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DISCOP ISTANBUL 2014 SPECIAL ISSUE

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KANAL D

A GOOD ISTANBUL GUIDE

This is the second time we attend Discop Istanbul with a special edition, fully devoted on the market. Last year we were extremely pleased with the results —both advertisement and market feedback— and we are going deeper this year. Undoubtedly, West Asia is a good place to focus on.

What will you find at this issue? A full local content edition, focused on West Asia content buyers and producers. These are the pillars of PRENSARIO worldwide: specific issues, regional buyers on top. So, here we provide mainly West Asia top broadcaster interviews and locally produced reports, with figures and trends.

What is important to say about the market, at this first page? Apart from the well known



concept that it is the fastest growing show within the content business, the fact that the event is evolving to a pole of emergent territories. It receives not only West Asia and Middle East buyers, but also people from Africa, Central & Eastern Europe, the CIS territories and East Asia.

With this condition, a new sort of market can take place, different from the others in the international calendar. Emergent territories need different strategies from developed markets, and if all the attendees are the same, new business practices created. The evolution of Discop Istanbul will be very interesting to check, in 2014 and the upcoming years.

Nicolás Smirnoff

DISCOP ISTANBUL 2014: MAIN SCHEDULED EVENTS

Event	Date & time	Place
Dramas with Passports	March 4, 10am	Conference Room
New Trends in Turkish Drama	March 4, 4pm	Conference Room
Welcome Cocktail Party	March 4, 7pm	TBA (*)
Public Broadcaster in the Digital Era	March 5, 10am	Conference Room
The state of digital in Turkey and Central Asia	March 5, 11am	Conference Room
Focus on Iraq	March 5, 4pm	Conference Room
Global Agency Party "Work Hard, Play Hard"	March 5, 10pm	Conrad Hotel Ballroom
How branded entertainment influences creativity and budgets	March 6, 11am	Conference Room
Launch of Branded Entertainment Europe MENA Asia)	March 6, 3pm	Conference Room
Character animation and the growth of licensing in Turkey	March 6, 4pm	Conference Room
Turkey: a world-class drama coproduction hub	March 6, 5pm	Conference Room

(*) To be announced

PRINT & ONLINE

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REGISTRO NACIONAL DE DERECHO
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PUBLISHED BY
EDITORIAL PRENSARIO SRL
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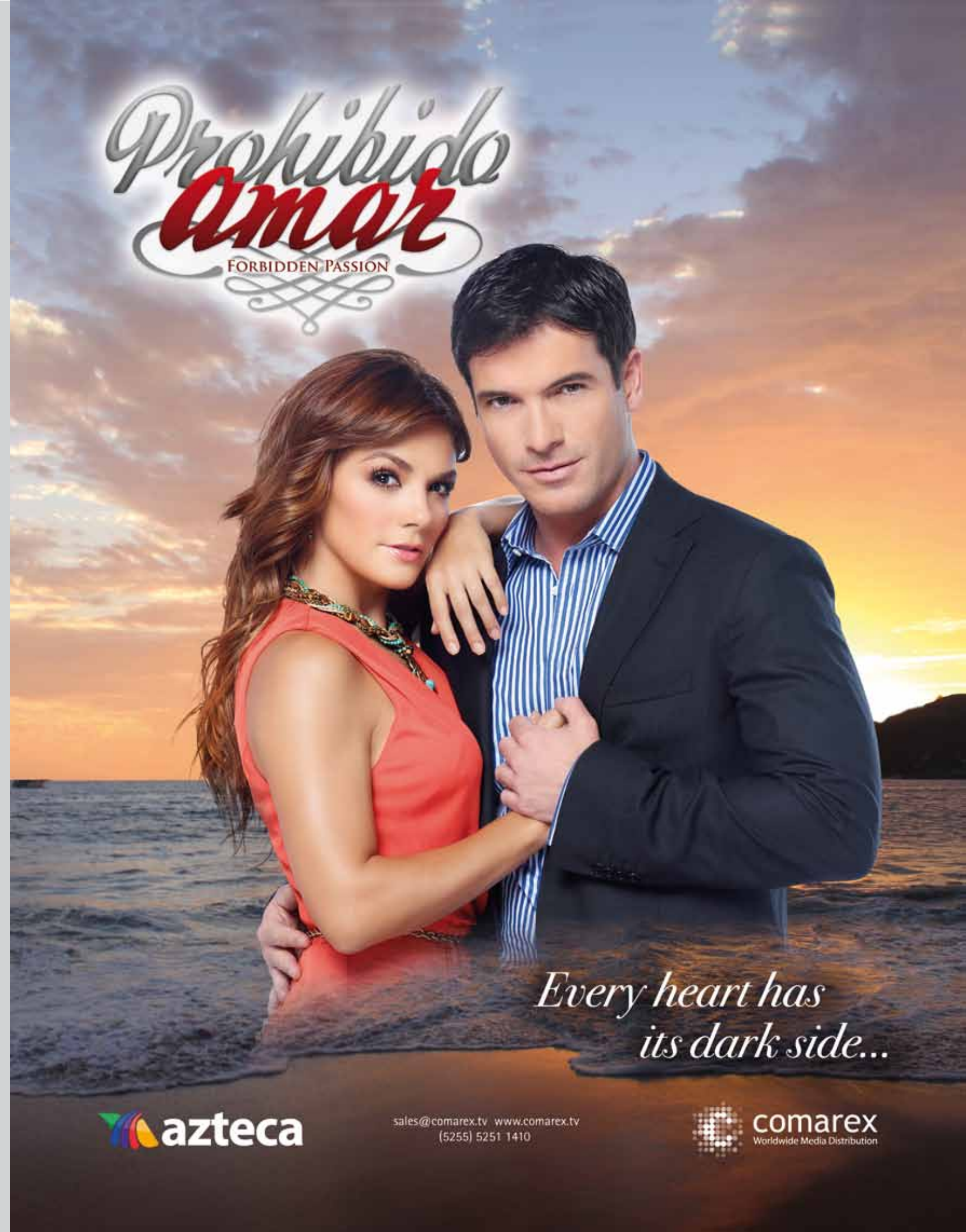
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WHAT'S NEXT IN THE TURKISH TV MARKET?

For the second year in a row, PRENSARIO attends DISCOP ISTANBUL, one of the most dynamic events of the calendar, which this year changes the venue to a convention center format. Even Discop is attended by players from Middle East, North Africa, Central Asia and Southeast Asia, the eyes are placed on the Turkish TV market, as dynamic as the tradeshow.

With almost 18 million TV households the Turkish TV market is one of the largest and fastest growing in Europe. The main broadcasters and protagonist of the industry were interviewed for this special report, to have a closer point of view of the market changes and evolution. From the leading commercial broadcasters Kanal D, ATV and Samanyolu TV to the state-owned TV group Turkish Radio & Television (TRT). Other networks were invited to participate, but up to Discop closing date, the information have not arrived.

2013-2014 TV SEASON

On January 2014 prime time slot was lead by **Star TV** (15%), which main hits on screen were the fourth season of *Magnificent Century*—the most sold Turkish series of the history— and *Tide*, the local adaptation of **Warner Bros.** series *The O.C.*, as well as the entertainment show *The Voice* and the local version of *Got Talent*, and the *UEFA Euroleague* and *Champions League*.

The second position, same slot, was alternated by **ATV** and **Kanal D**, who was the #1 broadcaster on “Total Viewers, All Day” (10.77%); both channels offered a mix of entertainment shows and drama series, the core genre on the Turkish TV market. Its important to highlight the growth of **Samanyolu TV**, which on season 2013/2014 become some nights the #1 station in the country



The fourth season of *Magnificent Century* on Star TV is the #1 drama series on Turkish prime time

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PELIN DISTAS YASAROGLU,
EDITOR IN CHIEF, KANAL D

‘TURKISH TV MARKET IS MOSTLY FRAGMENTED. SPORT GAMES, PREDOMINANTLY FOOTBALL MATCHES, STILL PRESERVE THEIR PLACE UP. AUDIENCE IS A BIT TIRED OF COMPLICATED STORY PLOTS AND SHOWING LOYALTY MORE RAPIDLY TO CONTENT PERCEIVABLE WITH EASE’.



ADEM GÜRSER,
GENERAL MANAGER, ATV

‘TURKISH AD MARKET STILL HAVE A LOT OF POTENTIAL FOR GROWTH AND IT CAN DEVELOP AT LEAST 2 TIMES OF WHAT IS IT TODAY. AS THE GROWTH OF AD INDUSTRY IS PARALLEL TO ECONOMIC DEVELOPMENTS, WE EXPECT A 100 % INCREASE IN 5 YEARS’.

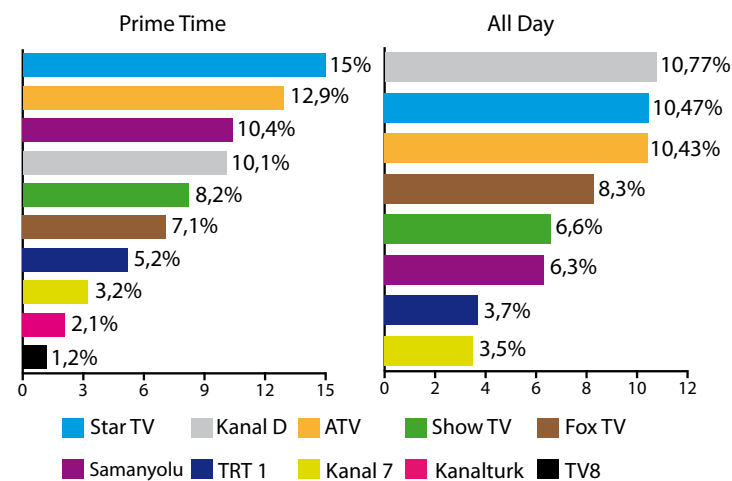
with high-budget drama series such us *The Hill*, *The Great Revenge* and *The Others*.

According to an article from CEETV.NET, Turkey's leading TV channels will premiere a total of 60 new series during 2014. **Kanal D** leads the chart with 12 new titles, followed by **ATV**, **FOX Turkey** and **Show TV** with 9 new projects.

Samanyolu TV will premiere 7 new series and **TRT1**, **8. Star TV** will offer only 6 new projects. **Kanal D** plans to air 20 series per week.

Same source indicated that **ATV** completed 2013 being the network with the most watched series: *Valley of the Wolves* won 32 out of 34 nights (average share of 13.2%); **Star TV**'s

TURKEY: AUDIENCE SHARE, PER CHANNELS – PRIME TIME & ALL DAY (JAN. 2014)



Source: TNS Gallup

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HASAN BOZASLAN, INTERNATIONAL
DIRECTOR, SAMANYOLU

‘TRADITIONAL MEDIA IS STILL POPULAR. ALTHOUGH THE DIGITAL MEDIA IS GAINING GROUND WITH GREAT SPEED, THE AUDIENCE STILL PREFERS TRADITIONAL MEDIA. THERE IS NO SPECIAL STUDY FOR THIS. PRODUCTIONS THAT ARE MADE FOR TV'S ARE BROADCASTED IN THE DIGITAL MEDIA AT THE SAME TIME’

Magnificent Century ranked second with 9.97% (total viewers); *Karadayi* (ATV) grabbed third spot with 9.78 rating. Top 10 includes *The Little Bride* (Samanyolu), *Black Rose* (FOX), *Tide* (Star TV), *Backstreets* (Kanal D), *Fugitive* (ATV), *Don't Worry About Me* (ATV) and *Sefkat Tepe* (Samanyolu).

Following with **ATV**, it had an excellent start of 2014: one of the most popular series, *Fugitive* became the star of Tuesday in Turkey, by achieving 7.8% rating and 17.5% share in time slot of 9pm-11pm during January (TNS Gallup). The most important programming strategy at **Samanyolu TV** was to broadcast TV series, instead



The comedy show *Arkada im Ho geldin* on Kanal D started getting positive response during the first months of 2014



SHEBNEM ASKIN,
EVP OF PROGRAMMING, FOX TV

‘FOX TURKEY HAS SOME FANTASTIC PROJECTS IN DEVELOPMENT FOR THIS 2014 TV SEASON. WE WILL CONTINUE TO INVEST IN THE VERY BEST COMMISSIONED AND ACQUIRED CONTENT FOR VIEWERS’.

of TV movies. Other networks of the same group that did well in 2013 were **Samanyolu Haber**, **Yumurcak TV** and **Mehtap TV**. The company also owns **Hazar TV** in Azerbaijan and **Ebru TV** in the US, as well as the international net **Dunya TV**.

‘50 years is no mean feat in this sector’, remarks **Ibrahim Eren**, deputy Director general at **Turkish Radio and Television** (TRT), the state-owned broadcasters that is celebrating in 2014 half a century of life. ‘TRT made the best of this time: a corporation that performed its duty to its fullest as far as public broadcasting goes, and with the help of ever advancing technologies, becoming 15 channels strong from the humble beginnings of only 1’.

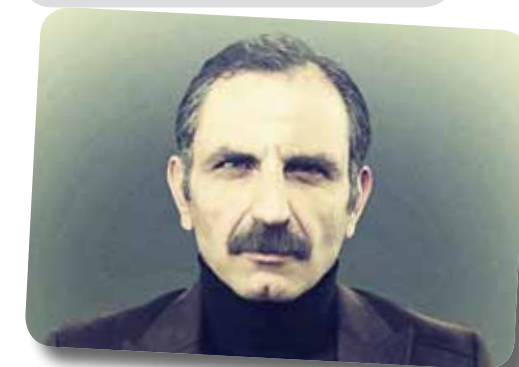
TRT's 50th year also coincides with a very important benchmark, the 100th year of Turkish Cinema. Continues the executive: ‘As TRT, we will participate in a lot of activities this year. To underline the importance of this year further and in the name of using our resources more efficiently and creating value for the industry, we plan to commission 30 new television feature films’.

‘For the new talents out there, there will be chances not to be missed. That is why we value this project immensely. In addition, we plan to produce mini television series in the honor of the 50th anniversary. As an alternative to the



IBRAHIM EREN,
DEPUTY DIRECTOR GENERAL, TRT

‘WE PLAN TO PRODUCE MINI TV SERIES IN THE HONOR OF THE 50TH ANNIVERSARY. AS AN ALTERNATIVE TO THE ‘90-EPISEODE MARATHON SERIES WHICH BECAME THE NORM IN TURKEY AS OF LATE, WE PLAN TO COME UP WITH HISTORICAL SERIES WITH SHORTER 4-5 EPISODES MAXIMUM’.



ATV's one of the most popular series, *Fugitive* became the star on Tuesdays by achieving 7.8% rating and 17.5% share in time slot

90 minutes an episode marathon series which became the norm in Turkey as of late, we plan to come up with historical series with shorter 4-5 episodes maximum, completes.

NEW CHANNELS

During 2013, local and international companies launch new channels in Turkey. Firstly, **Samanyolu Broadcasting Group** released a new channel targeting the female audience, **MC TV**, which will be distributed by **Türksat**. **Elif pek** has been appointed GM of the network described as Turkey's first ‘female-friendly’ TV net, and will offer numerous female topics about life in the

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WHAT'S NEXT IN THE TURKISH TV MARKET?



The Little Bride, drama series from Samanyolu TV, is among the top 10 programs on Turkey's prime time

family. The channel's first original production is the daily talk show *About Life*.

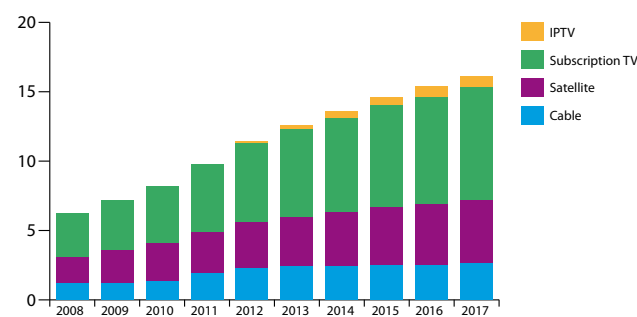
Secondly, **Modern Times Group (MTG)** launched its factual pay-TV channels **Viasat History HD**, **Viasat Nature HD**, **Viasat Explorer**, which broadcast since January 1 with Turkish voice-over on **Türksat**'s digital cable TV service **Teledünya**, as part of the company premium tier package. The channel programming is also be available on the platform's catch-up TV services.

THE PROTAGONISTS

Pelin Distas Yasaroglu, editor in chief, **Kanal D**, explains: 'We keep our leadership position in the local market as previous years. In 2013, **Kanal D** maintained its standing as most viewed TV channel of Turkey with 114 total day among total individuals and 150 total day among AB demographic group'.

Apart from drama series, it will be producing comedy and entertainment genres. Explains **Distas**: 'We have already launched a comedy show called *Arkadaşım Ho geldin*, which is getting quite positive response. Soon, some game shows will be on air such as the local adaptations of *Money Drop* and *The Chase*. *X Factor* is on air since February'.

TURKEY: TV HOUSEHOLD'S EVOLUTION, PER PLATFORMS (2008-2017). IN MILLION



Source: PricewaterhouseCoopers/Informa Telecom & Media

'We also get started a comedy series with a kid protagonist called *Küçük A a*. Soon there will be a new high school comedy *Boynu Bükükler*. Our in the house production company is working on two comedy projects. On June 2014, we will be launching new sitcoms as well'.

She completes: 'Turkish TV market is mostly fragmented. Sport games, predominantly football matches and programs still preserve their place up among our audience. Besides on-going series from previous seasons, audience is a bit tired of complicated story plots and showing loyalty more rapidly to content perceivable with ease. Thus, entertainment trend is still serving to what audience is looking for'.

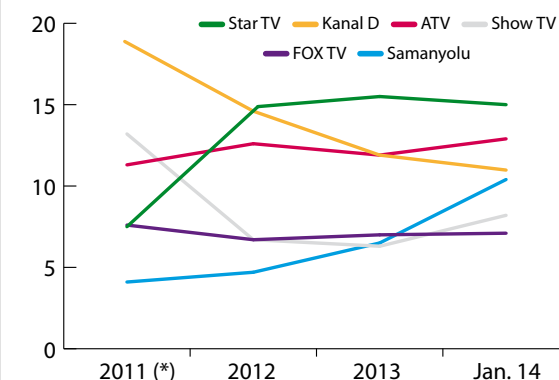
Adem Gürses, general manager, **ATV**, comments: 'ATV is the second TV channel overall. In drama television series we are definitely number one. Our channel produced the most popular and unforgettable series. The next season will be highly competitive due to changes in the market, but we are planning new projects to cope with this'.

