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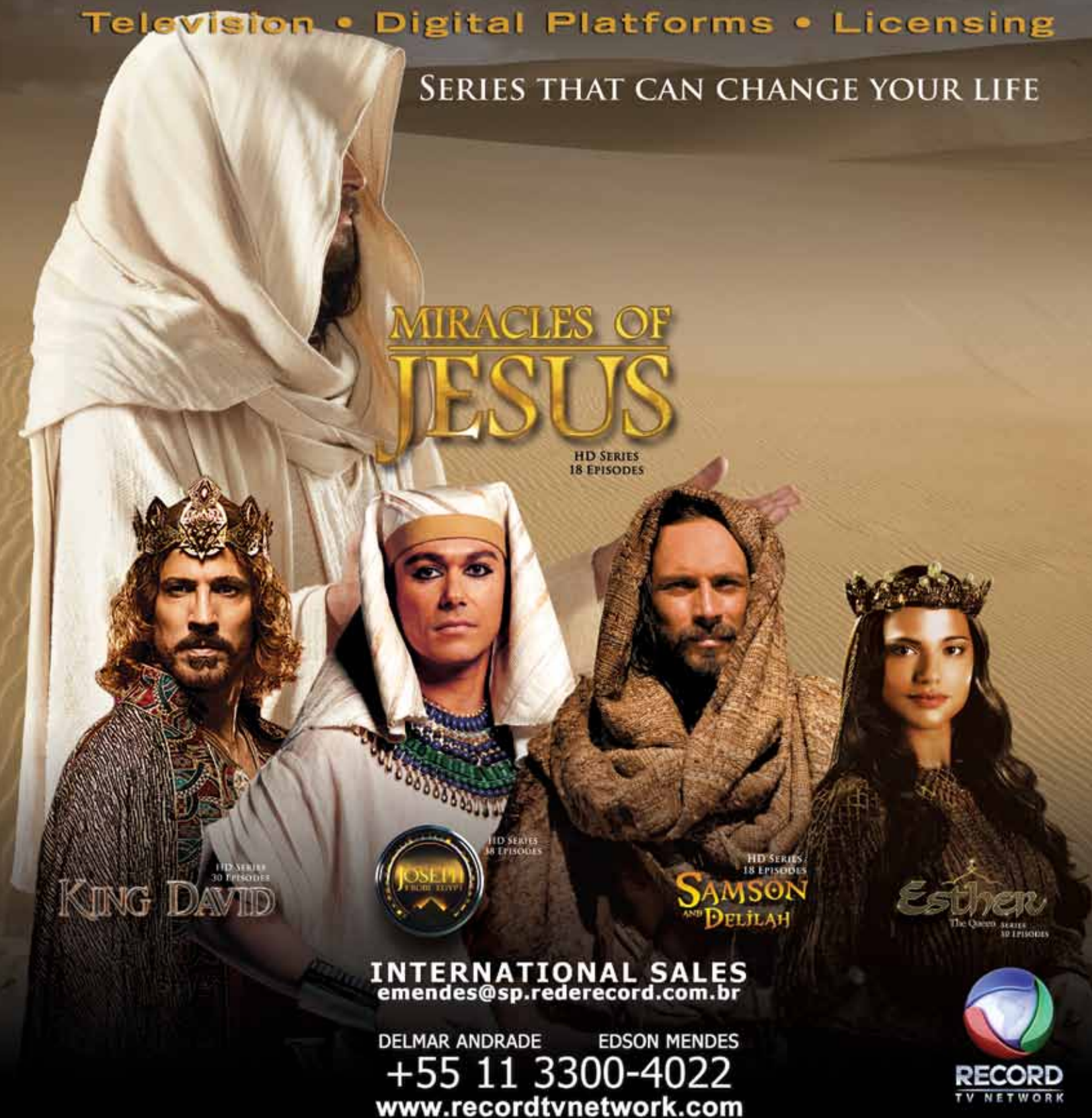
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# FROM BUDAPEST TO PRAGUE: THE CHALLENGES OF THE MAIN CEE TRADE SHOW



Rod Perth, CEO, NATPE

NATPE EUROPE arrives this month to Prague, Czech Republic, after 23 years held in Budapest, Hungary. It is a big move from NATPE organization — it acquired Discopin 2011 — that aims to bring fresh air to a tradeshow that,

in comparison with the former ones, has now more competition in the region.

During the last day of Natpe Budapest 2013, Prague appeared to be the next city for the show, after a research made by the organizer. And it finally happened: Natpe Europe is being held in this city from June 23-26, with lots of expectations, as well as challenges to improve the market organization. NATPE expects over 400 buyers and 150 exhibitors, transforming this market in the biggest of the region. The structure of the show is similar to the last year with the first day, Monday June 23, dedicated to the US Studios Screenings (NBC, FOX and CBS), and the market starting on Tuesday June 24 at 10am, and Lionsgate Screenings from 1pm to 6pm. Full market days are Wednesday and Thursday.

In a previous research, important executives attending Prague highlighted to PRENSARIO that they were happy and with 'good expectations' about the change. Rod Perth, CEO of NATPE, adds: 'We received great feedback with the move, fortunately. It represents a chance to refresh this market institution: Budapest has been a wonderful location, and after careful consideration and many conversations with our customers, the consensus was that Prague provides more flexibility to make NATPE Europe an even better market.'

'We are holding a market under the same roof — Hilton Hotel — with the independent distributors and the US Studios, which have confirmed their participation and Screenings again. We are investing a

lot in a region that we consider strategic for the future.'

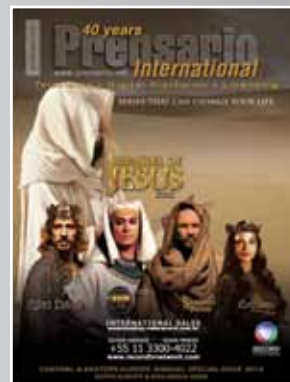
On Tuesday morning, there is a co-production panel *Now, the Story Starts in Europe!* with Rola Bauer, president/partner of Tandem Communications and Thomas von Hennen, VP


international co-production & documentaries, ProSiebenSat.1, both from Germany. Barrandov Studios, Universal Production Partners and Stilling Films are the other sponsors of the Summit that covers the aspects of building a global narrative and moving the international production industry to re-think how the business is run.


'It features a line-up of network executives actively involved in international co-productions, European show-runners whose narratives are going global, US show-runners who are breaking the mold and European production companies who are developing creative strategies', remarks Perth.

The main Czech broadcasters, NOVA (CME), Prima TV (MTG), Česká televize and TV Barrandov organize on Tuesday 6pm a cocktail reception. 'There is also a special highlight on Poland, for which are organizing a launch on Wednesday with the participation of the main Polish players, as the broadcaster TVN and producers ATM and Monolith Films. And we have confirmed the assistance of the filmmaker Agnieszka Holland', he says.

The program is specific focused on the outstanding programming being produced in the region alongside Poland's fast growing and competitive television landscape. With 80% of homes accessing pay TV via cable or satellite, more than 20 DTT channels available and the second largest advertising pie of CEE after Russia, Poland is one of Europe's largest TV markets.




 PUBLISHED BY:  
EDITORIAL PRENSARIO SRL  
LAVALLE 1569, Of. 405  
C1048 AAK  
BUENOS AIRES, ARGENTINA  
PHONE: (+54-11) 4924-7908  
FAX: (+54-11) 4925-2507


 IN THE U.S.:  
12307 SW 133 COURT -  
SUITE #1432  
MIAMI, FLORIDA 33186-USA  
PHONE: (305) 890-1813


EMAIL: INFO@PRENSARIO.COM  
WEBSITE: WWW.PRENSARIO.TV


REPRESENTATIVES:

 • MEXICO: ANGELES PEREZ AGUIRRE:  
ANGELES@PRENSARIO.COM

 • CHILE: KARINA CORTES:  
KARINA@PRENSARIO.COM

 • PERU: MIGUEL ANGEL HURTADO  
MIHUA7@HOTMAIL.COM

 • COLOMBIA: WILSON PEREZ VELEZ  
WILSON@WSNOTICIAS.COM

 • ECUADOR: JUAN CARLOS ARIAS  
RENDON  
JUAN.ARIAS@CANALNEWS.EC

EDITOR: NICOLAS SMIRNOFF  
EDITORIAL DIRECTOR: ALEJO SMIRNOFF  
NEWS DIRECTOR: DOMINGO VASSELLATI  
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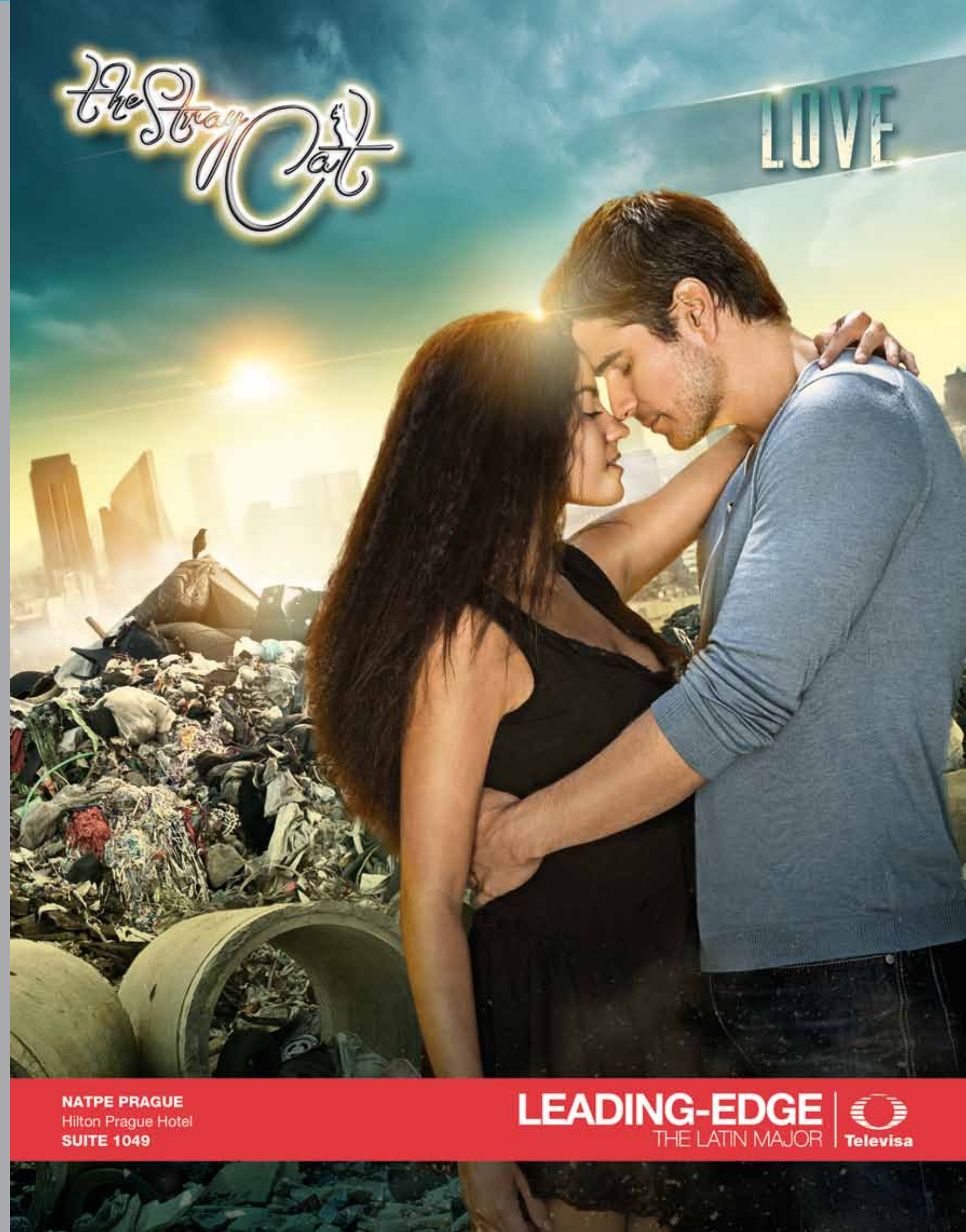
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## SCHEDULE

EVENTS	DAY & TIME	PLACE
CBS STUDIOS SCREENINGS	MONDAY 23 - 8AM-1PM	HILTON PRAGUE HOTEL
NBC/UNIVERSAL SCREENINGS	MONDAY 23 - 1PM-6PM	HILTON PRAGUE HOTEL
20TH CENTURY FOX SCREENINGS	MONDAY 23 - 11AM-6PM	HILTON PRAGUE HOTEL
LIONSGATE SCREENINGS	TUESDAY 24 - 1PM-6PM	HILTON PRAGUE HOTEL
CO-PRODUCTION PANEL NOW, THE STORY STARTS IN EUROPE!	TUESDAY 24, 8.30AM	HILTON PRAGUE HOTEL
COCKTAIL RECEPTION - SPONSORED BY BROADCASTERS	TUESDAY 24, 6PM	CLOUD 9 - HILTON PRAGUE HOTEL
CELEBRATION OF POLISH PROGRAMMING (LAUNCH)	WEDNESDAY 25, 12.30PM	CLOUD 9 - SKY BAR & LOUNGE - HILTON
COCKTAIL RECEPTION	WEDNESDAY 25, 6PM	ATRIUM HILTON PRAGUE HOTEL

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# CZECH REPUBLIC: MORE CHANNELS & OWN PRODUCTION FOR A DEMANDING AUDIENCE



To publish this special report about the Czech TV market, PRENSARIO has interviewed the top broadcasters: the commercial networks NOVA, owned by CME; PRIMA, by MTG; TV BARRANDOV and the public group ČESKA TELEVIZE. Below, it can be found the latest productions and top-rated shows, content trends, and digital platforms evolution in Czech Republic.

The Czech TV market is dominated by Central European Media Enterprises (CME) and its NOVA-branded networks, which totaled 41.3% of audience share in the target sales group 15-54 during the first three months of the year, according to the data provided by ATO-Mediaresearch.

State-owned Ceska televize is the second largest group accounting for 26.7% of market share, followed by Modern Time Group's Prima-branded channels with 20.2% and commercial channel TV Barrandov with 6% in the same period of time, according to the same source.

The main part of the digitalization process in the Czech Republic took place between 2008-2011. The digitalization caused that number of channels has grown significantly: instead of four nationwide channels, there are much more channels to watch.

## ADVERTISING

According to Pricewaterhouse Coopers's



NOVA: the main news program regularly achieves over 40 % audience share, while the prime time drama series *Rose Garden Medical 2* achieves the same figure in the target group 15-54 twice a week



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



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



MILAN FRIDRICH, PROGRAMMING DIRECTOR, ČESKA TELEVIZE



MARCELA HRDÁ, GENERAL DIRECTOR, VICECHAIRMAN OF THE BOARD OF DIRECTORS, TV BARRANDOV

some "classic" entertainment formats such as *The Voice* in the recent months. Another big blockbuster from the channel is the local retro hit *Wonderful Times*, of which **Dramedy Productions** has developed and produced four seasons.

## MTG

Owned by GES Media Holding a.s., which is 50% controlled by Modern Times Group (MTG), the Prima group consists of four commercial free-TV channels, Prima COOL, Prima Love and Prima Zoom that currently attract 20.9% SOV A15+ (Jan-June 3, 2014). Prima also operates wide portfolio of websites.

FTV Prima was launched under the name FTV Premiéra in 1993 as the first commercial broadcaster in the Czech Republic, offering a broad line-up of entertainment with a slight focus on female viewers (16-65) focused on own produced drama.

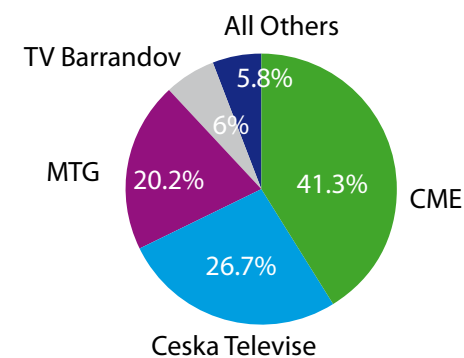
Prima COOL is 60/40 male skewed targeting primarily on 15-44 year old viewers. The programming schedule of the male-skewed channel includes blockbuster movies, as well as a number of new shows and hit series never



MTG: the OP drama series *Roads Home* (A15+: 807,000, 19.55% SOV / A15-65: 442,000, 14.93% SOV) and one of the most recent game show *I Love My Country* (A15+: 654,000, 16.19% SOV / A15-65 454,000, 15.47% SOV)



## CZECH REPUBLIC: PRIME TIME AUDIENCE SHARE 15-54, PER GROUPS (1Q 2014)



Source: ATO - Mediaresearch

Cinema, Fanda, Smíchov, Telka, and NOVA Sport. Together, they summed up 41.3% of audience share during the first quarter of 2014, making it twice as powerful as the next commercial competitor, MTG.

The group includes a broad portfolio of online portals and services (tn.cz, novaplus.cz, nova.cz, doma.cz, krasna.cz and more). It also operates a SVOD service, VOYO, as well as NOVA Plus, a seven-day catch-up online advertising video on-demand (AVOD) service.

'2014 has been a relatively stable year for programming, in comparison to the changes in the market we experienced in the past few years', explains to PRENSARIO Alex Ruzek, director of TV Channels and Programming, TV NOVA, and continues: 'The addition of new channels

after digitalization has had a significant impact on viewer habits, and specifically on the ratings generation potential of foreign content'.

'We have had to move a significant amount of our foreign product to our niche channels, and have bought new titles specifically for those channels, which we wouldn't have otherwise considered for our main channel. Our viewers now prefer significantly more local content on our main channel than we have had in the past. And the local content we produce has performed well by satisfying these preferences', she adds.

The highest rated programs are news and local drama series. 'Our main news this year regularly achieves over 40% audience share in our target group 15-54, while the prime time drama series *Rose Garden Medical 2* achieves over 40 %

audience share in 15-54 twice a week in prime time. Also successful is our long running daily soap, *The Street*'.

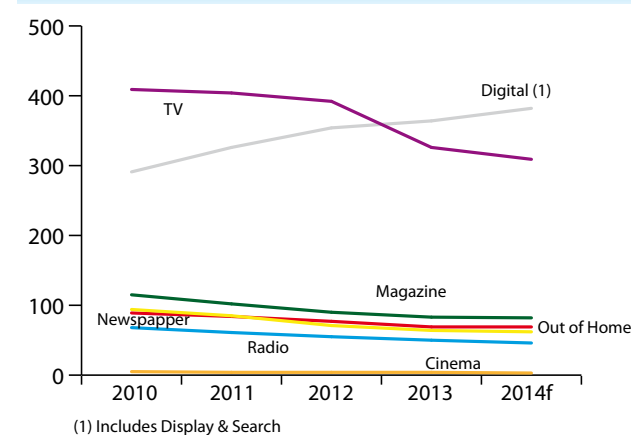
'We also had great results from a spin-off of *Rose Garden Medical 2*, which we launched in the second half of 2013, and now is consistently being watched by 1.5 million viewers in 4+ weekly. We also produce other drama and crime series (*Crime Unit Andel*, *Expozitura*, *Police Modrava*), sitcoms (*Comeback*, *Helena*), reality shows (*Wife Swap*) and entertainment formats (*The Voice*).

## ČESKA TELEVIZE

The public group operates six TV networks ČT1, ČT2, ČT ČT24, ČT Sports, ČT:D, ČT Art and two HD networks: ČT1 HD and ČT Sports HD. Currently, the flagship channel of the group has on air the prime time TV series *The Manor House* (produced by **Dramedy Productions**, and distributed worldwide by **Imagina International Sales**), a period family saga with murder mystery from the 20's. The series with great story as well as high production value is in its first season (22 episodes) reaching an average of 33-34% share every Friday on ČT1.

Ceska Televize is currently a quality production market leader, while the commercial networks NOVA and Prima's new shows are rather locally developed fiction series and

## CZECH REPUBLIC: ADVERTISING SPENDING EVOLUTION, PER SEGMENTS (2010-2014F)



(1) Includes Display & Search

Source: Aegis Global Advertising Expenditure Report



TV Barrandov: the most popular programs are the talk show *Sejdeme se na Cibulce* and the entertainment show *Kurňa, co to je*



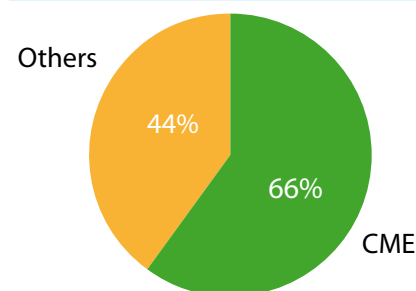
broadcast in the Czech Republic before. **Prima Love** focuses on attracting a 15-44 year old female audience with a fun, informative and romantic format, broadcasting international series, blockbuster romantic and comedy movies as well as infotainment shows; and **Prima ZOOM** is the first Czech free documentary channel.

**Marek Singer**, MTG EVP of the Group's Central European broadcasting operations and CEO of **Prima**, comments: 'The share of the three main TV groups (**Prima**, **CME** and **ČT**) remains quite same. While both **CME** and **ČT** groups decreased, **Prima Group** grew significantly (channel **Prima** is the only big channel that grew, regardless of the digitization).

'We launched some big entertainment shows this spring such as *X-Factor* (A15+ 395,000, share 10.06 % / A15-65 324,000 11.14% SOV), *Farmer Wants a Wife* (A15+ 482,000, 12.19% SOV / A15-65 348,000, 12.29 % SOV) and *I Love My Country* (A15+ 654,000, 16.19% SOV / A15-65 454,000, 15.47% SOV)'.

**Prima's** key slots are Monday-Friday 6pm with *Come Dine With Me* (A15+: 651,000, 24.07% SOV / A15-65: 421,000, 22.85% SOV); Monday + Wednesday 8.15pm with the OP drama series *Roads Home* (A15+: 807,000, 19.55% SOV / A15-65: 442,000, 14.93% SOV); Saturdays 8.15pm with *I Love My Country*; and Sunday 6pm with the

#### CZECH REPUBLIC: TV ADVERTISING SPENDING, PER GROUPS (2013)



Source: Pricewaterhouse Coopers's Global entertainment and media outlook 2014-2018

cooking show with famous Czech chef Zdeněk Pohlreich *Rozpal to, šéfe!* (A15+: 415,000, 18.63% SOV / A15-65: 299,000, 18.61% SOV).

'The role of own produced local content has become even more important in recent years. In general during prime time all the flagship channels for **Prima**, **Nova** and **ČT1**, consist mainly of own-produced programming, except the occasional movie. Own productions, mainly long-term running drama & crime series and big shows dominate the schedules – there is no real counterweight on the acquired programming side and the ratings for movies have started to drop.'

