of the Crime*.

Another big highlight is the factual documentary *150 years of splendor - Vienna's Ringstrasse* (3x'50) showing the impressive and spectacular buildings of the Austrian capital city influenced by the imperial culture and the "Belle Epoque". 'We are expecting successful sales & a great market in Prague', concludes **Camus Oberdorfer**.

In *Four Women and a Funeral* (50x'45) four remarkable women sharing an exceptional pastime, and *Tatort - Scene of the Crime* (12x'90) shows an inspector team starting their most thrilling and action-packed investigations. For kids, *Yummy - Cooking With Kids* (48x'15) shows children and their parents cooking healthy dishes, and *Cracker Snap* (16x'15) is a new knowledge format with a certain "a-ha" effect.

Lastly, four factual programs: *Where to, Mr. President?* ('45), available as format, delivers the human being behind the political mask, and *Newton* (26x'20) is aimed to anyone who likes to find out new things, enjoys the odd light-bulb moment and wants to discover what is behind many things and events.

The Wildlife Orphanage (125x'48 / 40x'30) is a wildlife & nature show shot in Namibia about a ten thousand hectare orphanage for wild animals, and *Time Out* (20x'25) is an travel documentary that takes the viewer from exciting dog-sled riding and skiing in the Canadian Rocks, to snorkeling at Croatia's coast, over Portugal and Finland right up to the Norwegian fjords.



Suburbia-Women on the Edge, comedy series

ANTENNA: STRONG IN DRAMAS

Antenna International Enterprises (Greece), international division of **Antenna Group** based in Greece but with operations in Serbia, Montenegro and Slovenia, arrives to Natpe Europe with great products.

'We have a catalogue of 9,000 hours high quality drama series produced for our FTA channels in Greece (ANT1) and Serbia (PRVA), as well as the product from Montenegro (PRVA Montenegro) and Slovenia

(**Planet TV**)', explains **Tatjana Pavlovic**, sales director.

The company is distributing the costume drama *One Summer Night* (12x'60), the family comedy *Blood Is Thicker Than Water* (45x'60), *Roi Mat* (200x'60), a drama where three strong chess players will stand as opponents; *Trail Of Vengeance* (16x'60), thriller; the second season of the hit series *Brousko, the grapes of passion* (195x'60).



Tatjana Pavlovic, sales director

ČESKÁ TV, CONTENT FOR ALL AGES



Marie Magdalena Nováková, international sales manager, Czech TV, Czech Republic

Through its six channels, the public broadcaster **Česká TV** (Czech Republic) covers various genres to satisfy its viewers. In Prague, the international division, headed by **Marie Magdalena Nováková**, releases a renewed catalogue including the movie *American letters*, an insight into the family life of the Czech composer Antonín Dvořák, and the crime miniseries *The Case of the Exorcist*, inspired by the British literary and film traditions.

Another top title is the crime production *The Zodiac Murders*, a twelve episode's modern series where the zodiac's signs become the line connecting all its parts.

Nováková: 'The fans of healthy life style and cooking shows will certainly enjoy new episodes of famous show *Herbarium*. Hosts present further herbs and the ways of using them in cooking, baking, preserving food, making ointments, creams and perfumes, according to the recipes of our grandmothers as well by modern methods.'

For the youngest audience, she recommends two new fairy tales:

Princess and the Scribe and *Fishy if there are no Fish*, a story about kingdom of Three Lakes and the sorcery of magic beings who has removed all fish from the local lakes, in order to punish the arrogant King.

Completes **Nováková**: 'Another s highlight is the animation *Bob and Bobby: Top Hat Rabbits*, a classical series starring two rabbits living in a magician's hat and thinking up something new to do every day. This animation has been recently converted to HD and, furthermore, *Bob and Bobby* have been selected to become the official mascot of Ice hockey world championship 2015 which took place in Prague.'



American letters, new film



Formatos de Entretención

Apuesto por ti

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

Calle 7

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

Juga2

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



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KANAL D, RICH CULTURE CONTENT & STRONG STORIES



Ozlem Ozsumbul, head of sales & acquisitions

During the last two years, **Kanal D Sales Team** (Turkey) has managed to penetrate into new territories like India, Pakistan, Estonia, Latvia, Chile, Uruguay and Argentina thanks to the good results of its programs where they broadcasted. Now it

aims to keep that success and try to become one of the best Turkish content providers worldwide.

Because of this growth, the company decided to participate for first time in LA Screenings, where highlighted a catalogue of series headed

by *Fatmagul* (80x'90), its most sold drama in the region, *For My Son*.

In 2014-2015 the company reached 86 countries with 61 titles thanks to rich culture content, strong stories and production quality. Top shows for this market includes the series *Matter of Respect* (26x'90), adapted from **Mediaset Italia** format of the same name, of which Kanal D has exclusive rights of the Turkish version. A second season has been confirmed for 2015.

War of the Roses is a simple, attractive drama with its romance, story and dynamism; *For My Son* (13x'90) started is reaching huge audience in a short time becoming #1 on Wednesday nights; and the dramas *Little Lord*, about a

NATPE EUROPE BOOTH: #57



War of the Roses, simply & attractive drama series

daughter of a wealthy and ripe family from Istanbul, and the son of a rich landlord from Urfa that suddenly decided to end their marriage of 10 years, and *Waiting for the Sun*, centered in a self-sacrificing woman who has raised her daughter as a single parent.

Finally are *Bandits*, where the most important thing which connects the gang members is their friendship; *Devoted*, about love and death, and *Mercy*, the story of a young woman who has had to overcome many difficulties to come to Istanbul, but once she is there, her luck begins to turn.

ABS-CBN = FILIPINO SUCCESS

ABS-CBN (Philippines) highlights for this TV season the worldwide hit series *The Promise* (*Pangako Sa 'Yo*), a remake of the love story series aired in 2000 with a modern retelling. The release of the series in Philippines achieved a national TV rating of 34%, more than double that of its rival program (Source: Kantar Media).

Other top product is the drama *Forevermore*. Since its pilot telecast, the show was always among the top three most-watched programs in the country, marking a share of 63% on it last episode.

Lastly is the primetime series *Dream Dad*, about an orphan girl who longs to have a family that will love and accept her. The **ABS-CBN** produced drama finished on top of its game with a national TV rating of 34.6% beating its rival program in the time slot to settle with only 14.9%, and the *hashtag* #DreamDadYesYesYesFinale trended nationwide and worldwide on Twitter.



Forevermore, drama

MADE IN SPANISH, DUBBING FOR LATIN AMERICA



Gabriel Cobayassi and Tomas Silva, partners at Made in Spanish

Based in Mexico City and with offices in Miami, **Made in Spanish** is an important dubbing house for Latin America. It is a partnership between two highly skilled executives: **Gabriel Cobayassi**, dubbing actor/producer, and **Tomas Silva**, distribution and production of TV content in Latin America, with the assistance of **Denice Cobayassi**, as production manager and dubbing coordinator.