'We are mostly concentrated on drama as its slogan is *Drama is best watched in ATV*. There is a general trend in the industry to screen formats towards the summer period and we will mostly likely to follow this trend as well', **Gürses** adds.

Hasan Bozaslan, international director, **Samanyolu TV**, says: 'We made a serious shift in balance during the 2013-2014 season and began to broadcast serials instead of TV films. With this change, serious ratings were gained. Serials usually start in September and October. Samanyolu TV began to broadcast three new serials in this period: *The little Bride*, *The Great Revenge* and *The others*'.

'2013-2014 season was really great year for us. Both new and ongoing productions with various stories had gained high ratings. With the stories carefully chosen, and rich contents, a serious number of audiences are reached. Other serials that were produced with great costs by the competitors could not conform the expectations because of their poor stories and were ceased before the end of the season. In short, many pretentious serials could not reach the end of the season', highlights **Bozaslan**.

TURKEY: AUDIENCE SHARE EVOLUTION, PER CHANNELS – PRIME TIME/TOTAL VIEWERS (2011-JAN.2014)



(*) ABG Nielsen

Source: TNS Gallup

Regarding international sales, the executive comments: 'I believe that especially the number one serial *The Little Bride* will take the first place on the sales list. Our priority is given to the Middle East, because the profit of this region is much higher than the other regions. Our goal is expand to Europe and Far East. Most of our shows were sold countries in Middle Asia, Middle East, the Balkan states, Afghanistan, Pakistan and some African and Far East countries and the sales are continuing'.

One of **FOX TV** top news was the designation of former **Fox International Production** executive **Shebneem Askin** as EVP of Programming at the TV channel, which is among the top five stations in the country's booming TV market. She reports to **Pietro Vicari**, general manager at **FOX TV**. **Askin**, who was SVP of International Acquisitions and Sales at **FIP**, is now in charge of boosting network's entertainment offering and is responsible for commissioning, acquiring and scheduling film, drama, factual, kids and event entertainment programming, as well as working with channel's partners.

'**Fox Turkey** has some fantastic projects in development, and while it is sad to leave **FIP** after four thoroughly enjoyable years I look forward to returning to Turkey and joining **Pietro** and his team as they continue to invest in the very best commissioned and acquired content for viewers', remarks **Askin**.

Eren from **TRT**: 'We have produced a lot of material in 2013 and we are very proud of each of these programs. As we carry no financial woes as a public broadcaster and always operate with the conscience of the responsibility we shoulder in mind, we strive to produce content that carries attributes like quality, respect for social values,

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WHAT'S NEXT IN THE TURKISH TV MARKET?



The Golden Apple will be one of the new drama series of the 2014 TV season on TRT 1

variety and balance, educational and entertaining. If we look from the angle of always reaching out to the maximum viewers as possible, we will always be "The Leader" in Turkey.

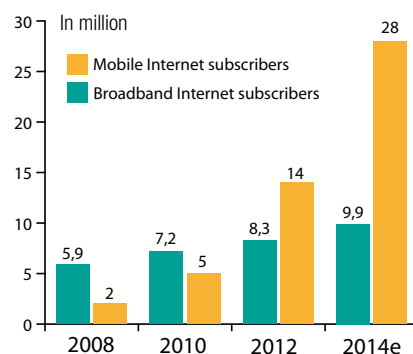
Today, TRT operates one mainstream channel, TRT1, and 14 thematic networks that allow the public corporation to reach out to all segments of society and is no match to any other channel with its vast program variety. TRT Kids is an example that is very rare in the sector. Turkey's first and only free to air children's channel, it regularly tops other channels in daytime ratings. Even if we group our content under 3 main groups, drama, documentaries and kids, with the additions of sub-groups we are able to offer a rich amount of content at the markets, he says.

For the 2014 TV season, TRT1 will have two brand new drama series: *The Golden Apple* and *A Tale of Yusuf*. 'Of course we have successful children's programming and documentaries to choose from', underlines Eren.

DIGITAL & FUTURE

Distas, from Kanal D: 'Internet has become a major advertising medium in Turkey, close to 15-16% of total advertising expenditure. Internet penetration of Turkey is rapidly increasing and engagement of young population over the

TURKEY: MOBILE & BROADBAND INTERNET SUBSCRIBER'S EVOLUTION (2008-2014e).



Source: PricewaterhouseCoopers/ Informa Telecom & Media

Internet is substantially high, even compared to major developed countries. So Internet became another way to reach audiences, like cable, DTH, analogue terrestrial. In this perspective, with an ultimate goal to reach our viewers, we adapted OTT services for our content long time ago and we are improving these services every year.

Right now, we are forecasting that over 600 million online videos will be watched at Kanal D OTT services in 2014. This is creating additional revenue streams for us and availability of such services are increasing the loyalty of our viewers in such a competitive market. On the other hand, these changes are pushing us to be more creative on the content development side, i.e. we are not only thinking TV, but second screen, VOD and other engagement tools at the development stage.

In the local market, Kanal D's main goal is to keep its leading position in the sector. In the future, we believe that creating content with high brand value will remain crucial regardless of the distribution ways. Our aim will be improving the brand value of the content sustainably, concludes Distas.

Gürses, from ATV: 'Turkish ad market still has a lot of potential for growth and it can develop at least 2 times of what is today. As the growth of ad industry is parallel to economic developments, we expect a 100 % increase in 5 years. In Turkey, the ad market is always higher than Turkey's GDP'.

And he completes: 'There is no definite answer which finds out the audience's preferences. But the most important is the good combination of different factors such as strong storyline, good cast, setting and quality work. We can't say that the historic productions are trending, because only one and the first one was very popular. Other dramas, which tried to copy a popular idea failed. The real trend is: improving quality of drama series and improving story lines.'

Bozaslan, from Samanyolu: 'Traditional media is still popular. Although the digital media is gaining ground with great speed, the audience still prefers traditional media. There is no special study for this. Productions that are made for TV's are broadcasted in the digital media at the same time.

Regarding future, he finishes: 'The developments for the future seasons are determined by the previous season. The content of the future season finds direction according to the previous data. Shows that have higher ratings surely continue for another season. We will continue watch serial and some entertainment shows unless a brand new trend is discovered.

Eren, from TRT continues: 'With the advancements in the world creating changes in peoples psychological and social structures, new trends are created in TV. People's interests change parallel to the changes in society. We can call this an involuntary adaptation to change and

evolution. Format production has multiplied in numbers over the past years.'

As in the international market, Turkey also has raised interests towards formats. With the cultural diversity that we have, it's difficult to value Turkish viewers through certain stereotypes. But in general, it's important to mention that respect for family values and cultural riches lie right in the core of this wealth.

We have two very important matters in our future plans. One of them is local and international co-production, and the other one is to become more efficient in the digital world: we have a new establishment just for this purpose named **New Media Channel Coordinationship**. With this unit we try to participate in all the platforms that has a viewer.

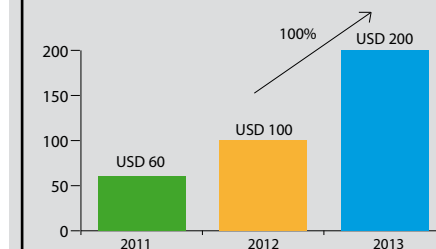
The advancements in technology in recent years have underlined the importance of digital media. With the anticipation of digital channels getting more and more popular each day, we plan to devise new products for these outputs. Trans media studies, projects geared towards the worldwide web and an Internet TV that has a specific broadcasting stream are among our new projects, he concludes.

TURKISH CONTENT FOR EXPORT

According to local sources, during 2013 Turkey has become the second largest producer of drama of the world, behind the US and surpassing Latin America. It exported Turkish drama for USD 200 million, a growth of 100% in comparison with 2012.

Local players estimate that the figure will reach 1 billion in a couple of years. For example, *Magnificent Century* — probably the most sold Turkish series ever — was premiered in China, being the first Turkish product in that market with great success.

TURKEY: CONTENT EXPORTATION EVOLUTION (2011-2013)



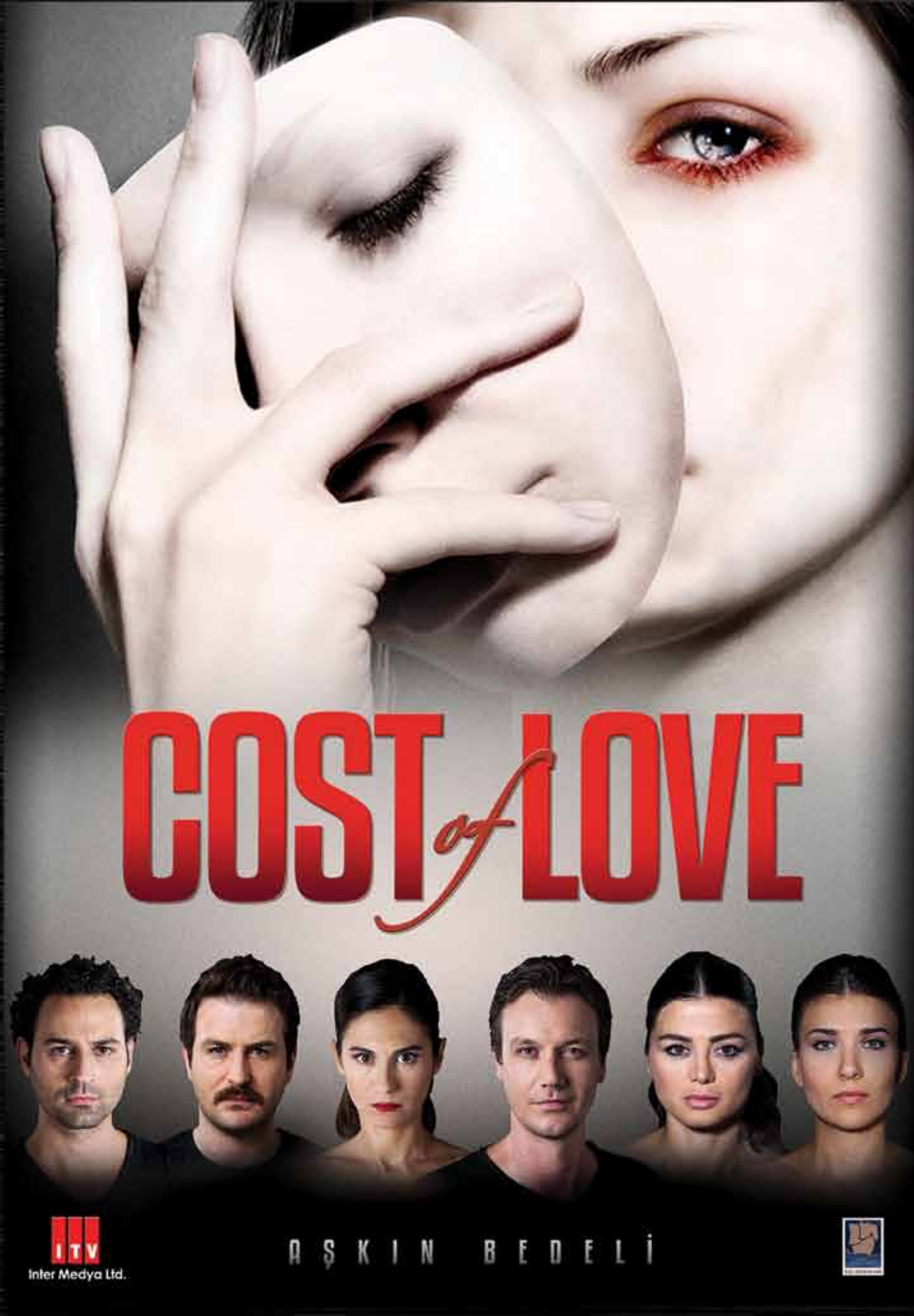
Source: local sources



The Female of the Species... and Dave



Army nurses, private detectives, revolutionary thinkers... and Dave.
Independent women lead our latest independent drama slate.
Oh, and let's not forget Dave.



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DISCOP ISTANBUL: THE GROWTH IS HERE

While the central markets (United States, Europe) are flat or still suffering the waves of 2009 global crisis—five years and going—the territories joined in Discop Istanbul are steadily growing, both in TV channel and production developments. They are not the paradise, of course, but there are lots of things to do around.

It is always interesting to talk with **Patrick Jucaud-Zuchowicki**, CEO at **Basic Lead** and organizer of Discop Istanbul. He always says trendy concepts as ‘Content business axe has moved to East. Middle East, West Asia and Africa take only 2% of worldwide content market incomes, about 250 billions of euros. But these regions are growing 100% per year, and they have 60% of the world population.’

ISTANBUL ATTRACTIONS

- **TURKISH PRODUCTION POWER**
- **THE PAN-REGIONAL PAY TV CHANNELS**
- **EMERGING LOCAL BROADCASTERS**
- **PRODUCTION AND CO-PRODUCTION PROJECTS**
- **ENTERTAINMENT + FICTION**
- **NEW MEDIA: VOD, IPTV, DTT, MOBILE**



The Power of Drama in Muslim Countries, last year in Istanbul: Jamal Douba, general manager of Media Link International (Lebanon), Fadi Ismail, director of drama at MBC Group, Mehmet Demirhan, head of acquisitions Kanal 7 (Turkey), and Farid Ahmad, co-founder of Worldwide Right Corporation (Malaysia)

TURKISH BROADCASTERS AND MIDDLE EAST PAN REGIONAL MEDIA GROUPS, ARE THE TOP BUYERS OF FAST GROWING WEST ASIA MARKET



Prof. Bekir Karlaga, CSC director, and Prof. Senoy Yalcin, rector of the Be-hceshir University (borders); Patrick Jucaud-Zuchowicki, CEO of Basic Lead; Abdurrahman Arici, deputy minister of culture and Tourism of Turkey

DISCOP ISTANBUL HAS CHANGED FROM A SUITE-FORMAT MARKET TO A CONVENTION CENTER OF 5,000sq, AND EXPECTS 1,000 PARTICIPANTS (25% OF GROWTH VS. 2013)

Also: ‘A region is getting strong when you see local players not only buying, but also dealing to each other, moving from its first country to others. When you see evolution from canned business to formats and co-productions. From 2-3 years ago, we are checking all of these in West Asia. We have now the international titans and many regional players developing themselves. There are solid business opportunities in the production and co-production sides.’

In fact, at Discop Istanbul there are buyers mainly from Turkey, Central Asia and Middle East, but also many from Central & Eastern Europe, CIS nations, North Africa and even East Asia. Countries such as UAE, Kazakhstan, Azerbaijan, Afghanistan, Lebanon, Jordan, Syria and the Gulf States, Egypt, Morocco, grow

in their presence every year... the market is a new pole of emerging territories now.

This year the event has moved from the *Ceylan Intercontinental Hotel*, to the *Istanbul Convention Center*, staying all together at a traditional floor (5,000sq). From about 750 participants in 2013 (250 buyers) the event expects to receive about 1,000 attendees this year, with more than 300 buyers.

Another two big news are the seven national pavilions, such as Iraq (its here for the first time), South Africa, UK, France, Ukraine, Malaysia and China, and the designation of India as “Country of Honor” with several activities related to. ‘We are receiving new companies, sellers and buyers, from Pakistan,

WEST ASIA/MIDDLE EAST VS. OTHER EMERGENT REGIONS

ADVANTAGES

- **SHORTER DISTANCES**
- **LOCAL PLAYERS TURNING REGIONAL**
- **STRONG FINANCIAL SUPPORT IN KEY NATIONS**
- **COMPLETE BUSINESS PIPELINE: CANNED + PRODUCTION**
- **QUITE VIRGIN TERRITORIES TO DEVELOP FROM BASEMENT**



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

EMERGING TERRITORIES ARE A KEY FACTOR IN ISTANBUL. FORMER SOVIET NATIONS ARE EVOLVING FAST AND SOME OF THEM ARE VERY BIG MARKETS

Oman, Bahrein, Saudi Arabia and Tajikistan, among others’, said **Jucaud-Zuchowicki**.

Turkey plays a strategic role with almost all of the local industry attending the market, and with new players like **Turkish Airlines**, which assists to Discop to acquire content for its VOD system for their passengers. ‘Is a show of the diversity we have this edition’, completes the organizer.

Regarding the conferences, **Basic Lead** divided them in three days: Tuesday 4 its about Drama/Formats; Wednesday 5 Digital Content; and Thursday 6, Branded Entertainment and Product Placement. ‘At Discop, it is being launched The European Product Placement Association (EPPA)’, highlights **Jucaud-Zuchowicki**, who also remarks the social events organized by leading Turkish distributors, such as the **Global Agency** “Work Hard, Play Hard” party on Wednesday, March 5 at 10pm at the Conrad Hotel Ballroom.

FIGURES & TESTIMONIES

The Arab Spring, for instance, triggered positive changes in the broadcasting industry. There are 80 million Arab households with 95% receiving satellite TV and more than 700 Arab channels. Drama is the most important genre among Saudi Arabia, Kuwait and UAE viewers (90% against 50% on entertainment and sports). Social drama beat other genres like comedy or Bedouin stories. There are new

production centers in MENA: Egypt, Syria, Lebanon, Jordan, Gulf Stats and Iraq.

Nabil Kazan, president and CEO of **K & Partners**: ‘The new trend of dubbing almost any program into Arabic has motivated channel owners to acquire relevant programs from around the world’. The **MBC Group**, main media group in Middle East, last year made a super production with Qatar, *Omar*, and there are more original/local projects in 2014’.

Egypt is one of the most experienced drama producers. **Ahmad Rahman**, head of acquisitions and drama at **Al-Nahar TV Network** has produced the TV series *Roots* with a Lebanese partner and **Endemol**. ‘Foreign series (from U.S. to Turkish ones) do not reflect Egyptian culture, so our strategy is to go further on the production of local stories’.