#### TV BARRANDOV

It was launched in 2009 as a full format TV station, and now is the fourth channel and third among commercial TV stations and has a stable position on the TV market. It share (adults 15+) grows steadily in wide target group and is now between 5-6%. 'Success of TV Barrandov is mainly based on its own production. We would like to continue in this trend, we will extend the internal production of the entertainment formats and we will also, for the first time, launch the new drama series on our **TV Barrandov**. Parallel we plan to extend our activities to build a strong group', describes **Marcela Hrdá**, general director, vice chairman of the board of director, **TV Barrandov**: 'The TV market in the Czech republic is growing every year, but the market sales potential is growing slowly. We are expecting the consolidation of TV Czech market in near future. We reach 5 million viewers of Czech population weekly in various target groups. The main viewers are women older than 35 years from middle socio-economic classes', she adds.

**TV Barrandov** programming is based on in-house entertaining shows, talk shows and contests, which are currently 21% of the content, and acquisitions (German movies, series, Turkish telenovela, romantic movies, woman thrillers etc.). 'The most popular programs are the talk shows *Sejdeme se na Cibulce* and *Exkluziv Kateřiny Brožové*, as well as the entertainment shows *Kurňa, co to je* and *Vtip za stovku*, as well as prime time movies and weekend afternoon romantic series', completes **Hrdá**.

#### DIGITAL & FUTURE

**Ruzek** from **NOVA**: 'In this digital age, we have actually been seeing a steady rise in the average amount of time spent watching traditional TV over the last few years. People are using multiple devices, e.g. watching TV and browsing the



Ceska televize: the local retro hit, *Wonderful Times*, and the period drama *The Manor House*, both from Dramedy Production for the flagship network ČT1



Internet at the same time. It is important to provide them with our content via multiple platforms. We are using our rich online portfolio including the SVOD service **VOYO** and our new AVOD service, **NOVA Plus**.'

'Our local formats work great in the market. Therefore our strategy is to continue with these well-proven products. We are investing into content and producing an even higher number of series than we did last year. We also plan to continue developing our online portfolio', she concludes.

**Marek**, from **Prima**: 'Traditional TV consumption is still the most popular in terms of viewership and ad-spend, but online, multi-media and non-linear services are growing in importance. Therefore, we have established a dedicated online division, **Prima Online**, which has created complementary websites to support our TV channels, build its image and extend the effect of our programs. Our online VOD service **PrimaPlay** is currently very popular and increases the number of visits and reach quite steadily.'

'Currently we are producing three new TV series that we are expecting to launch in the coming twelve months. We are very happy with the casting and selection of the production team, and expect very positive viewing figures.'

'Our overall aim is to enhance the performance of the **Prima** group, to attract a younger audience, continuously develop our secondary channels, increase our share in online media and capitalize on our brands in non-TV activities such as events, merchandising and various publishing formats', finishes **Marek**.

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## INSIDE THE CZECH REPUBLIC TV MARKET

The Czech TV market is dominated by three free-to-air broadcast groups, the public group **eská televize** and the two private groups **Central European Media Enterprises (CME)** and **FTV Prima** (owned by **Modern Times Group**). Both private channels have seen their market shares decrease over the past year.

CME's channel **NOVA** has been slowly losing market shares for the last couple of years, registering a 1.2 point decrease in 2013. However, with half of the best performing programs in 2013 being **NOVA's**, the channel remains the undisputable leader of the market.

Likewise, **Prima** channel's ongoing growth was cut short in 2013. With a 3.4 point decrease in one year, the channel records the biggest loss and is deprived of its rank of second most watched channel of the country. Replacing Prima on the second step of the podium is public broadcaster **T1** who keeps gaining ground, with a 0.3 point increase in one year. It has the most remarkable performance on the prime time slot, where it gained 0.6 points over the past year. To consolidate their respective overall market share in this increasingly fragmented TV market, the leading groups have created several digital niche channels in recent years.

CME launched **Telka** in February 2013—relying on NOVA's archives—joining the comedy channel **Smichov** and male-skewing channel **Fanda**, which started broadcasting in 2012. The same strategy applies to **Prima**,

which also launched **Prima Zoom** in February of the past year. The channel mainly focuses on providing documentaries for a male viewership. Finally, **T** launched two channels of its own, **T: D** for children and **T art**, which is culture-oriented.

Average viewing time in the Czech Republic keeps increasing over the years, reaching 3 hours and 28 minutes a day on average. With an increase of 7 minutes for all individuals in a single year, Czech viewership confirms its TV consumption level is above the worldwide average (3 hours and 14 minutes).

If 2013 recorded a strong growth in the Czech Republic's viewing time, 2014 is also off to a good start. Sports being a usual great generator of ratings, the *2014 Sochi Olympic Games* brought its share of viewers to TV channel **T Sport**, ensuring a good performance during the period and even reaching a peak, attracting almost 3 million viewers for a Czech Republic vs. Slovakia hockey game. It is the most watched program of the first quarter of 2014.

### PROGRAMMING

Fiction, and particularly local productions, is a key genre in the Czech Republic. TV movies are regularly voted in by the audience and long-running series are a safe bet. As a matter of fact, most of the three leaders'

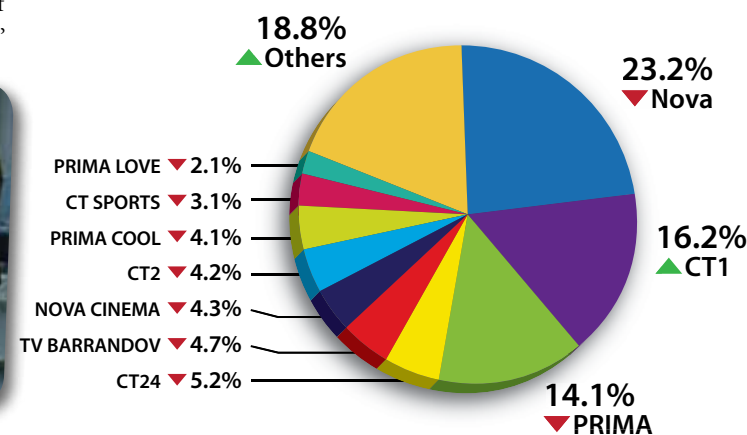
primetime grids are composed of local programs.

Local medical series *Ordinace Vřezové Zahradě 2* (**NOVA**) is one of the most watched series in the Czech Republic (and has been for more than 6 years), peaking at 2.2 million viewers for the best episode aired in 2013. In terms of successful new series, its spin off *Doktoři z Poátků* was launched by **NOVA** last June and rises to the first step of the podium, becoming the most watched series in 2013 with a 54.7% market share for its best episode.

On Prima, long-running soap opera *Cesty Domu* remains the channel's flagship and celebrates its 250th episode this spring. On **CT1**, new local project, *Mattoni I* is a period drama about 19th century industrialist Heinrich Mattoni and is scheduled for 2015-2016. The country also follows the trend of scripted formats with a local adaptation of British comedy *The Office* due to be aired in



### AUDIENCE SHARES FOR 2013 – BEST PERFORMING CHANNELS TOTAL DAY, INDIVIDUALS



The medical series *Doktoři z Poátků* is the spin off *Ordinace Vřezové Zahradě 2*, and was launched by NOVA rising to the first position with a 54.7% market share for its best episode



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# INSIDE THE CZECH REPUBLIC TV MARKET



2014 on CT1.

Czech productions also travel beyond the country's borders: *Burning Bush*, created by Polish director **Agnieszka Holland**, is a three-part mini-series created for **HBO Europe** and was sold to Germany, Italy and France. The storyline is also very local, depicting the personal sacrifice of a Prague history student, Jan Palach, who set himself on fire during a protest in Prague against the Soviet occupation of Czechoslovakia in 1969.

Finished series do not meet the same success as local ones but they are not outdone. USA is the main provider of foreign drama, mainly long-running series. *CSI Las Vegas* and *The Mentalist*, which are both aired on **NOVA**, were for instance the most successful foreign series aired over the first quarter of 2014. They respectively reached market shares of 30% and 26.2% for their best episode broadcast over this period and confirm the soft spot that the Czech audience seems to have for foreign crime and investigation drama.



On Prima, long-running soap opera *Cesty Domu* remains the channel's flagship and celebrates its 250th episode this spring

At the same time, Germany also brings both TV movies and long-running series. The most popular series are crime and investigation drama, such as *Misto inu* on the air on **Prima**, which attracted almost 500,000 viewers for its best episode in over the first quarter of 2014. Other European productions, from the UK to Eastern Europe, as well as France and Italy also fill the grids. The latest French series in the Czech Republic is *Julie Lescault*, which first aired in the morning on **Prima** then moved to primetime from May 2014.

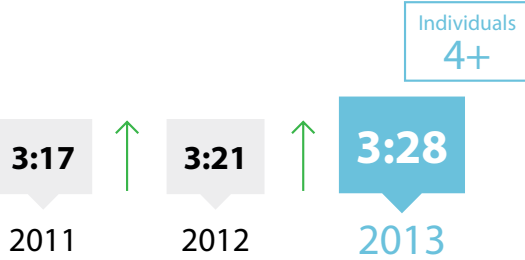
On the entertainment side, national production is also gaining ground, with local adaptations of strong brands. Competition shows seem to be a winning formula, with **CT1's** launch of the 6th season of the local version of *Dancing with the Stars* gathering nearly 2 million viewers at its highest point in 2013 and earning the title of flagship program of the channel, *Pop Idol* and the 5<sup>th</sup> season of local *The Voice* both airing on **NOVA** this year.

The trend was recently confirmed with Prima's new launches this spring: the local adaptation of *X Factor* and *Souboj Národ t*, the local version of the quiz show format Test the Nation. The channel also ordered a second season of the Dutch format *I Love my Country's* adaptation.

### DIGITAL PLATFORMS

The development of online TV in the

### AVERAGE DAILY VIEWING TIME – PER INDIVIDUAL IN H:MM (2011-2013)



The country also follows the trend of scripted formats with *Kancelu*, the local adaptation of British comedy *The Office* due to be aired in 2014 on CT1

Czech Republic has not stopped growing for the past year and seems to be an increasingly important element of the main network's strategy. **NOVA** launched **Voyo.cz**, an online TV service offering a wide range of series, films, sports games and documentaries on an on-demand basis. Meanwhile, the competition **FTV Prima** has been expanding its online strategy, launching a similar service, **PrimaPlay.cz**, which provides viewers with clips from series, feature films and archive material, as well as a premium section including sports content.

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Source: Eurodata TV Worldwide / ATO / MediaResearch

### TOP 5 PROGRAMS OF 2013 – BEST EPISODE OF EACH PROGRAM AND AFFILIATE (ALL INDIVIDUALS)

Rank	Channel	Program	Genre	Day/Date/Time	Rat%	'000	Shr%
1	CT1	Duch Nad Zlato	TV Movie	12/24/13-7pm	24.9	2448	53.2
2	NOVA	Televizní Noviny	News	04/01/13-7.30pm	24.2	2378	51.5
3	NOVA	Doktoři z Počátků	Series	06/25/13-8.25pm	24	2357	54.7
4	NOVA	Ordinace Vřezové Zahradě 2	Series	12/05/13-8.22pm	22.4	2201	50.4
5	CT1	Sněžný drak	TV Movie	12/25/13-8.03pm	21.1	2066	40.9



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## DRAMEDY: A LOCAL PRODUCER EXPERIENCE



Filip Bobiški, CEO

**Dramedy Productions**, Prague-based Czech production company, is celebrating 10 years from the release of the first prime-time fiction series produced for **TV NOVA** at that time, based on the format *Periodistas* from **Globomedia**.

**Filip Bobiški**, CEO: 'We have been the first who brought to Czech audience foreign scripted format. At that time, we have showed how TV fiction can be produced efficiently, which enabled commercial broadcasters to produce local fiction, thus we have sort of started the boom of fiction series in our TV market.'

'For public **Ceska televize** we have developed and produced four seasons of a local retro hit *Wonderful Times*, for which we have been awarded Golden Nymph in Monte Carlo TVF as "Outstanding European TV series Producers". Currently, we have on air prime time TV series *The Manor House* (*První Republika*), a period family saga with murder mystery from the 20's. The series with great story as well as high production value is in its first season (22 episodes) reaching an average of 33-34% share every Friday on CT1.'

'We have also worked with commercial broadcaster before, both producing and co-producing. We finance approximately 25% of our current series *The Manor House*, which enables us to achieve great production value and look. **IMAGINA International Sales**

represents the series worldwide, starting on NATPE Europe', he adds.

Regarding the local TV market, **Bobiški** says: 'Locally developed fiction is best received TV content at the moment. Audience is hungry for interesting shows both entertainment and fiction if created and produced in a high quality. Unfortunately, in many cases great international formats are adapted in a tiresome way or under-budgeted, which destroys the original concept and success formula resulting in very average audience results. This creates sort of reluctance and conservatism in programming departments who then have the tendency to fix only to proofed style of shows'.

'Czech market is lacking more entrepreneurship and passion for TV in channel management as well as new enthusiastic and well-trained creative talent such as scriptwriters, directors, show runners and producers. **Ceska Televize** is currently the quality production market leader, while **NOVA** and **Prima** new shows are rather locally developed fiction series and some "classic" entertainment formats such as *The Voice* in the recent months'.

About the digital platforms, **Bobiški** comments: 'We are not expecting fast massive increase on these, but we are trying to work with such means of distribution for additional financing of our primarily free TV shows. Free VOD distribution available on websites of the broadcasters represents



The first season of the period family saga series *The Manor House* has reached an average share of 33-34% every Friday on CT 1

more and more an important alternative way how the viewers follow their favorite shows'.

And he concludes about the future: 'We develop our shows in a way that they can be partially financed from international markets, both through co-production and from foreign sales. **Dramedy** is also working as a minority co-producer on several projects developed by foreign producers, bringing financing (including production rebate) from central European markets'.



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# FROM NATPE EUROPE TO KIEV MEDIA WEEK: CENTRAL & EASTERN EUROPE ON FOCUS



This is our annual special edition for Central & Eastern Europe, distributed both at Natpe Europe, for the first time in Prague, and Kiev Media Week, in Ukraine. Which are the main TV and digital media trends on the region? Best options to take?

As local players usually stress, the region is not still recovered from the global crisis started in 2009. There are already 5 years of difficulties, with advertisement pies being flat or down. The Western European nations and the United States, which were investing the last decade in CEE region to join their countries to European Union, have slowed or stopped their ventures, and nobody is sure when they will be back.

Of course, there are some territories better than others. Russia and Poland are very strong, especially the first one that has been growing by 15 percent per year, including about 300 TV channels all in all and now it is a huge pole of content production. The small Baltic countries, Hungary and Greece, on the other hand, have been suffering economical and political problems. Hungary changed three presidents in one week some years ago, and just in this 2014, is taking a bit of recovery about advertising bills. Most of the territories, unfortunately, are closer to Greece than to Russia.

At the same time, the digital *boom* arrived these years. The CEE countries are perfect to adopt it fast, because they are mainly small countries with good tech educated population. There has been an explosion of new TV outputs, CEE is one of the regions with more new channels of the world. This concerns not only Internet or VOD options; the pay TV business grew dramatically within the last 5 years, with many channels launched or re-launched.

So, today there are in CEE a lot of more channels than in the past, but the same or less money to afford them, with majority of the countries still under economical problems. And the last condiment to put into the bowl is own production. The CEE broadcasters have changed from side to side the last decade: from full finished programming buyers, to strong own producers, both of fiction and entertainment. Even in the smallest countries, TV channels have their own entertainment shows, some times with costs so low as USD 2000 per episode.



CME buyers with actors of the series presented at Disney Upfronts in Los Angeles, USA: Silvia Porubská, head of TV, Markiza (Slovakia), Alex Ruzek, head of acquisitions, TV Nova, Czech Republic; Sorina Big, acquisitions manager Pro TV (Romania); and Petra Bohuslavova, acquisitions executive at TV Nova (Czech Republic)

The big cross country TV groups are a big tip of Central & Eastern Europe. This must be used for better international ventures

The main problems of own production are increasing costs. It turns to more and more expensive with time, if you want to lead ratings and market share. Big entertainment shows, event programming, fictions to go international. Including flat ad pies, extreme competence and higher costs, there are a big and serious crossroads to solve.

What are the CEE broadcasters doing about? Most of them are developing group of channels. Instead of handling just one free TV channel, now they manage one or two free TV channels, 3-6 pay TV channels and different digital options. DTT (digital terrestrial television) is already announced in many countries, but in crisis times is difficult to imagine the analogue switch off seen in Spain (with catastrophic consequences for the financing health of the TV channels, also).

The concept is to invest for the future, to be well positioned when the market grows again in the new multiple-screen environment. If you handle a group of channels, you keep more market share all in all and you control better the dynamism of the market, you compensate one media with the other. You can also make unified advertisement deals, cross media synergies, and so on.

Investing on digital is key for the strategy. Many programming managers from the world have the opinion that as important as rating points, are web clicks. They are the rating of the future, they say. To develop 360

programs that increase web traffic, catch up services, social network communities, etc. are all good ideas.

To afford increasing costs, the CEE broadcasters and main producers have good options: co-production projects, production sharing ventures (locations, formats, etc.) branded content, second screen deals with online titans, 360 developments (licensing,



RTL Klub, Hungary: Peter Kolosi, programming director, Blanka Póth, format and co-production manager, and Péter Herman, head of creative

Hungary is scheduling access prime time programming inside the prime time, with good ratings results. But the new multi-platform landscape urges free TV to think big

the matter as they can. There is good traffic between groups of countries inside the region, but the CEE productions are not going worldwide as for instance the South East Asia ones, that though their no tradition in distribution, are investing with progressive plans to cover every corner of the world.

We have the Turkish *boom*, of course, one of the strongest of the last 20 years. Romania is doing a good work, with first-level international productions. Russia and Poland are now production titans. But we don't have a CEE push as a whole, we can't speak about a CEE style for the world. If you are in Africa or Latin America, it is easier to watch an Asian product than a CEE material.



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

Premium pay TV channels are leading original fiction production in CEE region. New bets on scripted are expected from more pay TV channels

live shows, merchandising), Government production plans, etc. And especially, to go international, to sale own products abroad.

Within the last 5-7 years, many international sales divisions were launched, including finished programs and formats. But below a neutral overview, it can be said that till now CEE broadcasters are not so developed or so successful on

the matter as they can. There is good traffic between groups of countries inside the region, but the CEE productions are not going worldwide as for instance the South East Asia ones, that though their no tradition in distribution, are investing with progressive plans to cover every corner of the world.

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The CEE broadcasters and

## THE CEE BOWL

- MOST COUNTRIES NOT RECOVERED FROM 2009 CRISIS
- MANY NEW CHANNELS EVERY TERRITORY
- PAY TV AND DIGITAL BOOM
- OWN PRODUCTION
- STRONG COST RISINGS

## CEE SOLUTIONS

- GROUP OF CHANNELS (FREE TV, PAY TV, DIGITAL)
- DIGITAL DEVELOPMENTS
- CO-PRODUCTIONS
- PRODUCTION SHARING
- BRANDED CONTENT
- SECOND SCREEN
- INTERNATIONAL SALES

## CEE CHALLENGES

- TO POST BETTER THE REGION INTERNATIONALLY
- WIN-WIN INTERNATIONAL RELATIONSHIPS
- OPENING NEW MARKETS
- IDENTITY NICHES: DIGITAL CONTENT, FRESH GENRES



Natasja Arbajter, program editor, ProPlus (Slovenia); Zrinka Jankov, editor in chief, Nova TV (Croatia); Danica Knezo, deputy programming director, ProPlus (Slovenia); and Nina Mikola, head of acquisitions Nova TV (Croatia)

Most of the CEE countries are not still recovered from the global crisis, but the broadcasters are betting on own production and launching new TV channels

## FROM NATPE EUROPE TO KIEV MEDIA WEEK: CENTRAL & EASTERN EUROPE ON FOCUS



natpe.europe

main producers must work on win-win international relationships, on co-production projects with overseas big titans that include not only sharing costs, but also opening markets and to establish a brand for upcoming proposals. There are Hollywood studios as Sony making productions in Russia, but CEE players can push co-production or collaboration deals with Latin America or Asia, for instance. CEE has groups of TV channels through different countries, this is a not frequent advantage to take in mind for co-productions or sharing ventures.

Concerning the advanced digital landscape, CEE region can make a difference about developing multi-platform content. This can be very demanded worldwide. Also, CEE region is good testing new genres, as happened with scripted realities recently, or now with fresh celebrity shows. The CEE players can head new genres for the world.

Entertainment or fiction? Genres? PRENSARIO regularly interviews many acquisition executives per market, and both at Discop Istanbul and MIPTV in Cannes, we've checked that CEE buyers are looking for fiction and scripted formats more than usual, due to the lack of fresh entertainment formats. **Daiva Andrade**, head of acquisitions at LNK Lithuania, said at MIPTV: 'I looked

for finished TV series and movies. And formats in case something fresh appears'.

In the new multiscree era, there are opportunities for all kinds of programming, and CEE is not the exception. The broadcasters are very well developed in own production so they need big entertainment formats to make a difference against pay TV and new platforms. Original fiction TV series are the flag of premium pay TV channels and online titans, to make their own way on content. And finished products are the best option to cover programming schedules in the many new channels appearing (at pay TV, new media) apart from the free TV ones that need lower and controlled costs of programming.

Even, finished programming is surprising with huge ratings successes in different territories of the world. Turkish TV series has lastly entered Latin America (the land of telenovelas) with an important success of *1001 nights* (Global Agency) at the prime time of free TV broadcaster **Mega**, in Chile. It is marking flashing 26 points rating, at 10pm. Romanian **Media pro's** telenovelas are present with good ratings in 6-7 Latin



Viasat, UK, for Central & Eastern Europe: Katrina Ivanova, acquisitions manager, Free TV CEE, Girts Lics, acquisitions manager, formats licenses, and Ilze Korjusa, head of acquisitions Free TV CEE & Africa

The U.S. and Western European investments are down now in CEE, but the region is learning to survive on its own

countries.

Hungary (see special interviews apart) is usually on the front about new experiences in Central & Eastern Europe. The two main broadcasters launched last year pay TV channels 'free TV alike', moving good entertainment brands to them. Now they've been successful offering access prime programming even inside the prime time. **Tibor Forizs**, head of program acquisitions and scheduling at **RTL Klub**, thinks: 'On one side, free TV must evolve in the new multi-screen stage. But on the other, to be similar to pay TV is dangerous. Free TV must always make a difference with event programming'.