With an experience of more than 30 years in this industry, **Cobayassi** has worked on the neutral Spanish or Latin American dubbing of *The Dog Whisperer* with **Cesar Millan**, *The Big Bang Theory*, *Aliens in America*, as well as the animation series such as *Heroes of the City* and *Doraemon*. For instance, he was the official Spanish voice of *Yogi Bear* when the cartoon debuted on TV.

Cobayassi and Silva: 'One of the point that set us apart from other studios is the fact that we are not only the "executives" of the company. Denice and Gabriel are talent voices and directors, we work whit all the actors and actresses in Mexico City, Union or non-Union. Being a tailored-studio gives us the opportunity of offering a very competitive price with out sacrificing quality or customer service'.

'We want to start spreading our reach to start working with flourishing markets like Turkey, Korea or Russia. We are dubbing two soaps from India and entering in new co-ventures in order to offer wider solutions for producers or distributors that are looking to reach Latin America.'

'Some of the producers I know as a distributor are trying to open the Latin American market. Some of them have offered us to exchange territories for the dubbing. This way the producer has access to the Spanish version of the program without out of pocket money. Other path we are exploring is the association with small studios in Canada, which will let us offer English and French dubbing. We are also the same in Brazil to offer Brazilian Portuguese', concludes **Silva**.



He will fight with his life, to find his mother.

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DORI MEDIA: GLOBAL FORMATS



Nadav Palti, president & CEO, Dori Media Group

Dori Media (Israel/Argentina) has a global position in the market, which enhances its development from now on. **Nadav Palti**, CEO: 'In the world there are just a few companies like ours, independent but with high production capacity on different continents at same time. This opens alliances with big players, such as **Sony**, with who we launched two channels in Asia.'

'In Israel we are producing 9 series and 5 non scripted formats. Up to now there were just two channels platforms (**Hot**, Pay TV, and **Yes**, satellite) but now there are four new OTT services. This means a growth in the demand of content.'

In Latin America the company has also very good news: 'We get back to the prime time with *Esperanza Mía*, coproduced with **Pol-ka** for **El Trece** (Argentina). Is a teen series with the singer Lali Espósito (*Teen Angels*). We hope to have some interesting international sales as we had with *Sos Mi Vida* (Natalia Oreiro) or *La Lola*. We had also three seasons of the series *En Terapia* (**TVP**), which garnered excellent reviews.'

At Natpe Europe the company present a varied catalogue of entertainment formats, dramas and romantic comedies headed by *Esperanza Mía* (120x'45), and the Spanish remake of *Ciega a Citas* (140x'60).

Regarding to unscripted formats, **Dori Media** highlights the reality show *Power Couple*, where eight couples must face extreme challenges, and *The Selfie Challenge*, a game show inspired from the cross-culture "selfie phenomenon".

Other top titles from the entertainment slate are the street trivia game show *Famous Face*, the studio game show *The Money Pump* and the quiz show *300 Seconds Ride*, where one playing team embarks on a five minutes ride on the Time Track.

Lastly are *Wedding Daze* (25x'35), drama, and *Driving Me Crazy* (11x'30), a comedy series about three women friends on wheels that lead their lives and their businesses on the open road.



Wedding Daze, new comedy

POL-KA, FOCUS IN THE INTERNATIONAL MARKET

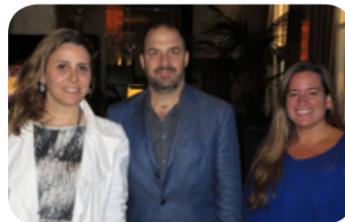


Manuel Marti, business development director

With a new international structure lead by **Victor Tevah**, projects director; **Manuel Marti**, business development director, and **Jimena Hernandez**, international production manager, **Pol-ka** (Argentina) keeps promoting the company top titles to international buyers. In the new area, which merged **Artear International** slate, is involved **Luciana Egurrola**, sales executive in charge of finished products, while the format sales continues to be in charge of **MediaBiz** with **Alex Lagomarsino**, CEO, and **Virginia Berberian**, VP development and international business.

Among the high-end series are the dramatic comedy *Brave Girls* (180x'60), about a group of five strangers that form an unbreakable friendship after losing all of their money; and the drama *The Brave Ones* (208x'60), where three brothers take the law into their own hands. Other ready made product is *Day & Night* (120x'60), an action series centered in the "Brigada 24", a place where cops who must purge some shameful sin are taken.

As formats the company recommends *Shysters* (124x'60), about a cunning, wit and ruthlessness law firm; the comedy *Only You* (223x'60), and the paper formats *Golden Love*, where a woman's life will suddenly convulsed when she falls in love with the love of her life who was thought dead 10 years ago. And *Ambition*, a drama where violence and corruption are the main characters.



Mediabiz: Virginia Berberian, VP development and international business; Alex Lagomarsino, CEO, and Teresa Bosch, content developer, during LA Screenings 2015

NATPE EUROPE BOOTH #53

ITV INTER MEDYA CONQUERS NEW MARKETS

ITV Inter Medya, is a good example of Turkish content diversification and expansion: the company lead by **Can Okan**, CEO, has closed many deals in Latin American in a short period of time, aiming to conquer the entire region with its dramas.

Black Rose was sold in Chile (**Canal 13**), Venezuela, Peru, the US Hispanic (**MundoFox**), Guatemala, El Salvador, Nicaragua, Costa Rica, Honduras and Dominican Republic (**Albavision**).



Black Money Love

Albavision also acquired the rights of *Forgive Me* for Paraguay, Bolivia, Ecuador, and Peru. While *Red Scarf* was sold to **Mega** (Chile) and **Teleargua** (Venezuela). **Televisa** acquired the remake rights of the show for Mexico.

'*Black Money Love* went on air on **Mega** with its original Turkish title *Kara Para Ask* and on its premiere, it reached to 26,3% rating and amazed the audience. The drama was acquired also Uruguay, Peru and the US Hispanic', explains **Beatriz Cea Esteruelas**, Sales Executive in charge of LatAm and Spanish Speaking territories.

The executive also recommends *Filinta*, which tells the story of a young police officer



Filinta

in the 19th Century Ottoman scenery; *Missing*, a Turkish remake of *¿Dónde esta Eliza?* and *The Tulip Age*; which was aired between 2010 and 2014 in Turkey.

TELEFE: CANNIBALS



María del Rosario Cosentino and María Eugenia Costa, sales executive

Telefe International (Argentina) attends to Natpe Europe 2015 with *Cannibals* (120x'60), its new 4K Ultra HD drama thriller coproduced with Monte Carlo TV (Uruguay) and **FOX International Channels (FIC) Latin America** and directed by the Academy Award winner Juan Jose Campanella (*The Secret in their Eyes*).