Africa and West Asia: Joseph Hussini, operation manager, Bright I, Lebanon; Tony Kassouf, Cable Arab Network, Lebanon; Marwan Helayel, acquisitions, and Lyes Belaribi, director of production of programs, both at Television Algerienne, Algeria

EGYPT AND OTHER NORTH AFRICAN NATIONS ARE GOOD PROTAGONISTS AT DISCOP ISTANBUL, BOTH FOR CANNED AND PRODUCTIONS

DISCOP ISTANBUL - KEY EMERGING TERRITORIES

	UAE
	KAZAKHSTAN
	PAKISTAN
	AFGHANISTAN
	LEBANON
	JORDAN
	SYRIA
	EGYPT
	IRAQ

Anyway, the executive stressed that Turkish series are a high-end product for prime time, which obtains huge ratings. The cost goes from USD 15,000 to 100,000 per episode.

Abdul Raouf Oria, deputy channel manager at **1TV**, Afghanistan: ‘Local TV industry is moving fast. Right now, 50% of our grid is own production and it will keep growing as we are buying more and more entertainment



Dato' Mohamed Sharil Mohamed Tarmizi, Chairman of the MCMC (Malaysia); Zakiah Halim, SVP, Malay Broadcast Division of MediaCorp (Singapore); Edmund Chan, MD, and Raye Lee, director, at Animasia Studio (Malaysia); Hazlin Hashim, Executive, Industry Operations Officer of MDA; and Kamil Othman, VP, Creative MDeC (Malaysia)

EAST ASIA IS BETTING STRONGLY ON WEST ASIA: FROM GOVERNMENT ENTITIES PROMOTING PRODUCTION HUBS, TO MAIN BROADCASTERS BUYING AND SELLING

formats. Local productions are the best rated programs. About acquisitions, we need daily shows, telenovelas, as well as drama & action series'.

One very active territory is Azerbaijan. Companies from this country are looking for readymade drama series and entertainment formats, and they are interested in doing co-production deals. **Azerbaijan Producers Guild**

THE ARAB SPRING

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



SURPRISING MANY INDUSTRY MEMBERS, COUNTRIES SUCH AS AFGHANISTAN HAVE VERY GOOD TV DEVELOPMENTS WITH A MEDIA SECTOR WORTH IN USD 75/USD 100 MILLION PER YEAR

1TV Media, Afghanistan: Abdulah Khengeni, chief editor, and Hayat Yaghubi, channel manager.

was in Istanbul last year pushing this. The same happens with Lebanon, whose TV industry is becoming bigger, especially on the drama side, and is looking for partnerships.

East Asian community is numerous, too. The *Filipino* broadcasters **GMA** and **ABS-CBN**, and **Trans TV** from Indonesia, buy and sell in Istanbul. Malaysia, through the state agencies **FINAS**, **CCMA** and **MDeC**, is again at Discop with over 20 companies. CEE countries as Serbia, Bulgaria, Romania, Croatia and Bosnia Herzegovina, are keen on Turkish series. **Margareta Iancu**, head of acquisitions at **Look TV** (Romania): 'We attend Istanbul to buy content quickly, to refresh the screen all the time, and to be competitive among big local broadcasters'.

Latin America has a strong presence of its traditional telenovela distributors, providing both canned and formats and studying co-production opportunities. They agree: 'Our advantages are the quality/quantity of TV executives (writers, directors) that guarantees high production levels; a variety of locations; and production costs (cheap and fast)'. Other trends: the more stable political and economic situation is helping content sellers in territories usually

difficult to do business, like Pakistan and Uzbekistan, whose TV industries are also better organized (fighting the piracy, for example). TV channels and producers from the former Soviet countries are demanding more formats, both entertainment and fiction. 'In comparison with two-three years ago, now they are not asking and researching about the product, ratings, etc.... they are buying directly', said one seller last year in Istanbul.

Local buyers turning to distributors across the region? For instance, **Outlook Entertainment** (UAE) is providing *Critical moments*, a medical drama series shot in Egypt. **Adham Nasrallah**, marketing and sales: 'It's considered the biggest Arab production done under American TV production-standards and probably the only one sold abroad: West Asia, Africa and Asia'.

What do the buyers look for this Discop West Asia? Consider these testimonies we have collected last year in Istanbul: **Neudachnaya Inna, 9TV** (Russia): 'Turkish drama series'. **Assel Nukisheva, Channel 7** (Kazakhstan): 'Dating/dancing shows'. **Gaye Arman Bicakcioglu, Kanal Turk** (Turkey): 'Entertainment formats, news and documentary programs'. **Safwat Ghattas, Spot 2000** (Egypt): 'Fiction formats'.

About digital platforms, Turkey is the main country in West Asia. On one side, leading Turkish pay TV player **D-Smart** (about 1 million subscribers) launched last year its OTT service called *D-Smart Blu*, offering movies, series and kids contents, while leading broadcaster **Kanal D** is developing a new SVOD services for web and mobile, with international content (**HBO**, etc.).

Turkish Prime Minister **Recep Tayyip Erdogan** confirmed that the **Türksat 4A** satellite was launched with a proton rocket from Kazakhstan on February 15, and there are also now plans to launch **Türksat 4B** in the second quarter after a test period. Both satellites have been produced at the **Mitsubishi Electronic Company's** satellite production centre in the Japanese capital: 4A will allow **Türksat** to offer telco and TV services in Turkey, Europe, Central Asia, the Middle East and Africa. 4B will meanwhile cover Africa.

Undoubtedly, content business is everywhere, and is growing particularly fast in West Asia.

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MONGOLIA, KAZAKHSTAN AND PAKISTAN: FIGURES & TRENDS



BY JULIA ESPÉRANCE

Television in Central Asia seems to hold rather well according to the viewing time results recorded in 2013. While Mongolia, which started TV audience measurement in November 2012, registered an average daily viewing time of 3 hours and 42 minutes in 2013 (+57 minutes up on the 2012 worldwide score), Pakistan and Kazakhstan respectively reaching 2 hours and 4 minutes and 3 hours and 17 minutes a day.

AVERAGE DAILY VIEWING TIME (2013)



Source: Eurodata TV Worldwide / One TV Year in the World / Relevant Partners – All rights reserved

Despite certain monopolistic television markets being dominated by state-run groups, Central Asia is marked by a strong presence of privately owned local TV channels, mainly broadcast by satellite and cable.

In Pakistan, the government-run group PTV, which cumulate more than 50% market share thanks to its flagship generalist channel PTV, coexists with hundreds of private channels. They are however, only permitted to air on cable and satellite.

This is very much the same in Mongolia, where private channels mainly broadcast via cable & satellite are gaining in importance, contributing to fragmentation of the market. For instance, the leading channel, the state funded television MNB, registers only a 9.9% market share and is closely followed by private stations TV5, TV9 and Mongol TV.

The latter has undertaken significant changes over the past two years as it has embarked in a three-year multimillion-dollar plan aiming to revitalize the country's programming and viewing habits as well as allowing it to rank as number one in the market.

The channel unveiled last year a new schedule driven by local productions, format adaptations and, most importantly, new imported fictions for primetime. The goal is to create a specific timeslot for foreign blockbuster series, mainly from the US or the UK such as *Homeland* or *Downton Abbey*.

Beyond Western acquisitions, **Mongol TV** continues, as are the other channels, to count on South Korean drama that remains a local favorite. Over the year 2013, seven out of the ten best performing shows were Korean series, the best performing, *Yellow Boot*, reached a 60.2% share among all individuals for its best episode broadcast on TV5.



Kazakh version of *X Factor*, on the air in 2013 for a fourth season, ranked again among the yearly best performing programs, achieving a 51.9% share among all individuals for its peak episode on First Channel Eurasia

Want to know more about ratings and programming trends in more than 100 territories worldwide?

Order Eurodata TV's "One TV Year in the World" and "International TV Trends" reports.

To find out more about these reports please contact Laure Bianchini: lbianchini@eurodatatv.com

PROGRAM RANK IN KAZAKHSTAN AND MONGOLIA

Kazakhstan									
Rank	Channel	Day	Date	Time	Program	Genre	Origin	Rate%	000
1	1 CHANNEL Eurasia	Sat	23/02/13	20:00	X FACTOR	Reality Soap	Kazakhstan	18.3	1205
2	1 CHANNEL Eurasia	Mon	25/03/13	19:11	"ТЮЛЬЧАТАЙ" Т/СЕРИАЛ (GYULCHATAI T)	Series	Kazakhstan	17.8	1168

Mongolia									
Rank	Channel	Day	Date	Time	Program	Genre	Origin	Rate%	000
1	TV5	Fri	26/07/13	19:00	ОШ ХОНЗОНГИЙН ЦЭЦЭГ (YELLOW BOOTS/ICE ADONIS)	Series	South Korea	21.4	215
2	MONGOLTV	Wed	02/01/13	21:30	АНГУУЧ (CITY HUNTER)	Series	South Korea	18.1	181

Source: Eurodata TV Worldwide / One TV Year in the World / Relevant Partners – All rights reserved



Over 2013, seven out of the ten best performing shows in Mongolia were Korean series: the best performing, *Yellow Boots*, reached a 60.2% share among all individuals for its best episode broadcast on TV5

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LEADING-EDGE
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MBC, MIDDLE EAST: NEW TO CHANNELS, MORE ORIGINALS PRODUCTIONS

PRENSARIO is pleased to publish a new interview with one of the main referent of the TV market in Middle East, FADI ISMAIL, Group Director of Drama Production, MIDDLE EAST BROADCASTING CORPORATION (MBC). The company had a great 2013 with new channels, as well as groundbreaking original productions that will be released in 2014.

'We have moved from strong to stronger in 2013. It was another year of growth and achievement on all levels. A new channel was born: **MBC Bollywood**, and international

talent formats such as *Arab Idol*, *Arabs Got Talent* and *The Voice* (currently on air) have been a phenomenal success. There will be more announcements about new entertainment formats, to be released this season', resumes **Ismail**.

MBC continues to offer its viewers the best of Arabic content and mix of drama genres. 'In addition, we were one of the few stations which continued airing Turkish dubbed dramas while other channels boycotted that genre. We also introduced Korean dubbed series and the response was very encouraging. In general, 2013 was a positive year'.

Regarding original/ local productions, and following the mega success of the series *Omar* (coproduced with **Qatar TV**), there will be more this year. 'New Arab drama productions will be released, such as *Cactus Alliance*, a high end Dubai based thriller of 15 episodes. And *Saraya Abideen* (*The Palace*), a period drama taking place in 19th Century Egypt in the Palace of the ruler. It is sort of *Downton Abbey* meets the *Magnificent Century*, and will be the biggest period drama ever done in the region', says **Ismail**.

The company is also well known for having adapted Latin titles from Brazil, México (*Ruby*) and Argentina (*Montecristo*). In 2014 it will produce and broadcast *Matrimonio/Second Chance*, an adapted telenovela of 120 episodes. 'Latin America is the home of the genre and, therefore, it is a logical place to look for scripted formats and even co-production opportunities on content that makes sense in MENA as well as in Latin American markets'.

Ismail continues: 'We



Cactus Alliance is a high end Dubai based thriller of 15 episodes



On drama, there will be more original production in both, local and Latin titles with *Saraya Abideen* and the adaptation of *Matrimonio/Second Chance*



have even picked up a short-33 episode prime time series and adapted it: we hope to have an Arab version of *The Chairwoman* (**Telefe/Endemol**) on screen by next year'.

FUTURE

The executive concludes about the future plans: 'For the future, there will be more quality content and better production values with stronger storytelling. We are open to adapt international scripted formats but also looking forward and working towards the day when our productions can travel worldwide and be adapted elsewhere'.



Fadi Ismail, Group Director of Drama Production, MBC Group/ 03 Prouction



GRISELDA BLANCO
THE DARK WIDOW
COCAINE QUEEN

CHANNEL SEVEN, KAZAHKSTAN: 'QUALITY PROGRAMS FOR THE FAMILY'

CHANNEL SEVEN was established on the base of capital TV channel ERA and has started republic broadcasting in September 9, 2009. Today, it is a rapidly fast developing channel with its own production projects and premier content, which has a clear positioning and strategy of broadcasting, and confidently conquer Kazakhstan's media market. It is considered among the top 5 strongest players in the media market.

There are nine main Kazakh TV channels, three of which are public: **Kazakhstan**, **Khabar** and **El Arna** broadcast primarily for Kazakh audience. Commercial channels, which appeared after 1991 (KTK, Channel 31, NTK) have their own loyal audience. Commercial channels are trying to share content in the Kazakh and Russian languages in the proportion of 50/50 according to the law of the state language.

Channel Seven has become one of the key players of the local market in less than 2 years after being launched. 'Qualitative and quantitative indicators of the network are the growth from year to year: from 5.3% of share in 2011 to 8.4% in 2013, increasing close to 60% in audience, according to TNS data', explains to PRENSARIO **Aziza**

Shuzheyeva, general director, who adds that by the end of 2012 the channel reached 86% for the population in Kazakhstan.

About the content strategy, she adds: 'Annually, in addition to the new TV season, which traditionally starts in the fall and spring, we launch bright and loud premiere for a wide audience.'

For example, on *Dance! Dance!* men and women lose weight by dancing for the grand prize of 2 million tenge, and the reality show *The perfect bride*, where eligible bachelor of Kazakhstan Anuar Nurpeissov in the team with his parents, grandmother and friends, choose the most worthy bride of 15 beauties.

'We continue with the third season of *Aina on-line* with a selection of unusual videos **Kaznet**, and mystical program *Signs. Steppe Legends* for viewers who like paranormal events', adds **Shuzheyeva**. Also, the third season of *Escape from the village*, which took place in Paris, the sharp social talk show *Way out!* and *The Show Forty million tenge*.

'Own production projects are especially important, as they show an increase in the professionalism and experience of the employees. We contribute to the development of local TV in general. The share of own production is 45%, and acquired content is 55%. Every year we move the bar upwards and increase the coverage of interest viewers', remarks the executive.

'Our goal is to deliver a quality product to Kazakh viewers designed for all family members. In 2014 we plan to increase the share of own production, focusing on original products, as

well as to continue to adapt the world formats. All programs will be produced in both Kazakh and Russian languages.'

Nowadays, there are several major trends in the market Kazakh TV: 'Production of own content based on international format (*The Voice*, *One to one*, *Star Factory*, etc.); rebroadcast or purchase of the Russian content; and translation of the art programs with Eastern accent - Turkish, Indian serials and films', says **Shuzheyeva**.

'Channel Seven is characterized by its brightness and boldness in



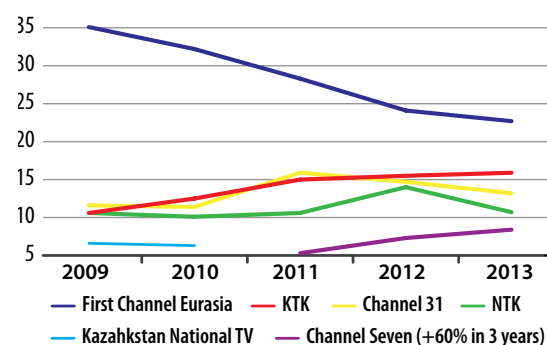
One of the top rated locally produced reality show *Dance! Dance!*

the media market. In order to show the world's best formats, adapting under Kazakh viewer, we decided to work with companies such as **BBC**, **Endemol**, **NBCUniversal**. By acquiring global formats, we realized the extent of responsibility to our viewers.'

'However, Kazakhstan appreciated adaptation of world formats like *Strictly come Dance*, *Wipeout*, *Dance you ass off*, *Operation Triumph*, *Comedy club*, *The Money Drop*, *Rivals in law* and many others. We are positioned as a channel for family viewing. Net broadcast is focused on multi-population, that is why there are programs for children, for youth, and fans of extreme sports, entertainment, Russian and Ukrainian serials, concerts, movies and documental films.'

The channel main program providers are **Central Partnership**, **PBC Weitmedia**, **Sovtteleeksport**, **Film UA**, **Starmedia** and others. 'But we plan to expand the market, so we currently have started to work with Turkish, Arab and Indian companies', concludes the executive.

KAZAHKSTAN: MARKET SHARE EVOLUTION, PER CHANNELS (2009-2013)



Source: TNS CA, 7:00-25:00, All 6-54, 100+



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Aziza Shuzheyeva, general director, Channel Seven

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SONY: 'THERE'S A REAL HUNGER FOR LOCAL PRODUCTIONS IN MENA'

SONY PICTURES TELEVISION ARABIA produces local programming for broadcasters across the Middle East. This covers both scripted and non-scripted content, developing original shows as well as adapting international formats for local audiences. Its business serves 22 countries across the Middle East and North Africa, and we operate with bases in Dubai, Cairo and Beirut.

Ziad Kebbi, president, Sony Pictures Television Productions Arabia, explains to PRENSARIO the most recent new regarding original production and alliances with top broadcasters of the region: 'Our recent productions include a local adaptation of the Latin American telenovela *Betty La Fea* called *Hebal Regal El Ghorab* (Crow's Foot). We are

also in the third season of *El Bab x El Bab*, our Arabic adaptation of *Everybody Loves Raymond*. Both series are licensed by pan-regional broadcaster OSN'.

'On the non-scripted side, we are currently midway through our second season of *The Voice: Ahla Sawt*, which we produce for pan-regional network



El Bab x El Bab is the Arabic adaptation of *Everybody Loves Raymond*, which was a success on the panregional broadcaster OSN

MBC. The show, which features contestants from more than a dozen countries, is a huge draw with more than 100 million viewers tuning in each week, continues Kebbi.

'We are also developing more original shows for Arab audiences', he highlights, and adds: 'We had major success last year with our celebrity talk show *Ana Wel Assal* that ran during Ramadan. In addition, our homegrown Egyptian sitcom *Lessa Badry* continues to play on *Al Hayat*'s schedules'.

TRENDS & FUTURE

'Much like we are seeing around the world, there's a real hunger for local productions across the MENA market. Audiences here want to connect with the story and look for characters that reflect them. Having one of the largest format libraries in the world, we are able to leverage our catalog of hit series to create original series that are in tune with the tastes of Arabic viewers'.

'At first glance, shows like *Everybody Loves Raymond* and *Betty La Fea* might seem to have very little in common with the Arabic world, but when we look at them closely we see that the characters, the family unit, and even the overall themes



Hebal Regal El Ghorab is the local adaptation of classic Latin American telenovela *Betty La Fea*

appeal greatly to our audience'.