So... there are many matters to deal with, nowadays. About the events, what? *Natpe Europe* promises to be reinforced with the move to Prague. Czech TV market is more similar to Germany, different from the Eastern territories that are more 'Latins', according to Czech opinions. We'll be seeing many new companies and more German players this year vs. Budapest events. And *Kiev Media Week* is growing every year, due to the potential development of CIS markets, where there are thousands of things to be done. If the Ukraine political situation is calm, it will have another good experience.

Nicolás Smirnoff



TVP, Poland: Paulina Rzczewska-Bednarczyk, head of film department (TVP1), Malgorzata Czyz, programming editor (TVP2), Krzysztof Bartolomiej Jaworski, sales

Russia and Poland are strong production poles now. Though, CEE region needs a twist to gain more international markets



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## TV-3 RUSSIA: 'MYSTERY, PUZZLES, SECRETS...INEXPLICABLE'

CEETV's **GEORGI R. CHAKAROV** met in Moscow with **DARIA FIALKO**, General Manager of TV-3 Russia, who highlights the evolution of the TV-3 brand focused around the inexplicable and mysterious, the channel's latest projects and trends on the market.

**ceetv:** Two years ago you said that your main goal would be to make TV-3 a recognizable brand. Have you achieved this now?

**DF:** Building a TV brand is a very long-term process. To say that we have achieved this in the last two years would be a lie, but we advanced greatly. We've prepared the ground. We have a clear understanding of our brand, of our mission, values and audience. And what is more important, we have performed an image research recently, because it's one thing to fantasize on how successful we are, and another one to understand how our viewers perceive us. We wanted to get feedback directly from the audience, and we got it. Our vision on the perception of the channel by our audience was confirmed. I can clearly state that we are on the right track, and we will stay on it; we will keep on developing our brand, making it broader.

**ceetv:** What would be the three key words describing your channel?

**DF:** Mystery, puzzles, secrets. And the fourth word: inexplicable

**ceetv:** Your channel created a trend for mystery in Russia. Can you explain how you made a decision to switch to mystic?

**DF:** TV-3 really brought the trend for mystery to Russia, and became a mystery pioneer in our country. Now we are expanding the range of the themes: it's not for nothing the channel changed the slogan to "All Dimension of Reality". It means that it's something more than reality, but not limited to mystery. Many other channels took up this trend, but it's only us who follow this positioning 24 hours a day, 7 days a week, whereas the others just do it on a level of airing just a few projects.

**ceetv:** Can you tell us more about the new shows? What's their idea?

**DF:** When I joined the channel two years ago, we started trying to work in different genres. It is widely thought that mystery mainly means TV series. We proved that it's not like that. For example, *The X-versions*, a mystery news where a real team of journalists gathers information from all the corners of Russia and the world about some strange events. There has never been such program before. We also actively entered the genre of scripted reality and docudrama. And after such super successful projects as *The Fortune Teller*, *The Ghost Hunters*, *The Mysterious Stories*, we are launching new ideas in the same genre. A big premiere of this spring is *Psychosomatics: The Other Medicine*. The main characters are doctors, two charismatic geniuses of the profession. And the main idea of the show is clear from its name – all sickness comes from the head and the nerves.

Also, the studio-based shows: given the positioning of our channel it was very difficult to come up with something and realize an adequate idea. But as a result we have the show *An Invisible Person*. And of course the TV series: we put in great resources, both creative and financial, to develop new series projects. The main premiere of the season is *13*. It is a series where the action takes place at the editorial office of a mysterious newspaper 13, and the main characters, journalists, investigate the strange cases.

cee|tv

TB 3



The series 13 is the main premiere of TV-3 season

**ceetv:** Any other projects we need to look forward to?

**DF:** We are trying to be very careful when it comes to the production of TV series. The important thing here is to make them well instead of making many projects quickly. Now we are doing an adaptation of *The 4400*, a story about people who disappeared from different times and in various circumstances, and came back to our time. It will be a huge premiere at the end of the year. We also continue to air foreign movies and series. We are the only channel in Russia that successfully broadcasts American series in primetime. It is very important that we have the audience that comes to watch those series only to us, showing us this unique loyalty.

**ceetv:** Do you think it is a good approach to adapt formats for your channel?

**DF:** What is good about a format? You buy it and you know that you have a strong story, huge number of written episodes and the success history in the countries of original broadcast. The disadvantages are also clear – the license limitations. That's why I can say that adapting series is not our strategic initiative. It is just an approach that works well in the condition we are currently in. Parallel to this we are developing our own stories. It is a very long-term process, and haste can only hurt. However, the formats are easier to produce. For example, we are now working on the adaptation of *The Mentalist*. We have high hopes for this project next year.

RUSSIA: SHARE, PER NICHE CHANNELS – 25/59 (JAN-APRIL 2014)



Source: TNS Russia, cities 100,000+, 05:00-29:00

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## bTV BULGARIA: 'WE ARE THE MAIN DRIVER FOR THE MARKET TRENDS'

The bTV MEDIA GROUP is the market leader in Bulgaria, operating a large portfolio of brands which consists of one main channel, five thematic channels and the first and only VOD platform in the country. It totaled an audience share of 39.6% on prime time in the target group 18-49 in the first quarter of 2014, according to GARB.

'Even though rather small, the Bulgarian market is highly competitive with more than 250 available channels in the country and all major international players represented', explains to PRENSARIO Margarita Alexandrova, Acting Program Director, bTV Media Group, who adds: 'Our main channel, bTV (34% of audience share 1Q14 in 18-49 prime time) is the market leader with a focus on news and entertainment since it was launched in 2000. In the last few years we built a unique portfolio of thematic channels each designed to attract specific target groups'.

'The right mix of high quality locally produced and acquired programs are the key to successful audience performance. There are several very attractive genres to the Bulgarian audience in the last few years: reality programs, locally produced series and entertainment

programs, as well as acquired series, and bTV is undisputable leader in all three'.

The key programs in Spring 2014 are the third season of

Bulgaria's Got Talent with 36.8% share points among audience 18-49, the Turkish series Kyuzei Gyunei (39% audience share) and the local dramedy series Capital Hillbillies (34% audience share).

Continues Alexandrova: 'The TV industry in Bulgaria faces many challenges nowadays as a result of the fading economic crisis in Western Europe. The market is still suffering from the very cautious spending behavior of our clients, as well as reduced marketing budgets, and we are happy to say that our group manages to maintain relatively stable results'.

'We do not only follow the trends in audience behavior and preferences because we are often the main driver for these trends. During the last decade, bTV produced the most successfully performing reality programs in Bulgaria, among which are Survivor, The Voice, and Bulgaria's Got Talent. Another achievement is the development of high quality local series, which a few years ago drastically changed the whole market. From acquired fiction there is strong interest in Turkish titles and recently we are observing also interest in Indian series primarily aired in daytime', she remarks.

Regarding digital Alexandrova explains: 'In the modern world with new ways to consume content, both traditional and digital media are getting more and more close to each other. Maybe some day they will become one medium but until this happens we still observe differences in the preferences of one or the other. It is hard to say though which one the audience prefers, as both are giving something that the other one cannot give'.

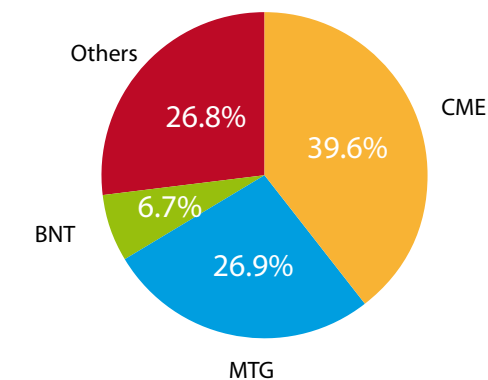
'While the Internet is getting more and more popular and is associated with the freedom to access whatever and whenever, as well as to share opinions, TV holds its ground as a main source of information and entertainment. At this point this seems to be the perfect symbiosis, as our observations show that the audience is not consuming one at the expense of the other, but the overall usage of content and hours spent increase'.



'The existence of both mediums also enables better interaction with the content as both TV and the Internet complement one another. One of the best examples for this symbiosis was a successful increase in the interaction with the online platform of the current season of Bulgaria's Got Talent during the live broadcasts. On a deeper level it improves satisfaction with our brand'.

Lastly, the executive completes about the future: 'We aim to keep our leadership position by creating high quality content which will provide a positive experience for our viewers and an effective environment to communicate the messages of our clients. The key pillar in our programming schedule in Fall 2014 will be a fifth season of Survivor – the strongest reality format in Bulgaria'.

BULGARIA: AUDIENCE SHARE, PER GROUPS – 18/49 PRIME TIME (1Q14)



Source: GARB



The key programs in Spring 2014 have been the third season of Bulgaria's Got Talent with 36.8% share points among audience 18-49 and the local dramedy series Capital Hillbillies with 34% audience share

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Margarita Alexandrova, Acting Program Director, bTV Media Group

## TV JOJ, SLOVAKIA, BETTING ON OWN PRODUCED FICTION

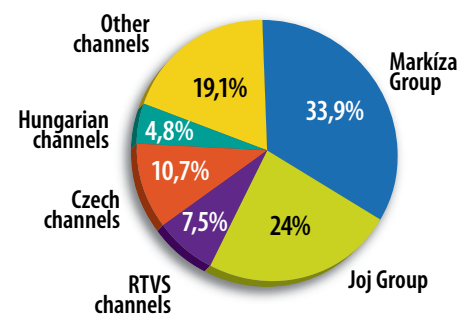
TV JOJ has been airing for 12 years in Slovakia and it has got *siblings* from that time: the networks **Plus** and **Wau**. JOJ has a share of 17-18%, being 21% on prime time, **Plus** 4-5% of share and Wau over 2%.

The channel offers quality family entertainment and drama projects, strong news blocks and primetime feature films and branded US series. **Plus** has contents for younger male type of audience who knows what he likes and **Wau** focuses on young female viewer and her demands.

**Erika Tothová**, head of acquisitions, TV JOJ, explains to PRENSARIO: 'We are strong in daily prime time projects: we are airing an own-produced telenovela called *Panelak* (Block of Flats), the news at 12am, 5pm and 7pm, crime news, sport and weather at 8pm, the court show *Sudna sien*, a weekly lifestyle magazine *Nove byvanie* (New Home), a sitcom about a police department *Profesionali*'.

Regarding acquisitions, it emits US series such as *Bones*, *Castle*, *CSI*, *Vikings*, *Suits*, *Hawaii 5-0* and features in adventure / action

SLOVAKIA: AUDIENCE SHARES - AVERAGE FOR WEEK 22<sup>ND</sup> 2014



Source: Analysis department, JOJ

and family movies/comedy genres 'that works the best', says the executive.

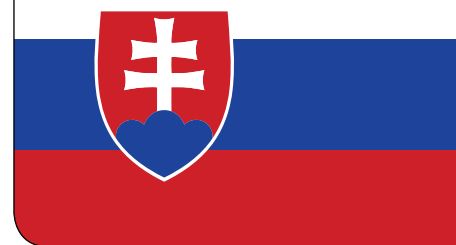
'We are continuing in all our own produced shows from Spring season in Autumn-Winter season as well and adding a new heart-warming format with emotional elements and a weekly drama series about relationships and solving the problems around them.'

The shows JOJ produces by its own are the local daily soap and drama series. She continues: 'Panelak has been on air for 7 years already and another daily drama series is in pre-production. The projects produced by our local teams are drawn from the local stories, habits, background and experience what viewers would like to see. The format shows we aired recently were quiz shows as *Think*, talent show as *Got Talent*, constructed reality *Day and Night* and had good viewership with *Kitchen Nightmares*'.

### THE MARKET

'In comparison with the previous years, there are lots of options to watch and content is the most important fact when choosing a TV channel. Local content, news, crime series, action/adventure/family movies works the best on the main channel, while the smaller channels give an alternative programs in the light of the wide offer from the competitors and strong website contents'.

'The audience selects smartly what to watch. We can keep our viewers if



Own produced fictions: *Panelak*, a prime time telenovela that has been on air for 7 years, and *Profesionali*, a sitcom about a police department



we air the content that brings something new and different on the market, something well and quality produced, content for the whole family, entertained or emotional in the slots where the viewers expect to watch exactly this type of program or genre', adds **Tothová**.

### DIGITAL

'Digital media has been changed a market a lot in the last several years and we built up a new media strategy and content, trends and expectations of the young generation and changed behavior on how to get the content. The website [www.joj.sk](http://www.joj.sk) is one of the most well-known media websites in Slovakia with strong news and crime content, lifestyle topics and issues, thematic websites with content wanted. Synergies with traditional media is supported by content offered through catch-up or giving local content promptly and exclusively', concludes the executive.



The weekly lifestyle magazine *Nove byvanie*

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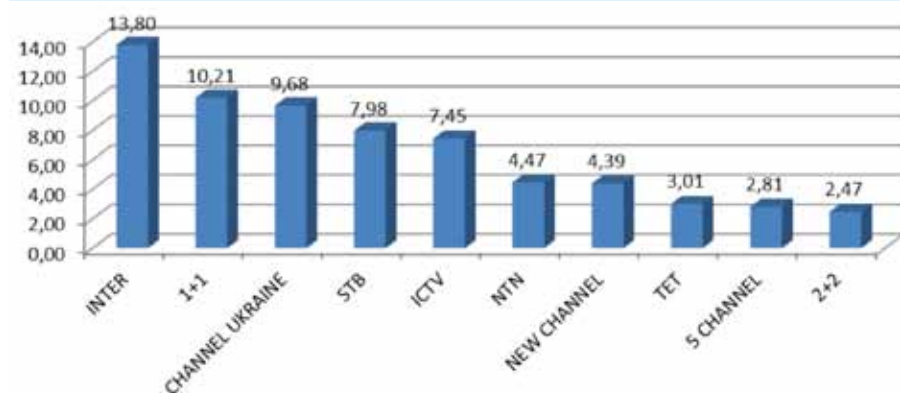
Erika Tothova, head of acquisitions

# UKRAINE: GROWTH, DESPITE CRISIS

Ukraine is the second largest TV market in the CIS region after Russia. The territory of the state is 603,628 km<sup>2</sup> and its population amounts 45.6 million people. There are a total of 16.4 million television households and approximately 24 million television sets in use in Ukraine (according to the National Broadcasting Council of Ukraine). Ukraine is a kind of unique country in Europe from the point of view of the national-wide analogue terrestrial TV nets quantity: there are 15 channels of that kind in the country.

Private TV broadcasters owned by Ukrainian tycoons play the leading role on the local market. There are four dominant TV Groups in Ukraine: **StarLight Media** (belongs to **Viktor Pinchuk**, operates **STB**, **ICTV**, **Novy Channel**, **M1**, **M2** and **QTV** channels), **Inter Media Group** (belongs to **Dmitry Firtash**, runs **Inter**, **NTN**, **K1**, **K2**, **Mega**, **Enter-film**, **MTV Ukraine**, **Pixel** channels), **1+1 Media** (owned by **Igor Kolomoisky**, operates **1+1**, **2+2**, **TET**,

TV SHARE IN UKRAINE, MAY 2014 (AUD 18+, ALL UKRAINE)



Source: Nielsen

**PlusPlus**, **Bigudi** and **Unian TV** channels), and **Media Group Ukraine** (belongs to **Rinat Akhmetov**, runs **TRK Ukraine**, **Football**, **Football+**, **Kinotochka**, **Donbas**, **Sigma TV**, **Sphere TV**, **34 Channel** and **NLO TV** channels). Government-owned TV channel

**First National** is not so popular, as private broadcasters. Nevertheless it belongs to TOP-10 most popular TV channels in Ukraine.

There is no public broadcasting company in the country yet, although the process of its launch on the basis of state-owned **First**

## MK, UKRAINE: 'WE KNOW WHAT TO OFFER'



Katerina Dmitrieva, CEO

**MK-Distribution** is one of the top content distributors from Ukraine acquiring content for Ukrainian and Russian TV channels such as **First Automotive**, **Business**, **Dobro TV**, etc., but also working with the Internet, VOD, OTT services and international producers and footage stocks. It has launched the new media project **Global Content Exchange (GCE)**, which creates alternative global market for distribution through **globalcontentexchange.net**.

**Katerina Dmitrieva**, CEO: 'We aggregate quality content and formats, license it for different markets and then build a strong portfolio. We know what to offer here in Ukraine. We also work with digital platforms, even last year they tend to purchase only premium content from the major world studios and high ratings Russian content.'

The most popular genres are beauty & fas-

hion shows like *Losing the weight*, the reality *Bachelor and single women*, and different social projects and talent shows. 'We licensed mostly factual and entertainment programs: Australian *Connect* and *Invent Flying*; Polish *Automaniak* and *Yes We Can*; Italian *Marry me* and *American Girl*, and Colombian *First Lady*, etc.'

**Dmitrieva**: 'Because of the political situation in Ukraine, the channels have reduced acquisition budgets, while many of them disappear or change the owners. It is not a secret that a huge part of Ukrainian broadcasters are owned by people involved in politics. Situation on top channels is better'. Regarding trends, the audience has switched into informative and infotainment content, and many news channels were launched to provide people with non-stop information. 'Anyway, local adaptations of big international formats (*The X Factor*, *The Voice*, *MasterChef*, etc.) continue to be the most relevant content in Ukraine. Also, CIS countries produce a lot of TV product & formats and some



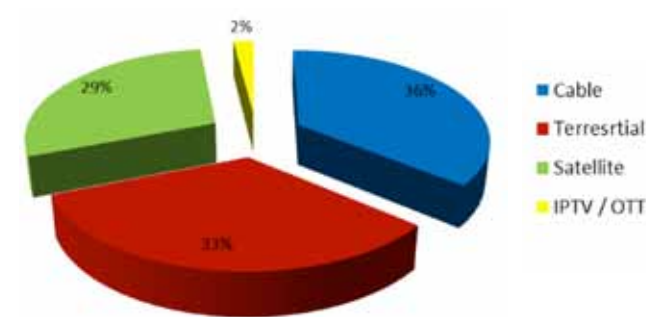
Own productions from MK-Distribution: *Paintings of the World*, *The World in Pictures* and *More than a Song*

of them are developed specifically for sales: for instance, we offer internationally formats such as *Calendar Live* and *The Fight of Managers*.

'This year we began active work in MENA, Asian and African markets and had positive experience. We plan to open our own mini production studio, where at the beginning we want to produce short series of different genres. Our team invented an exclusive way for channels to gather these short series like a constructor, which will make it individual and suitable for any programming. We have already produced *Paintings of the World* (100x3), *The World in Pictures* and *More than a Song*', concludes **Dmitrieva**.



TV SIGNAL RECEPTION TYPE IN UKRAINE



Source: National Broadcasting Council of Ukraine, E&C Consulting

**National TV channel** is currently underway. Totally there are 16 national-wide broadcasters, more than 200 local and regional TV stations (both private and government owned) and more than 80 satellite private broadcasters.

Cable is the most widespread television platform in Ukraine accounting by the end of 2013 for over 5.9 million subscribers (36% of the total television households). The penetration of cable TV has risen near 6% comparing with the results of 2012. The terrestrial platform yet remains the second most widespread television platform in Ukraine and is used by 5.4 million television households. Satellite TV coverage in 2013 grew more than 200 thousand households and reached 4.7 million homes (near 29% of the total television households). The majority of satellite households prefer to receive FTA channels and not to pay DTH operators for the service. However, the constant growth of the cable and satellite platforms has eroded the terrestrial platform's market share which has decreased from 75% in 2007 to 63% in 2009 and to 33% in 2013.

All services on the terrestrial platform are currently free-to-air including DTT service from Zeonbud, private operator of 4 out of 5 DTT multiplexes in Ukraine. The rest 2% of the households use IPTV and OTT platforms (currently there is no update statistics of these two platforms users) to watch TV.

From the advertising point of view Ukraine is the second largest market in the CIS region after Russia. The total volume of its TV ad market grew 14% in 2013 and amounted \$555 million, plus \$62.5 million of TV sponsorship (data provided by All-Ukrainian Advertising Coalition). For this year the market volume was forecasted 10% growth but because of Ukrainian grivna 10-12% deflation in February-March the market volume will definitely grow in the Ukrainian currency equivalent but is likely to remain flat in US dollars. (data provided by All-Ukrainian Advertising Coalition).

## ROSTGROUP: THE 7TH SENSE DIGITAL PLATFORM

Ukrainian developer and producer **RostGroup** continues to promote in the international market the first TV format based on an original digital platform: *The 7th SENSE*, launched last MIPTV. **Olena Sibiriakova**, managing partner, explains: 'While developing our new show, we have done the key focus on its interactivity and innovative possibilities for the audience that allows them playing together with the players in the studio.'

'TV audience can also influence the results of an interactive game show in the studio: the intuitive choice was placed as the key drama of *The 7th SENSE* game show. This distinguishes the format from the traditional quiz and talent shows', remarks the executive, who highlights that the company will continue to search new ideas for the digital platform-oriented formats for the audience of 22+ and more.

Due to **SINCE TV** technology, about 1,000 PR representatives worldwide could remotely participate during *The 5th World Communication Forum* in Davos (Switzerland). **RostGroup** acted as a technical partner and presented its technology of interactive communication to the speakers, participants of the global event as well as their remote viewers in the real time mode.

It is an innovative cross media platform, which integrates Internet into television and new media with wide operativeness. At the Davos Awards ceremony **Sibiriakova** awarded a prize on "The Media of the Future" category to the PR expert Maxim Bekhar for his **Nominate.com** project.

**RostGroup** is currently working on the development of a new version that includes ability for simple integration with digital resources, multilingual and live analysis systems. This new version also easily integrates with the other systems through AJAX/JSON, API, SSE, websockets, webRTC, iframes, multilingual.

Technical feature of the original digital platform is a combination of a live broadcasting with the new possibilities of managing the screens of the game participants mobile devices (PC, iPad, iPhone) in the remote locations and gathering instant feedbacks from unlimited number of TV viewers in a real time mode.



Olena Sibiriakova, CEO, RostGroup



The 7th SENSE, interactive game show

## DIGITAL PAY TV SOARS IN EASTERN EUROPE

The number of digital Pay TV subscribers will increase from 26.1 million (21.5% of TV households) in 2010 to 45.0 million (36.6%) in 2013 and onto 73.6 million (58.2%) by 2020, according to a new report from Digital TV Research.

As Eastern Europe crawls out of recession, the number of digital TV homes will triple between 2010 and 2020: up from 41.0 million to 124.7 million. From the 52.3 million digital TV homes to be added between 2013 and 2020, DTT will supply 24.9 million, digital cable 15.3 million, IPTV 6.6 million and paysatellite TV 5.8 million.