Starred by **Natalia Oreiro**, **Benjamin Vicuña** and **Joaquín Furriel**, and filmed with 4K Ultra HD technology, this new fiction gathers the best talents in each field, not only locally renowned but also with worldwide recognition, to achieve a different and superior series.

Through an agreement with the **Gustavo**

Cerati (*Soda Estereo*) family and his music company, the series features the creations of the Argentine artist, presenting an unprecedented musical quality of excellence.

Other new products are the miniseries *Story of a Clan* (13x'60), produced by **Underground** and based on the life of the Puccio clan, a traditional Argentine family who devoted themselves to the kidnapping and murder of businessmen they knew. And the super series *The return of Lucas* (60x'60), and the fiction project co-produced with **America TV** (Peru) about a mysterious disappearance of a boy who reappears 20 years later.

The new telenovela *Lioness* (120x'60) tells the story of a rundown factory that represents so much more than just a job for its workers, it's their world and they will not let go; while *Pope Francis, the story of Jorge Bergoglio* ('90), is a historical documentary produced by **Anthos Produzioni** (Italy) that proposes a close study of Jorge Mario Bergoglio.

Lastly are the unscripted reality *The Entrepreneur*, *A Million to Start Up*, produced



Cannibals, new drama directed by Juan Jose Campanella

by **Endemol**; *Love Road* (120x'60), telenovela coproduced with **LCA Producciones**, and *Legacy of Rock & Roll* (150x'60) is a romantic comedy co-produced with **Underground** and **Endemol**, the same team of *Graduates*, one of the biggest hit of the latest times.

NATPE EUROPE BOOTH #VB 2

LATIN MEDIA: MIXTURE OF CULTURES

Latin Media Corporation (USA) launches in Prague a complete catalogue of Asian, Latin and Turkish telenovelas dubbed in Spanish headed by *Chicas de Oficina* (25x'70), *Yo, Te Amo* (16x'80), *Mamá Mechona* (92x'45), *Valió la Pena* (90x'45), and *Free Pass* (90x'45).

the most successful telenovelas of Portugal

onza distribution
Viewing Box VB52 (market level)
World Sales

CARACOL TV, OVERCOMING BARRIERS



Lissette Osorio, VP International Sales

After a successful participation in the *World Content Market 2015* (Russia), held on May, and the *New Europe Market* (NEM), realized in June in Croatia, **Caracol TV Internacional** (Colombia) keeps expanding into new markets and assist to NATPE Europe with a renewed catalogue of series and telenovelas, films and documentaries, both in Spanish and in English

Heading the slate is *Laura*, an extraordinary life (25x'60), the story of a woman who challenged the rules of the society of her time, by dedicating herself to fight for those less privileged ones and renounce becoming a wife and a mother.

In films, the company highlights *The Principal*, centered in a Spanish dancer who seeks to change her luck. From the hot nights in Madrid she arrives to the cold streets of Bogota, when faith randomly faces her with the chancellor of a very prestigious university. And *Before the Fire*, a detective story set in the 80's decade in Colombia, days before the siege of the palace of justice by the guerilla group M-19.

Finally **Caracol TV** presents a slate of '60 documentaries produced with **Discovery Channel** and other independent production companies, based in diverse global social problems like the conflict between governments, sexual tourism, miner and illegal armed groups, among others.

And the series *Emeralds*, *The color of ambition* (60x'60), a drama where three different generations of a same family divided by the ambition and love will face the evil together.



Laura, an extraordinary life,

FEEL THE PASSION WITH CISNEROS

Cisneros Media Distribution (USA) arrives to Prague with a varied catalogue composed of thrillers, telenovelas and unscripted formats. Among the new titles are *Separated by Love* (120x'60), currently in pre production by **Venevision**, and *An American Girl Trapped on a Telenovela* (60x'60), centered in the life of a Puerto Rican-Italian actress from Brooklyn struggling to become an actress in Los Angeles.

In Natpe are **Marcello Coltro**, EVP of Content Distribution, and **Cristobal Ponte**, exclusive independent representative for Europe, Africa & Middle East, who keeps pushing *Fallen Over Love* (120x'60), a multi-faceted story that reflects the everyday experiences of people entangled in the complexity of love, and *Secret Love* (150x'60), a love story between a secretary and a millionaire widower.

Criminal MasterMind (50x'60) is a thriller series based on the book *Sangre en el Diván* of Ibéyise Pacheco; *Sweet Thing* (140x'45) tells the story of two families living in almost opposite worlds, while *Emerald Heart* (140x'45) follows a young environmentalist in her battle against the most powerful industrialist Valle Bonito.

From **Ony Productions** (USA) *Candela* (80x'60) is a teen series written by **Patricia Maldonado** (*Usina de Migré*) that follows a teenage girl raised with complete freedom, until she is forced to live with her father, who she believed to be dead. Also, *Xtreme Reality Clips* (52x'30); *Animal Atlas* (234x'30); the variety travel series *Latin Angels* (52x'30); and the 60x'60 coproduced formats for teenagers *Blast to the Past*, about time travels; *Morph App*, about a simple girl who discovers an App on her cell phone that enables her to become whatever she wants, and *Royal School*.

Lastly, **Cisneros Media** launches the new teleseries *Ruta 35*, *la valvula de escape* (65x'60), executive produced by **Cristina Palacio** in collaboration with Univision.



Marcello Coltro, EVP of Content Distribution



Cristobal Ponte, exclusive independent representative for Europe, Africa & Middle East



Fallen Over Love

ECCHO RIGHTS: THE SUCCESS OF ELIF

One of the top products of the offer of **Eccho Rights** (Sweden) for this season is *Elif* (380x'45), drama premiered on **Kanal 7** in Turkey in mid 2014. The series scored a international success with top ratings and increasing audience share in both Indonesia and Bosnia.

Produced by **Green Yapim**, *Elif* scored over 20% of market share in **SCTV** Indonesia and a 21.74% in the commercial target group of **OBN** (Bosnia),

which is over double the channel's normal average share of 8.23%. Eccho also secured deals on the show with **Prava** (Serbia), **Kanal 5** (Macedonia) and **Netflix** in the US and UK.

The drama follows the story of a young girl whose mother sends her away to live on a farm to protect her from her unpredictable stepfather. But nobody realizes that their new houseguest is actually the daughter of the farm's owner.



Elif, drama produced distributed by Eccho Rights

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AZTECA/COMAREX: SHOWS THAT "TALK" TO AUDIENCE



Marcel Vinay Jr., CEO

Through **Comarex** (Mexico), **Azteca** assists to NATPE Europe to present a slate of new dramas and entertainment formats headed by *Once I Loved You* (90x'60), a love story about a man returning home with no memory of his past life,

which hides a dark past.