Regarding the future, Kebbi says: 'We are now the leading international studio in the region and will keep building on this scale and success. We have brought some of the world's biggest format franchises to the Middle East and have a great deal of local programming in development for the year ahead'.

And he concludes: 'Developing local telenovelas, for example, is a key priority for us. The most important thing is to ensure that there is a strong local theme in everything we produce, so that our viewers can associate and connect with the characters'.



The Voice: Ahla Sawt is on the second season on MBC



Homegrown Egyptian sitcom *Lessa Badry* continues to play on *Al Hayat*
(© 2014 Sony Pictures Television Inc. All Rights Reserved)



Ziad Kebbi, president, Sony Pictures Television Productions Arabia

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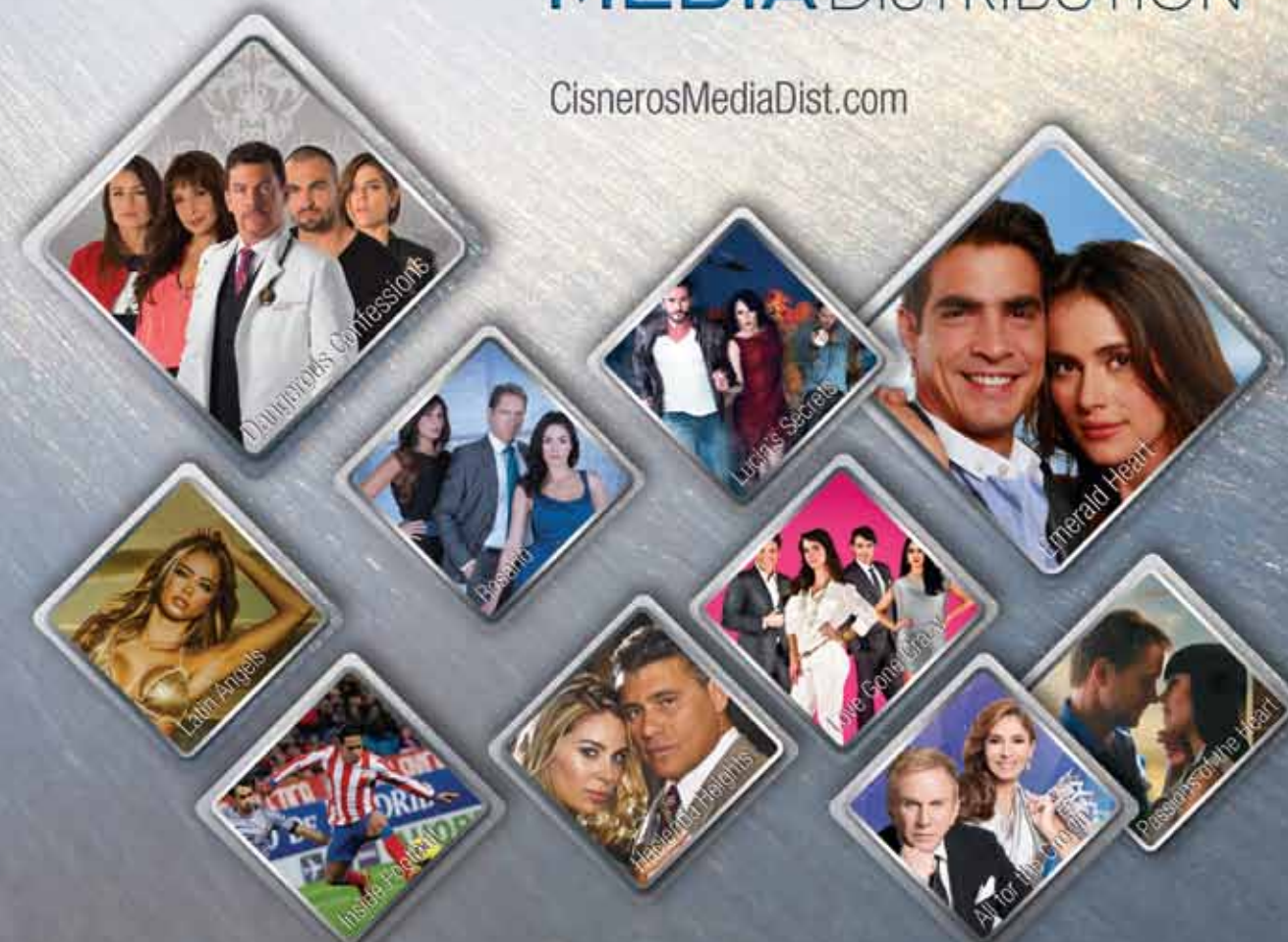


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BY NABIL KAZAN, K&PARTNERS TV SERVICES (*)

2013-2014: DEEP CHANGES IN THE ARAB BROADCASTING INDUSTRY

The 2013-2014 Arab TV scenario will show drastic changes. The Arab Spring (revolutions in Tunisia, Egypt & Libya; political unrest & riot in Syria, Iraq and Yemen; heat in Bahrain, Palestine, Sudan & Lebanon) is still generating transformations in the local TV and content industry.

This political situation within the region allowed the birth of 150 new Arabic satellite channels and, consequently, a strong increase of viewers on Arab TV networks. A ban was applied in 2013 on Turkish drama in major Arab government related TV channels due to a stand by the Turkish authorities against the new Egyptian leadership favoring Moslem Brotherhood.

The advertising spent from 2010 up to date increased by 40%, passing from USD 6,3 billion in 2010 to USD 10 billion in 2013. In 2000, the expenditure reached only 573 million.

Pan-Arab & generalist TVs are spending more money on high-rated programs, mainly locally produced drama, formats & US movies. Major channels are improving their image with HD contents, new logos (rebranding), sophisticated

graphic designs and acquiring more slots on satellites for a wider coverage.

VIEWERSHIP

Free-to-air viewership prevails in the Arab world. Niche satellite channels have strongly emerged in the last 3 years (thematic networks about drama series, movies, news and current affairs, sports, children, cultural and religious, tele-marketing, music), making a total of over 700 free to air TV channels (broadcast mainly via three satellites: Nile-Sat/AB7, Badr and Hotbird).

Local terrestrial channels are highly dependent on Government support, while the Pan-Arab TV networks has greater importance than terrestrial viewing hence received 60% of advertising. Regarding cable TV, it exists only in the Gulf Cooperation Council (GCC) and Lebanon. Pay TV via encrypted cable or satellite TV viewership does not exceed 10% of all Arab TV viewers.

In total, there are 75 state-run TV networks, while over 225 generalist movies & drama and 175 Islamic/cultural channels. Also, 65 news & current affairs, 60 music & entertainment, 40 sports & youth, 35 games & others, 14 children and 11 tele-shopping stations.

Surveys in Saudi Arabia, Kuwait and United Arab Emirates (UAE) shows similar



NABIL KAZAN, OWNER, K&PARTNERS TV SERVICES:

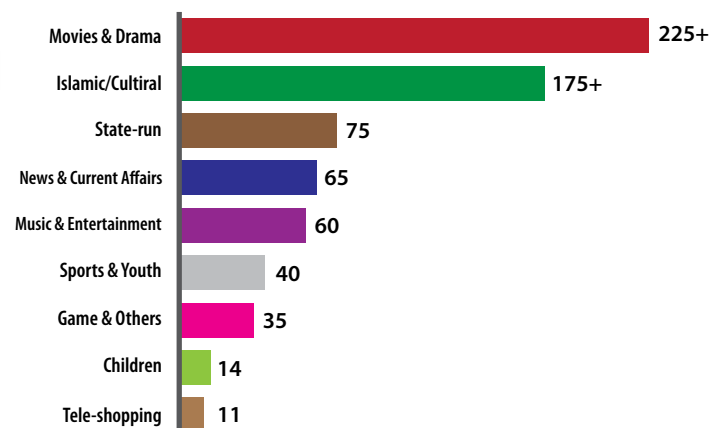
'THE ARAB SPRING ALLOWED BETWEEN 2010-2013 THE BIRTH OF 150 NEW ARABIC SATELLITE CHANNELS AND, CONSEQUENTLY, A STRONG INCREASE OF VIEWERS ON ARAB TV NETWORKS'

results of viewer's preference: 90% choose drama series, movies & soap operas; 50% entertainment, news & sports; and 25% other genres (source: PARC – Omnibus Survey).

PRODUCTION & DUBBING CENTERS

The main hubs for content productions and dubbing services are in Egypt, Syria, Lebanon, Jordan, Iraq and the GCC. The first one specializes mostly in the production of melodrama, comedy, sitcoms and animation

THEMATIC CHANNELS AVAILABLE IN THE ARAB WORLD (2013)

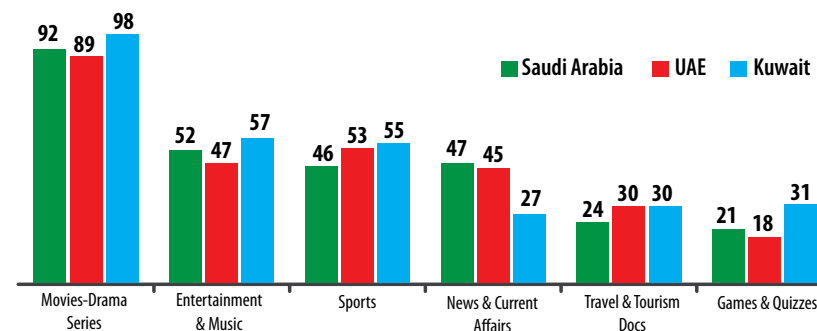


Magnificent Century



Omar

FAVORITE GENRE OF PROGRAMS (2013)



Source: PARC – Omnibus Survey

series. Egyptian studios and TV channels are dubbing foreign drama, animation, cartoons and soap operas in the local accent.

Historical, epic and Bedouin stories are mainly produced in Syria, along with Arab and modern drama. Since 2010, the country has become the center of dubbing into Syrian accent for Turkish drama.

Lebanon is the main Arab center for the production of advertising commercials, spectacular shows, game formats & music clips. The country is still considered the birthplace for dubbing Mexican soap operas, documentaries and cartoons into classic Arabic. Nowadays, many studios in Beirut are using Syrian actors to dub Turkish series.

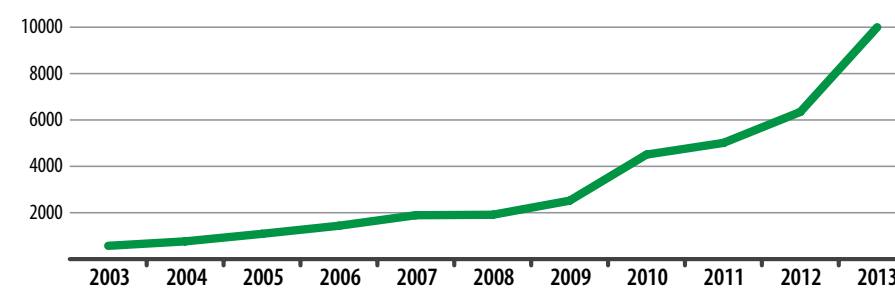


Aski Memnu



Araf Zamani

PAN ARAB TV EXPENDITURE EVOLUTION (2000-2013)



Source: PARC – Omnibus Survey

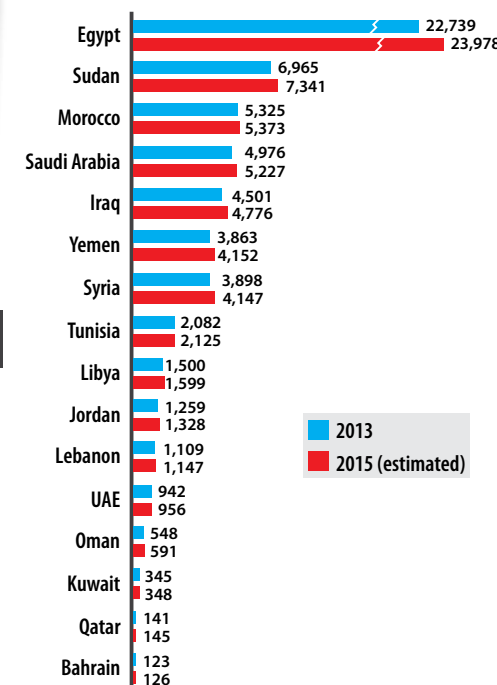
and the World Football Championship Brazil 2014. It would be a halt in the broadcasting of Turkish and Arab dramas.

(*) Born in Beirut in the forties and with dual nationalities Lebanese & French, Nabil Kazan is considered the pioneer of the Pan-Arab advertising industry. It has a solid knowledge of advertising, sponsorship, tele-events & satellite TV communication acquired during four decades by on-site working experience in the Middle East & Europe.

MAIN PRODUCTION AND DUBBING CENTERS IN THE ARAB WORLD

COUNTRY	SPECIALIZES IN...
EGYPT	MELODRAMA, COMEDY, SITCOM, ANIMATION. DUBBING HOUSES
SYRIA	HISTORICAL, EPIC AND BEDOUIN; ARAB AND MODERN DRAMA
LEBANON	AD COMMERCIALS, GAME FORMATS, MUSIC CLIPS. DUBBING HOUSES
JORDAN	ARAB HISTORICAL & BEDOUIN PROGRAMS. DUBBING HOUSES
IRAQ	DRAMA AND COMEDY SERIES
GCC	GULF STYLE DRAMA AND DUBBING IN COLLOQUIAL GULF ACCENT

MENA: TV HOUSEHOLDS (2013-2015) IN THOUSANDS



Source: Informa

ACT: 'MEDIA CONVERGENCE IS A FACT OF LIFE'



Ross Biggam, managing director, ACT



but it is still a seductive argument and one we have to rebut wherever

we can', he adds.

'So, to sum up, my team and our member companies have spent much of the past year putting the case to the EU decision-makers that copyright works well, and that anyone who wants to buy content should be in Istanbul doing deals instead of in Brussels complaining to regulators. However, EU regulators can help - and the most fruitful area for the EU to help is in addressing piracy and online theft of content'.

DISCOP

'One of the roles I have at the ACT is to communicate to the EU institutions what is going on in the marketplace. It's too easy for people living in Brussels (whether an EU regulator or someone like myself who represents the industry) to view media as an abstract idea, or as a business sector that needs to be strictly regulated to produce certain (usually vague) outcomes', says Biggam.

WhyspecificallyDiscop Istanbul?, wanted to know PRENSARIO. He answers: 'Two reasons. First, the dynamism and innovation in program making from this part of the world is not nearly well known enough to the EU institutions. Sometimes we in Brussels are scared that US content might come to take over "our" screens, or that somehow regulators can decide what is best for people to watch.'

'Rather than engage in an academic argument about this, it's much better to point to some of the great examples we have, whether it is Danish cop shows or Turkish costume dramas, of genres of content which have taken our sector by storm in recent years, because viewers like them, not because of any quota or regulation.'

'The other reason is simple. What is decided in Brussels today will be applied in Istanbul, Kiev, Tirana, Baku and Tbilisi tomorrow. I can spare the details but whether it's via negotiations to join the EU, via the Council of Europe, or just regulators seeing what has worked elsewhere and applying it domestically (see, regulation can work rather like a program format...) EU rules will impact on the daily

business practice of many market participants. So, my daily work in Brussels is as relevant to a Turkish or Kazakh company as it is to a French or German one'.

FUTURE

'Media convergence is a fact of life', remarks Biggam, and continues: 'Consumers want more on-demand or OTT delivery of content and more personalization of content. In addition of course to linear TV, which stubbornly refuses to decline despite the best efforts of the Internet gurus'.

'The best, maybe the only thing broadcasters can do is to stay ahead of the curve - so get your own OTT offer out there before a big US player gets in ahead of you, make sure you have the rights you need to offer your customers a real multi-platform experience. If viewers want to watch content on laptops, tablets they will do so, which means it is up to our companies to make sure they're watching it on our screens and not those of a competitor, legal or otherwise.'

'Specifically, many of our companies are doing some or all of this list: diversifying revenue, growing beyond national borders, exploring co-productions, dealing with digital switchover, launching OTT services, fighting piracy, moving to cross-platform/cross-device distribution, looking at on-demand windows, moving towards day and date deals for appropriate content. But in as far as I can summarize the experience of our member companies: if it works for the consumer, we'll do it'.

WHAT ARE THE EU BROADCASTERS DOING IN THE ERA OF CONVERGENCE

- DIVERSIFYING REVENUE
- GROWING BEYOND NATIONAL BORDERS
- EXPLORING CO-PRODUCTIONS
- DEALING WITH DIGITAL SWITCHOVER
- LAUNCHING OTT SERVICES
- FIGHTING PIRACY
- MOVING TO CROSS-PLATFORM/CROSS-DEVICE DISTRIBUTION
- LOOKING AT ON-DEMAND WINDOWS
- MOVING TOWARDS DAY AND DATE DEALS FOR APPROPRIATE CONTENT

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AL-GHADEER TV, IRAQ: 'DIVERSITY IS PART OF OUR DNA'



Muthar Al Bakaa, CEO, Al-Ghadeer, celebrates nearly a quarter century of resisting the media's status quo

Muthar Al Bakaa, 49, began his professional life in 1991 as part of the opposition media for the anti-Saddam Hussein movement. Today, he is the owner and CEO of Iraq's **Al-Ghadeer** TV, which he founded in 2003. The news and politics-heavy station broadcasts 24 hours a day with a staff of 300 from its Baghdad headquarters, and the station has offices in more than 10 Arab Muslim countries.

In addition, **Al-Ghadeer** broadcasts local radio in the Baghdad district of Furat and hosts the annual Al-Ghadeer Festival in the city of Najaf. Al Bakaa spoke with **Disbook** about the station's special security risks, their first animated TV movie and his desire for diverse programming.

DISBOOK: DO YOU CONSIDER YOURSELF A CREATOR FIRST OR A PRODUCER?

MUTHAR AL BAKAA: I'm struggling to be a creative producer as well as a successful businessman. The producer is the one who masters the ideas and the content. He's the one who sets the compass according to his own perspective. The message we bring to our audience is a noble one, but everything must be under control along the way. The process of being able to produce is a top priority.