The Digital TV Eastern Europe report states that digital TV penetration crossed the halfway mark of TV households in 2012, up from a third at end-2010. Fast take-up will push digital TV penetration to two-thirds by end-2014 and onto 98.5% by

2020. Thirteen of the 21 countries covered in this report will be completely digital by 2020, with Estonia the first to full conversion—in 2012.

Simon Murray, author of the report, clarified: 'For the purposes of this report, we have assumed that the situation in the Ukraine will be resolved quickly, with Russia withdrawing from the Crimea.'

The number of analog terrestrial TV households halved between 2010 and 2013, leaving 23.2 million. Only 11.9 million DTT homes were added, therefore the digital pay TV

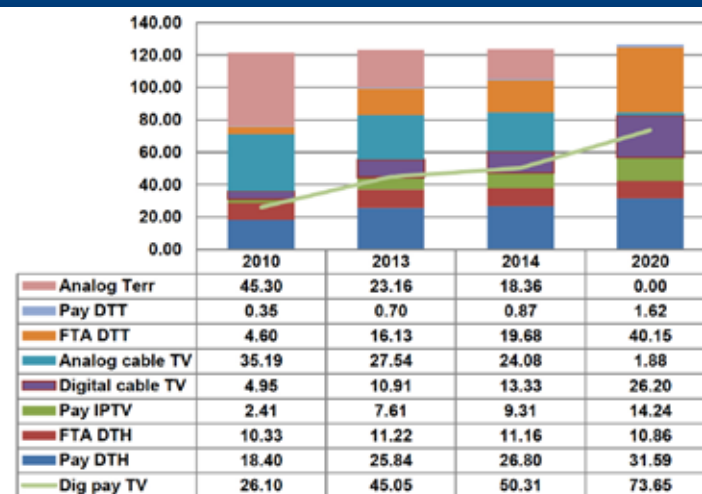
platforms benefitted from the analog terrestrial homes converting to digital. However, 24.9 million DTT homes will be added between 2013 and 2020, with all of the remaining 23.2 million analog terrestrial homes lost, so pay TV operators will gain less from terrestrial TV.

Murray added:

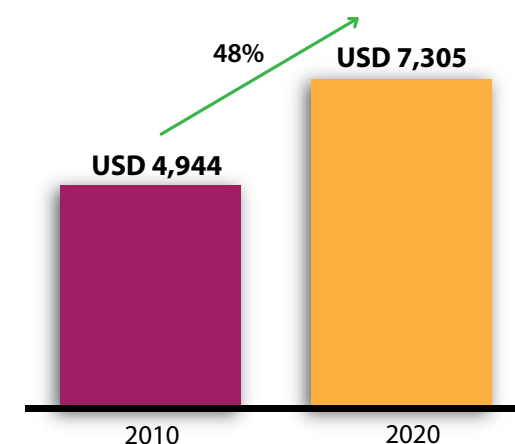
'With the proportion of terrestrial homes settling, much of the emphasis from pay TV players has fallen on the 27.5 million remaining analog cable subscribers. Many of these homes will upgrade to digital cable, but some will shift to IPTV and satellite TV. However, many of the remaining analog cable subscribers are refuseniks, who don't want to pay more for TV services. As time goes on, the proportion of the remaining analog cable homes with this attitude increases. Free-to-air DTT (or even pay DTT) is an attractive option for these homes.'

From the 83.6 million digital TV homes to be added across the region between 2010 and 2020, Russia will contribute 40.7 million, with the Ukraine increasing by 13.3 million and Poland 6.7 million.

EASTERN EUROPE TV HOUSEHOLDS BY PLATFORM (2010-2020) IN MILLION



EASTERN EUROPE: PAY TV REVENUES (2010-2020) IN MILLION



Source: Digital TV Research

### PAY TV REVENUES

In Eastern Europe, Pay TV revenues will be 48% higher in 2020 (USD 7,305 million) than in 2010 (USD 4,944 million). Digital cable and IPTV revenues will more than double between 2013 and 2020, but satellite TV revenues (the main earner) will only grow by 22% over the same period.

Russia will contribute \$2.02 billion (28%) of the pay TV revenues in 2020 overtaking Poland in 2015. Russia will be responsible for nearly half of the region's \$1.1 billion additional pay TV revenues between 2013 and 2020. TV ARPU's have traditionally been very low in Russia, but they are set to increase.

### RUSSIA: CTC LAUNCHED CTC LOVE

CTCLoveChannel, targeting the 11-34 year-old audience, was launched on April 1 in cable and satellite, with penetration of approximately 20% and 13 million subscribers in 20 cities Russia.

Yuliana Slashcheva, CEO, CTC Media, which also managed CTC, Domashny and Peretz networks, comments on the company

1Q 2014 results: 'Our Russian TV advertising revenues grew 12% year-on-year in ruble terms in first quarter, and we therefore significantly outpacing the estimated 7-8% growth of the Russian TV advertising market.'

'We expect the growth in the Russian TV advertising market to slow in the remaining quarters of 2014 and to be at the lower end of the previously indicated range of approximately 5-8% for the full year. We strive to outperform the overall market in Russian TV advertising revenues for the year', she concludes.



Yuliana Slashcheva, Chief Executive Officer of CTC Media



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## TV2, HUNGARY, PREPARED FOR THE NEW CHALLENGES



Gyorgy Bence, news and programming director, TV2 Group

PRENSARIO interviews for the first time **Gyorgy Bence**, news and programming director of **TV2 Group**, one of the leading Hungarian media groups gathering 17,7% in all day shares total individuals +4, and 20,8% in prime time (6pm-11pm) shares in the same target group.

He explains: 'The biggest news in our market is that we have become market leader in Hungary in terms of all day average ratings considering 18-59, starting a new phase in the history of the channel. The competition for the prime time has been also much more tight than in the recent years. Cable channels also doing well'.

About the top shows on air, **Bence** explains: 'The year started with the *Big Duet*, a celebrity singing contest show, which was a huge success and won every time it was aired.

The second event show this season is the second season of the *Masterclass*, performing extremely well and winning every Sunday prime time on TV2'.

'We have launched a new scripted reality format, *Magánnyomozók* (*Private Detectives*), a daily show that is doing very well in the 7.30pm slot every day. A big change in our schedule is that from the beginning of May we have moved the local soap opera *Jóban Rosszban* to the first part of the prime time, changing the trend,

which made it starting after 10pm. *Yellow Press* is also on air every day: it is one of our biggest inventions, keeping its good performance in the prime time in a really hard contest', stands the executive.

In Hungary, **Bence** comments, realities—especially docu and scripted realities—'remained successful', and local production 'rules' the prime time. He continues: 'No big announcements for new channels, but the

*Big Duet* is a successful celebrity singing contest show, which was a huge success and won every time it was aired, while the second season of *Masterclass* performs extremely well and wins every Sunday prime time on TV2

small cable competition is extremely strong, with 100+ Hungarian speaking channels. Free TVs still dominating the market, but the model is going to change. TV2 like RTL Klub is going to charge for content, thus the distribution market faces a different situation starting from January 2015'.

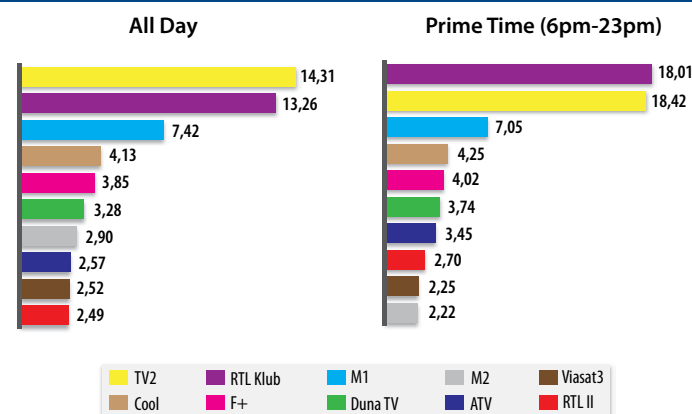
The executive says that the Hungarian audience watches 'extremely lot' television, 240 minutes a day in average. 'Most of them are subscribers of a cable or satellite service, 30 percent has digital cable. DVR usage and on demand does not really effect the viewership so far', describes **Bence**.

Regarding the future, he finishes: 'There are plans of new channels on the table, but they are not realistic this year. The cable market system will change in 2015 and it is going to be a really important development in our life, so we are ready to act fast, if necessary'.

# THE BRAVE ONES

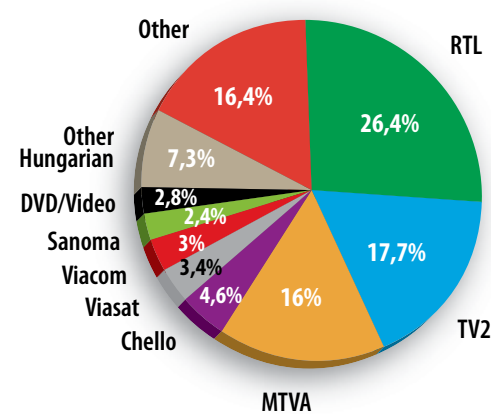


HUNGARY: YEARLY SHARES OF CHANNELS  
TOTAL INDIVIDUALS +4 (JAN. 1-MAY 25)



Source: Nielsen Audience Measurement / TV2 Research

HUNGARY: YEARLY SHARE, PER MEDIA GROUPS –  
TOTAL INDIVIDUALS +4 - ALL DAY (JAN. 1-MAY 25)



Source: Nielsen Audience Measurement / TV2 Research

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## TVN POLAND: HIGH-END DRAMAS, DIGITAL PLATFORMS



Maciej Maciejowski, member of the management board in charge of new business development, TVN, and Sebastian Podkościelny, deputy director of the news section, TVN



TVN Group is made up of nine channels: apart from the main TVN it operates two other channels on DTT, TVN7 and TVP (now 51% owned by TVN), as well as the thematic networks TVN24 (news), TVN Style (female), TVN Turbo (male), TVN CNBC (business), TVN Meteo (weather) and ITVN (international).

The flagship network TVN reached the first position between March and May, getting 14.11% of audience share, followed by Polsat with 14.04% and the two State-Owned channels TVP1 (8.81%) and TVP2 (8.15%). TVN7 and TVN24 were also among the Top 10 channels of this period reaching 2.35% and 2.42% audience shares, respectively.

The company is also betting strong on the digital platforms. It closed this month an agreement with Sony Computer Entertainment Europe to launch its VOD service Player.pl on PlayStation3 and PlayStation4 systems. It is available on the first platform since 4<sup>th</sup> June 2014, but the date of launch on the second one was not announced yet.

PlayStation users have access to the most popular TVN-produced content such as the TV series *Medics* or *True Law* as well as exclusive,



*Medics*, one of the broadcaster top series, is available for PlayStation users, after the deal closed with Sony this month

previously unaired TV programs: *Medics by night* (comedy episodes and night shift jokes from *Medics*) or bonus web extensions of consecutive *Kuba Wojewódzki* episodes. It also offers spans beyond TVN productions: *Spartacus*, *Masters of Horror* or *Magic City*,

as well as the kids series *Teletubbies*, *Inspector Gadget* or *Johnny Test*, *Superman*, *Batman* or *Justice League*.

Maciej Maciejowski, member of the management board in charge of new business development in TVN, says: 'Connected devices are becoming increasingly significant for TV. Player.pl is being introduced to further platforms so as to be everywhere within reach of our fans. Given the access to Player.pl via PlayStation, they will benefit from even more convenient and unconstrained opportunity to stream highest-quality videos on the big screen.'

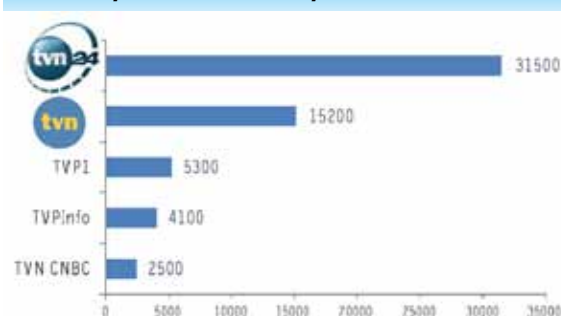
The application is available on Android, iOS devices, TV sets of many manufacturers as well as decoders of selected operators. In April 2014 a total number of nearly 4.6 million unique users visited the platform via all devices. According to Megapanel, the average time spent on Player.pl by user was 7 hours and 13 minutes in February 2014.

On the other hand, the company recently announced that TVN24 and TVN have been acknowledged to be the most 'authoritative' TV channels in Poland in the period of January 1, 2004 to December 31, 2013, a report by the Media Monitoring Institute from June 2014 has shown.

TVN24 is TVN's 24-hour news channel and was quoted by other media 31,500 times. TVN ranked second, being quoted a total of 15,200 times. TVN CNBC (replaced by TVN24 Biznes i Świat as from January 2014) was quoted 2,500 times over the last decade and ranked fifth both on the list of the most authoritative TV channels and the list of the most authoritative business media in 2004–2013.

In the overall ranking of the most authoritative media TVN24 was the fourth most highly quoted channel and was the top television station, immediately behind three press publications.

### THE MOST AUTHORITATIVE TELEVISION CHANNELS IN JAN 1, 2004 – DEC 31, 2013



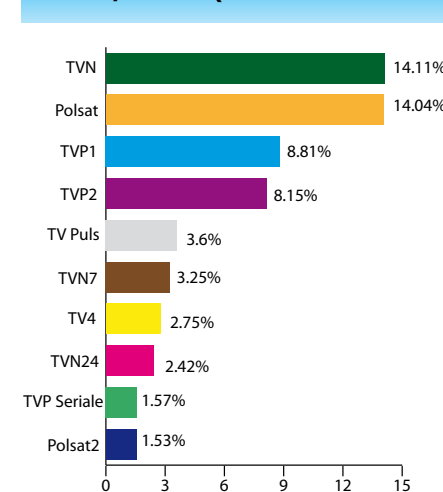
Source: TNS OBOP

TVN24.pl came fifth among Internet websites, being quoted 4.6 thousand times in other media.

Sebastian Podkościelny, deputy director of the news section, TVN, comments: 'The fact that these channels came top among the most authoritative TV channels proves that it is not only the audience that relies on us, but also other media. Our coverage gives them the fastest, high-quality, reliable and verified news on which they can build their own news stories.'

The findings were based on press, radio and TV monitoring where over 900 press titles, Internet websites, radio stations and television channels or their programs were quoted as sources. The analysis included any coverage containing quotes from or references to primary sources. The findings do not include quotes published on the Internet.

### POLAND: AVERAGE AUDIENCE SHARES, 16-49 (MARCH-MAY)



Source: TNS OBOP

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## PRO TV, ROMANIA: STRONGER AND BIGGER



Aleksandras Cesnavicius, CEO, Pro TV

During the first quarter of 2014, **Pro TV**'s portfolio of channels drew an average of 32.3% audience share on the commercial urban audience aged 18–49 during prime time, while on all day, **CME**'s stations had an average audience share of 26.1%. The generalist **Pro TV** was audience leader with an average of 25.9% audience share in prime time and 20% all day on its target audience.

**Acasa**, the female-oriented channel, had an average audience share of 4% in prime time and 3.4% on all day on the same target. Then, **Pro Cinema** (1.1% of audience share on prime time and 1.2% all day); **Sport.ro** (0.7% audience share in prime time and 0.8% all day); **MTV** (0.2% audience share in prime time and 0.4% share all day); and **Acasa Gold** (0.3% in both slots on its target audience).

**Aleksandras Cesnavicius**, **Pro TV**'s CEO, stands: 'Our overall position on the market is primarily focused on prime time, as TV audiences are most active during prime time and when they expect to see the best products. Advertisers try to take advantage of the high exposure that this slots offer since it delivers better effectiveness for their campaigns.'

'The trends of 2013 continue into 2014: we continue to grow stronger and bigger. Between March 3rd-March 9th, **Pro TV** drew the highest ratings in the history of modern audience measurement in prime time, on the commercial audience aged 18–49. On the national audience, it had the highest weekly average in prime time and also in all day. On the

commercial audience, **Pro TV** had an average of 30.5% audience share, more than double than **Antena 1**, which had 12% share. On all day, **Pro TV** was the leader with an average of 21.8% audience share.'

Continues **Cesnavicius**: 'Our focus is chiefly set on reality and entertainment shows because both resonate better with the Romanian audiences. However, fiction will not be set aside. In 2014, **Pro TV** continues the series of top-rated shows that rule television entertainment in terms of ratings and popularity. *Romania's Got Talent*, which drew the highest ratings in the history of the local TV, already beats its own audience share record reaching 59.1%.'

Regarding fiction, *Las Fierbinti* is the 'genuine' Romanian series inspired by the life of the rural inhabitants in the country, reaching an audience share of 29.3% for the first four episodes of this spring's 5<sup>th</sup> season; and *O saptamana nebuna* is the new comedy series based on the TV series *The Worst Week*. **Pro TV** will also broadcast the football matches in *Europe League* and *Romanian Cup* in 2014 since in 2013 they were the most watched competitions in free TV.

'The most loved, discussed and watched shows in Romania are typically talent shows and those which bring ordinary people into the limelight, such as *The Voice of Romania*. After *Masterchef*, the cooking shows produce high audience shares, so we are preparing the 4<sup>th</sup> season of the program', comments the executive.

About digital, **Pro TV** is highly active on TV convergence with the Internet. 'We are constantly developing new ways of strengthening its position on new media



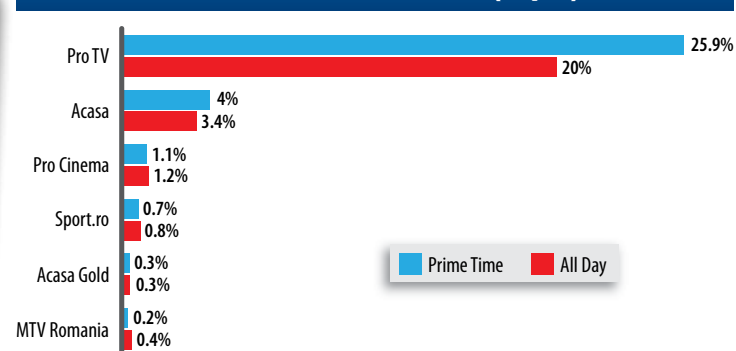
After *Masterchef*, the cooking shows produce high audience shares, so Pro TV is preparing the 4<sup>th</sup> season of the program

platforms. Bringing TV and *second screen* experience closer is definitely a priority, as we have a unique set of tools to maintain and reinforce our leadership', he says, and adds: 'The TV brands have Internet extensions that are current leaders of segments in entertainment (**proTV.ro**), news (**stirileproTV.ro**) and sport (**sport.ro**). 'We have already developed *second screen* apps for *The Voice of Romania* and *Romania's Got Talent* with more than 10 million page views for live events'.

'VOYO is not just a catch-up service, but a standalone SVOD offering, which includes all TV content in simulcast as well as catch-up, but the bulk of the content is comprised of foreign series and movies, including *House of Cards*, *Breaking Bad*, *Salt* and *The Artist*. Any user can watch on almost any device'.

**Cesnavicius** concludes: 'Our main focus in 2014 is strengthening and improving the quality of existing brands. This will be reflected in the new shows we are preparing for the fall season of 2014. We plan to leverage the advantages provided by CME production facilities as well as our experienced teams of producers that stand behind our most successful shows. As a market leader we cannot stand still and will always aim at bringing new, innovative ideas on the market and constantly focus on bringing execution standards to higher levels'.

### ROMANIA: AUDIENCE SHARE, PER CME CHANNELS 18-49 URBAN – PRIME TIME & ALL DAY (1Q14)



Source: Kantar Media



*Las Fierbinti* is the genuine Romanian series that reaches an audience share of 29.3% for the first four episodes of this spring's 5<sup>th</sup> season

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

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



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



Gonzalo Cilley, Resonant Argentina, with Alexandra But, head of international, Russian World Studios



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



Buyers from ProSiebenSat1 Media AG, Germany: Kaspar Pflüger, operating manager, and Nicolas Paalzw, managing director



Antoanela Ungureanu, content manager VOYO (new media) Czech Republic, from the CME Group



Filip Bobinski, Dramedy, Czech Republic



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

Maxim Pogibelny, liaisons sales manager, and Daryna Pirogova, liaison director, NBCUniversal, with Ukraine buyers: Natalia Liavynets, senior manager, Direct Sight Acquisitions; Oleksandr Zhuravskiy, program director, and Oleksandr Melnychuk, CEO, both at NTN TV



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



Poland: Alicja Gancarz, acquisitions at Kino+, and Joanna Rathe, acquisitions specialist, DOMO + Kuchnia +, at the new media player nc+, with Magdalena Garbacz



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



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



TV Joi, Slovakia: Erika Tothova, head of acquisitions, Eva Dzurovcinova, acquisitions manager



Georgian Association of Regional Broadcasters: Khatuna Mamardashvili, Aleksandre Khutashvili, Natia Kuprashvili, executive director, and Tamar Karkula



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



Jaanus Noormets, acquisitions, Kanal 2, Estonia



Junita Budvytiene, head of acquisitions, LRT



LNK TV, Lithuania: Daiva Andrade Gonzalez, head of content, and Jolanta Jasiene, acquisition manager



Eniko Harsányi, head of business administration, and Dániel Spollar, head of film channels at Chello Central Europe (borders) with Althia Plange and Pia-Maria Haka, sales at NBCUniversal



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



Andreja Sertic, Media Acquisitions with Delo Hadziselimovic and Ranka Horvat, editors-buyers from HRT, all them from Croatia; Johannes Stanek, Marion Camus-Oberdorfer, sales at ORF (Austria); Nidal Garcia, from Lucha Distribution (Lebanon); and Armin Luttenberger, ORF



Croatian main broadcasters: Nina Mikola, head of acquisitions, and George Makris, board advisor, Nova TV; Marco Dosic, head of schedule and research, RTL; Zrinka Jankov, editor in Chief, Nova TV; and Dragana Kos, head of acquisitions, RTL



Gordan Bobinac, CEO at Kip Croatia



Filip Zunec, head of films and series, RTL Croatia, with Tatjana Pavlovic, director of acquisitions at Antenna Group (Greece)



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



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



TV2, Hungary: Fisher Gábor, head of programming strategy, Bence Gyorgy, program and news director, and Ökrös Gergely, chief creative officer. The company is looking for talent and game shows at MIPTV



RTL Klub, Hungary: Bernadett Molnár, junior acquisitions manager, and Anita Kiss, programming coordinator



Hungary: Andrea Zaras, head of acquisitions, MTVA; Edina Balogh, Sr Acquisitions manager, Sanoma Media/Story 4 & 5; Blanka Balazs, programming director MTVA



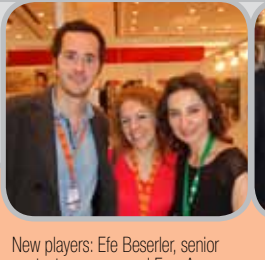
The leading channel in Turkey, Kanal D: Ozlem Ozsumbul, head of Sales and Acquisitions; Emrah Turna and Ezgi Ural, sales executives; and Amac Us, sales and acquisitions specialist



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



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



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



Ilcunur Omer, content production manager, Haluk Kurcer, president and executive board member, and Fatih Sals, news and international production director, from Kanal D (Romania), with Asli Serim, sales director, and Ismail Dursunov, international sales director, Calinos Entertainment (Turkey)



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



Kis Balazs, acquisitions executive, and Adam Horvath, acquisitions manager, SPT Networks Central Europe, with Diego Piasek, sales director of Electus International



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



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



Nicolas Smirnov, director of Prensario, with Arthur Yezekyan, president, and Laert Soghoyan, head of acquisitions of Shant TV, Armenia



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



Pro TV, Romania: Oana Barbulscu, acquisitions manager, and Sorina Big, head of acquisitions



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



Fox International Channels, Bulgaria: Mariana Grozdeva, acquisition coordinator, and Vessela Dimitrova, programming manager



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



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



Buyers from Star, Greece: Gina Dimitriadis, international acquisitions manager, Nathalie Woodfield, programming director, and Lena Papavasileiou, foreign program assistant



Pink, Serbia: Dragan Jelacic, head of film department, acquisitions and programming; Ivan Vlatkovic, VP; Barbara Sandic Stetic, head of administration & communications; and Zeljko Mitrovic, president



Katarina Niketic and Ivana Zebic, acquisitions at Di&MA Vision (Serbia) with Tatjana Saudet, from regional distributor Saudet Media (France)



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



Bosnia Hersegovina: Sanela Junuzovic, program acquisition at Hayat, and Dzenan Priganica, program manager, Plus



Dragan Petkovic, Visionary Thinking, Serbia

## MTG Pay-TV: 'CEE HAS ALWAYS BEEN A CRUCIAL DRIVER FOR OUR BUSINESS'



Irina Gofman, EVP/CEO of Russia & CIS and Pay-TV Emerging Markets

**Modern Times Group (MTG)** CEE operations include some of the leading free-TV media houses in the Baltic, Bulgaria, Czech Republic and Hungary as well as a majority stake in the leading production company **Paprika Latino**, with presence in nine countries in the region. It is also the largest shareholders in **CTC Media** (Russia).