In entertainment the company highlights the new street show *Do You Know Who Knows?*, in which participants are chosen randomly, and in 10 minutes can earn money answering general knowledge questions. Also are *Dance if you Can* (40x'60), a show in which ordinary Mexicans compete against 20 celebrities in a series of

dance challenges for a spectacular prize. And the realities *I'm Your Double* (45x'60), where 24 contestants compete to demonstrate their singing skills to imitate a chosen/well known singer; *Mom! Dad! Help me Succeed* (13x'60), a TV program in search of the best family musical talent; and *La Academia Kids*, a reality show that seeks to discover the child artists of tomorrow and develop their musical talents.

A Love to Remember (135x'60) is a store where love will fight to survive, while *Así en el barrio como en el cielo* (120x'60) shows what happens when in the roulette of life the rich become poor and the poor become millionaires. In *Girls Only* (130x'60) four brave women must face a mountain of debt and all the problems that come with it.

Finally are the telenovelas **UEPA**: "*Un Esce-*

*Once I Loved You*, new telenovela

nario Para el Amor" (120x'60), about a young woman that must take care of her younger sister after the death of her parents. And the series *The Man of Your Dreams* (13x'60), adaptation of *El hombre de tu vida*, from **Telefe** (Argentina), about a man like any other... until this hard-working, single father discovers that he is a chick magnet.

ZODIAK RIGHTS, FACTUAL & DRAMA

NATPE EUROPE BOOTH: #VB26

*The Disappearance*, new drama

Zodiak Rights (UK) arrives to Prague with a wide catalogue of products, including high end British drama series, as well as factual contents and entertainment formats. Heading the slate is *Versailles* (10x'60) that takes a dramatic journey into 17th century France where the cults of celebrity and style were born, created by an absolute monarch with a compulsion to control the world.

The Disappearance (8x'60) is an intimate, character-driven drama that traces the increasing trauma of a family when their 17 year old daughter fails to return

home from a night out, while *The Pinkertons* (22x'45) is a brand new original action-adventure crime procedural series.

Also are the factual series *The Supervet*, (16x'60), centered in the last-chance saloon for Britain's most sick and injured pets, and *Wild Things* ('60), a brand new family entertainment game show, where partners need to work together for a chance to walk away with a cash prize that lies deep within the Wild Wood.

*The Supervet*, popular factual

ONZA, THE ONLY ONE

As one of the fastest growing Spanish producers and distributors, **Onza Distribution** keeps closing deals with strategic partners worldwide. **Gonzalo Sagardía**, managing director, explains: 'In 2015 we sold the documentary series *Wild Menu* for Nat Geo Europe, four of our telenovelas as formats in the Mexican market, the

*The Only One*, sold in Latin America and Africa

series *The Avatars* in Brazil (Globo), and we are having conversations with South African and Nigerian companies.'

'We are also very pleased with the acquisition of *Magic Mania*, our DIY series for child audience, by **Piwi + (Canal + France)**. We are closing deals in Latin America and Africa for *The Only One*, the new telenovela premiered at MIPTV, and we close an agreement with **Ching Gong Films** for *El Ministerio del Tiempo* in USA and sold the format to **DNA** in India.'

Other important focuses are the apps for TV channels: the company launched during MIP-COM 2014 a division focused in the distribution of apps. 'It's not an easy market, but we think that it is something that in the medium term will be relevant', explains.

NATPE EUROPE BOOTH: #VB52

For this season, **Sagardía** recommends *The Only One*, *The Kiss of the Scorpion*, and *The Avatars*. 'We are convinced that the quality and narrative of these products will captivate juvenile audiences.'

Concludes: 'In addition to its high quality, its European origin helps to many broadcasters to fulfill their obligations of local programming. In addition, we also have documentaries that have worked well in the past in the region. The first half of the year was very positive for us and we hope to maintain the cycle.'



Gonzalo Sagardía, managing director

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NEW FILMS: BIG BUDGET THEATRICAL FILMS + UNDERCOVER

New Films International is a Film Development, Finance, Production and Worldwide Distribution Company located in Los Angeles, CA. The company is owned by **Nesim Hason**, an industry veteran who is in the market for 35 years.

New Films International took a huge step forward in its evolution by its alliance with **Mace Neufeld**, who is the producer of films like *Jack Ryan: Shadow Recruit*, *Clear and Present Danger*, *Patriot Games*, *No Way Out*, *The Omen 1-2-3*, *The Hunt for Red October*.

They already have 3 films on the move; first one is titled *Pursuit*; the writers are Ian La Frenais and Dick Clement. The second project is titled *The Man Who Sued God*, which director is *Larry Charles*, responsible of films and TV series like *Borat*, *Dictator* and *Curb Your Enthusiasm*; also, he is one of the creators of *Seinfeld*, he has written the script and most probably he will also direct it. The third one is *Samaritan*, which script is being written by *Mike Maples*.



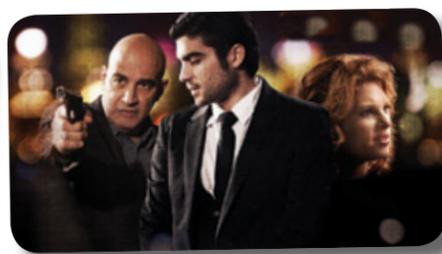
Jules Lopez and Nesim Hason, last May in LA Screenings

Hason and Neufeld are also producing the American version of the Bulgarian action TV Series *Undercover*, which is currently in pre-production for its 5th season in Bulgaria. Hason believes that it will be a big hit for US prime-time. He also mentions that they are hoping to announce the credits for American version of *Undercover* soon.

New Films International will be present in Natpe, Prague 2015, stressing especially the new TV Series titled *New York* produced by *Dorimedia* "Yes Tv" in Israel.



Bulgarian successful TV series *Undercover*, offered in its 5th season at this Natpe Prague



New York, another big TV series available

NATPE EUROPE BOOTH: #VB45

FREMANTLEMEDIA, PARTNERSHIP IN CROATIA

FremantleMedia (UK) and **Jadran Film Zagreb** (Croatia) signed a strategic partnership in order to adapt and distribute the literary work of **Marija Jurić Zagorka**, one of Croatia's most popular writers, to global TV audiences. The partnership kicks off with a joint production of one of Zagorka's most famous works: *The Witch of Grich* (Grička vještica), of which more than 10 million copies have been sold so far in Eastern Europe.

INDIACAST, HISTORICAL DRAMAS

IndiaCast (India) presents at NATPE Europe a slate of new drama series, headed by *Chakravartin Ashoka Samrat* (100x'60), the story of Ashoka the Great as it has never been told before, and *Udaan* (200x'30), a series that shows a mission to highlight the grave issue of bonded labor in Indian villages.

NATPE EUROPE BOOTH: #VB53

COMERCIAL TV, FICTION + ENTERTAINMENT

Comercial TV, (Spain) attends to NATPE Europe with a catalogue of Spanish and Latin multi-genre content, including series, telenovelas, programs, documentaries, sports and films.