PRENSARIO
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D: HOW WOULD YOU DESCRIBE AL-GHADEER'S POSITION IN THE IRAQI TV LANDSCAPE?

MAB: Following 2003 and the dawn of Hussein's regime, we witnessed fantastic changes, not only politically but also on the television front. Openness progressed, obviously, but the majority of channels are either politically or religiously [focused], so it's mainly political parties backing them, each with their one-sided political angle. They ignore many issues that the audience is curious about, such as development. What I have struggled to achieve since the early days of Al-Ghadeer is to move gradually from a terrestrial and local-provincial broadcaster, to a diverse satellite channel covering entertainment and news as well as politics and culture. That diversity is part of our DNA; this is Al-Ghadeer's position in the Iraqi television landscape. We also share with the audience many important issues regarding society, national unity and reconstruction following Saddam's regime of fear. We are far from being international, though, which is my ultimate goal.

D: WHAT SORT OF CHALLENGES DOES A JOURNALISTIC ENDEAVOR FACE IN IRAQ?

MAB: One of the main concerns for the channel is the lack of protection and official support for its journalists, especially in light of the security issues the country faces. The station's ability to produce news,

live programs and quality animation and documentary programs—as well as imported content from Syria, Libya, Iran, Egypt, Jordan and other Iraqi companies—is part and parcel to the station's journalistic future.

D: WHAT'S THE NEXT STEP FOR THE CHANNEL?

MAB: For me, finance and investments remain the most crucial issues. My objective is to attract the largest audience share. We have developed a coproduction/cooperation strategy with other Arabic radio and TV stations, and produced our first-ever animated TV movie with Karmala Channel in Iraq and Roya from Iran. Today, we are open to coproduction.

D: HOW DO TRENDS IN THE IRAQI TV MARKET DIFFER FROM OTHER MARKETS?

MAB: Ironically, even after such a long period of tyranny and oppression, the Iraqi people have the same demand as anywhere else on earth—for entertainment and dramas. In addition, the specificity of Iraqi people is their high expectation for political programs.

D: WHAT GETS YOU OUT OF BED EVERY MORNING?

MAB: I have a sense of responsibility toward my community and my people. This is what gets me out of bed every morning, to enrich the media landscape, keeping in mind that humanity and ethics should always prevail.



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INSIDE THE ELECTRONIC MEDIA MARKET IN PAKISTAN

BY MOHAMMAD HANIF RAVDA (*)

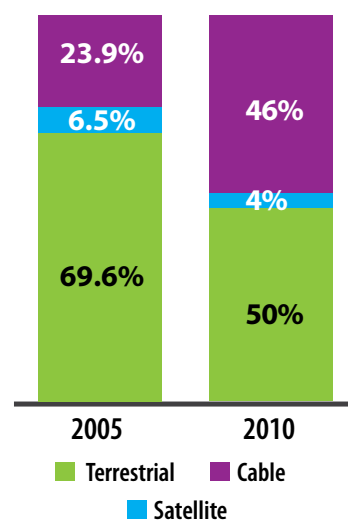


PRENSARIO publishes below a special report about the electronic media market in Pakistan, a strategic market in Central Asia of 190 million people, where 67.1% are below the age of 30. In 2002 ended the state-owned broadcaster PAKISTAN TELEVISION CORPORATION (PTV) monopoly and nowadays there are in country more than 80 TV channels, out of which 15 are major news channel and the remaining caters for entertainment, music and religion

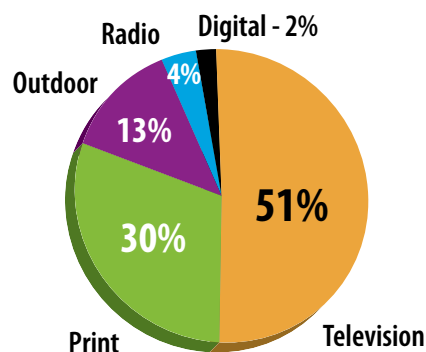
The country is divided into four provinces: Sindh, Punjab, Baluchistan, and Khyber Pakhtunkhwa each with a unique ethno-linguistic identity, together with the Islamabad Capital Territory, the north-western Federally Administered Tribal Areas (FATA), the northern semi-autonomous Gilgit-Baltistan region, and Pakistan-administered Kashmir (known locally as Azad Jammu and Kashmir). Pakistan is urbanizing at the fastest rate in South Asia: half the population will live in cities by 2025, up from one-third at present.

Owing to the worsening security situation and poor foreign investment, economic growth in Pakistan averaged only 3% per year from 2008 to 2012. High inflation, led by soaring food prices, has increased poverty levels. According to the UN's 2011 Human Development Report, 49.4% of the population

PAKISTAN: TV VIEWERSHIP, PER MEDIA (2005-2010)



PAKISTAN: ADVERTISING SPENT (2013)



suffers multiple deprivations as identified by the Multidimensional Poverty Index. Official unemployment in 2011 was 5.6% of the population; this figure was an estimate, however, which did not account for the large informal economy or the fact that under-employment levels remain extremely high.

That said, Pakistan's middle class has doubled to 70 million people in the past decade, and consumer spending increased at an average rate of 26% between 2010 and 2012, compared with 7.7% for Asia as a whole. Between 2006 and 2011, household incomes in the urban areas rose faster than inflation by an average of 1.5% per year, and the retail sector grew at 5.3% per year. This growth explains high levels of media consumption and the exponential growth of the telecommunications sector.

HISTORY

The history of electronic media in Pakistan is as old as the country itself as **Radio Pakistan** began operating the day independence was achieved after the **Pakistan Broadcasting Corporation** (PBC) was formed. TV was relatively slow to grow as it wasn't until 1964 that **Pakistan Television Corporation** (PTV) was launched. However the resident of Karachi had already gotten a taste of this new invention when a television was displayed at an exhibition arranged by the American Embassy in 1955.

PTV's state monopoly ended in 2002 when the market for the electronic media was liberalized. This led to the boom in new private TV Channels that today transmit soaps,

news, drama and talk shows to the millions of viewers. The private channels have been issued licenses for cable or satellite only, which means that PTV is the only channel that provides terrestrial services to the population

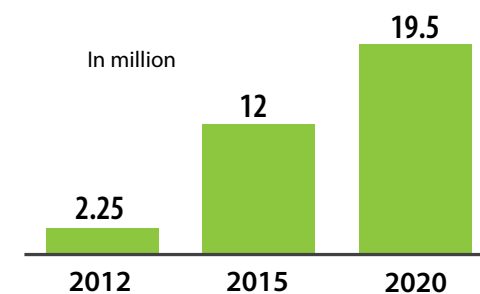
After the de-regulation of electronic media industry, TV sector remains vibrant. By now in Pakistan there are more than 80 TV channels out of which 15 are major news channel and the remaining caters for entertainment, music and religion.

Pakistani media consumers currently have low capacity to consume digital media offerings, which have significantly expanded over the past decade. Digital consumption of television remains low owing to the lack of infrastructure for transmission and consumption. According to the **Pakistan Electronic Media Regulatory Authority** (PEMRA), there are only 12 million television sets in the country, approximately one every 14 people while private surveys put the number at about 18 million.

Given that there are 86 million television viewers in Pakistan, this low number indicates that communal television watching is popular. More than half of these viewers are only able to access state-run, analog terrestrial broadcasts while 38 million viewers can access digital satellite channels that are primarily distributed via analog cables owing to the high cost of purchasing satellite dishes. In 2010, PEMRA introduced a fee structure and rules governing digital cable television transmission, and has called for a complete switchover to digital cable by 2015. However, digital cable television still has an extremely limited reach due to the high cost of set-top boxes and slow adoption of digital infrastructure by cable companies.

The total number of PCs in Pakistan is also unrecorded, but can be estimated at a few million given that there are 29 million Internet users in the country. The greatest potential for access to digital content currently rests with mobile phones: mobile teledensity is high at 69.8% of the total population. As such, mobile phone companies are seeking to exploit current Internet access gaps. However, Pakistan does not have a 3G network, which restricts the spread of mobile Internet access.

PAKISTAN: BROADBAND SUBSCRIBERS FORECAST (2012-2020)



Source: PTA In Millions

PLATFORMS

As a result of media reforms introduced by the Government, TV market was bisected between state-owned terrestrial broadcasters and privately owned satellite and cable television channels. In the past decade, Pakistan has shifted from predominantly terrestrial broadcasting (69.6% of TV households in 2005) to a roughly even split between terrestrial and cable television by 2010. According to one national survey, satellite and cable television access varies considerably by region; while 93% of television viewers in Karachi, Pakistan's largest city, have access to satellite channels via cable. A BBC survey further revealed that 69% of the urban population had access to satellite and cable television compared with 11% of rural respondents.

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

Pakistan Telecommunications Company Limited (PTCL), the largely state-owned telecoms corporation, is the only company currently holding an operational IPTV license. Additionally, three private companies have obtained mobile television licenses, and are also providing this service. Since 2005, there has also been a significant increase in Internet

usage. There are 50 operational Internet service providers (ISPs) and 29 million Internet users, more than 16% of the total population

The most rapid growth in the number of Internet users occurred between 2006 and 2008, after which the pace slowed significantly. There has, however, been a surge in the

number of broadband connections:

the Pakistan Telecommunications Authority (PTA), a government agency charged with the establishment, maintenance, and regulation of all telecoms, reports broadband customer growth of over 150% for the four years 2008–2011; in October 2012, the total number of registered broadband users stood at 2.25 million. The PTA has also forecast a rapid growth of broadband subscribers to 12 million by 2015 and 19.5 million by 2020.

Fixed broadband dominated the market in 2010 with 59% of overall subscribers compared with wireless broadband (41%). However, according to the PTA, wireless Internet subscribers overtook fixed broadband subscribers in 2011, claiming 50.5% of the market.

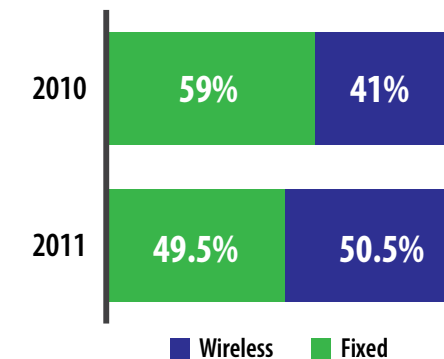
The most explosive growth and potential can be seen in the mobile phone sector. With over 123 million subscribers, more than 69% of the country's population owns a mobile phone, creating massive potential for Internet usage and radio consumption in the coming years. Despite these advances, the high number of private news channels has not directly translated into a greater diversity of news content, owing to rampant cross-media ownership.

MEDIA PREFERENCES

Although the 2002 liberalization of Pakistan's broadcast media market led to an unprecedented growth that is often described

as a media boom, concerns about the diversity of news sources persist. Approximately half the population of Pakistan continues to have limited news access, as terrestrial broadcasts by the state-owned PTV are the principal source of information in most rural, underdeveloped areas. That said the rapid growth of cable and satellite television channels has made a wide range of news sources, both local and foreign,

PAKISTAN: BROADBAND SUBSCRIBERS, PER TYPE OF CONNECTION (2010-2011)



Source: PTA

available in the major cities and towns. As of 2011, more than 20, Urdu- and regional-language private news channels dominated local content viewership.

While newspapers and other print publications have seen a decline in recent years, the online space has provided both mainstream and niche publications with an avenue for growth and new audiences. According to the **Internet Service Providers Association of Pakistan** (ISPAP), there were approximately 30,000 websites registered under the ".pk" domain in 2012.

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



LBCI, LEBANON: 'INNOVATIVE PRODUCT OFFERING AND WELL-DEFINED BRAND EQUITY'

For this DISCOP Istanbul edition, PRENSARIO publishes below a special interview done with the LEBANESE BROADCASTING CORPORATION INTERNATIONAL – LBCI. Currently, LBCI ranks number one in Lebanon holding the highest viewership rates.



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



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

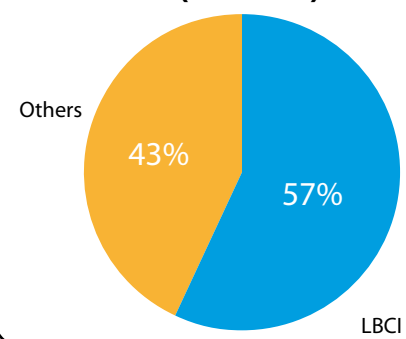
LBCI
INTERNATIONAL

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

Is a general entertainment channel always thriving to offer its viewers highly entertaining top quality programs. *The Voice, Got Talent, Celebrity Splash, Celebrity Duets*, and *Star Academy* are some of the top international entertainment programs aired on LBCI during the past years. 'Our grid consists of a variety of shows targeting all family members such as adapted international formats, in-house formats, Lebanese, Pan Arab & Turkish series in addition to current affairs & news programs', a source from the channel explains to PRENSARIO.

'The local TV market is competitive and constantly evolving and our mission remains to deliver unprecedented content with high production values. The challenge is to maintain the # 1 positioning achieved by innovative product offering & well-defined brand equity.

LEBANON: MARKET SHARE, PER CHANNELS (JAN. 2014)



Locally produced social & variety shows as well as Lebanese drama series are the trends in our market.

About LBCI's future plans, the source explains: 'In addition to continuously offering our viewers with premium content, LBCI expands its services to include premium production know-how & facilities. In terms of digital media, it currently ranks as the number one entertainment website in Lebanon and LBCI News is the leading mobile application in terms of downloads.'

'LBCI will continue to bring to its users a unique cross-platform experience, integrating more & more digital initiatives into the screen ecosystem. LBCI's future plans include focusing on our newborn VOD platform, launching new mobile apps & sites.'

AZERBAIJAN: ANS JOINS ENEX

Under a new partnership agreement between **Enex**, the international news provider, and the Azeri news channel **ANS**, ANS will share content and resources with the 41 broadcast partners that belong to Enex worldwide. The broadcaster becomes Enex's special affiliate in the region, gaining exclusive access to the video, live transmission and production facilities of the network across the globe, while the agency gains access to ANS' own reporting from Azerbaijan.

Vahid Mustafayev, president of the **ANS Group**, comments: 'We look forward to bringing this material to our viewers, making our international news coverage more unique'. **Henning Tewes**, Enex managing director, adds: 'The positive momentum in our partnership agreements testifies to the value Enex brings to its partner channels across the globe'.



OSN: MORE FILIPINO CHANNELS

Leading pay-TV network in the MENA region **OSN** has launched two new **ABS-CBN** channels: in addition to **TFC**, **Bro**, **Cinema One Global** and **ANC** (launched in April 2013), the operator now carries the TV-radio channel, **DZMM TeleRadyo**, and music radio channel, **DWRR 101.9**, both of which are included in **OSN Pinoy** packages at no additional cost.

David Butorac, CEO, **OSN**, said: 'Since the launch of the **ABS-CBN** channels last April, we have recorded nearly 40% growth in our Pinoy sales'. And **Edgardo Garcia**, **ABS-CBN**'s MD for Middle East and Europe, added: 'We have found a committed partner in **OSN** to assist in our aim to pursuing our serve the *Filipino* community better, so expect us to be even more actively present in *Filipino* events and activities next year'.

OSN currently offers a choice of three Pinoy packages with more than 50 channels to choose from including six **ABS-CBN** channels.



David Butorac

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BY GEORGI R. CHAKAROV

RWS: A KEY PLAYER ON RUSSIAN TV MARKET



Yuri Sapronov, CEO, Russian World Studios



YURI SAPRONOV, CEO at RUSSIAN WORLD STUDIOS, is one of the country's top TV execs (ranked among the Top 20 most influential media managers in the CIS). In this first interview —second part will be published at MIPTV edition—, he speaks about the company's recent projects and the ever-increasing competition on the Russian market.

CEETV: WHAT IS THE COMPANY'S CURRENT POSITION ON THE MARKET?

YS: We are focused on TV production including feature films with TV productions taking the largest share. We shoot in any type of genre but drama is our main focus. We are on the Top 5, but it differs from year to year depending on the volume of productions. But, there is no real statistics... the number of shows that go on air and the reruns is bigger than we think. We work with all channels on the market.

CEETV: WHAT WERE YOUR HIT TITLES IN 2013?

YS: Usually, we consider a series a hit when it gets 30% share and higher but it happens here seldom, once every five years. At the same time if we look at the ratings *Otpep'* (*Thaw*) is no hit at all but it made a lot of noise and people are still talking about it. In 2013 we had seven premiering titles. If we add the reruns the number grows to nearly 500 hours of telenovelas and primetime shows.

CEETV: WHAT NEW PROJECTS DO YOU HAVE COMING UP THAT YOU HAVE BIG HOPES FOR?

PRENSARIO INTERNATIONAL

YS: *Talianka* (*The Italian*), which is set after World War II with the story of a pilot who, believing his family has been killed, falls in love with a girl and have a little baby. Soon, he realizes his family was alive and now he is torn between two families with secret police agents behind his back. We are negotiating the rights in Poland.

Set in 1987 just before the Soviet collapse, *Phantom* is based on true events after the treason of Oleg Gordievsky.

Based on a Korean format, *Ob/Gyn* is a very touching and dramatic story of young woman Natasha who works in a Moscow hospital and has been in love with her mentor for a long time.

CEETV: HOW DO YOU CHOOSE THE PROJECTS THAT YOU WANT TO PRODUCE AND THEN HOW DO YOU NEGOTIATE YOUR IDEAS WITH THE CHANNELS?

YS: Firstly, you must believe in your project. Secondly, you must make sure it is produced as good as possible. We're constantly looking for ideas that might be interesting for a particular channel. Then, we present those to the channels. But the main thing during these negotiations is to be able to tell the whole idea of the series in just three lines: no matter if it is 8 or 16 or more episodes.

CEETV: WHICH ARE THE MAIN CRITERIA TO CHOOSE THE FORMATS TO ADAPT?

YS: We don't really adapt that many formats because it is not that easy to adapt the scripts to the taste of the Russian audience. For example, with this Korean series we have been re-writing the scripts for nearly two years but the story was so good and the format price was so fair that it would be a crime not to make it work. We adapt Latin, Korean and European formats and I have to say that the federal channels don't air so many projects based on formats now. Five years ago, there was this illusion that each format would guarantee success. Now, we understand that the format doesn't give you a 100% guarantee that it is going to be a hit.