'Our Pay-TV business in CEE consists of the **Viasat** satellite platforms in the Baltic and Ukraine, and the joint venture satellite platform **Raduga** in Russia. We offer 34 own produced pay-TV channels to other operators, which are available all across CEE, including Russia and the CIS. Some of the channels are also available in the Nordics, USA and Africa in 36 countries.'

The company recently acquired 75% of **Trace**, the France-based youth media brand and global Pay TV channel operator that has distribution agreements with third party network operators in 180 countries, including CEE. 'Our objective is to expand our content offering, digital availability and geographical footprint. We have invested heavily in the overall channel offering, the content we make available on those channels and the actual branding of the channels themselves. Over 60% of our premieres are exclusive, seen for the first time in the local markets.'

'We have rebranded all our factual channels **Viasat Nature**, **Viasat History**, **Viasat Explore** as well as several of our **TV1000** movie channels. We have also entered Turkey: we are also looking at other fast-growing markets where there could be a demand for our portfolio of entertainment

or factual channels.'

'We are working with operators to enhance their *TV Everywhere* products and on-demand services. All of our programmes have full VOD and catch-up rights so our viewers can engage with our content on a multi-screen basis. Six of our channels are available in HD, as well as two additional Nordic sports channels that we offer in the region.'

'There has been consistent growth in the Pay TV market as a whole over recent years, which should continue as more and more countries in the region digitalise. CEE has always been a crucial driver for our business since we entered the region back in the 1990s, and remains so today.'

'Our channels are very well received with the target audiences, and have become a must-carry for all operators in the region. Currently there are over 95 million subscriptions to our channels and we expect to go beyond the 100 million mark soon. Many of them are the most popular networks in their country. In Russia, we are the largest group: our Russian language movie channel **TV1000 Russian Kino** has the country's highest viewership followed by **TV1000**, which shows American and international movies.'

'When we acquire content and plan the schedules, the CEE region is always top of our mind. We buy and pre-buy content that is relevant for the region and localise feeds: in Poland we have dedicated feeds allowing us to focus exclusively on the needs of that territory.'

'Audiences in CEE like well-researched factual programming. **Viasat History** is performing very well in its target group and beyond. An example of the titles it shows is *Inquisition*, which will premiere later this year. Even we don't commission original programming for our Pay TV channels, we do invest early in shows and have helped finance several shows by pre-buying rights, such as *Black Ops* and *Myth Hunters* for our male-skewed **Viasat Explore** channel or the recent *I Bought My Own Rainforest* for **Viasat Nature**. We are

**VIASAT**  
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showing more exclusive European premieres across our factual channels than ever before', remarks **Gofman**.

'We also offer premium programming that audiences expect to pay extra for. In Russia, Ukraine and CIS our premium HD movie channels have the first pay-TV window rights for four of the big Hollywood studios, and in the Baltic our **Viasat Sport Premium** channel has unrivalled sports rights such as *Barclays Premier League*, *UEFA Champions League*, *KHL* and *Formula1*, and the Olympic Games.'

'We don't so much compete with free-TV as we offer a differentiated entertainment experience that they can't match. Viewers get programming that is relevant to them: what sets us apart from most of our competitors is that we are also a significant free-TV operator in the region.'

Regarding the synergies with digital media, the executive explains: 'We operate the online pay-TV service **Viaplay** in Russia (stand alone) and Ukraine (*TV Everywhere*). In Russia it offers movies from our premium movie channels, in addition to library content, factual and series. In Ukraine it complements the satellite subscription.'

'If possible we clear all multi-screen and catch-up rights for our programming so that 3<sup>rd</sup> party operators also have a ready-available *TV Everywhere* product. As operators and platforms evolve their propositions to *TV Everywhere* and Multi-Screen services, **MTG** is ready, and there with them from the start', concludes **Gofman**.



*Inquisition* is one of the latest shows in *Viasat History* (photo credit: TCB Media Rights)



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## Formatos de Entretenimiento



### Apuesto por ti

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



### Juega 2

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



### Calle 7

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

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## MBC GROUP: SARAYA ABDEEN, THE BIGGEST PERIOD DRAMA EVER DONE IN MIDDLE EAST

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*, *The Voice* and recently *Your Face Sounds Familiar* (currently on air) that has been a phenomenal success. There will be more announcements about new entertainment formats, to be released by end of year', resumes **Fadi Ismail**.



On entertainment, *Your Face Sounds Familiar* (Endemol) is currently on air and has been a phenomenal success



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



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* (already on air), a high end Dubai based thriller of 15 episodes. As for *Saraya Abdeen* (*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 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



Fadi Ismail, Group Director of Drama Production, MBC Group/ O3 Production

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'.

سرايا ابدين



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

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## APKIT, RUSSIA: TOWARDS THE CONTENT INDUSTRY



Michael Lesin, chairman of the board, APKIT

Russian Association of Producers of Film and Television (APKIT) gathers major local production companies and serves the interests of the Russian film industry in political, economic and public spheres. Formed in 2009, it brings together 25 members, which are oriented toward production of movies, TV films, TV series and programs for the Russian film, animation and TV markets. The members work with all the broadcasters in Russia and countries of CIS.

The Association includes companies such as Amedia, Art Pictures Group, Bazelevs, WeiT Media, Russian World Studios, Dixi Media, Film Direction, Comedy Club Production, LEAN-M, Mars Media, Mostelefilm, Motor Film Studio, Non Stop Production, Pimanov and Partners, PRIOR, Profit, Riki Group, Star Media, Sreda, STV, 2V Studio, TeleAlliance Media Group, Forum, Central Partnership, United Multimedia Projects.

In April, the entity appointed Michael Lesin, general director of Gazprom-Media, as the new chairman of the board, while the two co-chairmen of the board are the president of AMEDIA, Alexander Akopov, and director of STV, Sergey Selianov. Since 2013, annually awards APKIT professional awards in the field of television movies.

Last February, the Association announced the results of 2013: 'Members of APKIT released 17 films in the rental and collected only in CIS countries USD 160 million, 60% of total annual fees of Russian cinema. New records include: *Stalingrad* (Non-Stop, Art Pictures) was the most successful Russian film (USD 52 million); *Three heroes on the distant shores* (PTS) was the most successful Russian cartoon (USD 31 million); *Bitter!* was the most profitable comedy (USD 25.5 million - over budget by more than 16 times); and *Metro* was the most successful Russian film-catastrophe (USD 12 million)'.

In terms of TV product, companies at APKIT released on federal channels over 2,500 premiere hours — 1,776 hours serials (43% of the total film premiere broadcasts on TV) — and 750 hours of TV shows. Among the highest-rated Russian programs, according to TNS Gallup Media, were the shows *One to one!* (WeiT Media, Channel One) and *HB* (Comedy Club Production, TNT); historical dramas *Ashes* (WeiT Media, Russia 1), *Cossack village* (Profit, First Channel) and *Kill Stalin* (Star Media, First Channel); and the dramedy sport *U* from Art Pictures Vision, through which slots share 9pm on STS increased by 26%.



Kill Stalin, from Star Media, was broadcast on First Channel and was one of the top rated military drama series of 2013

## BEEMAA: BRANDED ENTERTAINMENT

BY MEHMET AKIF EBIÇLIOĞLU,  
FOUNDER OF BEEMA



Can you envision a meeting point where entertainment-marketing professionals from Europe, MENA and Asia could exchange their projects, facilitate each other's production needs, and meet with brands? This meeting point has taken shape as Branded Entertainment EUROPE MENA ASIA Association (BEEMAA), born with its official launch at DISCOP Istanbul, last March.

Co-founded by Turkish agency 3P Product Placement Production, Hollywood's A-List Entertainment, Munich's Ma Media and DigitalOne from Poland, it aims to facilitate the necessary tools for global brands to meet suitable productions, as well as for productions to benefit from the support of global brands contributing to the making of higher-budget and higher-quality productions in Europe, the MENA region, and Asia. Product placement and branded entertainment agencies, production companies, corporate members, motion picture studios, industry leaders, TV network and other industry professionals are part of the entity.

Why in Istanbul? Istanbul is located at the crossroads between Europe and Asia, and a growing TV content production capital. Turkish productions are internationally distributed to over 58 countries. Being in Istanbul allow brands and branded entertainment agencies and other industry stakeholders to be better communicated and linked to each other; and also to contribute to the professional management of the branded entertainment sector.

We provide the necessary tools for entertainment-marketing professionals to meet and be better informed about trends and potential collaborations. By becoming a member, the companies will have a practical and easy way to access a comprehensive international database with contact information; a place where production companies and studios can share their upcoming projects, and their production needs; a way to keep up-to-date with branded entertainment-related news, information and announcements

BEEMAA has engaged in talks with the European Association of Commercial Television (ACT) for collaboration and joined efforts in communicating the Association to potential members in Europe. TV channels from Asia, Pakistan, China, Ukraine, and the MENA region will be joining the association within the next couple of months.

It was presented and shared with potential member Turkish brands at Yeditepe University in Istanbul during a conference on Product Placement given by 3P Product Placement Production in March 2014. The Association's representatives attended this month iTVF Istanbul Forum and Fair and will participate at DISCOP Africa (Johannesburg, November 5-7) and MIPTV 2015.



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# THE TV MARKETS IN CAUCASUS & BALTIC, BY MRM

By ARTEM VAKALYUK, HEAD OF PUBLISHING PROJECTS CONTENT REPORT AND MEDIA BUSINESS REPORTS, MEDIA RESOURCES MANAGEMENT



MEDIA RESOURCES MANAGEMENT continues the cycle of articles dedicated to the current situation on TV markets of the Eastern and Central Europe. The region is developing rapidly both in terms of its TV market volume and the number of players on it. This time it provides an analysis of the Caucasians' Azerbaijan, Armenia and Georgia, and the Baltic's Lithuania, Latvia and Estonia territories

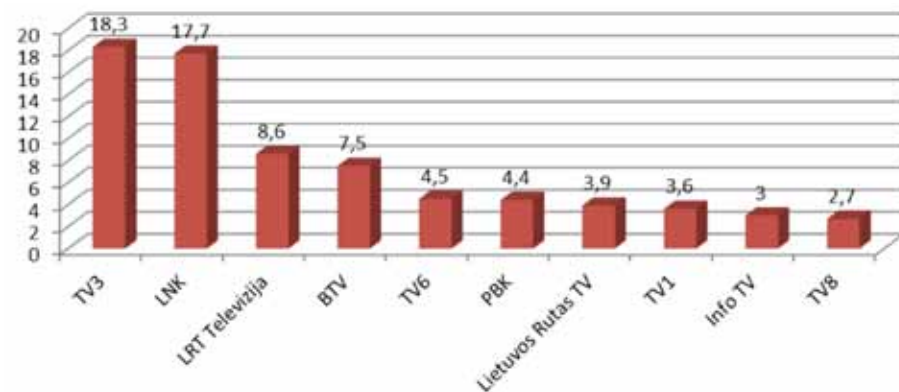
## AZERBAIJAN

Azerbaijan is the biggest Caucasian country. It has an area of 86,600 km<sup>2</sup> and its population exceeds 9.4 million people. The overall number of television households is 1.8 million and the overall number of television sets is approximately 2 million. The analogue terrestrial TV platform is available in all TV HHs, its coverage is about 98.9% (1.78 million households). However, satellite TV maintains a strong market share: 1.2 million households (66.7%) use this platform to receive TV signal. Cable TV penetration is about 15% (270,000 households).

A total of 9 broadcasters are available on the analogue terrestrial platform (public broadcaster **TV Azərbaycanı**, government-owned **AzTV** and **Idman TV** and commercial TV channels **ATV**, **Lider TV**, **ANS TV**, **Space TV**, **Xazar TV** and **TRT1**). It is estimated that approximately 97% of the population have access three or more networks. Currently there are more than 30 TV channels in Azerbaijan (20 of them are the regional ones). Overall Azerbaijani viewers have access to more than 100 TV channels through satellite platforms.

The first DTT transmissions began as a pilot project in September 2004 in the capital city of Baku. It is estimated that DTT coverage reaches now 95% of the population. Now there are 10 TV channels available for the population through

## TV SHARE LITHUANIA, APRIL 2014 (4+)



Source: TNS LT

DTT-multiplexes (DVB-T MPEG-4 standard): **AzTV**, **ITV**, **Idman Azerbaijan**, **Medeniyyet**, **ANS**, **Lider**, **Space**, **ATV**, **Xazar**, **TRT1**. It is planned that in nearest future 24 TV channels will be available through DTT platform. Among the three Caucasian countries, Azerbaijan is leading the DTT process. The full transition from analogue broadcasting to DVB-T is scheduled to take place in 2015.

data on TV ratings and share of the TV channels in Armenia is not available because of the absence of national-wide TV researches in this country. According to **Star Zenith Optimedia** the total TV ad spend in the country exceeded \$68 million in 2013.

## GEORGIA

Georgia is the second largest territory with an area of 69,700 km<sup>2</sup> and a population of 4.5 million people. The total number of TV HHs is slightly more than 1.5 million and it is estimated that there are approximately 2.5 million television sets

in the country.

A total of 7 broadcasters are available on the analogue terrestrial platform (Government-owned **Channel 1 Georgia** and commercial TV channels **Rustavi 2**, **Sakartvelo**, **Adjara TV**, **Marneuli TV**, **MZE TV** and **Alani TV**), although not all broadcasters have full population coverage. **Rustavi 2** has the largest population coverage reaching near 85% of the population. Currently there are more than 60 TV channels and over 40 radio networks in Georgia.

Analogue terrestrial is the primary television platform in the country. Cable and satellite platforms are insignificant and used only in such large cities as Tbilisi and Batumi (approximately 20-30% of HHs). There are less than 200,000 pay TV subscribers (less than 14% of the total number of households) in the country.

The country has begun a DTT trial which has been running since the summer of 2009 in the city of Tbilisi. For digital terrestrial TV implementation Georgia will use DVB-T2 standard with MPEG4 compression. The analogue switch-off should be completed in the country till June 17, 2015, although there is yet no special DTT Deployment Programme approved by the Georgian authorities.

Unfortunately, data on TV ratings and share of the TV channels in Georgia is not available because of the absence of national-wide TV researches in this country. Nevertheless TV advertising is a rapidly evolving industry: the total TV ad spends exceeded \$110 million in 2013.

## ARMENIA

Armenia is the smallest country in the Caucasian region with an area of 29,743 km<sup>2</sup> and a population of 3.1 million people. The total number of TV

HHs equals 785,000 and the overall number of TV sets is approximately 840,000, of which 300-400 television sets have a built-in DVB-T tuner. The analogue terrestrial television platform is the most widespread television platform in Armenia, its penetration is about 96%.

It should be noted, however, that some TV HHs rely on more than one TV platform. Cable services are one of the most rapidly developing markets, although they are provided only in the biggest cities Yerevan, Gyumri, Vanadzor and Kapan. It's share is near 15% of Armenian households while satellite TV penetration is about 5%; IPTV services also started to emerge in the biggest towns of Armenia, but their total penetration yet is not significant – near 0.1% of Armenian TV households.

A total of 18 broadcasters are currently available on the terrestrial platform in Yerevan (3 public channels - **Armenia 1**, **Armenia TV** and **Shokhakat** as well as 15 commercial broadcasters: **Armenia 2**, **Shant**, **Erkir Media**, **ATV**, **Armnews**, **Kentron**, **Lime**, **Dar 21**, etc). In other Armenian towns viewers can watch only 5-6 TV channels. Currently there are more than 80 TV channels in Armenia (more than 30 of them are the regional ones).

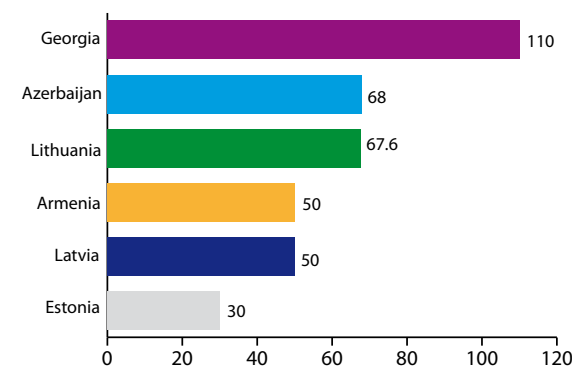
In accordance with Geneva 06 plan, Armenia will switch to digital TV transmission during year 2015. The federal operator **TRBNA** has chosen DVB-T2 as the system standard for the country.

Unfortunately data on TV ratings and share of the TV channels in Armenia is not available because of the absence of national-wide TV researches in this country. According to **Starcom Media West**, Armenia the total TV ad spends in the country exceeded \$50 million in 2013.

## LITHUANIA

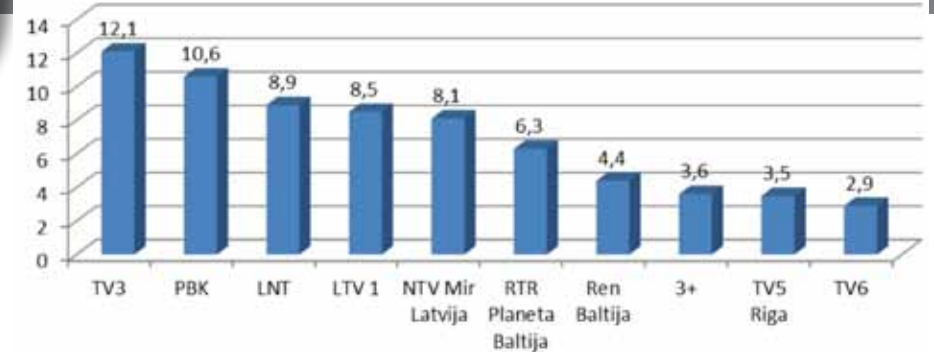
Lithuania is a country in Northern Europe, the

## ADVERTISING EXPENDITURE, BY COUNTRIES (2013)



Source: Star Zenith Optimedia, Starcom Media West Armenia, etc.

## TV SHARE LATVIA, MARCH 2014



Source: TNS Latvia

largest of the three Baltic states. It has an estimated population of 3 million people, and its territory totals 65,300 km<sup>2</sup>. The total number of TV HHs equals 1.35 million and the overall number of TV sets is approximately 1.8 million.

The pay-TV market is dominated by the cable operators, which still have a low digitization rate. Cable TV services are facing competition from other digital platforms. These include the Viasat satellite package and various IPTV services. **Digital GALA** is the country's main pay-DTT platform. The number of pay-TV subscribers to 414,400 in 2013 (according to the national telecommunications regulator RRT). The figure included 128,000 digital cable TV and MDDS subscribers, 118,300 IPTV subscribers, 67,800 DVB-T subscribers and 100,400 satellite users. The majority of households prefer watching free terrestrial television. Nine years after the introduction of free-to-air DTT channels, analogue terrestrial transmissions were switched off in October 2012.

Local TV broadcasting market is dominated by **Modern Times Group** (headquartered in Sweden) that owns **TV3**, **TV6** and **TV8** channels. Commercial TV channels **LNT**, **BTV**, **PBK** as well as public broadcaster **LRT** have also strong positions. The TV advertising market is growing year on year with expectations of growth of 3.5% this year. In 2013 it accounted for \$67.6 million.

## LATVIA

Also from the Baltic region, Latvia that has a population of more than 2 million and a territory of 64,589 km<sup>2</sup> with a total of 810,000 TV HHs and approximately 1.2 million TV sets in use. There are more than 80 Latvian TV channels (about 20 of them are the regional ones).

In total more than 300 channels are available on the territory of Latvia. **TV3** is the most popular television channel targeted at a Latvian language audience owned by **Modern Times Group**. Russian language channels (**PBK**, **NTV Mir Latvija**, **RTR Planeta Baltija** and **Ren Baltija**) also have

significant share in viewing in Latvia as well as public broadcasters **LTV 1** and **LTV7**.