Santiago Gimeno, president, explains: 'We distribute all kind of products with different content to access globally to all TV channels and different companies. Our clients in Europe request mainly fiction, specially telenovelas, series and movies, but they also are searching

new entertainment formats, so we have to be strong in every genres if we want to stand out in the market.'

For this season **Comercial TV** releases the documentary *FC Barcelona Passion & Business* ('50), a full report and analysis of the football club as a global brand in all the aspects: sport, company and a worldwide mass phenomenon. And *Wild Skin*, a new telenovela about love, war and hate, where a secret gives a magical twists to the lives of those who vowed to remain in silence. 'A telenovela that will catch the audience and has all the elements of a classic telenovela set in the actual world', remarks the executive.

'One of our most successful products is *Bandolera*, an adventure series about a Brit-

ish student who escapes to Andalusia to fulfill the dream of writing her own novel. **Bandolera** has all what it needs to be a story full of adventures and love, set in the 19^o century in the south of Spain', highlights **Gimeno** and completes: 'We also have *MMA Stars*, a high quality sports reality show where 16 fighters from 11 countries will live together during 16 weeks to train and compete in individual fights to prove who is the best one.'



Santiago Gimeno, president



Bandolera, drama series

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TV FILM: CHILEVISIÓN FOR THE WORLD



Juan Pablo Carpenter, president

TV Film International (Chile/USA) the historical distributor focused in movies and children's content led by **Juan Pablo Carpenter**, has given important steps in overcoming their operations against usual, both in terms of the material that it distributed as in resources and framework.

By one hand, the company has consolidated its relationship with the Chilean broadcaster **Chilevisión** as official distributor worldwide. On the other hand, it has expanded its scope of Latin America to the world after acquiring new animated titles for preschool audience.

Third, TV Film has incorporated to its staff to **Matthew Carpenter**, Head of Business Development and Digital Sales, who has good experience with majors and comes with the aim of giving a jump to the commercial management and in particular the monitoring of new digital platforms.

Heading its offer is the *Viña del Mar Festival* (25 hours), one of the best and biggest music festival in Latin America and the most important musical event in the Americas which is held annually in the month February since 1960 in Viña del Mar, Chile. In telenovelas and scripted by her husband both physically and psychologically; *Carolina Carolina* (100x'60), centered in a young middle class woman that despite her college education is lost.



Viña del Mar Festival

Finally are *Infiltradas* (78x'60), a series that takes its name after four female detectives who lead a dangerous double life, and *Sud-american Rockers* (18x'60), based on the history of the Chilean band Los Prisioneros.

Finally are *Infiltradas* (78x'60), a series that takes its name after four female detectives who lead a dangerous double life, and *Sud-american Rockers* (18x'60), based on the history of the Chilean band Los Prisioneros.

NATPE EUROPE BOOTH: #M1

ARMOZA SALES THE PEOPLE'S CHOICE IN TURKEY

Armoza Format (Israel) confirmed the Turkish broadcaster ATV as the first to adapts its prime time entertainment show *The People's Choice*, developed in partnership with **TF1 France**. Produced by **Endemol Shine Turkey** and locally titled as *Cevap Sende*, the first season will kick off in mid-June, and will air weekly in prime time slots.



The People's Choice

The People's Choice takes audience engagement to the next level and tests how well we know our nation by presenting viewers with the most trending, thought-provoking and entertaining dilemmas.

KESHET, SYNERGY BETWEEN ISRAEL AND CEE

Keshet International (Israel) is going from strength to strength in CEE having sold a number of formats to local broadcasters which have gone on to air very successfully. According to **Cynthia Kennedy**, Sales Director for the region, some distributors can struggle to find a good cultural fit in terms of formats that suit the CEE market, but this success relies on 'the good synergy between Israel and CEE, both in terms of production budgets and content'.



Cynthia Kennedy, Sales Director, CEE

Other strong point is that, for Kennedy, that CEE markets they are stronger in creating their own scripted formats, so they're looking for formats that showcase their country. 'We intend to engage in co-development with like-minded partners in the region, rather than simply licensing formats', continues.

Among the top sales in the region the executive highlights *Master Class*, now in its third season in Hungary on **TV2** having become one of the most popular shows in the country along with *Rising Star Hungary*. *Master Class* has been also sold to Slovenia (**Planet TV**), China (**Beijing TV**) and Greece (**MegaTV**).

Girlfri3nds season two has also recently premiered on **Novy TV** (Ukraine), while *BOOM!* has been delivered in Kazakhstan (**Channel 7**) resulting in a second season commission. So far the format has been sold to Hungary (**TV2**), Spain (**Atresmedia**), France (**TF1**), Argentina (**Telefe**), Cambodia (**Bayon TV**) and Peru (**America TV**). The Spanish finished tape also sold to Uruguay (**Canal 10**).

Finally are the game show *Trade Up*, sold to **Prima TV** Romania and **Discovery Italia**, and the romantic comedy *The Baker and the Beauty* (13x'45), licensed by **Ant1 TV** (Greece) for a local adaptation.



The Baker and the Beauty, comedy licensed in Greece

'We are selling into more territories than ever before, especially in light of the economic situation in Russia and Ukraine, this is driving us to find new markets in the region and there is growing demand in territories like Kazakhstan', concludes.

NATPE EUROPE SUITE: #1001

GET MARRIED AT FIRST SIGHT WITH RED ARROW

Red Arrow International (Germany) highlights at NATPE Europe the brand new factual series *Married at First Sight Australia* (6x'45), a social experiment launched on Nine Network where singles who have failed to find love put their hearts in the hands of a team of experts.



Married at First Sight

Other highlights are the crime series *Bosch* (10x'45), produced by **Fabrik Entertainment** for **Amazon Studios**; *100 Code* (12x'45), starring **Michael Nyqvist** (*John Wick*) and **Dominic Monaghan** (*Lost*), and *The Last Cop* (60x'45), a compelling police drama with a dramatic twist. It also launches the third season of the comedy series *Lilyhammer* (8x'48), second season of *Remedy* (10x'45), the entertainment formats *The Big Surprise* and *Meet My Idol*, and the reality shows *Real Men*, *Santas in the Barn* and *3AM* (7x'30), from the Emmy Award winning Dick Wolf.

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SMILEHOOD, TO TAKE IN MIND

Smilehood (Argentina) attends *Natpe Europe* in Prague for the first time, headed by sales manager **Silvana D'Angelo** —well known in CEE, due to her former experience in **Telefe** and **Dorimedia**. The new company has an important tip to take in mind: few products but very special each, to consider for sure.

D'Angelo: 'I've been dealing with CEE broadcasters for years, I know how they think. Nowadays, programmers don't buy entire catalogs any more, they buy product per product. So, we are very selective with our proposals, not

to make them waste time. We have very good TV series targeted for teens, kids and female audiences, all with 360 development'.