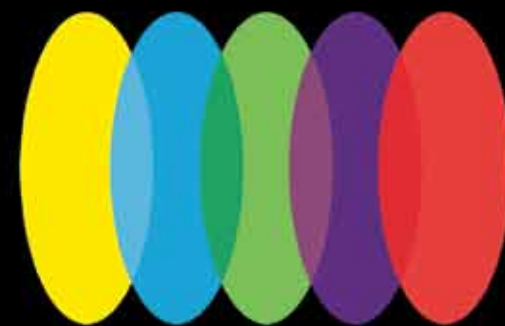
Also, there are other reasons why formats have become less attractive. On one hand, we really want some project but it takes a long time

The new series *Talianka* is set after World War IIBased on a Korean format, *Ob/Gyn* is a very touching and dramatic love story

to negotiate it, or sometimes it is not possible to buy it all because of various reasons. Or, if we finally get an agreement – the terms can be still complicated. On the other hand, by the moment a format becomes available, the situation on the market has already changed and it doesn't make much sense taking it.

CEETV: WE HAVE OBSERVED THAT CHANNELS MAKE THE COMMISSION BUT IT TAKES MAYBE TWO YEARS OR MORE BEFORE THE SERIES GOES ON AIR, BUT THE MARKET HAS CHANGED COMPLETELY. DOES THIS REALLY MAKE SENSE?

YS: Well, it makes no sense because they chase the format for five years, then it takes two years to get it on air... each format has its strong idea at the start but then the story falls thru and we have to re-write the whole story while adding lots of Russian elements to it. And during the period of working on such projects, it is very likely that another company will come up with a similar original series and if that happens after 7 years of hard work, it really makes no sense. We had such a series: we almost signed the agreement with the format rights holder as one of the networks launched a show, which was the mere resemblance of that format, and we were happy we didn't put our signatures on.



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TAJIKISTAN AND UZBEKISTAN: EVOLVING INTO GLOBAL TO TRENDS

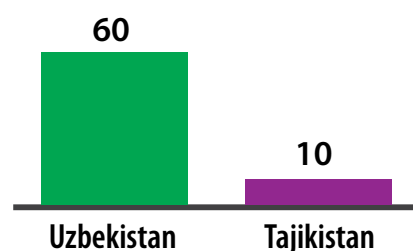
BY ARTEM VAKALYUK, MEDIA RESOURCES MANAGEMENT, UKRAINE

Television markets in such Central Asia countries as Tajikistan and Uzbekistan differ a lot from the points of view of their volume, number of broadcasters, TV-content production facilities and trends of development. TV markets of these two countries are just starting to evolve and integrate into global TV tendencies. In this article we'll give a short analysis of these two CIS territories from the point of view of current situation on their television markets.

TAJIKISTAN

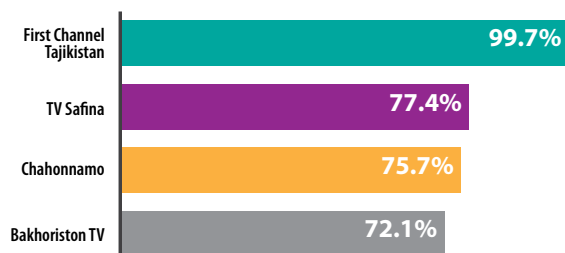
TV industry in Tajikistan is the least developed among other CIS countries but for Turkmenistan, which is the only one "closed for the others' eyes" market of the region with only 5 TV state-owned channels and without private TV stations at all. According to the TV and Radio Broadcasting committee of Tajikistan there are totally 57 TV stations in the country, 17 of which are private and the others are state-owned ones. The main distinctive feature of the local TV market is absolute dominance of regional and local

ADVERTISING EXPENDITURE IN MILLIONS OF US DOLLARS (2013)



Source: MRM

TAJIKISTAN: CHANNELS NATIONAL COVERAGE (2013)



Source: MRM

PRENSARIO
INTERNATIONAL

TV broadcasters (the majority of local TV channels are operating in the province of Sughd (one of 4 administrative divisions of Tajikistan situated on the north of the country).

Currently there are only four national-wide TV stations in Tajikistan that cover more than two-thirds of the state territory by means of terrestrial and satellite distribution. They are: **First Channel Tajikistan** (aka Shabakai Aval, 99.7% coverage), **TV Safina** (77.4%), **Chahonnamo** (75.7%), and **Bakhoriston TV** (72.1%). All of these TV channels are state-owned. Nationwide private broadcasters' absence is the main obstacle of the country TV industry development. Local authorities actually stopped issuing new broadcasting licenses in 1999 – from that time and till the beginning of 2013 only one TV channel was "awarded" by TV license – it was private **NTT** channel (stands for Independent Television of Tajikistan) which started broadcasting in summer 2007 and covers with its signal the capital of the state Dushanbe and its suburbs.

Due to the government policy that restricts appearance and development of the local private terrestrial and satellite broadcasters, some Tajik internet TV channels started to emerge in 2013 (for instance, **Istaravshan TV**, **TAJIK Internet TV**, **Tojikoston TV**, etc). Also in August 2013 one more private Tajik satellite TV channel started its activity. It was **Safo TV**, headquartered in Moscow (Russia), but covering both the territories of Russia and Tajikistan.

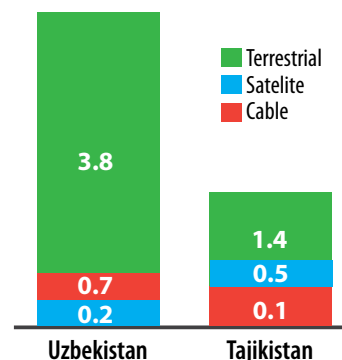
TV advertising market in Tajikistan is rather small – less than USD 10 million (the population of the country nears 7.4 million people, there are approximately 2 million households). Out of 2 million television households, 1.4 million households rely on the terrestrial platform for their primary television reception while 500,000 households rely on satellite, and near 70,000 households are subscribed for the cable TV services. Dominance of the state-owned channels

< 44 >

UZBEKISTAN

For the number of TV households TV market of Uzbekistan is more than twice bigger than one of Tajikistan – there are about 4.7 million households and 7.4 million television sets in use in the country. The terrestrial platform is used by 81% (near 3.8 million) of all television households. Cable and satellite television delivery platforms are

TV HOUSEHOLDS, PER PLATFORMS IN THOUSANDS (2013)



Source: MRM

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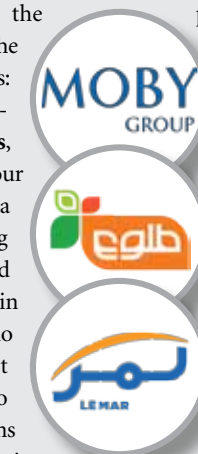
MOBY GROUP: 'AFGHANISTAN'S MEDIA MARKET IS TRULY BOOMING'

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

Zaid Mohseni, COO of **Moby Group**, describes to **PRENSARIO** the assets of the main TV group of the country: 'We operate three channels: **Tolo TV**, a Dari-language general-entertainment channel; **ToloNews**, Afghanistan's first and only 24-hour TV news channel, and **Lemar**, a Pashto-language channel offering general entertainment, news, and current affairs'. Moby's holdings in Afghanistan also include two radio stations, a general-entertainment satellite channel that broadcasts into Iran, **FARSII**, and a communications firm, **Lapis**, which operates in Afghanistan, Pakistan, and Yemen.



Zaid Mohseni, the COO of Moby Group



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

becoming increasingly popular with viewers and account for 10-15% and 4-5% of all television households, respectively.

Although a government decree officially eliminated state censorship in 2002, independent media are still severely restricted. In 2006 authorities further tightened state control by requiring re-registration of all media outlets not passing a summary review of qualifications. In 2012 almost 40 independent private television stations and 9 state-owned regional TV channels were operating in the country, but four state-owned television stations, run by the **Television and Radio Company of Uzbekistan**, dominated the market.

'We plan to launch a general-entertainment family channel in Iraq in 2014', highlights **Mohseni**, and continues: 'Afghanistan's media market is truly booming. There has been more than 20% annual growth in the number of outlets each year since 2006, with over 75 active TV channels and 175 radio stations identified. There are a few hundred print media outlets and dozens of websites.'

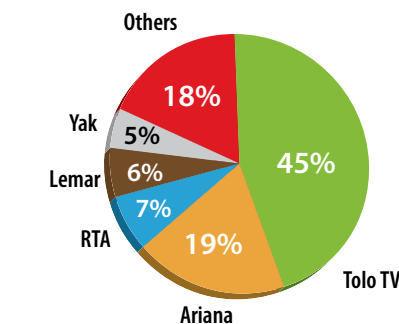
'The media sector has between USD 75 million and USD 100 million revenue per year, with 60% of that driven by ad revenue. TV has 88% penetration in urban homes, and 28% of urban homes own a computer. About a third of Afghans watches TV for more than 2 hours per day. Six million Afghans have access to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

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

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

Explains **Mohseni**: '**Kaboora**, a production

AFGHANISTAN: MARKET SHARE, PER CHANNELS (2010)



Source: Altai Consulting

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

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



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

adapted in Uzbekistan).

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

< 45 >

PRENSARIO
INTERNATIONAL

ITV INTER MEDYA, "MADE IN TURKEY"



Ahmet Ziyalar, managing director, y Can Okan, CEO, at the last MIPCOM edition

With 21 years in the market, **ITV Inter Medya** (Turkey) is one of the leading Turkish content distributors and for Discop Istanbul presents a wide slate of dramas, including series, telenovelas "made in Turkey" and TV movies. The company also distributes the series from **Construir TV** (Argentina) for this region.

Can Okan, CEO, y **Ahmet Ziyalar**, managing director, describe to PRENSARIO: 'In recent years we have grown steadily in MENA and the next step is Western Europe, Asia and the

Americas. The nature of the content we provide also radically changed: telenovelas "Made in Turkey", TV series, and to a lesser extent, Turkish feature films, started to draw broad interest from all markets as well as the Middle East and North Africa'.

Among the main titles for Istanbul, the company highlights the mini-series *Butterfly's Dream* and *Black Rose*, a series about two brothers who are at war: the oldest has always been jealous of his younger brother and all he wants is to be the sole heir of the inheritance and the sole leader of the family.

20 Minutes is a super production that mixture drama and crime. It tells the story of a man who takes four years to marry the woman he loves; nine to get the job he wanted, 10 years to build his home, 12 years to raise her two children, 35 years to build a happy family and ... only 20 minutes to lose everything.

Also, **ITV** exhibits the series *In Between*, based on the famous novel of **Peyami Safa**, a



The mini-series *Butterfly's Dream*, highlighted at Discop

story that represents life and love with all its contradictions and conflicts; the drama *The Family* that follows the fantastic story of some super men: one can move things around with his mind, other can read minds, other become invisible and the last one can generate electricity from her fingers.

Lastly, *Prisoners of Love* where the only thing in common that four women from very different lives and social status share is their imprisoned lovers.

VIEWING BOX 16

ABS-CBN: FEATURE FILMS

ABS-CBN International Distribution (The Philippines) promotes its brand-new drama series *Against All Odds* (26x'45), about a woman that took away her son and almost her life.

The Legal Wife (45x'45, available on Q3 2014) and *If Only* (30x'45) are two HD series, followed by *Got to Believe* (50x'45, available on Q2 2014) with the love story of two kids, *Tomorrow can wait* (30x'45) and *Raging Blood* (60x'45).

The distributor also highlights its feature films slate with *Bride for Rent* ('115) and *She is the One* ('110) and the lifestyle show *Green Living* ('20-'24 per episode).

BOOTH #524

GET CLASSIC WITH A+E

A+E Networks (USA) arrives to Istanbul with several titles: first, the new movie *Flowers in the Attic* ('120) that tells the horror story of four siblings who are forced by their grandmother and mother to live in an attic.

Then, the new series *Don't Trust Andrew Mayne* (13x'30), *Big History* (16x'30 + '120 special), *Kim of Queens* (12x'60), and the classic titles about real-life characters *Duck Dynasty* (58x'30 + 4x'60), *Storage Wars* (104x'30 + 2x'60), *Pawn Stars* (272x'30 + 2x'60), *Counting Cars* (52x'30) and the returning entertainment series *Dance Moms* (82x'60 + 9x'60 specials + 1x'90 special + '120 special + 4x'60 reunion specials).

CONSTRUIR TV: SOCIAL TRANSFORMATION



Ralph Haiek, general manager, and Alejandra Marano, executive director



With three years on air, **Construir TV** (Argentina) has become a quality alternative in which workers are the protagonists. The channel reaches over 2.5 million homes and the grid includes non-linear formats that could be adapted in any worldwide market.

Ralph Haiek, general manager, and **Alejandra Marano**, executive director, say: 'We have short programs and docu-series about our four axes: industry, workers, social content and education. Through strategic alliances, such as the one we have with **ITV Inter Medya** (Turkey) we are closing sales of our series to distributors and TV channels in Eastern Europe, Latin America and Europe. For example, they have recently sold *The Yellow Table* (26x'13) to the Turkish network **TV Minika**'.

PRENSARIO
INTERNATIONAL

'In 2013, we launched **Construir Cine**, the first cinema festival about work in Argentina; our **iPad** app in Spanish and English is already available on **Apple Store**. We have built a big and active community on social networks that give us a very important feedback about what they are interested in, and help us when we have to produce and schedule our content'.

After a successful Natpe Miami, the company highlights through **Inter Medya** three new series at Discop Istanbul: *Trades over time*, about the history of some fundamentals works; *Art & Work*, that mixes work and art, and *History Restorers*.

'For 2014, we are focused to continue selling our contents abroad, in the global distribution of our contents on digital platforms, and to reinforce and extend our presence in the independent digital platforms in Argentina', conclude Marano and **Haiek**.



Art & Work

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PAY ATTENTION TO KANAL D'S OFFER



Karim Emrah Turna,
international sales executive

Kanal D is a key referent in the local TV market: it is not only the #1 broadcaster with 10.77% of share (all day, total viewers) but also one of the main content exporters of Turkish series abroad.

Karim Emrah Turna, international sales executive, describe to PRENSARIO: 'We will be presenting our new titles to both our existing and new clients, and looking for new opportunities in different platforms. In addition, we are adding a couple of new titles to our catalogue in the upcoming weeks. Discop attendees are the first ones to be informed about those new projects'.

Among the top series, the distributor highlights *Waiting For The Sun* (+30x'95), with the story of a woman that finds hard to adapt to Istanbul, after moving from a small village: she tries to find her unknown father while trying to adapt her new life, new school and new friends.

In *Mercy* (+30x'90) a young woman who has overcome many difficulties in her life through hard work and determination, is well on the way to really becoming someone successful without help from anyone. *Secrets* (18x'95) tells the story of a family that has a life to be envied, but his little son is taken from his home by two police officers one night, and the life of them change forever.

The classic titles from the distributor are *Kuzey Guney* (80x'90), about two brothers' struggle to survive in their own worlds, and the successful *Fatmagul* (80x'90), where a woman is counting days to marry her fiancée, but one



Waiting for the Sun and Mercy

night she gets raped by people she has never met in her life before.

'Discop Istanbul is turning into a "must attend" international market for all buyers and sellers from all around the world. It is important for players that are looking for new opportunities such as in production, financing and distribution across all platforms. Istanbul has lots of advantages for all the attendees. It is in the center of the east and west and has direct flights from almost all territories', completes **Turna**.

KESHET: RISING STAR ARRIVES TO TURKEY

Keshet International interactive singing talent show format *Rising Star* has been snapped up by Turkey's **Acun Medya** (*The Voice*, *Survivor*, *Turkey's Got Talent*), who will produce the series in house. **Acun Ilcali**, CEO at the production company: 'We believe it's technological twist is going to begin a new era in TV where the audience has real-time control over the course of live programs'.

Keren Shahar, head of distribution and acquisitions, **Keshet International**: 'With several international series now in production, we

are thrilled to see the show coming to life all over the world'.

Since its launch at MIPCOM 2013, *Rising Star* has been picked up by more than 20 broadcasters, including the US (**ABC**), UK (**ITV**), Spain (**Atresmedia**), Italy (**Toro**), France (**M6 Group**) Russia (**Rossiya 1**), Germany (**RTL**), the Nordics (**Nordisk**), Hungary (**TV2**), and most recently Brazil (**Globo**), Argentina (**Telefe**) and Portugal (**TVI**). The season finale in Israel peaked with a 58% share of the total domestic audience, attracting more viewers than the country's election night.

RTVE: SPAIN MEETS TURKEY AND MENA



Maria Jesus Perez,
sub director of international sales

Corporacion Radio Television Española (RTVE) assists to Discop Istanbul through **Maria Jesus Perez**, sub director of International sales, and **Fernando Hernandez**, sales executive, who push the catalogue of the largest audiovisual

Ferdinand begin their reign, but they have to overcome a series of difficulties and embark on a war.

Together is an *emotainment* format: it is a useful public service format that channels requests for help and proposals for support, by encouraging solidarity within society. Knowing and Winning is a half-hour quiz show where three contestants face one another in a series of different cultural knowledge and mental agility test. Lastly, *Mom Detective* (19x'70) tells the story of a mother that is not just any inspector... her weapons, intuition and instinct help her dismantle the most perfect alibi.

The company has a successful Natpe Miami last January, where the most recent format of the company *Together* attracted 'considerable' enthusiasm: 'Various large program retailers expressed interest in presenting the idea in



Together

different countries. It has also appealed to various TV stations in Chile, Argentina, Brazil, Panama and Colombia', says Perez.

TVE has established itself as a key reference for high-quality Spanish productions for VOD platforms. For instance, *Isabel* has consolidated its dominant position within the realm of Spanish language fiction on the Latin American market with its second season. The series' third season is still in production.

group in Spain.

The company highlights the most successful historical series of the Spanish market *Isabel* (26x'70), which narrates the life of one of the most prominent women in Spanish history, Queen Isabella the Catholic. Isabella and

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BOOTH #521

TELEVISA: FAST GROWTH IN TURKEY & MENA REGIONS



Mario Castro, director of Asia and Africa

Televisa Internacional (USA) arrives to Discop to promote its well-known and successful telenovelas, but also the strong catalogue of entertainment formats.