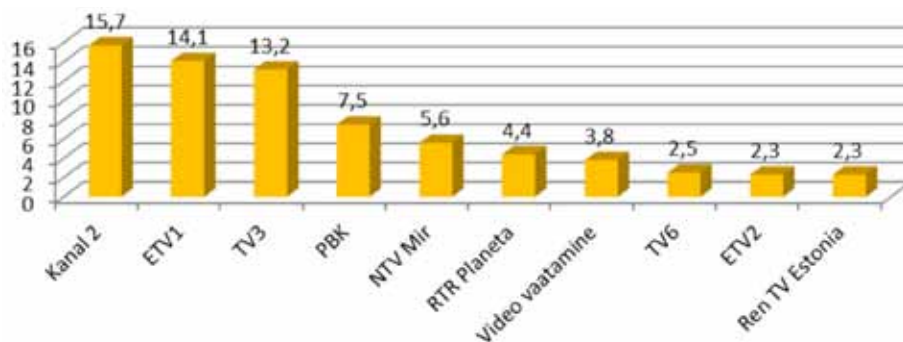
63% of households in Latvia receive TV signals via cable (analogue, digital, IPTV), and 16% use satellite services. Among the leading cable television operators in Latvia are **Izzi**, **Baltkom** and **Lattellecom**, while **Viasat** is the leading provider of satellite services. Lattellecom (51% owned by the Latvian state) is the country's main IPTV platform and operates the only digital terrestrial television platform. DTT was launched in Latvia in 2009 and, after a brief transition period, analogue terrestrial transmissions were switched off in June 2010. Currently over 20% of Latvian households receive terrestrial TV. Latvia is the second largest market in the region after Lithuania with a total volume of its TV ad market of \$50 million in 2013 and is forecasted to grow 6.5-7% in 2014.

## ESTONIA

The territory of Estonia covers 45,227 km<sup>2</sup> with a population of 1.3 million that make it one of the least-populous member states of the European Union. The overall number of TV HHs is 550,000 and the overall number of TV sets is approximately 800,000. Of the approximately 550,000 TV HHs in Estonia, 50% rely on the terrestrial platform for their primary TV reception. While terrestrial remains the most popular television platform, it is closely followed by the cable platform which is the largest pay television platform and available in nearly two-fifths of television households. Satellite and IPTV platforms count for less than 10% of penetration each. The switch-off of analogue terrestrial transmissions took place on 1 July 2010.

The public service broadcaster **ERR** runs two channels: **ETV1** and **ETV2**. Estonian viewers can watch several private national TV channels, the number of which has increased within the digital switch. Still, **Kanal 2** and **TV3**, which continue to broadcast also in analogue mode, dominate on the television market along with **ETV1**. TV advertising spend reached last year a bit more than \$30 million, which is a rather flat result comparing with 2012. It is forecasted that the market size will grow at least 2-3% this year.

## TV SHARE ESTONIA, APRIL 2014



Source: TNS Emor

## TELEVISA EUROPE: NEW PRODUCTS FOR NEW MARKETS



Claudia Sahab, director,  
Televisa Europe

The European office of **Televisa International** (USA/Mexico) continues to build a strong presence in Central and Eastern Europe, by launching new titles and reinforcing its position, or recovering territories that are betting again on the distributor's product.

**Claudia Sahab**, director, **Televisa Europe**: 'Our businesses in CEE have been stable during the last years, but we have also increase presence in more territories, such as Albania, where we gained a new slot on **Media Vizion**, and we started working with **Top Channel** that will premiere *The Dark Widow* (co-production with **Caracol TV** Colombia). Our products are having the best audience results of the market.'

For Natpe Europe, the executive highlights two new telenovelas: *The Stray Cat* and *Malquerida* (Victoria Ruffo and Cristian Meier, premiered in June 2). 'The first one is starred by **Maite Perroni**, a very well-know actress in CEE from *Don't Mess With an Angel*, and has already been sold to **TV2** in Hungary. We will be probably closing more deals in the next weeks.'

The company continues to push its format catalogue, with the return of the #1 entertainment show: *Dancing for a Dream*. 'After a successful new season in **Canal 2** Mexico, it returns to CEE: Romania will have the 15<sup>th</sup> season, while **Markiza** (Slovakia) will produce the second one. The local versions in Serbia, Czech Republic and Bulgaria have been a huge success in the past.'

From **La Competencia** (Spain), **Televisa** brings to Prague five outstanding titles: *Dolphins with the Stars*, sold to Spain and Portugal, and optioned in France, Italy and Netherlands; the game show *The Wacky Old Game*; *Mad Mall*; *Project Adan & Eve*; and the quiz show *Push it!*

According to **Sahab**, the region is doing better year to year: 'We have increased our footprint in Poland, Hungary (working with **RTL Klub**, **TV2** and **Story 4**), Croatia (**HRT** and **Nova**), Bulgaria



Ricardo Ehrsam, Manola Martin, Beatriz Rodriguez and Elsa Garcia, all from Televisa Europe, with Elza Strapkova, acquisitions manager, and Peter Chalupa, head of acquisitions, Markiza TV (Slovakia)



*The Stray Cat*, the new telenovela with Maite Perroni has already been sold to TV2 Hungary, and *Dancing for a Dream* returns stronger to CEE with new seasons in Romania and Slovakia

(*Triumph of Love* was sold to **Viasat Pay TV**, and **Diema TV** is airing *Wild at Heart*), Serbia (**Pink** is also airing *Wild at Heart*) and Slovenia (two new telenovelas on air).

'We have big expectations in this region, as there are new channels being launched: **Planet TV** (Slovenia), **Agon** (Albania), **CTC Love** (Russia) and new small and medium-sized channels and TDT networks in Poland and other strategic territories.'

'There is a growing demand of formats — entertainment is being produced all over the region—, but fiction product is still strong, as well. Great news from our division is that *Rebelde Rio* (the Portuguese-language version of successful *Rebelde*) was sold to **Mediaset** in Italy, a market we are putting special emphasis this year. There, we have optioned three formats: *Sing it Sell it*, *Los Gonzalez* and *Dolphins with the stars*, concludes **Sahab**.

## TV3: CO-PRODUCTIONS IN ALL SENSES



Victor Carrera, sales  
executive

**TV3**, the leading broadcaster of Catalonia (Spain), assists to Natpe Europe for the first time bringing its recent co-production with Brazil (**TV Brasil**) and **Televisión Espanola** (TVE), *Barefoot on Red Soil* that expects to sale all across CEE, specially in Poland.

**Victor Carrera**, sales executive, is in Prague pushing strategic international alliances to continue developing co-productions in the world. Among others, the distributor has two powerful miniseries, *Looming Affairs* and *Worth your Salt*.

'We have a catalogue of over 300 hours of

contents, where apart from the miniseries we have daily soaps of 30 minutes in original language (Catalonian) such as *Family Fare*, a 25% share telenovela in its fifth season. Another genre we manage are documentaries about music, culture and biographies,' explains **Carrera**.

*Exaneta* is a 3D documentary about the "human towers" in Catalonia, which have been named intangible World Cultural Heritage. 'We



Family Fare

### VIEWING BOX V55



Barefoot on Red Soil

also have co-produced animation (with **Imira, BRB**). *Dynamiks*, that makes science fun for 7-12 years old kids,' completes the executive.

Another great news of the company is that the format of the series *The Red Band Society* (co-produced with **Filmax International**, who distributed internationally) has been picked up in US by **FOX**, which confirmed the first season that will have a younger target. The title has already been adapted in Italy, France, Finland, Poland, Peru, Argentina and Chile.

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## TELEMUNDO: HIGH QUALITY, CLASSIC TELENOVELAS

At Natpe Europe, **Telemundo Internacional** (USA) offers for the first time ever to European buyers the telenovela *Queen of Hearts* (120x'60), premiering this summer in USA, and the series *The Lord of the Skies, Second Season* (80x'60), co-produced with **Argos** (México) which has already reached an outstanding audience, becoming the third most-watched premiere on **Telemundo** in its debut.

'We are also presenting *Nora* (120x'60), a co-production between **Televen** (Venezuela) and **Cadenatres** (México), about a young woman of humble beginnings who overcomes obstacles

in her way to make her dreams come true, and *Part of Me* (120x'60), based on the story of *Second Chance* which has been a favorite from our catalog in Europe, broadcasted in most of the CEE countries', explains **Melissa Pillow**, sales director, Europe.

The distributor is also pushing two of the latest formats from **TVN Chile** *The Carmona Family* and *Come Back Soon*. 'We have recently closed sales for the format of our hit telenovela *Missing* for ex Yugoslavia; *The Impostor* has been our best-seller in the CEE this year, having been licensed in Romania, Bulgaria, Serbia, Bosnia, Macedonia, Montenegro and Cyprus. In Hungary we have licensed *Broken Angel* and our classic title *Beautiful But Unlucky*, as well as the rerun of our legendary hit, *El Zorro*. *Part of Me* has recently been sold in Romania', she adds.

**Telemundo** has a good presence in the region. Continues **Pillow**: 'We currently have two dozen premieres on air in the CEE, and would double that number if we also consider rerun slots. Our prime shows on air so far in 2014 are *Broken Angel* and *The Return*, in addition to the 2011 hit *Maid in Manhattan*, which is the driving force of ratings on its channel in Romania and Bulgaria. Curiously, we also have the rerun of our 2006 telenovela *The Woman in the Mirror* on air with excellent results in Bulgaria and Poland.

We have an equal balance of new telenovelas and those from previous years on air at the moment'.

**Trends?** 'Not much has changed in the CEE', says the executive and concludes:

'Buyers want high quality as always but still wish to have classic, fairy-tale like telenovelas for Free TV. The only difference between now and previous years is that, naturally, we are discussing an ever increasing amount of digital rights in the form of VOD, streaming on mobile devices and catch up rights. We must collaborate with the broadcasters in the region as viewers watch their telenovelas on demand instead of real time'.

Later in 2014, **Telemundo Internacional** will be launching the new entertainment format *I Am The Artist*, which will be the first large-scale non-scripted format to be offered in Europe, and the company expects it will be a hit in the CEE.



Melissa Pillow, sales director, Europe



*Queen of Hearts*, brand-new for European broadcasters and *The Lord of the Skies, Second Season*

## ENTERTAIN WITH TVN CHILE



Ernesto Lombardi, manager of international business

Apart from the successful telenovelas, distributed as ready made or format worldwide by **Telemundo Internacional** (USA), **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, such as Ecuador, Bolivia and Peru, among others.

**Ernesto Lombardi**, manager of international business, and **Alexis Piwonka**, sales and marketing, explain: '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 Television** in Ecuador with 18.8 rating points and 28.8% of share, being the #1 program in the 8pm slot with peaks of 39 rating points'.

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



*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 Television

the great *finale*; and *Peloton*, where common people received a hard military training and only the stronger survive.

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## ITV: FROM ACTION TO LOVE STORIES



Can Okan, president & CEO, and Ahmet Ziyalar, managing director

Being one of the top content distributors, **ITV Inter Medya** is a good example of Turkish content diversification and expansion: its catalogue includes from action/drama series to traditional, love story series with high quality production values.

**Can Okan**, president & CEO, and **Ahmet Ziyalar**, managing director: 'We changed our distribution model in the MENA region, by partnering with Dubai-based production company **Beelink**, which already have four of our titles to distribute. They will have our full catalogue available in the near future.'

Among the main titles for Prague the company highlights the mini-series *Butterfly's Dream* (5x'42) and *Black Rose* (27x'42), 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.

*In Between* is the story of a traditional woman who lost her mother as a little girl who lives with her father and her aunt in the suburbs. *The Butterfly's Dream* (5x'42) follows two poets in their early twenties and their dream to become famous. In Central Asia the distributor is doing really well with new deals in Georgia, where it sold



From *20 Minutes*, action, to *Black Rose*, love series

*Black Rose*, *Red Scarf*, *The Tulip Age*, *Love is in the air* and *20 Minutes* to local broadcasters. 'Both, traditional love stories and action series work well for us in the international market. We aim to have this diversity to offer more options and became more attractive to clients.'

Other top titles are *Law of the Land*, where the law of love and the love of the land will face and *The cost of Love*, the drama of the young heir of Haznedar Holding, one of the biggest companies in Turkey; and *Red Scarf* (88x'45).

## BRB, FOR YOUNG AUDIENCES

**BRB Internacional** (Spain) introduces at Natpe Europe the series *Talking Tom and Friends* (52x'11) and *Invizimals* (26x'30). The company also shows in Prague for the first time for CEE clients the first episodes of *Filly Funtasia* and *Mica*.

Based on the app phenomenon created by **Out Fit 7**, *Talking Tom and Friends* revolves around the real live of the "appstars". Aimed at a target audience of between 6-11 year olds, it's all about a new cartoon sitcom

that will premiere in 2015 around the world.

*Invizimals*, the series from the **PlayStation** videogame saga, is preparing its premiere this autumn after the welcome afforded its two TV movies: *Invizimals: The Alliance* and *Invizimals: A Tale of Two Dimensions*, which reached more than 8 million viewers around the world.



Talking Tom and Friends

## WMP, MEDIA MACHINE OF ENTERTAINMENT FORMATS



Juan Fernandez, CEO

**Juan Fernandez**, a very well known Latin telenovela distributor in Central & Eastern Europe, is back attending Natpe Europe but this time with a fully different proposal: he has formed in Miami, USA, a media machine of fresh

entertainment formats, associated with **David Barski**, a successful format creator and producer.

He is in Prague offering five brand new entertainment formats for CEE: *La Corteciente*, a court show where all the issues are exclusively couple problems and the arguments get hot. A show where all the "dirty laundry" is exposed.

*Spin the Bottle*, the reality show where three

girls and three guys play the hottest, most sensual game ever, giving them no boundaries. Nothing is off limits as long as they are willing; and *I want Alex's job*, a reality show featuring the fascinating life of international recognized and award winner glamour photographer Alex Manfredini, with behind the scenes of incredible and sensual photo shoots.

*Theme Park Mania* is a dynamic show that runs through the most incredible world theme parks, exhibitions, conventions, museums and attractions. Customized branded content creation is available. *Glamorosas* is a variety show hosted by 4 beautiful hostesses from Colombia, Venezuela, Ecuador and Argentina, where they review all the topics that interest men, and fascinate women.



Spin the Bottle

**Fernandez**: 'He have invested in trailers and pilots of the products, we have a good infrastructure of staff and tech equipment to keep business moving. And the media machine includes generating fully on demand, any program the customer decides. The market today demands fresh ideas, end-to-end solutions... we are for the matter.'

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# L.A. SCREENINGS 2014: NEW PROGRAMMING ROADS ARE OPEN

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The L.A. Screenings 2014 for worldwide buyers took place last May in Los Angeles, USA. Since Thursday 15, about 1,500 buyers from all the regions attended the product display of major Hollywood studios, featuring their 2014-2015 season of U.S. TV series, feature films and other types of programming.

What can be said after the show? The perception of PRENSARIO is that, as never before, the programming needs of free TV, pay TV and the new digital platforms are diverging. New identity, differentiation, monetization options are required. There are good opportunities for providers on feeding and enriching these needs.



There was a good presence of Central & Eastern Europe buyers in Los Angeles. At the Disney Upfronts: Eva Dzurovcinova, acquisitions manager, TV Jol (Slovakia); Sorina Big, acquisitions manager Pro TV (Romania); Petra Bohuslavova, acquisitions executive at TV Nova (Czech Republic); and Silvia Porubska, head of TV, Markiza (Slovakia)

A huge amount of product was exhibited at the screenings; most of them lasted from 9am to 7pm, or so... the buyers were not happy about this. About attendance, in some regions less buyers per company attended. Though, most main broadcasters around the world assisted the L.A. Screenings.

Regarding genres, the global offer included many political dramas, lawyer and medical stories, while less comedies, less super natural and dysfunctional stories. These latter two were the trend at the show last year, but this time Hollywood returned to more traditional issues. If *Modern Family* (Warner) influenced the 2013-2014 season, *The Black List* (Sony) was the



Julian Geist, communications, Markus Freker, chief officer group content, Wolfgang Link, SVP entertainment, and Ruediger Boess, SVP acquisitions, all from ProSiebenSat.1 Media AG Germany (borders), with Lars Wagner, VP and general manager, Disney Channels Germany.



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

driver to the 2014-2015 crop.

Let's check: according to Nielsen, after 10 years, the U.S. TV season 2013-2014 was led in adult ratings 18-49 and 25-54 by NBC, with *The Black List*, *The Voice* (Talpa) and sport events.

It averaged 2.7 points and 8% market share (+13%) followed by Fox (2.5 and 7%), CBS (2.4 and 7%), ABC (2.1 and 6%), Univision (1.2 and 3%) and The CW (0.8 and 2%). For the sixth year in a row, CBS won in total spectators, with an average of 10,73 million people.

Beyond titles and genres, there's a trend towards rolling out event TV series, with fewer episodes (10-12) but a quest for impact. The plots tend to be more complex, featuring many



At CBS screenings: Beverley Shenken, VP Programming, ZoomerMedia (Canada) with ORF Austria: Wolfgang Hoefer, programming, Claudia Polak, editor, Andrea Bogad-Radtz, SVP Films & Series, and Mag. Irene Heschl, head of films and series



GMA The Philippines, at the Sony Screenings for Asia: Vicky Rivera, acquisitions; Roxanne Barcelona, international head; RJ Cuevas, writer, and Lilybeth Rasonable, acquisitions



Nordic buyers at Disney: Tarmo Kivikallio, head of programme acquisitions, and Johanna Salmela, acquisitions, both at YLE (Finland); Fredrik Luihn, head of acquisitions, Aira Planting, acquisitions, both at NRK (Norway); and Gudrun Jonasdóttir, head of acquisitions, RUV (Iceland)



Latin America, at the NBCUniversal screening: Belinda Menéndez, president, and María Sánchez-Munoz, SVP for Latin America, with Mexican Televisa Group: Elsa Vizcarra, VP programación at Televisa, Karina and Ana Lidia Montoya, both acquisitions at Televisa Networks; up: Adrián Echegoyen, Jaime Aguilar, both acquisitions at Televisa, Carlos Sandoval, MD, CEO, and Rubén Jácome, corporate image director, Televisa



Buyers from Mediahuis, Belgium: Nico Nulens, head of scheduling & planning TV; Luc Janssens, acquisitions manager TV; Tatjana Vucanovic, from Disney; and Ricus Janssegers, program director of TV



Malaysia, at the Disney Upfronts: Airin Zainul, group general manager, ntv7 & 8TV, Seelan Paul, CEO, Television Networks, Sherina Mohamed Nordin, group general manager, TV3 & TV9, Media Prima Group; Chen Khen On, content manager assistant, TM; and Cheng Imm, general manager, TV3, Media Prima Group



Australia & New Zealand broadcasters, at Fox Screenings: Len Downs, acquisitions; Paul Anderson, COO, Beverly McGarvey, Chief Programming officer, Daniel Monaghan, programming associate, and Azar Marashian, acquisitions, all from Network Ten (Australia), with Mark Caulton, programming at TV3 (Zew Zeland)

twists. This has resulted in unhappy comments from free TV buyers, who need simpler stories aiming at general big audiences.

This leads us to the major issue: as the pay TV channels are becoming stronger buyers than free TV and digital platforms keep growing, the Hollywood production as a whole is aiming more to a premium cable series appeal, with strong production, hot levels of sex and violence. Free TV also needs to evolve, not to be left behind.

If until now the distributors have provided general audiences product, appealing more to the mass media or cable but keeping elements of interest for anyone, from now on the differences can become larger; the industry may start to produce specifically for each group, specializing the output. This is not fully new but may result in a new environment from now, creating opportunities for providers. The new multi-platform market is being shaped.

Free TV needs a new entity,

retaining massive audiences but evolving according to the new digital era and the new programming trends. Pay TV needs to make a difference against the new digital platforms, with original, premium, possessive content. This sector is doing a good job nowadays about the matter, but many channels are just starting on this.

The online players, lastly, must draw their own way in content, different from the pay

TV-oriented fare, following the Internet way of being. And they must develop new ways of monetizing business, some of them through the products by themselves. The three groups of content outputs face lots of homework ahead.

PRENSARIO conducted a survey among some 150 buyers from different regions, regarding what major Hollywood studios product they liked most. *Chasing Life* (comedy) was the preferred TV series at Lionsgate; *Rush* (about a cynic doctor taking care of millionaires) at Fox; *Jane, The Virgin* (an adaptation of a Venezuelan telenovela) was the top product in CBS; *Satisfaction*, about sexual twists, headed the NBCUniversal slate.

*Gotham*, about the beginning of the Batman city and its characters, was the preferred at Warner; *Battle Creek*, a police countryside thriller, headed Sony; *Secrets & Lies*, about a father accused of killing his son, was the preferred Disney new product.

It can be seen these best preferred titles are not following a single pattern; the TV series explore different concepts. After all, achieving a good product on its own remains the most important goal, beyond any trend.



There were a good number of European buyers at eOne party: Sergio Calderon, Mónica Iturriaga, Angel López, all acquisitions executives at Mediaset Spain, with Alix Goldschmidt, acquisitions director at Orange/OCS France, Valerie Cabrera from eOne, and Leticia Pérez, acquisitions Mediaset Spain



Matthew Perry and Thomas Lennon, stars of The Odd Couple, with Asian buyers at CBS screening: Lanny Huang, MD, Playboy TV Asia-Pacific (Hong Kong); Kwan Lay Hoon, director of acquisitions, and Joy Olby-Tan, VP acquisitions, MediaCorp (Singapore); Jeremy Kung, CEO, TM Net (Malaysia), and Lim Pahn, Thaole Entertainment (Vietnam)

## CISNEROS MEDIA: CRIMINAL MASTERMIND



César Díaz, VP, and Cristóbal Ponte  
Exclusive Independent Representative  
for Europe, Africa & Middle East

**Cisneros Media Distribution** (USA), formerly **Venevision International**, presents at Natpe Europe its brand new thriller series

with a working title *Criminal MasterMind* (60x'45) starring Lorena Rojas and Sebastian Ligarde.

The series is currently in production at **Cisneros Media's** studios in Miami; it is based on Ibeyise Pacheco's book *Sangre en el Divan*, which tells the story of the late Venezuelan psychiatrist Edmundo Chirinos, who was imprisoned for murder.

Other top titles are *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 *Latin Angels Special* (52x'30) scripted teen series like *My Life In Sayulita* (17x'30); as well as the series *Hacienda Heights* (26x'30 or 13x'60), about a powerful figure in Hacienda Heights and his constant uphill battle to remain in control of his community; the football magazine *Inside Football* (34x'30) and the variety program *Latin Angels Special* (52x'30).

There is an important focus on *edutainment* programs such as the wildlife documentaries *Anima Atlas* (208x'30), produced by **Bellum Entertainment**, and *Platinum Documentary*



*Criminal MasterMind*, based in the book *Sangre en el Divan*

*Series* (+20x'60), by several independent producers. Lastly, the telenovelas *Rosario* (107x'45), the love story between a young brilliant law student and a prominent veteran attorney, and *Passions of the Heart* (111x'45).