Roxy, for instance, it is a comedy that tells the day by day of women with children, and the challenges they must face while nobody else cares of. It was created first on Internet, with 8 web-episodes of 10 minutes each. Now it is a TV series with 26 episodes, aired in **Lifetime** in Latin America. It has strong responses at 'On demand' services. 'It is funny, very fresh, agile and direct for adult ladies', **D'Angelo** stresses.

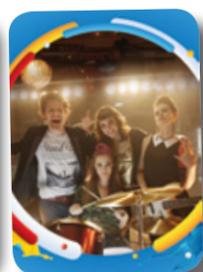
Wake Up is the first original content of **Coca-Cola** Latin America, produced by **OnceLoops** with **E! Entertainment**, which is airing the TV series. In Italy, it was sold to **RAI**, and worldwide, to online titans as **Netflix**, **Hulu**, **DirectTV**, etc. It is a musical teen comedy,



Roxy, for female audiences



The Creators combines live action with animation



Wake Up, music & teens



Silvana D'Angelo, head of sales

the Latin *Glee*, with live interpretation of many cross-popular songs.

The Creators is a trans-media series for the family, which mixes animation with live action, a website and a mobile app that interact permanently with TV. It was released in **Telefe**, the top broadcaster of Argentina, with very good results. *Plim-plim* is an animated series for little kids sold to many countries of the world, from Latin America to Russia. It provides 360 development, including a strong deal with **Netflix**.

D'Angelo: 'For Latin America, we also distribute *Ekaterina*, the famous TV series of **Russia TV**. We expect to grow fast in CEE, *Natpe Europe* is an important step in our expansion through the region'.

BOOMERANG TV SALES

LOS MISTERIOS DE LAURA IN RUSSIA

Los Misterios de Laura, detective comedy produced by **Boomerang TV** (Spain), keeps crossing borders. The series was adapted in Russia under the name of *Mum Detective*, for the **Channel One's** prime time and **NBC** announced that the U.S. version, *The Mysteries of Laura*, will run for a second season. Holland and Italy have also produced adaptations.



Mum Detective, Russian adaptation of *The Mysteries of Laura*

Moreover, the original **TVE** series has been sold to strategic territories such as Argentina, Bolivia, Costa Rica, El Salvador, Ecuador, Guatemala, Honduras, Nicaragua, Paraguay, Peru and Dominican Republic, and negotiations with other countries are currently underway.

PMA FILM & TELEVISION EXPANDS TO FRANCE

Cédric Hazard, former executive of **Arte France** (France), joined **PMA Film & Television** (UK) in order to launch the company's French subsidiary. Hazard will be based in Paris, and will manage all operations of the French branch.



Cédric Hazard joins PMA Film & Television

PM has accompanied major film studios, distributors and PR agencies with their film releases for over 10 years, producing press junkets, EPK's and other essential communication and marketing tools.

CBS STUDIOS, LIMITLESS

CBS Studios International (USA) offers in Prague a screenings the day before of the market, Monday 22th, where highlights its new product *Limitless* a 13x'60 series based on the feature film starred by **Bradley Cooper**.



Limitless, new series

This fast-paced drama follows the story of a man who discovers the brain-boosting power of the mysterious drug **NZT**.

Other top products praised by, specially, the CEE buyers during the last LA Screenings are the single-camera comedy *Angel From Hell* (13x'30), and *Crazy Ex-Girlfriend* (13x'60), centered in a successful, driven, and possibly crazy young woman.

Also the drama series *Zoo* (13x'60), where a wave of violent animal attacks against humans begins taking place across the globe, and *Billions* (12x'60), that takes an insider look at the world of high finance by tracking the approaching



The Late Late Show with James Corden

collision between two titanic figures.

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TV Nova, Czech Republic: Alexandra Bezpalcova, acquisition manager; Ivona Popovichová Patocková, content manager, Alex Ruzek, director of TV channels and programming, and Petra Bohuslavova, acquisition executive



Barrandov TV, the fourth broadcaster in Czech Republic: Marcela Hrdá, general director and vice-chairman of the board, Lukáš Soukup, acquisitions manager, and Markéta Daems, program executive



Jan Maxa, director of programs and formats development, and Markéta Stinglová, manager of international content projects, both from Ceska Televize (Czech Republic) with Olaf Grunert, head of sub coordination TV Games, ZDF (Germany).



Ceska televize, Czech Republic: Jitka Bodlákova, import executive, and Dana Seidlova, acquisitions executive



TV2 Hungary: Gyorgy Bence, news and programming director; Simon Zsolt, CEO, Yvonne Dederick, deputy CEO; Gabor Fisher, head of acquisitions and strategy; and Katalin Joborun, head of programming and acquisitions



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



TRT Turkey: Halid Simsek, director of TV Movies; Gokhan Donmez, acquisitions executive; Mehmet Dermirhan, deputy head of TV department



MJobs.tv, Czech Republic: Ondrej Michalek, manager, and Martin Soucek, CEO



MTVA, Hungary: Zoltan Nevelos, program manager, sales and acquisitions, Andrea Zaras, head of acquisitions, and Bianca Balaz, programming director



Maria Csenyi, scheduler, Zsuzsanna Farkas, marketing coordinator, Alice Nagy, senior scheduler, and Robert Kalas, programme planning manager of Viasat Hungary, with Sven Noth, SVP Liason, German Speaking territories & Hungary



Edina Balogh, senior acquisitions manager, Sanoma group's of channels Story4 & Story5



Poland: Andrzej Muszynski, president ATM Group; Ursula Piasecka, Director, Monolith Films; Piotr Korycki Member of the Board TVN



Adam Urbanowski, acquisition executive, TVN Poland, and Renata Kolomyjska, director of programming TTV, new channel of the TVN media group



Poland: Piotr Lenarczyk, head of programming and acquisitions, Polcast TV, and Piotr Borys, acquisitions and program director of SPI International



Malatko TV, kids channel from Ukraine: Tetiana Kmetyk, acquisitions, and Volodymyr Kmetyk, managing director



ATV, Turkey: Serra Batus, movie and international drama acquisition specialist, Erdi Zencirli, head of acquisitions, and Safet Arslan and Pinar Canbaz, movie and international drama acquisitions deputy managers



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



HRT, Croatia: Tanja Simic, head of international relation department, Delo Hadziselimovic, editor-buyer, Leilani Kijunak, international project coordinator and Zvezdana Djuranek, program acquisition business affairs



Croatia: Nina Mikola, head of acquisitions, and George Makris, board advisor, Nova TV; Marco Doslic, head of schedule and research, RTL; Zrinkia Jankov, head of TV Doma; and Dragana Kos, head of acquisitions, RTL



Dragan Petrovic, general manager, Visionary Thinking (Serbia) and Gordan Bobinac, president & CEO, KIP International (Croatia)