Mario Castro, director for Asia and Africa, comments: 'Istanbul is a great opportunity to meet with the entire TV industry of Turkey and MENA, an area of the world where local production has grown and as we have seen in the last few years.'

'We still have telenovelas on the air in various important satellite channels and Pay

TV networks across the region. Also, we have an important opportunity to do business with free TV because there is an increasing interest in our entertainment & scripted formats. Our presence has continued due to key strategic coproduction, joint ventures and volume deals'.

The products the distributor is pushing are *Loving you is all I Want* (150x'60), with **Cristian Dela Fuente** and Karyme Lozano, *Forever Yours* (150x'60), with Susana Gonzalez and **Guy Ecker**, and *What Life Took From Me* (150x'60), which was a success in Mexico.

On the entertainment side, the company highlights: *Sing It Sell It* ('30), a program in which any object can be sold by unknown people; *Little Giants*, a reality show which



Loving you is all I Want, telenovela, and *Sing It Sell It*, entertainment

gathers the Mexican families in front of the TV; *Parodying* (14x'150), where two well-known comedy personalities form teams to compete; and Spanish **La Competencia**' *Everybody And Their Brother*, carried out by a group of 100 people putting acts together like a flashmob which is directed by "the leader", who will also be hosting the show

Lastly, the scripted format *Los Gonzalez* ('20), a mix of reality and fiction that shows a family head that has been fired and started creating a hidden camera pranks website in which he involves the entire family.

BOOTH #5-20

MEDIASET: STRONG SCRIPTED FORMATS



Manuela Caputi, International Sales Manager

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

As finished programs, *The Secrets of Borgo Larici* (7x'80 or 14x'40) is a costume drama series about the secrets of a small town called Borgo Larici in the '20s. *A matter of respect*, which fourth season in production, is available as miniseries (6x'100) or series (12x'50): it is about two brothers that decide to avenge their father's death. It was adapted in Russia. *Intelligence* is an action miniseries (6x'100) and series (12x'50) dedicated to espionage and secret services produced by Italian television.

Kissed by love (12x'50) is a family comedy series full of sentiment, joy and funny twists but love, in all of the forms it can present itself, is always victorious... and *Blood Ties* is a drama history available as miniseries (6x'100) or series (12x'50) that happens in the '60s, where three siblings are bound by a secret: the code to an account which contains the loot from a bloody robbery.

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The Secrets of Borgo Larici and *Intelligence*

PRENSARIO
INTERNATIONAL

ARTEAR: SERIES WITH TWIST

Artear International (Argentina) highlights for Turkey and MENA region a good variety of series with twist for late prime time, as well as telenovelas and documentaries.

Among the highlighted products is *The Brave Ones* (218x'60), a telenovela that narrates the story of three brothers who take the law into their own hands against the most powerful man in town. In *Compulsive Times* (14x'60) an experienced doctor is responsible for treating a group of outpatients with diverse severe ailments. And *Wolf* (55x'60) tells the story of the seventh son of a seventh son, who after his 30th birthday, during full moon becomes half man, half wolf.

Another top product from the distributor is *The Social Leader* (40x'60), which tells the story of a political staffer, a man that keeps his dreams alive in a very peculiar way: through the political and social work within a extremely poor neighborhood. It reached an average rating of 17.7 and a 44% of the market share during its emission in 2012, when it won the Golden Martin Fierro, the main award of Argentine TV.

Other new series is the cooking program *Boulangerie* (39x'26), in which two French pastry chefs reveal different techniques and recipes different delicacies baked in their traditional firewood oven. Lastly, the documentaries *Hotels and Spas of Latin America* (13x'26) and *Legacies* (13x'26).



Luciana Egurrola, Senior Sales Executive



The Brave Ones, classic telenovela

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TELEMUNDO: *THE IMPOSTOR* ARRIVES TO ISTANBUL



Xavier Aristimuño, SVP International Business Development & Digital Media

Telemundo Internacional (USA) launches at Discop Istanbul the telenovela *The Impostor* (120x'60) with story of a humble and beautiful young woman from Acapulco who falls deeply in love with the son of a ruthless businesswoman and owner of an important shipping company, who committed a terrible injustice against her father.

In *Part of Me* (120x'60) two women share a tragic and supernatural destiny that binds them together even after death, and

at *Broken Angel* (120x'60) the lives of a perfect family are shaken when a music instructor discovers that the granddaughter of the town's most powerful lawyer is using illegal substances and her mother becomes obsessed with him.

Karina Etchison, VP Sales EMEA, explains: 'Part of the business philosophy of our international division is to identify new development ideas to create original content and generate innovative businesses for the different television platforms'.

Following Telemundo's offer is *My Dear Handyman* (141x'60), co-produced with **Globo TV** (Brazil), which follows a simple woman

who lives by strong ethical values. No faucet, pipe or switch can resist her hands. With her unusual job as a handyman she provides for her three children and her grandson, while paying no attention to what people think of her.

Lastly, the entertainment format *Mad about Dance* from **Reset TV** (Spain), where two groups of celebrities come together to compete in teams, knowing only one will win, anything goes. Is the contest that tests the ability of 12 artists, who are not professional dancers, in weekly performances. The purpose of these battles: to defeat all opponents and win cash prize reward for the charity of their choice.



The Impostor



Mad about Dance from Reset TV

ARMOZA: KANAL D TAKES *WHILE YOU WERE SLEEPING*

Armoza Formats new format *While You Were Sleeping* has been picked up by leading Turkish broadcaster **Kanal D**. Both companies have worked together in the past year on prime time game show *We Believe In You*, which is now also airing on **MTVA** in Hungary.

Developed by **Assi Azar** and **Kastina Communications**, is the first ever game show that gives you money while you're fast asleep. One partner must answer trivia questions correctly to stay in the game, or risk performing a crazy and hilarious challenge – all without waking up their partner!

The humorous game show was launched at MIPCOM 2013 to positive responses.

Dilek Dağcıoğlu, director of programs, **Kanal D**: 'We give great importance to innovative ideas and always trying to broadcast different formats to meet with our audience.' And **Avi Armoza**, CEO, adds: 'We are always looking to bring the most innovative and fresh formats to the market. *While You Were Sleeping* is a crazy new show that makes all audiences laugh!'



While you were Sleeping

SMILEHOOD, A 360 PLAYER TO DEAL WITH



Silvana D'Angelo, director, Smilehood Media

After MIPCOM and Natpe Miami, **Smilehood Media** (Argentina) has established itself as a player to be reckoned with, by including areas of distribution, licensing and production, it focuses on just a few products but high quality, making a difference in the market.

Silvana D'Angelo, director: 'With the animated series *Plim Plim* we close deals in Italy and India, which will give wide circulation. All this added to the partnerships we have with major companies to boost 360° businesses such as

CMD for digital content and **Universal Music** for the international exploitation of the music'.

Broadcast on **Disney Junior** Latin America and **Discovery Family** USA, the series has a mass appeal that lies in its positive message for the little ones. 'It is not just a series, but also a multiplatform content (TV, theater, merchandising, music and apps). Soon, it will be on air in India, Turkey, Israel and Italy, and are very advanced in Spain and France', she adds.

Co-produced between **Onceloop**, **Coca-Cola TV**, **Warner Chapell** and **Framezero** with original idea and musical production of **Sebastian Mellino**, and executive produced by **Sergio Pizzolante**, EVP & GM at **E! Entertainment**

Television, the teen musical series *Wake-up* premiered last November on **E! Latin America**. 'It had a great reception from buyers from Spain, Italy and France. The first season has 13 episodes with 56 songs', explains **D'Angelo**.

'After the great success at social networks, the comedy *According Roxi* released its first book and it will be shot for TV, which will be available worldwide. It is about motherhood that has become a cult series for the female audience. These three products, thanks to **Cinergia Dubbing** (**Lilian Hernandez**), were translated into English and French for buyers in the world', completes the executive.



Plim Plim, multiplatform

ATV, TOP DRAMA PLAYER IN TURKEY



Ziyad Varol, Head of Sales at ATV

ATV was during 2013 the #1 broadcaster of drama series in Turkey with successes such as *Valley of Wolves*, *Fugitive* and *Tatar Ramazan*, which has reached its final, completing 26 episodes, with great success.

Ziyad Varol, Head of Sales at **ATV Distribution**, explains: 'Expansion to new

markets such as Pakistan and Ukraine was our focus this past year. We have partnered with new clients in the Balkan region, which we already had presence in. Middle East maintains its stable situation but we are expecting it to grow in 2014. Generally it was a successful year and we can see an increasing trend both in our market expansion strategy and sales'.

At Discop, the company highlights *The Noble of Today*, *Fugitive*, *Tatar Ramazan* and *Peace Street*. 'In the upcoming days, we will introduce new drama series to our audience. As we have a vast library size, our classic series such as *Sila* and *Unforgettable* are also available for acquisition'.

Sales were 'mostly focused' in Balkans, Middle East and Caucasian regions in 2013/2014, says



The Noble of Today and *Tatar Ramazan*, two of the top series at Discop

Varol and he adds: 'We had a very good start in 2014 and the sales already reached 1/3rd of previous year's total amount'.

'Eastern Europe is one of the major markets of our business. We are already having strong presence in this region. For Turkish drama, apparently there is no border to be clarifying as it has a very strong presence in all countries. Surely, there is still room for us to be the first choice of our potential clients'.

ALL3MEDIA: *GOGGLEBOX* ARRIVES TO ISTANBUL



Kelly Shek, Sales Executive, and Facundo Bailez, Format Sales Executive



British **all3media international**' top recent factual entertainment format *Gogglebox* arrives to Discop Istanbul and promise to have a great reception among the attending buyers. This audacious fly-on-the-wall format captures first-hand reactions to the week's television broadcasts. It's life... in front of the television.

Other title entertainment format is *Reflex* that trigger sounds, synapses fire, muscles tense, breathing halts, pupils dilate... and in the blink of an eye, the world's fastest game-show has begun.

The distributor is an interesting drama provider as well. *Miss Fisher Murder Mysteries* 22 (13x'60) returns to the streets of 1920s Melbourne, where a lady is once again fighting crime with her unique cocktail of wit and style with a twist of romance

On factual entertainment, there are other two ready made products: *Speed with Guy Martin* (4x'60) where a man loves speed so much that he

has decided to challenge four extraordinary land speed records – hydroplaning, human powered flight, tobogganing and speed on a push bike. And *Gadget Man* 2 (6x'30), where a man explores the wonderful world of gadgets and how much easier they can make our lives ranging from parenting and DIY to the great outdoors

Lastly, the "constructed reality" format *Families at a Crossroads*, which is a success in many Central and Eastern European markets: there are over 600 scripts available for adaptations. It's a new take on the dramatised reality genre from leading German producer **Filmpool** (owned by **all3media**) where life is stranger than fiction. Each episode focuses on a gripping story of self-discovery told in a documentary style through the eyes of our female hero.



Gogglebox, new factual entertainment format



Gadget Man

TVN, FROM POLAND WITH LOVE



Recipe for Life

TVN (Poland) pushes at Discop Istanbul its drama series, feature films, documentaries and magazines that has been promoting in the international and regional markets such as MIPTV/ MIPCOM, Natpe Budapest and AsiaTV Forum through **Dorota Kamińska**, international sales manager.

'Our titles attract a wide audience and have greatest market shares on TVN Poland. We bring new seasons of our most successful drama series *Recipe for Life* (65x'60), *Medics*, (39x'60), *True Law* (54x'60), and our mystery series *Marked* (13x'60), as well as the romantic comedy *Letters to Santa*, she explains.

CISNEROS MEDIA, IN ISTAMBUL



César Díaz, VP

Chirinos, who was imprisoned for murder.

In addition, CMD proposal includes *Lucia's Secrets* (75x'45), and two new enchanting telenovelas: *Sweet Thing* (150x'45), in production at **Venevision Studios** in Miami, and *Emerald Heart* (120x'45), being produced by **Venevision** in Venezuela starred by Irene Esser (Miss Venezuela Universe 2011).

The company is also promoting reality series, such as *All for the Crown* (15x'45) scripted teen series like *My Life In Sayulita* (17x'30), as well as the comedy *My ex wants Me* (159x'45), the football magazine *Inside Football* (34x'30) and the variety program *Latin Angels Special* (52x'30).

Also, there is an important focus on *edutainment* programs such as the wildlife documentaries *Anima Atlas* (208x'30) and *Safari Tracks* (52x'30), both produced by **Bellum Entertainment**, and *Time Compass* (16x'30), produced by **Sol90**, about the history of the greatest civilization: mankind.

Cesar Díaz, VP, attends the market, and comments: '2014 has begun with much enthusiasm as we are introducing our new company name and focus, and thanks to our associated and affiliated production companies, we bring new programming to Istanbul.'



Dangerous Confessions

Cisneros Media Distribution (USA), formerly **Venevision International**, presents at Discop Istanbul its brand new thriller series with a working title *Dangerous Confessions*, starring **Lorena Rojas** and **Sebastian Ligarde**.

The series is currently in production at **Cisneros Media's** studios in Miami, and will consist of approximately 60 episodes; it is based on Ibeyise Pacheco's book *Sangre en el Divan*, which tells the story of the late Venezuelan psychiatrist Edmundo

AZTECA/COMAREX: NEW SERIES & TELENOVELAS

Generating over 10,000 hours of content per year, **Azteca** (Mexico) is one of the world's largest producers of Spanish-language television programming. Through the distribution company **Comarex**, it launches at Discop its brand new telenovela *Lucky Me* (120x'60) with a very charismatic, noble and lucky taxi driver.

Forbidden Love (120x'60) shows a love triangle in a textile emporium, while in *The Agency* (120x'60) a woman is willing to stand out in a man's world and in *Destiny* (120x'60) a woman is looking for his biological mother, until she realized that is the woman with which she is fighting for the love of a man. *Timeless Love* (120x'60) is about a married couple that will have to overcome all manner of obstacles and intrigues in their search for happiness.

The company also highlights the series *Confessions from the Beyond* (13x'60) and *The Lieutenant* (24x'60), developed by **Azteca & Benjamin Salinas** and **Roberto Gonzalez**, as well as the telenovelas *The Other Side Of The Soul* (124x'60), with Gabriela Spanic, *The Kings* (125x'60), *Prisoner of Love* (120x'60), *Loving You* (120x'60), *Legendary Love* (165x'60), *Trading Lives* (130x'60) and *Under A Red Sky* (171x'60).

From **Comarex** independent catalogue, it is highlighted **MTV Networks** series *Niñas Mal 2* (70x'60), the thriller *Senior Year* (70x'60), the teen telenovela *Popland!* (70x'60), as well as three seasons of **Nickelodeon** series *Grachi* (50x'60) and the interactive format *All Connected* (24x'60).

From **Mediset Italy**, it presents the thrillers *Mystery Island* (60x'100) and *Angel Face* (8x'50), and from **HBO Latin America** four series available for Eastern Europe, Africa and Asia: *Alice* (13x'60), *Hijos del Carnaval* (12x'60), *Mandrake* (13x'60) and *Mujer de Fase* (13x'30), produced in Brazil; *Capadocia* (39x'60), from Mexico; *Epitafios* (26x'60), Argentina; and *Fugitives* (26x'60), from Chile.



Marcel Vinay Jr., CEO, and Martha Contreras, sales for Asia



Fugitives, from HBO

ENTERTAIN WITH TVN

Apart from the successful telenovelas, distributed as ready made or format worldwide by **Telemundo Internacional**, **Televisión Nacional de Chile** is pushing internationally its catalogue of entertainment formats, which are not only very successful in the local market, but also in some territories of South America.

Ernesto Lombardi, manager of international business, and **Alexis Piwonka**, sales and marketing, explains to PRENSARIO: 'We have long experience in realities, talent and game shows. Chilean reality shows have a lot to surprise international audiences... they are fresh, originals, with rhythm and can work really

well in the most demanding TV markets', they remark.

Is the case of *Apuesto por ti*, about people with extraordinary activities that surprise visually, which has been optioned in Spain and Argentina, as well as **TC Televisión** in Ecuador, whose premier on January 26th, obtained peaks of 29.5 rating points (Guayaquil) and 22.6 rating points (Quito), being the #1 program in the 8pm slot betting *The Voice* (**Ecuavisa**)

Calle 7 is another big blockbuster from **TVN** with five years on air, which also has a tremendous success in **TC** with 18.3%



Apuesto por ti, which had a great premier last January, and *Calle 7*, a big show at 5pm slot, are very successful on the Ecuadorian broadcaster **TC Televisión**

market share at 5pm with a impressive 360° development through social media; *Rojo - Fama Contrafama* returned with incredible numbers: is a tournament of 12 dancers and 12 singers that are being eliminated week-to-week up to the great *finale*; and *Peloton*, where common people received a hard military training and only the stronger survive.



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CALINOS: ALLIANCES & CO-PRODUCTIONS



Firat Gulgen, CEO

Calinos Entertainment (Turkey), one of the pioneer distributors of Turkish products, brings to Discop a wide offer of contents, including own productions and third party series. The company is planning to launch a Pay TV channel, **DramaTiVi**, and has concreted a deal with local broadcaster **Show TV** to distribute worldwide their series.

Firat Gulgen, CEO: 'DramaTiVi will contribute to expand Turkish series in the world: it will be launched within various countries that have wide range of Turkish series audience around. Regarding the deal with Show TV, from now on we will be collaborating on the international distribution.'

Its own production *Hidden Lies* is about a young man with a beautiful family that run

a successful business, but he met a woman that change his life foreve. *Love and Dreams* revolves around a power struggle within a wealthy family; *Different Lives* is about a state high school where poor students study that is burned down after a fire.

In *Endless Love*, a man is trying to survive under the hard circumstances of his daily life, and *In Between* is based on Peyami Safa's famous novel with the story of a beautiful young girl, who is stuck between two different lives. Lastly, the second season of *Don't Worry About Me*.

Continues **Gulgen** about sales: 'Especially Balcan and Middle Eastern distributors are looking for Turkish series. The biggest reason of Turkish series' popularity in Balcan and Middle Eastern Countries is the culture, family structures, attitudes towards life, etc.: our heroes are more believable to them unlike foreign stories. Since the broadcasters are leaning towards producing local programs, they are more eager to acquire format rights.'