### VENEVISION STUDIOS: VOLTEA PA' QUE TE ENAMORES

**Venevision Productions**, the Cisneros Media production house based in Miami, has announced that it is about to begin production of the telenovela *Voltea Pa' Que Te Enamores*. 'Is the first novela to be produced under the CM brand: the project is very innovative and contemporary, not only in terms of the storyline, but also with the scenic design, visual technique, photography and acting demeanour', says **Juan Carlos Sosa**, EVP **Venevision Studios**.



Juan Carlos Sosa, EVP  
Venevision Studios.

## CBS STUDIOS INCREASES ITS PRESENCE IN FRANCE

**CBS Global Distribution Group** (USA) arrives to Prague after the announcement of an extension of the multi-year volume agreement with France's M6 to bring CBS's hit network series to French audiences.

The agreement continues the long-standing programming partnership between CBS Studios International and M6 that began in 2003 when M6 acquired the top-rated series *NCIS*. Other CBS series that have performed well for M6 are *Hawaii Five-0*, *Elementary* and *NCIS: Los Angeles*.

As part of the extension, M6 will also broadcast the second season of *Under the Dome* and the new series *Extant*, starring **Halle Berry** and produced by **Steven Spielberg's Amblin Television**. Besides being acquired by M6, CBS confirmed the premiere of *Extant* on the streaming service **Amazon Prime Instant Video** in the UK.

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Extant

## CONSTRUIR TV: WORK AND HISTORY



Ralph Haiek, general  
manager

With three years on air, **ConstruirTV** (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 **Alejandro 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.

'Last year we launched 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, and help us when we have to produce and schedule our content'.

After a successful first semester, the company highlights three new series at Natpe Europe: *Argentinean industry*, a series that goes through all stages of the manufacturing process with testimonies and explanations of each of the professionals involved in the production chain; *Work with History*, about the origin and evolution of the different professions, and *History*



Argentinean Industry

*Restorers*, that embarks audience on a journey through the recovery of various works of art.

'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**.

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## AZTECA/COMAREX: A LOVE TO REMEMBER



Marcel Vinay Jr., CEO

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 Natpe Europe its brand new telenovela *A Love to Remember* (130x'60), the love story of an architect who, after an accident, blinds and the woman who took care of him.

Other top title from the company is *Lucky Me* (140x'60) with a very charismatic, noble and lucky taxi driver. *Forbidden Love* (90x'60) shows a love triangle in a textile emporium, while in *The Agency* (105x'60) a woman is willing to stand out in a man's world and in

*Destiny* (105x'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* (150x'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 *The Other Side Of The Soul* (124x'60) and the reality show *La Academia Kids* (17 weeks) that seeks to discover the child artists of tomorrow. Lastly is the telenovela *The Kings* (125x'60).

From **Comarex** independent catalogue, it is highlighted from **HBO Latin America** four se-



Mujer de Fase, from HBO

ries available for Eastern Europe, Africa and Asia: *Alice* (13x'60), *Hijos del Carnaval* (12x'60), *Man Drake* (13x'60) and *Mujer de Fase* (13x'30), produced in Brazil;

*Capadocia* (39x'60), produced in Mexico; *Epitafios* (26x'60), produced in Argentina; and *Fugitives* (26x'60), from Chile.

Finally are the **BluePrint** factual series *PK Trazadores* (15x'24), a journey to its limits in the amazing world of Parkour; *Historias Infinitas* (12x'24), about the challenges that people with disabilities face when practicing an extreme sport; *Aire* (6x'24), *Quatro Elementos* (15x'24), and the drama *Pinky Jimenez* (13x'45).



A Love to Remember

## FOX: SCREENINGS IN PRAGUE

**Twentieth Century Fox Television Distribution** (USA) is holding a Screening during Natpe Europe on June 23<sup>rd</sup> from 11am to 6pm at the Hilton Hotel. The company has recently announced the appointment of **Greg Drebin** to SVP, Worldwide Marketing, who will report to **Mark Kaner**, President.

**Drebin** oversees the international marketing, publicity, creative services and corporate communications for the worldwide marketing group, which supports the global sales team and broadcast, Pay TV, SVOD and AVOD partners around the world. He also manages TV Distribution's

marketing functions for **Twentieth Century Fox Television**, **Fox 21**, **Fox Television Studios**, **FX Productions**, and **Fox Filmed Entertainment's** four feature film units.

**Drebin** joins Fox from **Warner Bros.** Most recently he was SVP of Marketing, International TV, Canada, Asia and Latin America. Prior to that, he was SVP of Programming and Marketing for International TV Branded Services.



Greg Drebin, SVP, Worldwide Marketing

## UNIVERSAL CINERGIA: MULTILINGUAL DUBBING

**Liliam Hernandez**, managing director at **Universal Labs of America**, and her 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.

Since 2014, the company has been betting in new markets, by attending the most important regional trade shows: after a successful Natpe Miami in January, Hernandez and Lopez attended Discop Istanbul and visited the top Turkish distributors. Then, MIPTV in April and LA Screenings in May, and now they are in Prague to visit the most important CEE content providers.

'We are expanding five new studios in Mexico

and debuting with major Turkish productions for the Latin American market. We offer our services to international producers, channels and global distributors from Europe, Africa and USA, as well multiple countries in Latin America', says **Hernandez**.

'Our multilingual dubbing of native talents are 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.', adds **Lopez**.

**Universal Cinergia** dubbed production meets the quality required for all majors' principal television stations in the entire world.

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

'We attend to Natpe Europe to give welcome to new programs. We will continue with our tour to various European and Asian Countries with much energy and fighting tirelessly, and yet our goal has not been achieved, complete the executive.

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## ALL3MEDIA: BRITISH DRAMAS, CONSTRUCTED REALITY FORMATS



Stephen Driscoll, SVP  
International Sales

**all3media international** (UK) arrives to Natpe Europe with huge expectation for its catalogue, where it highlights its brand new productions, especially its high end British drama series. The distributor brings a mix of factual programming and drama series, apart from its extensive entertainment formats catalogue.

Heading the catalogue is *Neighbours Secrets* (80x'30), a constructed reality format that

reveals amazing events of neighborhood dramas that change the lives of everyday people forever. Rich in detail and steeped in authenticity, *ANZAC Girls* (6x'60) is the true story of five Australian and New Zealand army nurses, young women who put their lives on the line for King and Country during WWI. *Love Child* (8x'60) is a story that takes a poignant trip to the swinging 60s, led by the young heroines, midwives and rock stars pulling the world through a cultural revolution.

In the unscripted factual shows *Chrisley Knows Best* (8x'30), that follows a multi-millionaire and his picture-perfect Southern clan as they launch a new multi-million dollar fashion empire, and *Be My Guest* ('60),



Chrisley Knows Best

a global competition format goes under the covers to look at the houses, habits and tastes of guesthouse owners whose home is their business— and business is highly personal.

Other titles are the detective thriller *Hinterland* (4x'120), the children's drama *Rocket's Island* (13x'30) and the game formats *Are You Normal* ('60) and *Sexy Beast* (8x'30). Lastly, the comedy drama format *Step Dave* (13x'60), the story of a man that finds out that the love of his life comes complete with three kids and a whole host of responsibility that he has spent his life successfully avoiding.

## GLOBO: BRAVE WOMAN

**Globo TV International** (Brazil) introduces in Prague its catalogue of telenovelas, miniseries and films headed by *Brave Woman* (140x'60), the story of a beautiful woman with spontaneous sensuality and great inner strength.

It also brings *Trail Of Lies* (160x'60), the story of a persevering woman whose newborn baby is kidnapped by his own brother, and *Side By Side* (105x'60), the **International Emmy Award** winning drama in the category "Best Telenovela".

The company also recommends *Caribbean Flower* (120X'60), an exciting story of love and adventure, and the comedy *Tangled Hearts* (120X'60).

Among the top miniseries, **Globo** highlights *Next in Line* (5X'45). Nominated for **International Emmy**; *Siren's Song* (4X'45), about a beautiful singer in a world of envy and hatred, *Suburbia* (8x'45) and the four episode series *Xingu* and *Bald Mountain*.

Lastly, Globo is introducing three co produced films: *Time and the Wind* ('115 or 3 episode miniseries), *Till Luck do us part* ('100) and *Till Luck do us part 2* ('100), both co-produced with **Paris Filmes**.



Caribbean Flower

## SMILEHOOD: FOCUS IN TRANSMEDIA



Silvana D'Angelo, director,  
Smilehood Media

**Smilehood Media** (Argentina) highlights for the CEE clients its TV shows focused on a 360° and *transmedia* proposal, with the synergy of its divisions as a hub for the development of a comprehensive proposal that addresses all current

emission displays and interaction.

**Silvana D'Angelo**, director: 'At Smilehood, we continue generating multiplatform content and now much more focused on transmedia era, that has certainly begun a while ago. We keep closing agreements in each territory for *Plim Plim* our 360° animation series, which is getting increasing recognition in Argentina and

expanding worldwide.

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)'.

Co-produced between **Onceloop**, **Coca-Cola TV**, **Warner Chapell** and **Framzero** 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 Brazil, Ecuador, Mexico, Spain, Italy and France. The first season has 13 episodes with 56 songs', explains **D'Angelo**.

Lastly, **Smilehood** announced during last L.A Screenings 2014 that

the company started to shoot the TV version of *According Roxi*. The series, originally designed for Internet, has earned the preference of Latin American producers. 'It is a family proposal that gives high doses of irony and that conquer all buyers who just see their trailer', she describes.

And concludes: 'We believe that the greatest merit of the series is just being born as second screen, with the challenging proposition of creating a community of fans from internet to other emission displays'.



Plim Plim, multiplatform

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## PASSION AND MYSTERY WITH CARACOL TV



Lisette Osorio, VP International

Heading **Caracol TV International** (Colombia) slate at Natpe Europe are *Shot of Grace* (60x'60) that follows an actor who must embody a recognized and powerful Capo and simulate its surrender. In *Fugitives* (40x'60), a renowned civil engineer should escape justice for a crime he never committed.

At *Men cry too* (40x'60) a man who thought he could have everything he ever dreamed of in life: an important medical title and a youth and a beautiful wife, his love for his wife will inspire him to aim towards a more prestigious professional

title in efforts to become financially stable enough to keep up with his flashy wife's expensive lifestyle.

Produced by **RTI Television** for **Caracol Television** and **Televisa**, *The Dark Widow* (80x'60), is the story about a woman with an angelic beauty but with very dark secrets, and *The sweetest love* (120x'60) is the Colombian version of the **Telefe/LCA** format.

*Football Dreams 2* (60x'60) is a series about the lives of four of the most historical and emblematic Colombian National Football Team's players: Carlos Valderrama, Freddy Rincon, Rene Higuita and Faustino Asprilla. Other top title is *The Voice of Freedom* (60x'60), the story of Helena Vargas, a woman eager to become emancipated during an extremely chauvinist time. Other co-production is *The Mother in Law* (120x'60) —with **Sony**—, a joyful comedy where a woman will have to find a way to reshape her life after an unfortunate experience in USA.

On entertainment formats, *The Dance Floor* (60x'60) is a dance talent competition where 16 dance groups led by 16 experienced Colombian singers will make the audience dance to well known choreographies and *The Challenge* (80x'60), a reality in which a number of participants should survive, live together, and compete in 4 different stages, for a big price in money.



Shot of Grace

## GET PASSIONATE WITH ABS-CBN



Evelyn Leng Raymundo, VP, Integrated Program Acquisitions and International Distribution

**ABS-CBN** is The Philippines' largest broadcaster that do not only growth in the domestic TV market, but also abroad. The company is attending the major programming tradeshow in order to show and sale its top-rated drama series and soap operas.

**Evelyn Leng Raymundo**, VP, Integrated Program Acquisitions and International Distribution, explains: 'Our strength continues to be in drama and we shall continue to push this in 2014. We have strong material such as *The Legal Wife*, which generated passionate reaction among viewers and the online community through its main theme of infidelity.'

'There is also the multi-generational romantic drama *No Greater Love* that spans across three generations in time and is a current primetime hit. Meanwhile, *Got to Believe* and *Be Careful with My Heart*—a phenomenon hit in **Media Prima** Malaysia and **Today TV** Vietnam—are on the light and comic side, both of which are presently enjoying successful runs in Southeast Asia. Lastly, *Mirabella*, a fantasy drama about a young girl and her struggle with inner and outward beauty.'

'We consider CEE region as a big opportunity for growth. There have been appealing development since we started attending; we are offering something new and interesting even to non-Filipinos. Natpe Europe's focus on this region provides an excellent networking opportunity to introduce the best that we Filipinos can offer', remarks Raymundo.

And she conclude: 'We have sold almost 1,000 hours of content to Romania and Poland. We intend to harness our strength in drama and bring our content to other CEE countries, as well as grow our format and new businesses.'



The Legal Wife and No Greater Love, brand new dramas

## MEDIASET ESPAÑA, GOOD RATINGS AND SALES

**Mediaset España** (Spain) is a great option for fiction and entertainment products. The distributor brings to Natpe Europe two highlighted titles available on both, ready made and format: the police-investigation series *El Príncipe*, with an average audience of 5.1 million of viewers on **Telecinco**'s prime time.

And the entertainment format *Dreamland*. 'It was selected by **The Wit** during Fresh TV conference, is a big

project about a dance academy', explains to **PRENSARIO** **Silvia Cotino**, international sales at **Mediaset España**.

The company is also promoting the mystery miniseries *Stolen Kids*, inspired in real cases during 1970, and sold to **M6** (France), **Mediaset Italia**, **Sony Pictures** (Russia), **Direct TV** (Latin America & USA) and **Telefe** (Argentina), as well as the new drama miniseries that will be released at MIPCOM 2014: *Hermanos* (6x'70).



Raquel Perez de la Campa y Silvia Cotino, international sales department, Mediaset España

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## DORI MEDIA, ENTERTAINMENT AND DRAMAS



**Dori Media Distribution** (Switzerland) brings to Natpe Europe a varied catalogue of entertainment formats, a genre the company is specializing. Also, it highlights its drama, police and teen series.

Heading the catalogue is the reality show *Power Couple* that shows eight couples moving into a village for 6 weeks facing in each week extreme challenges. *AHA! Experience* is an entertainment quiz show that wants to find out not what you know but what you see and *Taste of Love* combines two of the greatest human passions: the passion for good food and the passion for love. Other entertainment top titles are the game show *Mission is possible* and the talent show *Win the Crowd*.

Regarding series, the slate is headed by *The Surfers*, a new tween daily drama about a group of adolescent surfers that set up a surfing club in a deserted and cursed beach.

In each episode of the comedy *So Where Were We?* (8x'30) a cast of main characters find themselves in a different location or venue where things don't go as planned. The Docu-reality *Selfies* reveals the

world of teenagers by following five teenagers in their last dramatic year in high school, as they get ready for the senior prom while the new street game show *Billy the Board* enables people to have fun and earn money while waiting.

Lastly is the second season of the teen series *Galis* (116x'30), where a mysterious donation sends three lucky foster home kids to join "Galis", an elite summer camp in a faraway forest. While at first they struggle to find their place amongst stuck-up kids and twisted love triangles, they soon discover it wasn't luck that brought them there, but a sophisticated scheme that leads them on a larger than life adventure.



Power Couple, reality show, and The Surfers, teen series



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### ECCHO RIGHTS: NEW GLOBAL SALES

**Eccho Rights** (Sweden) confirmed the sale of the Finnish entertainment format *Comedy Combat* to three new territories: **Coyote** in France, **Imagicin** in the Middle East and **Shine** in Denmark. Also, the Korean hit show *Ice Adonis* (CJE&M Corporation) has been acquired by **Moby Media** (Afghanistan, Iran and Iraq). Also, a local remake in Ukraine and an option by **Endemol** Italy. Lastly, it sold the Turkish drama *Kurt Seyit and Sura* to **Intra** in Georgia, **FARS11** in Iran, **TOLO TV** in Afghanistan and **URDU1** in Pakistan. In the Middle East, **MBC** will launch the series in its native Turkey.

## RED BULL: SPORTS AND ADVENTURE

BOOTH: #VB-18

**Red Bull Media House** (Austria) brings to Natpe Europe its portfolio composed by fresh new programming with a diverse range of compelling subjects.

**Alexander Koppel**, COO, explains: 'We deliver fascinating, true-life stories not only from the category of sport & lifestyle—covering more than 130 sporting disciplines—but also from the realms of nature & science and tradition & inspiration.'

'In all of our programming across the full range of today's platforms, we put a premium on audience engagement, which results in exceptional value for our partners'. In addition to **Red Bull Global Series** like *Red Bull Cliff Diving*, *Red Bull X-Fighters* and *Red Bull Crashed Ice*, this year

the company presents the *Red Bull Air Race World Championship*, which assembles the planet's best race pilots in the world's fastest motorsport series. Another standout is *Neymar*, a portrait of the Brazilian soccer superstar **Neymar de Silva Santos Júnior**.

Also are *All In* with **Laila Ali**, the feature film *Cerro Torre—A Snowball's Chance in Hell*, *Ultimate Rush*, and *Break'n Reality*.

More content exclusive includes *eXplorers—Adventures of the Century*, which profiles a dozen of the world's most extraordinary adventurers as they brave unexplored challenges on land, sea and sky; *Wings for Life World Run*, a unique event that brought together around 45.000 runners; and the format *Up Close—Inside the Extreme Sailing Series 2014*.

'We're looking forward to grow our industry relationships and forging dynamic new ones in Prague', concludes Koppel.



X-Fighters World Tour 2014



Cliff Diving World Series 2014

### RIVE GAUCHE PROMOTIONS

**Rive Gauche Television** (USA) has promoted **Marine Ksadzhikeyan** as SVP of International Distribution, covering France, Italy, Benelux, Scandinavia and Africa, and **Bryan Gabourie** that has been named VP of International Distribution, handling Central/Eastern Europe, Asia and the Middle East.

The promotions come as the pair heads into their fifth year at Rive Gauche. Gabourie is attending Natpe Prague.



Bryan Gabourie, in Prague

MEETING TABLE M13

VIEWING BOX # 22

## TELEFE IN CEE, RELOADED

**Telefe International** (Argentina) returns to the CEE-based tradeshow by attending Natpe Europe 2014 with its brand new content, such as the recently premiered *Love Road* (150x'60). After the success of *Candy Love*, this is the new production by **Telefe & LCA Producciones'** Enrique "Quique" Estevanez, starred by fiction's most lovable couple: Sebastián Estevanez and Carina Zampini.

During the first week of emission (end



Love Road, brand new classic telenovela and Dear Daddies

of May), it has consolidated as the top-rated show on its slots in rating and share, building a viewership of over 63% of affinity and 45% of share. The main target of this telenovela is women-men under 50 years olds. It tells the story of a man that returns to the hands of the only woman he has ever loved.

The distributor also highlights *Dear Daddies* (150x'60), a daily family comedy that reaches 36% average share since its debut in January. Four modern and attractive fathers become friends by daily sharing conversation at the door of the Kindergarten of their kids. The original version has been sold to Panama and its format to Chile.

*We Are Family* (180x') is another comedy from **LCA** which has marked the return of renowned actor Gustavo Bermudez and successful international actress, Ana Maria Orozco (*Ugly Betty*) to TV. It is currently airing daily at 9pm prime time on Telefe, reaching an average share of 32%; the original version



Daniel Otaola, Content Distribution Manager, and Maria Eugenia Costa, International Business Executive, in charge of

has been sold to Italy and its format has been sold to México.

Lastly, the distributor highlights the telenovela *Taxxi, Crossed Hearts* (66x'60), coproduced with **Endemol**, the second season of the successful 360° teen telenovela *Allies* (40x'60) produced with **Cris Morena**. Lastly, *Candy Love* (120x'60), with an average of 19 rating points and a 45% share: its original version has been sold to Panama and Nicaragua and its format was adapted in Colombia and México; it has also been optioned in Middle East and Turkey.

### COMERCIAL TV: HISTORICAL SERIES + SPORT CONTENT

**Comercial TV** (Spain) attends for the fourth time Natpe Europe with **Santiago Gimeno**, CEO, and **Paloma Garcia**, sales manager bringing a wide portfolio of different genres coming from well-known Spanish and Latin American providers.

From Spanish broadcaster **Atresmedia**, it offers the historical soap opera *Bandolera* already sold in various CEE countries as well as Western Europe. The distributor

also launches its brand-new reality entertainment sport competition *MMA Stars*, of which they have exclusive worldwide rights.

Lastly, the telenovelas from **RCTV** (Venezuela) and other Latin production companies which it is a genre well known in this territory. 'Our objective is to reinforce the actual clients contacts and added new ones in CEE region', remark Gimeno and Garcia.



Bandolera

VIEWING BOX V-60

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## RECORD: BIBLICAL SERIES, A GOOD WAY TO MAKE A DIFFERENCE



Delmar Andrade, International Sales Director, Record TV Networks

**The example of evolution of REDE RECORD is to be considered. These second broadcaster of the Brazilian market has been found desirable in the production and distribution of Bible series a niche market that allowed him to expand into the U.S. market.**

PRENSARIO, which closely follows the trends of content in Latin America, interviews **Delmar Andrade**, International Sales Director of **Record TV Network** (global distribution division of the broadcaster) about the focus on the new business that the company is moving ahead with epic series. Since the first production *King David* to the last *The Miracles of Jesus*, retailers found in this genre an opportunity for expansion.

On its second season on air, *The Miracles of Jesus* is 'poetically narrated' allowing the audience to learn about the miracles, but with a very polished audiovisual narrative. 'There is a descriptive story that has allowed us to reach markets where we didn't have before, Honduras and some areas of Central America, in addition to Portuguese-speaking Africa and Mozambique, among others', says **Andrade**.

During the first 13 episodes, the series reached 67.3 millions of viewers in Brazil; the 64% of homes were impacted by the production,



*Joseph of Egypt, Queen Esther and Samson and Delilah*

registering 8.4% in rating and 20% share (Ibope - NTP TR MW: From 22/1 to 16/4 - Composition based participation: Record, Globo, SBT, Band and Rede TV 1 Scope Accumulated% (COV) designed Atlas of Coverage Record 2014 - Nation Market. Individual Universe 181,302,787).

And the first episode of the second series, which narrated the beautiful love story between the young Gerson (Chay Suede) and Ada (Rayana Carvalho) displayed an audience of 8.1% and a share of 13.4%.

### BIBLICAL SERIES

Following the trilogy of *Queen Esther*, *Samson and Delilah* and *King David*, the broadcaster aired in January 2013 the miniseries *Joseph of Egypt*, a 30 episodes super production. Launched for MIPTV this year, the series is considered the most expensive production in the history of **Record**: had a budget of \$36 million and was shot in the Atacama Desert in Chile, which offered us the sights we needed, Brazil and Egypt. It was filmed with new HD cameras called **Alexa** (Arri) 35mm that give the series a different ball', he explained.