Alexander Wrabetz, director general, ORF (Austria); Wolf Bauer, CEO, UFA (Germany); Jan Mojtó, CEO, Beta Film Germany; and Bernd Reichart, CEO, Vox TV (Germany)



NTK, broadcaster of Kazakhstan: Gulnara Sazanbayeva, program director, Elina Fu-Chai-Chi, marketing director, Saida Igenbek, general director, and Talgat Dairbenko, advisor to GM



TV Joj, Slovakia: Erika Tothova, head of acquisitions, Eva Dzurovicnova, acquisitions manager



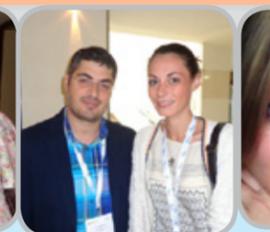
Markiza Slovakia: Michal Nemeth, Mario Prizenc, Tomas Chlapovic, acquisition executives, Lukas Benacka, head of channel DAJTO, and Ivana Sulikova, program editor, DOMA



ProPlus, Slovenia: Natasa Arbajter, program editor, and Tomaz Krzicnik, head of acquisitions



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



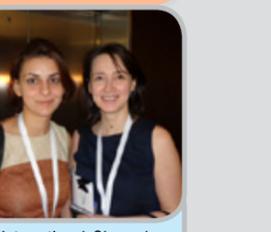
Antenna Group, Romania: Eduard Darvari, channel manager GSP TV, and Anne Maria Dragomir, acquisitions



Ines Turturica, acquisition director, Prima (Romania)



Pro TV, Romania: Sorina Big, head of acquisitions



bTV, Bulgaria: Apostol Penchev, head of TV, Vicky Politova, general director and chairman of the Board of directors, and Miro Yanev, head of contents



Telephote Studio, Russia: Rostislav Goncharuk, acquisitions; Zlata Romanova, general director, and Hovannes Petrossian, acquisitions



Friday TV, Russia: Anastasia Korchagina, head of acquisitions, and Maxim Krivitskiy, programming director



Alexandra But, head of international, Russian World Studios



Channel 9, Russia: Anna Tleuzh, program director, and Inna Neudachnaya, head of marketing department



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



Tarnmo Kivikallio, head of program acquisitions, and Mari Koivuhovi, acquisitions executive, both from YLE Finland, with Justus Risenkaugh, Beta Film Germany



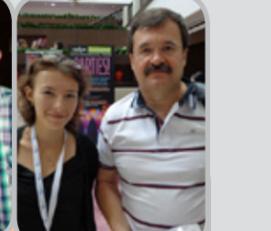
Christian Gockel, SVP Sales and Acquisitions, Beta Film Germany; and Viktoria Wasilewski, digital content acquisitions manager, Amazon Instant Video



Poland: Adam Urbanowski, acquisition executive, TVN Poland, and Renata Kolomyjska, director of programming TTV, new channel of the TVN media group



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Malatko TV, kids channel from Ukraine: Tetiana Kmetyk, acquisitions, and Volodymyr Kmetyk, managing director



AS Kanal 2, Estonia: Jaanus Noormets, acquisitions executive; Margus Paas, Research Manager; Kai Gahler, acquisitions executive; Oile Mirne, programming director



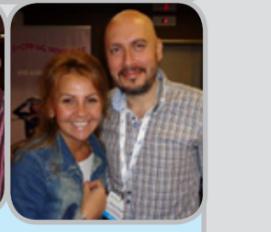
Liutauras Elkimavicius, Development director, LNK Lithuania



LNK TV, Lithuania: Jolanta Jasieni, acquisition manager



Pink TV Group (Serbia): Dragan Jelacic, head of acquisitions, Zelko Mitrovic, President & CEO, Ivan Vlatkovic, VP, and Natasa Milosavgevic, head of Pink Pedia. The group manages 45 free and Pay TV channels in Serbia, Bosnia and Montenegro



Igor Todorovac, program director, Hayat Plus & Hayat Music TV (Bosnia Hersegovina), Jovica Tojagic, acquisitions RTV Vojvodina (Serbia), and Dragana Banjac, programme manager, Alternativna Televizija (Bosnia Hersegovina)



Kata Szalai, program planning & scheduling manager, Viacom Central and Eastern Europe; Bob Verteeq, acquisitions manager, Viacom Netherlands; Magdalena Zdunikowska, Viacom; and Malgorzata Lucniska, acquisitions specialist, Viacom Northern Europe



Bisera Jordanovska, CEO, and Hamdi Rashiti, program director, Alsat M TV from Macedonia (borders) with Andreja Sertic, president, Media Acquisitions (Croatia)



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



Dejan Zerajic, programa and acquisition manager, Channel 5 Macedonia



Antoanella Unu-reanu, acquisitions manager, Viacom Central & Eastern Europe



Star TV Greece: Elena Paschlidou and Gina Dimitriadis, ready made acquisitions managers



Mega, Greece: Louis Xenopoulos, head of Greek programming, and Dionisis Kinigos, stock manager



Georgia: Ekaterine Javakhishvili, Silk Media House; Bacho Chinchaladze, CCO, SilkNet, Giorgi Gachechiladze, general producer, GBP/Georgian Public Broadcaster



Georgi Lominadze, head of acquisitions, Rustavi2 (Georgia) and his wife


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L.A. SCREENINGS 2015: MAJOR CHALLENGES & CONTENT TWISTS

The 2015 L.A. Screenings convention has ended after an intense week in Los Angeles, USA. The outcome? The Hollywood major studios have a big challenge ahead: to make their product evolve according to the new multiplatform era, yet not losing the massive touch that always defines television, and free TV in particular.

From 2014 to 2015, this is the time with more major TV series cancellations in many years. This can be due lack of creativity, performance or just luck, but above all, the buyer perception is that Hollywood is not matching the current content market.

For the European free TV broadcasters, for instance, it is very difficult nowadays to schedule many of the new shows, as they see them too alike to premium pay TV. Buyers say most of the series carry hot sex or dysfunctional characters. They are serialized (same story evolving through chapters) instead of episodic (plot starts and ends at the same episode). It is very hard to find procedural series (*CSI*, etc.) a genre that free TV loves very much.



Germany: Claudia Ruehl, senior manager of acquisitions, and Ruediger Boess, SVP acquisitions, both at ProSiebenSat Media Group; Ladya Van Eeden, program director, Vox/RTL; Quirin Berg, from big producer Berg & Wiedemann; Bern Reichart, CEO, Vox/RTL; Oliver Kreuter, CBS



M6, France: Berengere Terouanne, fiction manager; Sidone Garrett, senior manager of acquisitions and marketing; Bernard Majani, head of acquisitions; and Thomas Valentin, VP of the board in charge of TV channels and contents

In addition, stronger local fiction content is available at every region, competing hard and often surpassing Hollywood product. In fact, the big format titans (**FremantleMedia, Endemol Shine, ITV**, etc.) and top central broadcasters, are today looking for partners everywhere, as a good way to get fresh ideas.