And he completes: 'With our newly catalogue, we expect to add new countries in which we are already active. We have signed exclusive agreements with few producers. We plan to focus on co-productions by building partnerships with international producers. Lately, TV channels started to distribute their own productions, producers are selling their own products.'

PAVILLION 6



Hidden Lies



Love and Dreams

UNIVERSAL CINERGIA DUBBING

Universal Labs of America, a leader in dubbing in all languages and subtitling, was set up in 1994 by **Liliam Hernandez**, managing director, who celebrates last Natpe Miami 20 years in business and 33 year as an executive in the Latin American audiovisual industry.

Together with her business partner **Gema Lopez** founded

in 2012 **Universal Cinergia**, based in Miami, Florida, in a 10,000 square foot building that provides services for the worldwide TV industry. 'Is honor for us to announce our new facet: we are expanding five new studios in Mexico, and debuting with major Turkish productions for the Latin American market', she says.

'We offer our services to international producers, channels and global distributors from Europe, Africa and USA, as well multiple countries in Latin America; our multilingual dubbing of native talents based here in South Florida (French-Paris, Portuguese-Brazil & American-English) with our specialty in French. We worked for films, series, animations, documentaries, soap operas, corporate presentations, and infomercials, etc.'

Universal Cinergia dubbed production meets the quality required for all majors' principal television stations in the entire world. After Natpe Miami, the company closed with major projections for 2014. 'We attend Discop Istanbul for the first time to give welcome to the Turkish schedules programs for our Latin American market', concludes Hernandez and Lopez.



Gema Lopez and Liliam Hernandez celebrated Universal Labs 20th Anniversary during Natpe Miami with a big party in a boat

GLOBAL AGENCY, STRONG TITLES



Senay Tas, sales director, Global Agency

'2013 was the company's best year ever in terms of business and 2014 will be even better. We are very selective in our acquisitions and are adding strong titles to our catalogue that appeals to the TV audience all over the world.'

Senay Tas, sales director at **Global Agency**, continues: 'At Discop, we bring entertainment formats and strong drama series such as *Lovebird*, a high budget period drama, based on the best-selling Turkish novel *Çalikusur*'.

'We are also launching two documentary series based on two of our most popular series *Magnificent Century* and *Lovebird*, which show the "making of" of these productions. On formats, *Keep Your Light Shining* will soon be produced in Germany and France: it is a fast paced singing talent show that has great visual dynamics', remarks **Tas**.

Additionally, the distributor added two new titles: *Dating Pool*, where the winner from a team of men and a team of women will get to go on a dream date to an exotic place, and the singing talent show *Bring 'em Back*. 'Buyers are mainly looking for original ideas and we work hard to present them projects with good track records on the market', she says.

Global Agency's unscripted format sales have doubled during the last two years with *Shopping Monsters*, *Blind Taste*, *Rivals in Law* and *Keep Your Light Shining* being sold to many of territories. 'We are currently evaluating the possibilities of entering the production business in the near future', concludes **Tas**.



Keep Your Light Shining, new singing talent show

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THE SINS OF RECORD



Delmar Andrade, director of International Sales

Record TV Network (Brazil) promotes for the MENA region its new series *Sins*, the story of a family that arrives to Brazil in the early '70s to escape the police and the financial difficulties of a Europe at war.

The distributor has also become a leader in Bible series, among which stands out the latest *Joseph of Egypt* (38x'60) that tells the story of a young man who returns to reclaim the throne that was stolen and save his people. It was filmed in Egypt and the Atacama Desert (Chile) at a cost of USD 36 million and got a huge reception for the latest edition of MIPCOM in October.

Other highlights are the series *The Penny Lady* ('45), about an abandoned, uneducated woman who must work twice as hard to give their children a brighter future, and *Tricky Business* (163x'45). The most successful series in 2013 was undoubtedly *King David* (30x'60), released in **MundoFox** for the U.S. Hispanic with excellent results of audience: the slot in which it was transmitted (8pm) grew 300% in audience opening the door to new titles.

The catalogue includes the telenovelas *Jackpot!* (234x'45), the story of a group of friends who become millionaires in the New Year's Eve; in *Masks* (125x'45), a wife of a rich landowner from Mato Grosso do Sul is kidnapped along with her son while returning from a therapeutic cruise to cure her postpartum depression.

Delmar Andrade, International Sales Director, explains: 'In addition to the series and telenovelas of the highest quality that offer this Discop Istanbul edition, we are starting a new phase in the international distribution of **Record** by selling the formats of these same productions. Hopefully it is having a great reception in the market.'



José de Egipto, continue the Bible series

CARACOL TV EXPANDS IN WEST ASIA

With the premier of *Pablo Escobar, the drug lord* last January in **Lemar TV**, a network of the Afghan **Moby Group**, **Caracol TV International** (Colombia) arrives to Discop with strong expectations about increasing its presence in the region with series such as *The Dark Widow* (80x'60) about Griselda Blanco known in US as the "The Godmother" and connected to the growing business of drug trafficking in that country. It is a production of **RTI Television** for **Caracol TV** and **Televisa**.

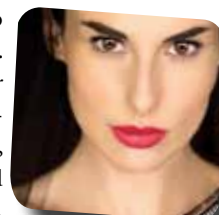
The sweetest love (120x'60) is a classic love story about a pilot who has to quit the racetracks and be the chauffeur of an important executive with which will fall in love. *The Mother in law* (120x'60) tells the story of a famous talk show host in US that is accused of paying guests to give false testimonies on her show. Co-produced with **Sony Pictures Television**, it is starred by **Andres Parra** and **Christian Tappan**, well-known actors from *Pablo Escobar* series.

Football dreams: a world of passion (60x'60) shows the four emblematic players from the Colombian National Football Team. Produced by **CMO**, *The voice of freedom*, *Helenita Vargas* (60x'60), which has a tremendous premier in Colombia last January: 15.8 rating points and 44.3% of share, maintaining an audience of 2.97 million of viewers. *The Lord of the Skies* (65x'60), co-produced with **Telemundo**, shows the story of Aurelio Casillas in his efforts to become the leading drug lord in Mexico in the '90s, taking Pablo Escobar's place in the region.

On entertainment, it presents *The Dance Floor* (60x'60), an original **Caracol** format that has revolutionized dance talent competition; and *The Challenge*, a reality in which a number of participants should survive, live together, and compete in 4 different stages, for a big price in money.



Berta Orozco, sales executive for Western Europe and Africa



The Dark Widow

DORI MEDIA: INDOOR AND OUTDOOR ENTERTAINMENT

Dori Media Distribution (Switzerland) had a great 2014 beginning, bringing new drama series and entertainment formats, a genre in which the company is becoming a referent in the marketplace.

AHA! Experience, the new studio game show is a quiz show that wants to find out not what you know but what you see, by checking your powers of perception. *Enigma* is the new telenovela available in two formats (150x'30 or 75x'60) about a man whose mental deterioration threatens a thriving family business.



Aha! Experience, new studio game show

Following is the prime time dating cooking show *Taste of Love* that combines two of the greatest human passions: the passion for good food and the passion for love. The weekly drama *Minimum Wage* is about three women, from remote, harsh backgrounds, that work as cleaning ladies at an office building in the city. *Little Mom* (13x'30) is a scripted comedy that reveals the harsh truth of life after having kids; *Win the Crowd* is an outdoor talent show that takes place in the street with no audience, no votes & no judges; in *Invisible Man* experts strive to identify each episode's celebrity guest whom they cannot see or communicate with; and *Duel Games* is another game show presenting task-based dueling in the streets.

Lastly, the distributor highlights the second

season of the teen series *Galis* (116x'30), where a mysterious donation sends three lucky foster home kids to join an elite summer camp in a faraway forest; and the reality show *The Village* in which five nuclear families are taken from their comfortable, modern lives and brought to an uninhabited area in order to build a new community with other families.



Elena Antonini, VP of Sales, and Nadav Palti, CEO at Dorimedia, with Ludovic Attal, head of development and formats, TF1 Productions (France)

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

Ozlem Ozsumbul, head of sales and acquisitions at Kanal D (Turkey); Fadi Ismail, group director of services at MBC Group (UAE) with his wife Amal; and Marwan Helayel, NBCUniversal Middle East



Fox International Channels, Turkey: Ozge Dogan and Fulya Tiryakioglu Baykal, programming coordinators



TRT Documentary, Turkey: Hatice Tanriogen and Musa Peksen, acquisitions executives, Documentaries, and Pinar Genc, Head of Programming coordinators



Saran Media, Turkey: Evren Marfali, TV Rights Acquisitions & Sales Manager and Emre Bilgen, director



Al Jazeera Network, Turkey: Zeynep Handan Capakur Oz, head of acquisitions, and Yusuf Ihsan Ozkes, acquisitions producer



UAE: Rupert Morling, senior channel manager, MBC Action; Kamal Nassif, director new media, e-vision; Khulud Abu-Homos, SVP programming & creative service, OSN; Lina Matta, channel manager, MBC2, MBC4 y MBC Max; Tareq Fahah Al Ibrahim, channel manager MBC Drama & coordinator manager, MBC 1



Sebastien Tobele, channel manager MBC2, MAX, Persia (UAE) Amac Us, sales and acquisition specialist of leading Turkish Kanal D with Saule Zhirechina, program director of Kazakhstan National Television

Asim Khan, acquisitions of Al Jazeera Documentary Channel (Qatar) and Kateryna Udut, international client manager of MRM, organizers of Kiev Media Week (Ukraine)



Central Asia Media Distribution, Kazakhstan: Zhuldyz Kaden, director, and Mira Bukenbayeva, CFO



Channel 7, Kazakhstan: Asel Nukisheva, program director, and Ainur Nussipbekova, chief content acquisitions & sales manager



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



31 Channel, Kazakhstan: Vela Fidel, Sr acquisitions manager, Igor Syrtsov, general Producer

Abdelhai Hammoud, senior distribution at Al Jazeera Media Network (Qatar), Mohammad Yaghi, general manager of Middle East Media, and chairman of the Union of Jordanian Media Producers (Jordan), and Saleh El-Taweel, managing director of Doha City Media (Qatar)



Masreya Media, UAE: Makram Karib, content manager, and Norman Dawood, acquisitions



Kanal 5 Macedonia: Kristina Grkova and Jana Kocev, from the programming department



Indrid Orstadius, Sr. Manager, Corporate Development, Turner EMEA



Neudachnaya Inna, head of marketing department, and Anna Tleuzh, program director of 9TV. Many Russian players are in Istanbul

Malaysian presence at Discop: Johan Nawawi, director of HudHud Media; Dato' Mohd Mahyidin Mustakim, CEO CCMA; Balaraman Narayanasamy, head of the Film in Malaysia office; and Farid K Ahmad, general manager of WRC



ABS-CBN, #1 broadcaster in the Philippines: Pia Baungan, sales manager, Evelyn "Leng" Raymundo, VP integrated program acquisitions and international distribution, and Rachel Simon, acquisitions manager



IRIB, Iran: Gh. Ali Ramezani, president, and M. Mehdi Yadegari, head of acquisitions



Can Okan, president ITV Turkey, with Sara Rahbari, Gem TV, Iran



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



Kanalturk, Turkey: Merve Tufekci, senior acquisitions executive, Seda Korkut, acquisitions and planning executive, and Gaye Arman Bickacioglu, director of programming and acquisitions



Producers from Turkey: Onur Avcı, format manager, and Ebru Erkal Kip, general coordinator of ARTI Film, with Burcin Ozdemir, producer from Sinerji Productions



Kanal 7, Turkey: Yesim Sezdirmez, head of audience research and programming planning, Mehmet Demirhan, head of acquisitions, and Serra Batus, audience researcher



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



Ahmet Oncan, vice president of the producer Medyavizyon, Turkey



Middle East: Joseph Hussein, TV consultant Bright i and Ibrahim El Massri, City RT, both from Lebanon, with Awni Al Lababidi, Founoon Film (UAE) and Bouchra el Kadmiri, Proximity Interactive (Morocco)



Middle East producers: Amer Sharaf, producer/CEO, and Bahaa Rashid, COO of Sama for Media Production (Syria) with Jamal Douba, general manager of Media Link International (Lebanon) and Abdel-Hadi Tayem and Khalid Tayem, from Fada A Media (Jordan)



Middle East: Sarkis Semaan, COO of the producer Sync, Ruqaya Abdulla, acquisitions at the broadcaster Abu Dhabi Media, May Nassur, CCO of Sync, Shereen El Meligi, head of programming at Abu Dhabi Drama channel, and Dania Barghout, project manager of TV at Abu Dhabi Media



Egyptian buyers: Sheren Magdy, general manager of the production company Stars, with Eslam Mosaad, senior acquisition executive from the Arab Radio and Television Network (ART)



Ahmad Al Rahman, head of acquisitions and drama at Al-Nahar TV Network (Egypt)



Hyam Saliby, head of acquisitions for Middle



Syria: Bahaa Rashid, COO, and Amer Sharaf, producer/CEO, of Sama for Media Production



Giorgi Lominadze, head of acquisitions at Rustavi 2, and Giorgi Gachechiladze, producer general of Georgian Public Broadcaster (GPB), both from Georgia (extremes) and Fabricio Ferrara, Prensario International



Middle East: Tarek Ghattas, general manager of 6 Hats (Lebanon) with Safwat Ghattas, managing director of Spot 2000, and Ahmed Fawzy, managing director MF Films, both from Egypt



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



Hod Hod Lebanese satellite channel: Ehsan Helmi, general manager, Dhya Alnaseri, communications



Adham Nasr and Nidal Garcia, sales & marketing from Outlook Entertainment from UAE (extremes) with Ramzi Nakfour from Transworld Television Corp. (Lebanon)



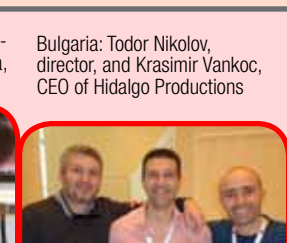
PPlus D.O.O, Bosnia Hersegovina: Sanela Junuzovic, Program Editor, Hayat TV, and Dzenan Priganica, Program Manager, at Plus



Channel 7, Bulgaria: Niya Staveva, translator, Nadia Kostova, head of acquisitions



Bulgaria: Todor Nikolov, director, and Krasimir Vankoc, CEO of Hidalgo Productions



Larisa Mohut, acquisitions coordinator at National TV (Romania) with Hasan Bozaslan, International director of Samanyolu (Turkey)



Larisa Mohut, acquisitions coordinator at National TV (Romania) with Hasan Bozaslan, International director of Samanyolu (Turkey)



Turkey: Can Okan, president of the distributor ITV, with Ahmet Oncan, vice president of the producer Medyavizyon. The first distributes the latter's productions



Leading channel from Turkey, Kanal D: Ozlem Ozsumbul, head of Sales and Acquisitions; Emrah Turna and Ezgi Ural, sales executives; and Amac Us, sales and acquisitions specialist



Yesim Yunak, programming director, and Rasim Yilmaz, acquisitions of Turner Turkey, with Ingrid Orstadius, senior manager, Corporate Development, Turner EMEA



TRT, Turkey: Meltem Tumturk Akyol, head of international sales, with A. Zafer Erkmen, deputy head of TV department, and sales executives Necati Aca and Mahir Çavus



KTK, Kazakhstan: Elmira Jamlova, deputy general manager, Alma Akhmetzhanova, first deputy chairman of the board, Natalya Freiman, head of acquisitions, and Talgat Dairbekov, advisor to the GM



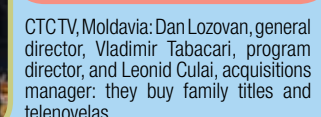
31 Channel, Kazakhstan: Vela Fidel, Sr acquisitions manager, Igor Syrtsov, general Producer



Sara Rahbari, Gem TV, Iran



IRIB Media Trade, Iran: Ali Ramezani, president, and Mehdi Yadegari, acquisitions manager



CTCTV, Moldova: Dan Lozovan, general director, Vladimir Tabacari, program director, and Leonid Culai, acquisitions manager: they buy family titles and telenovelas.



Middle East buyers: Awni Al Lababidi, Founoon Film (UAE), Ibrahim El Massri, City RT (Lebanon), Tony Kassouf, Cable Arab Network (Lebanon).

Sebastien Tobelem, channel manager MBC2, MAX, Persia (UAE); Holger Hendel, Mediapiers; Michael Brown, head of marketing worldwide, MGM Studios



Saleh K. El-Taweel, general manager of Doha City Media (Qatar), and Nidal Garcia, managing director of Lucha Distribution (Lebanon)



Lebanon: Jamal Douba, general manager, MediaLink International; and Joanna Douba, acquisitions, Cubic Connect (digital)



Hod Hod Lebanese satellite channel: Ehsan Helmi, general manager, Dhya Alnaseri, communications



GMG, Georgia: Bidzina Baratashvili, general producer, and Levan Kubaneishvili, managing director

9 Channel, Russia: Inna Skibina, deputy program director, and Anna Tleuzh, program director



Igor Fedorov, director of acquisitions, Intra Communications, Russia, Giorgi Lominadze, acquisitions, Imedi TV, Georgia



Georgian buyers: Giorgi Gachechiladze, general producer from the public broadcaster GPB, with Estate Khabazishvili, main director, and Noe Sulaberidze, general director of the top Georgian production company TBC TV



Georgian TV channels: Zaza Tanashvili, general director of MZE, and Anri Getsadze, deputy head of administration of Pik TV



Nina Mikola, Head of Acquisitions, and George Makris, consultant of the Board of Nova TV Croatia with Melissa Pillow, sales director of Telemundo International (USA)



Ritchie Mohamed, Zenith Film Distributors (South Africa) and Saeed Shiraz, chief executive, Sterling International (Pakistan)



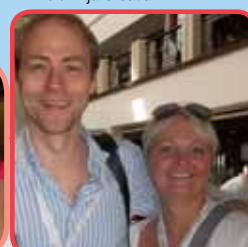
Dexin Films, Serbia: Dana Petrovic with Ljupka Triunovic



Elsa Strapkova, Acquisitions Manager, Markiza TV (Slovakia)



Kaspar Pfluger, programming director, and Dragana Kos, program acquisitions and sales manager of RTL Televizija Croatia



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