With this miniseries, the broadcaster doubled its score in that slot. Before the premiere were between 5 and 7 points, but *Joseph of Egypt* doubled the measurement with peaks up to 14 points at 9.45pm, according to local sources. 'We consolidated as exclusive offer in this biblical epic genre. We understood that there is a gap (hole) in the international market for this type of production that makes a difference in our catalog', emphasizes **Andrade**.

About *The Miracles of Jesus*, **Andrade** comments: 'It was an amazing success in Brazil; we invested 23 millions of dollars. We had a total leadership positioning us every Wednesday second in the ranking of channels', says the Executive.

### THE SUCCESS IN USA

Is very interesting highlight the biblical



*The Miracles of Jesus* is the big bet of Record in 2014. The first episode of the second season got an audience of 8.1% and a share of 13.4%



*King David* was the first biblical miniseries at MundoFox and gave the chance to the signal to grow in a 724%

series' success outside Brazil. With **King David**, **MundoFox** (fifth network of the Hispanic market in the United States) found a true ally to grow in audience, since it is the newest Hispanic market channel. 'The series has given the channel a 724% growth, positioning from fifth to second place while issuing' he says.

That success gave **Record TV Network** the chance to close some exclusiveness agreements through Edna Orozco, director of scheduling and acquisitions MundoFox. So far we have issued 96 hours (4 series: *King David*, *Queen Esther*, *Samson and Delilah* and *Joseph of Egypt*), and soon will debut *The Miracles of Jesus*.

'Never happened before this kind of success with a local series at the U.S. market. The channel decided to go for this genre and for us it is a great honor, it makes us grow as producers and distributors' highlights Andrade.

### FORMATS AND MORE

The company is also making inroads in the business of formats, exploring a market for some time, but which is now particularly interested. All titles in its library are available, although the executive highlights especially *Sunlight*, *Love Test*, *Wild*, *Those Women* and *Lives at Stake*.

Other highlight is the brand new series *Victory!*, which debuted on Monday 3th June in Brazil with a gala party at Sao Paulo's Jockey Club and had the presence of big celebrities from Brazilian telenovelas. The plot, written by Cristianne Fridman and directed by Edgar Miranda, tells the drama lived by Arthur (Bruno Ferrari), son of Clarice (Beth Goulart) and, supposedly, of Gregorio (Antonio Grassi).

'The international market has begun to put the eye in Brazilian productions that are very successful in and outside Brazil. We noticed a significant increase in demand, and we understood that it is time to also promote our valuable books', concludes **Andrade**.



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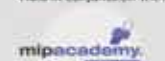
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## SOMOS, FROM ALL ORIGINS

**Francisco Villanueva**, VP & COO, **Somos Distribution** (USA), explains: 'We have grown carefully and always trying to have the product mix that can support our expansion into new markets. The entry in a new territory must be accompanied by content that is appealing to the programmers in that particular region, or there is the risk of passing unnoticed, affecting the company's long term positioning.'

'We started in the Americas, where we already had the contacts and the content to have the impact we wanted at launch. Our experience in the industry served as a platform to sign relevant partnerships with attractive content providers and the push towards globalization.'

The distribution agreement with US based companies gave **Somos** the necessary content to enter global markets. '11-11 (**Nickelodeon**) gave us an attractive content backed up by a global brand in a genre with global appeal. Our decision to participate in the business of telenovela scripts and Turkish dramas also contributed to our global presence, as well as our affiliation to **Sparks Networks**, which gave us access to a format portfolio from all over the world', he says. **Somos** also signed agreements with companies such as **Shoreline Entertainment**, and more recently with **Ecuavisa** for the distribution of its series *Secretos*.

'TV drama is still the dominant presence in the market, especially the telenovelas, but genres like **Mixed Martial Arts** combats, Hollywood movies, which has diminished somehow and opened doors to independent cinema, and new formats have gained ground. We are looking to strengthen our catalog in many of the genres we already manage, as well as expanding our participation in the selling of formats', adds Villanueva.

'We are moving towards Asia, reactivating our relationship with key players such as **CCTV** (China). We look to the future with lots of optimism, given our continuous search for new products and new approaches to the marketplace', he concludes.



Francisco Villanueva, VP & COO



*Secretos*, the new series from Ecuavisa (Ecuador) for international distribution

## ARTEAR: STORIES TO FALL IN LOVE



Luciana Egurrola, Executive Senior of Sales

**Artear Internacional** (Argentina) highlights from its catalogue series produced by **Pol-ka** for **El Trece** Argentina headed by the telenovela *Valientes* (218x'60), the story of three young brothers separated and who find each others after thirty years and decided to take revenge from the man who robbed their land and their lives.

In *Compulsive Times* (14x'60), a therapeutic space that houses patients with severe compulsions, some with pathologies associated with psychiatric settings. The experienced psychologist must manage a group consisting of a workaholic, a woman with a compulsion of accumulation, a woman with a body full of self made wounds and scars and a psycho pathological liar.

*Lobo* (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, and *Por amor a vos* (250x'60), the love story between two concierges of a building where the daily but fascinating world of coexistence mixes tragedy and comedy, terror and passion, fight and tenderness.

Finally is *Alguien que me quiera* (185x'60), the store of two people separated for hundreds of miles who end up in the place where they will live their love story: a community market. She just escaped from her tyrannical husband and he was in prison for a crime he did not commit.



*Lobo y Valientes*

## MIGRÉ: FOCUS ON THE AUTHORS

Founded in October 2013, **Migré - Asociación de Autores** (Argentina) participates through its productive area **Usina Migré** in Natpe Europe where it highlights a selection of 50 projects from 57 Argentine authors.

Under the artistic and commercial direction of Ana Montes and Marcelo Carmaño, the productive area of **Migré** unites nearly 200 authors of TV series and film. Also, it provides advices, services and development of audiovisual creation stories in different genres and formats, and tools for broadcasters and Pay TV channels, independent producers and distributors interested in optimizing their proposals.

Montes explains: 'Our members are integral authors that optimize the dynamic of team creations and enhance the outcome of each audiovisual

work in key stages of the process of production in the global market.'

The association presented for first time this year in Natpe Miami, Rio Content Market (Rio de Janeiro), MicSur (Mar del Plata), with con excellent results.

'In partnership with Ony Productions (USA), we started the pre-production of the teen drama *Candela*, written by Patricia Maldonado, and we are closing deals for 360° products; also we received the visit of Sony and TV Azteca in our headquarters in Buenos Aires', concludes Montes.



Ana Montes, artistic and

# WORLD SPORTS

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## MONDO TV, PLUS IN ANIMATION

**Mondo TV** (Italy), a referent in the market not only as one of the top animation producers and distributors from Europe, but also in the consumer products business, exhibits at Natpe Europe a slate of series headed by the 3D CGI animation co-produced with **RAI Fiction**: *Treasure Island* (26x'26), about an English preteen boy of the eighteenth-century. The series was born from the masterpiece of R.L. Stevenson, and from the beginning it blends the classic story with a wider and complex story.

Other top title from the catalogue are *Sissi* (26x'26), the story of the charming young Empress of Austria, one of the historical figures who that impressed the popular imagination, especially among women and *Cat Leopold* (78x'5 or 26x'13), a co-production between Mondo TV and **Russian Mobile Television**

based on an original concept, about the adventures of a very kind and précis cat and two mischievous naughty mice.

Realized with **Ferrari**, *The Drakers* (26x'26) follows two young Formula X drivers who compete in the Kids championship for the Drakers team. Their mission is not only to become champions; they will also have to rescue the official driver of the Drakers' team, who



Playtime Buddies

disappeared at the beginning of their adventures.

Finally is *Playtime Buddies* (26x'13), co-produced with **Visual Picnic** and **Licensing Works**. Aimed to audiences between 3 and 5 years old, each *Playtime Buddies* story encourages the development of positive social interaction and cognitive skills. The property features both real life role models, such as bakers, cowboys, policemen, fire-fighters, athletes and farmers, and the fantasy characters who inhabit the imaginations of children; like pirates, mermaids, princesses and superheroes.



Treasure Island

SUITE #1106

## TRAVEL, ADVENTURE AND COOKING ON TVN



Dorota Kaminska, International Sales Executive

Polish broadcaster **TVN** brings to Natpe Europe a varied slate including its drama series, travel, adventure, cooking series and documentaries. Heading the slate is the travel & adventure series *Woman at the End of the World* (36x'30), where an open-minded traveller meets unique women from various parts of the globe to plunge into their colourful cultures, religions and traditions.

In *Taste the World with Pascal* (27 x 30') a renowned chef discovers the world through different countries' tastes and flavours, and *Following the Sixth Sense* (38x'30) is a documentary that explores Ukraine, Russia and the Balkans you have never seen - filled with local healers and shamans resorting to unusual methods of treatment.

On drama, the company highlights *Recipe for Life* (65x'60) where the main character doesn't let the miseries of life pull her down; it is on air in Asia, Middle East and Europe, including China, Russia and UAE. And *Medics* (52x'60) about a group of bold and energetic surgeons that deals with serious medical cases but also need to face the challenges that life throws at each of them.



Woman at the End of the World

## SECUOYA: BUILDING ALLIANCES



Carlos Benito, director of international development

**Secuoya Content Distribution** (Spain) presents at Natpe Europe a new format slate, along with a larger catalogue for distribution and a clearly defined goal: 2014 is the year that the internationalization of its business model sees the light.

The musical talent show filled with humor is *The Shower*, a complete turnaround of the more traditional programs of this genre, thanks to its unique staging in which the less fortunate contestants will end up under the shower. The show has already reached agreements with Russia, Germany, USA, Thailand, Denmark and five other countries.

**Secuoya** is also offering *Journey to the Past*, *Elcano*, *Adventure to the Edge* and *Beautiful and Dangerous*, which make up a catalogue of over 400 titles and approximately 3,000 hours of ready-to-use footage.

In addition to working on the distribution of the group's audio-visual catalogue, the company makes the most of its presence at Prague in order to strengthen its international position and continue building alliances for its international network of contents production, which is one of the company's strongest commitments for 2014.



The Shower, new format

## LIGHTSCREEN

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**PART OF ME** (120x'60) IS BASED ON THE STORY OF *SECOND CHANCE* WHICH HAS BEEN A FAVORITE TITLE FROM THE DISTRIBUTOR CATALOGUE IN EUROPE, BROADCASTED IN MOST OF THE CEE COUNTRIES. DISTRIBUTOR: TELEMUNDO INTERNACIONAL (USA)



PREMIERED IN MEXICO ON JUNE 2, **MALQUERIDA** (150x'60) IS THE BRAND-NEW TELENOVELA FROM THE GIANT MEXICAN COMPANY STARRING THE WELL-KNOWN ACTORS VICTORIA RUFFO AND CRISTIAN MEIER. DISTRIBUTOR: TELEVISIA INTERNACIONAL (MEXICO)



THERE IS AN EMPIRE, A VERY WEALTHY PLACE WHICH EVERYONE INSIDERS OR OUTSIDERS ARE VERY INTERESTED IN. IT IS A PLACE RULED BY A GROUP WHO IS EQUALLY LOVED AND HATED. IT IS A KINGDOM OF KINGS AND IT'S THE LAND OF **THE KINGS** (125x'60). DISTRIBUTOR: AZTECA/COMAREX (MEXICO)



**MEN CRY TOO** (40x'60) IS A BRAND NEW COMEDY FROM THE COLOMBIAN DISTRIBUTOR, ABOUT A MAN WHO THOUGHT HE COULD HAVE EVERYTHING HE EVER DREAMED OF IN LIFE. DISTRIBUTOR: CARACOL TV INTERNATIONAL (COLOMBIA)



BETTING STRONGLY ON ENTERTAINMENT FORMATS, THE REALITY SHOW **POWER COUPLE** SHOWS EIGHT COUPLES MOVING INTO A VILLAGE FOR SIX WEEKS FACING IN EACH WEEK EXTREME CHALLENGES. DISTRIBUTOR: DORI MEDIA DISTRIBUTION (SWITZERLAND)



IN **COMPULSIVE TIMES** (14x'60), A THERAPEUTIC SPACE THAT HOUSES PATIENTS WITH SEVERE COMPULSIONS, SOME WITH PATHOLOGIES ASSOCIATED WITH PSYCHIATRIC SETTINGS. DISTRIBUTOR: ARTEAR INTERNATIONAL (ARGENTINA)



**INSIDE FOOTBALL** (34x'30) IS A NEWS MAGAZINE FOCUSED ON THE WORLD OF INTERNATIONAL FOOTBALL, PRESENTING IN-DEPTH COVERAGE AND FEATURING INSIGHTFUL STORIES ABOUT PLAYERS, TEAMS, CLUBS, LEAGUES AND STADIUMS FROM AROUND THE GLOBE. DISTRIBUTOR: CISNEROS MEDIA DISTRIBUTION, USA



CO-PRODUCED WITH NICKELODEON, **11-11** (75x'45) GAVE THE COMPANY AN ATTRACTIVE CONTENT BACKED UP BY A GLOBAL BRAND IN A GENRE WITH GLOBAL APPEAL: TEEN TELENNOVELA. DISTRIBUTOR: SOMOS DISTRIBUTION (USA)



**NEIGHBOURS SECRETS** (80x'30) IS A NEW CONSTRUCTED REALITY FORMAT THAT REVEALS AMAZING EVENTS OF NEIGHBORHOOD DRAMAS THAT CHANGE THE LIVES OF EVERYDAY PEOPLE FOREVER. DISTRIBUTOR: ALL3MEDIA INTERNATIONAL (UK)



**20 MINUTES** IS A SUPER PRODUCTION THAT MIXTURE DRAMA AND CRIME: A MAN TAKES FOUR YEARS TO MARRY; NINE TO GET THE JOB HE WANTED, 10 YEARS TO BUILD... AND ONLY 20 MINUTES TO LOSE EVERYTHING. DISTRIBUTOR: ITV INTER MEDYA, TURKEY



**MORTAL SIN** (146x'45) HAPPENS DURING THE 70'S, WHEN A NEW SCENARIO HAS CHANGED THE FACE OF THE CITY'S NIGHTLIFE BY COMBINING LIGHT, RADIANCE AND MUSIC: THE DISCO CLUBS. DISTRIBUTOR: RECORD TV NETWORK (BRAZIL)



WITH LOCAL ADAPTATIONS IN MEXICO, CHILE AND COLOMBIA, **SWEET LOVE** (150x'60) IS A TRADITIONAL TELENNOVELA THAT HAS HAD AN AVERAGE RATING OF 28.1% AND 43.1% OF SHARE. DISTRIBUTOR: TELEFE INTERNATIONAL (ARGENTINA)



**WAKE UP** IS A 26-EPIISODES TEEN SERIES PRODUCED BY ONCELOOPS (ARGENTINA), FINANCED BY COCA COLA AND THAT WILL BE PREMIERED ON E! ENTERTAINMENT TELEVISION IN LATIN AMERICA IN NOVEMBER. DISTRIBUTED: SMILEHOOD MEDIA, ARGENTINA



**GLAMOROSAS** IS A VARIETY SHOW HOSTED BY FOUR BEAUTIFUL HOSTESSES FROM COLOMBIA, VENEZUELA, ECUADOR AND ARGENTINA, WHERE THEY REVIEW ALL THE TOPICS THAT INTEREST MEN, AND FASCINATE WOMEN. DISTRIBUTOR: WORLD MEDIA PICTURES (USA)



BASED ON AN ORIGINAL AND SUCCESSFUL CONCEPT, **CAT LEOPOLD** (78x'5 or 26x'13) IS A COMEDY SERIES CO-PRODUCED WITH RUSSIAN MOBILE TELEVISION THAT SHOWS THE ADVENTURES OF A VERY KIND AND PRECIS CAT. DISTRIBUTOR: MONDO TV (ITALY)



**BE CAREFUL WITH MY HEART** IS A SERIES THAT WAS A PHENOMENON HIT IN MEDIA PRIMA (MALAYSIA) AND TODAY TV (VIETNAM) AND MIX LIGHT DRAMA AND COMEDY, BOTH OF WHICH ARE PRESENTLY ENJOYING SUCCESSFUL RUNS IN SOUTHEAST ASIA. DISTRIBUTOR: ABS-CBN INTERNATIONAL (THE PHILIPPINES)



**SARAYA ABDEEN (THE PALACE)** IS A PERIOD DRAMA TAKING PLACE IN 19TH CENTURY EGYPT IN THE PALACE OF THE RULER. IT IS SORT OF *DOWNTON ABBEY* MEETS *MAGNIFICENT CENTURY*, AND WILL BE THE BIGGEST PERIOD DRAMA EVER DONE IN THE REGION. DISTRIBUTOR: MBC (UAE)



THE BROADCASTER IS THE MOST IMPORTANT CO-PRODUCER IN CATALONIA, ESPECIALLY ON THE ANIMATION GENRE (WITH TOP PRODUCTION COMPANIES SUCH US **IMIRA**, **BRB**): *DYNAMIKS* HELPS TO MAKE SCIENCE FUN FOR 7-12 YEARS OLD KIDS. DISTRIBUTOR: TV3 (SPAIN)



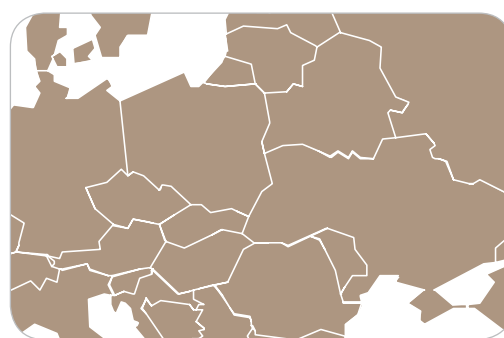
**CALLE 7** IS ANOTHER BIG BLOCKBUSTER FROM THE BROADCASTER WITH FIVE YEARS ON AIR, WHICH ALSO HAS A TREMENDOUS SUCCESS IN MANY LATIN MARKETS SUCH US TC ECUADOR (18.3% MARKET SHARE) AND AN IMPRESSIVE 360° DEVELOPMENT THROUGH SOCIAL MEDIA. DISTRIBUTOR: TVN, CHILE



IN THE DRAMA SERIES *RECIPE FOR LIFE* (65x'60) THE MAIN CHARACTER DOESN'T LET THE MISERIES OF LIFE PULL HER DOWN: IT IS ON AIR IN ASIA, MIDDLE EAST AND EUROPE, INCLUDING CHINA, RUSSIA AND UAE. DISTRIBUTOR: TVN (POLAND)

# NEW CHANNELS IN CEE... MANY

Sources: CEETV.net, other local sources



## RUSSIA AND CIS: E! ENTERTAINMENT

**Universal Networks International** launched **E! Entertainment** in Russia and CIS on April 25. The channel airs shows like *Keeping Up With the Kardashians*, *Gossip Girl* and the premiere of *Rich Kids of Beverly Hills*. E! Entertainment will replace the existing **Diva Universal** channel on cable networks.

## RUSSIA: PARAMOUNT CHANNEL

**Viacom International Media Networks** is launching **Paramount Channel** in Russia following an exclusive deal with **Rostelecom**, which operates the country's largest cable TV network. The Russian version of the channel will be available in SD and HD to its Interactive TV subscribers as part of the **Movie** and **Maximum TV** packages. The channel was launched in Hungary and Romania.

## UZBEKISTAN: UZREPORT TV

**Uzreport TV** was launched in April in test mode in Uzbekistan, and with the aim of becoming a modern business news channel directed towards the active population. It will be broadcast in three languages with hourly updates on the hottest news and will inform about the political, economic, financial, social and business events both in Uzbekistan and abroad.

## POLAND: FOKUS TV

**ZPR's** new educational channel **Fokus TV** was launched on April 28 and it is offered on Multiplex 1. The new channel shows programming divided into thematic blocks; each of them has its own flavor and character, as revealed by **Ewa Lampart**, head of the network, who expects to get 1% share in the commercial demo by the end of this year, with the long-term goal being the 2% mark in three years.

## RUSSIA: RUSSIAN DETECTIVE

**Digital Television** (part of **VGTRK**) has launched the new channel **Russian Detective**, which offers 1,000 premiered hours of detective series and movies.

## POLAND: MUZO.TV

**Polsat's** second music network **Muzo.tv** was launched last month, and offers both local and international music, mostly pop and rock. 34% of the programs will be in Polish, airing 12 hours per day. Its target group is 12+ and it will be available on **Cyfrowy Polsat** and other operators.

## AZERBAIJAN: MIR 24

The Russian-speaking channel **MIR 24** is available in Azerbaijan via the digital package of **KATV1**. It airs news, live broadcast from the scenes and comments of the experts 24/7, about science, culture, sports news, analysis of the political and economic events, press review, film industry news and news of the social life and others are part of the broadcast. In one year, more than 40 million people have access to the channel.

## AZERBAIJAN: REGION TV

Azerbaijan has launched a new national channel called **Region TV**, which will be transmitted via cable networks and the national satellite **Azersat-1** and carried out in an analog format. It is planned to complete a gradual analog switch-off within two months and a full transition to digital in the various regions of Azerbaijan.

## HUNGARY: RTL+

**RTL+**, new channel from **RTL Klub**, launched last month in Hungary and replaced channel **Prizma** in the networks of the local pay-TV providers. It offers repeats of original **RTL Klub** productions like *Balazs Show* and *Monika Show*, as well as library series like *The Benny Hill Show*, *Columbo*, *Married with Children*, etc.

## CEE: C8

The new channel of **Chello Central Europe C8** was launched on May on the Czech Republic, Slovakia, Romania and Hungary. It will be available to all operators which previously offered **Animax** that was stopped in those countries.

## SLOVAKIA: TELEVIZIA Z

Owned by **Zoe Media** and **Petr Kominek**, Slovakia's newest TV station **Televizia Z** was launched on May 7. It will be launched in the regional DVB-T multiplexes and later on cable and IPTV networks, offering 27% news, 9.5% political current affairs, 34.5% current affairs, 22% documentaries, 2% music and 5% religious programming.

## ESTONIA: KANAL 8

**Group OÜ** has announced that it will launch a new general education TV channel **Kanal 8** this month. **Hans Ulmiste**, head of the network, said that he is currently negotiating with the cable operators while it is already working on a number of programs and their first series production.

## GREECE: NERIT

Greece's new state broadcaster **New Greek Radio, Internet and Television (NERIT)** has begun transmissions in May, 11 months after its predecessor was shut down and many of its journalists were laid off, *Deutsche Welle* reports.

## BOSNIA AND HERZEGOVINA: HAYATOVCI

**Hayat TV** launched in May a new channel called **Hayatovci** targeting children, and will focus on cartoons with no violence, but rather on educational ones that would help them grow up. It will be distributed via the satellite *Eutelsat 16A*.

NATPE EUROPE 2014

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