To this, the U.S. studios answer, with good arguments, that TV must evolve to be in line with what *millennials* like, attracting young audiences. The new premium cable and OTT productions are the path to follow: **HBO, Fox International Channels, Netflix, Amazon, Hulu**, etc. Their series are justly serialized, frenetic, twisted, etc.

But then, a smarter mix must be found, to fit better both worlds. The existing cross-regional co-production projects are very good current solutions; the one announced at the recent MIPTV between **NBCUniversal Productions, TF1 France and RTL Germany** is a good example. They will co-produce procedural TV series in English in USA: that will be U.S. production, but with European taste. This is an opportunity time for creative and flexible producers from any region of the world, from Latin America to Asia.

A Hollywood studio executive argued, off the record: 'The problem is not free TV or cable-alike. The matter is to sell or not to sell. The question to ask the studios is not What new do you have? It is Which fare that you sold last year, is still on air? With so many cancellations, content strategies must be reconsidered.'

Angel Lopez, acquisitions manager at **Mediaset**, Spain: 'For free TV we need episodic series, or serialized if they start and finish at the same season, as *Wayward Pines* from **FIC**. If a serialized series lasts more seasons, people that get involved watch the next ones through other platforms, before we receive them.'

Gabor Fisher, head of acquisitions at



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



George Makris, programming director, Nova (Croatia), with National TV Romania: Diana Stanciu, acquisitions analyst, Anamaria Popa, acquisitions manager, Adrian Mohut, sales manager, and Larisa Mohut, acquisitions coordinator



Nordic countries: Gudrun Jonasdóttir, head of acquisitions, RUV (Iceland), Stephen Mowbray, head of acquisitions, SVT (Sweden), Johanna Salmela, acquisitions executive, and Tarmo Kivikallio, head of program acquisitions, both at YLE (Finland)

TV2, Hungary: 'We liked **CBS'** TV series *Zoo*, for instance, with the lions attacking; it's more for all people. It is fine to target young audiences, but most of the people that now watch free TV are adults.'

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L.A. SCREENINGS 2015: MAJOR CHALLENGES & CONTENT TWISTS

Genre trends at L.A. Screenings? PRENSARIO has interviewed more than 100 worldwide buyers during the week; they mostly agreed that this year the Hollywood TV series proposal is once again dominated by supernatural, superhero, suspense-thriller stories, with many famous feature films translated to TV series. Since the studios are producing series for OTT platforms, there are more edging, twisted, violent, moving camera pieces.

This year, drama is ahead of comedy: the



Buyers from the U.S. Network ABC: Ayo Davis, VP of casting; Adam Giagni, content development director, and Tracy Underwood, content development manager, both at ABC Signature



Spain: Lola Molina Santoja, channel director, and Mercedes Gamero Hoyos, director of acquisitions, Atramedia TV (Spain); Tamara Misert and Carolyn Stalins, sales for Europe, NBCUniversal; José Antonio Antón, director of programming and complementary channels, and Ramón Campos, producer, Atramedia TV



Grupo Televisa, Mexico: Elsa Vizcarra, VP Programming, Erika Rodríguez Echegollén, acquisitions, Jaime Aguilar-Alvarez, and Adrián Echegoyen, programming and acquisitions, Televisa; Christian Cuadra, finance and administration, Karina and Analdyia Montoya, programming & acquisitions, Televisa Networks; and Carlos Sandoval, general manager of the Group SVOD platform VEO

majority of buyer-preferred programs, have been dramas. Most of the comedies feature sex or hot matters, so they don't appeal to family audiences. Sometimes, programmers stressed, the sex clichés are non-sense extras to the plot, but they lower the product perception. Medical dramas are back, with 3-4 good products cross studios, but they don't promise to surpass E.R. or Grey's Anatomy.

Specific products? Coming from Fox, the buyers stressed *The Frankenstein Code* and *Damien*, both thrillers with supernatural tips, and comedy *Life in Pieces*, shot with single camera. At CBS, the top product was *Zoo*, about lion attacks with good massive potential. *Billions* (Wall Street) and *Limitless*, a police drama, have been appreciated, too.

At NBCUniversal, *Mr. Robot*, thriller about Internet hacker, obtained very good reviews; medical series *Heartbreaker* was mentioned as a new *Grey's Anatomy*; and, *The Last Kingdom*, a new *Game of Thrones*. At Disney, *The Catch*, a cat and mouse game thriller with Mireille Enos, the actress from *The Killing*; *The Family*, suspense where nothing is as it seems; and comedies *Uncle Buck* and *Grandfathered*.

Buyers at Sony remarked *The Player*, with the debut on TV of Wesley Snipes; *Mad Dogs*, extreme violent series for Amazon; and *Dr. Ken*, comedy with Ken Jeong (The Hangover). At Warner, police thriller *Blindspot*; *Rush Hour*, spin off of the Jackie Chan movie; and *Containment*, were the preferred products.

Is digital the future? Alexander Marin, Sony: 'A key aspect today is Live + 7. TV series must be measured not only by their live emission, but also considering the catch-up services during the release week. Our hit series Blacklist uses to have about 35% extra audience during the week, and sometimes it reaches 50,60%. Other series have 100% extra ratings at most of the episodes or when they have a sports event competing against during the live emission. The new media series, as our *Outlander* for Netflix, have strong audience on demand.'

Undoubtedly, the market is changing.



Mediaset Italy: Lucia del Prete, deputy head of acquisitions; Zeldia Stewart, head of acquisitions, Cristina Veterano, vice director, Rete 4; and Imma Petrosino, acquisitions manager



Middle East: Humaid Rahid Sahoo Alsuwaidi, CEO, and Kamal Nassif, new media director, e vision; Maaz Sheikh, president, and Isabelle Mitsch, SVP acquisitions, Starz Play Arabia; and Fadi Ismail, Group director, drama, O3 Productions/MBC



Media Prima Group, Malaysia: Airin Zainul, group general manager, ntv7 & 8TV, Sherina Mohamed Nordin, group general manager, TV3 & TV9; Nini Yusof, group general manager, Cheng Imm, general manager, TV3; Gordon Kho, editor, Star Publications; y Seelan Paul, CEO, Television Networks, Media Prima

A good proof of this may be watched ; just by driving through Los Angeles. On the public large advertisement spots, where once we used to notice the U.S. networks' product, now we watch billboards by Netflix, Amazon, Hulu, spotlighting their original production. OTTs are the new growth engine of the content market, and TVOD (transactional video on demand) is the big segment still to be developed systematically.

Nicolas Smirnoff and Fabricio Ferrara

JOAQUIN FURRIEL

NATALIA OREIRO

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