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MÉXICO
MIPCOM 2014

• Major Mexican broadcasters, producers, and distributors
• Strong international players promoting business in Mexico
• Mexican content leadership in the world: telenovelas and beyond
• Market data and trends
• Business advantages and opportunities
• Television, theatrical, licensing, new media
Global Leader
in Content Production for the Spanish-Speaking Market

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

- The creative and media industries sector in Mexico represents 3% of the GDP. It is the country’s 5th strategic sector, just behind the aerospace, agriculture, food, and automotive sectors.
We are very proud of introducing this ‘Mexico Country of Honour – Mipcom 2014’ special issue, we have prepared after an official agreement with ProMexico, the Government entity in charge of the move this October in Cannes.

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

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

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

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

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

Welcome to Mexico, the ‘Country of Honour’ of Mipcom 2014.

Nicola Smirnoff
Director Prensario International

PARENTS AND KIDS DUETS WILL GET AN ENTIRE COUNTRY OFF OF THEIR SEATS TO GET THEIR VOTES

FROM ONLINE PHENOMENON TO TV STAR... THIS IS NOW A REALITY

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LEADING-EDGE
THE LATIN MAJOR

Televisa

COMMentary

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

Our country’s main competitive advantages are led by the triple “I”: Internal market, Infrastructure and Innovation. Our attractive market is fostering our creative ecosystem. In 2013, Mexico ranked in the 13th place of the Global Entertainment and Media Outlook, with a market value of 25 billion dollars. Mexican creative industries are expected to grow 9% and achieve 27 billion dollars for 2014. Mexico is also ranked among the 14 main video game markets worldwide, with an overall value of one billion dollars, which represents 1/3 of the total share in Latin America. In the film sector, Mexico also leads the way. It has the 10th largest box office revenue in the world and the highest in Latin America, with 900 million dollars in 2013 and over 230 million tickets sold, which equals to two tickets per every Mexican.

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

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

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

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

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

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

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

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

State support for the Mexican film industry has become consolidated in the Foprocine and Fidecine funds, and the Eficine fiscal stimulus. These instruments have made it possible to maintain an annual average production of more than 100 national films over the past four years, in contrast to the nine features made in the 1990s. In 2013, 360 shorts were produced in Mexico, many were made independently and by educational institutions.

For 2014, the sum of €2.8 million has been allocated, through Eficine Distribution, to support Mexican film distribution. This economic stimulus promotes the creation of national distribution companies interested in distributing Mexican cinema, as well as independent distribution by the producers themselves. In 2013, 5,347 movie screens were counted in 604 complexes.

There are 8 exhibition chains (with more than one complex) and 69 independent movie theaters. Two companies (Cinemex and Cinepolis) account for 90% of the attendance in the country. While 10 digital screens were counted in 2007, less than 1% of the total, by 2013, these represented 66% of the screens in the country. In 2013, the average cost of admission was €2.6; for digital screening rooms, the average ticket prices were: for 3D, €4; for IMAX, €2; and for IMAX/3D, €5. In the first statistical review, about 300 film clubs were counted in 2007, less than 1% of the total, by 2013, almost all the states in the Mexican Republic have film festivals, with a broad range of thematic diversity.

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

MIPCOM

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

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

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

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

Mexico is an outstanding international partner for film production; it has world-class schools providing the industry with highly trained technical and artistic professionals; it holds the 3rd place in the world in movie admissions; it is among the Ibero-American countries with the most funds and fiscal stimuli to promote production (€4.2 million a year); it has co-production agreements with the countries and regions with the most developed film industries (20 countries in the world).

It is one of the countries with the biggest film production in Ibero-America. According to Remtrak, in recent years, its films have been shown commercially in 42 countries on the five continents. In 2013, Mexican movies released abroad brought in revenue of €30 million; it is the Latin American country with the most films released abroad; Mexican motion pictures go to festivals and film events in over 52 countries each year; it has the greatest infrastructure of digital movie theaters in Ibero-America; and Mexican cinema has a potential market of 450 million Spanish speakers.
The Mexican Institute of Cinematography (IMCINE), through the Mexican Film Commission (COME汩L), promotes the industrial and professional infrastructure of the country, the natural, architectural and historical sites for making audiovisuals. It has also initiated actions to promote and create new institutional ties with the film commissions in the various states of the Mexican Republic.

COME汩L provides to audiovisual producers from Mexico and all over the world all that is necessary to film in the country, institutional ties with the film commissions in the various states of the Mexican Republic. It has also initiated actions to promote and create new institutional ties with the film commissions in the various states of the Mexican Republic.

COME汩L provides specialized professional attention as well as all that is necessary to film in the country, institutional ties with the film commissions in the various states of the Mexican Republic.

The FOPROCINE is a fund designed for quality film production. It is a trust for the production or postproduction of fiction, documentary or animated features (75 minutes or more) in co-production. The candidates for the support must be Mexican production companies or individuals. The participation of foreign directors is subject to their link to a Mexican company or individuals; the participation of foreign companies or individuals; the participation of foreign directors is subject to their link to a Mexican company or individuals; the participation of foreign directors is subject to their link to a Mexican company or individuals; the participation of foreign directors is subject to their link to a Mexican company or individuals; the participation of foreign directors is subject to their link to a Mexican company or individuals; the participation of foreign directors is subject to their link to a Mexican company.
With over 112 million inhabitants, Mexico is the second most populous country and the second largest economy of Latin America, as well as a key destination for international investments for all segments of business. This, due to its important domestic market, competitive costs, working force and high tech production capability.

Mexico also represents access to the US market, being part of the largest free trade zone of the world: the North American Free Trade Agreement (NAFTA) accounts for almost USD 1.8 trillion in annual trade. The United Nations Conference on Trade and Development (UNCTAD) considers Mexico one of the seven most attractive countries of the world concerning investments.

The average age of the population is 26 years and 4 months. 64% of the total is Mexican is the world’s fourth largest exporter of light vehicles, after Japan, Germany and South Korea. It is also an important logistics and aerospace manufacturing hub in Latin America. Regarding digital technologies, it is the third largest service supplier globally, following India and The Philippines (Gartner 2012). About 23% of all software projects in the region are assigned to Mexico.

Samsung, Panasonic and LG have manufacturing presence in the country, which is the first exporter of flat screen TVs in the world. In addition, it is the 3rd largest global exporter of computers and the 10th of mobile phones.

**Creative Industry**

Mexico has leveraged its power regarding TV content production and the main creative content exporter in Latin America (Creative Economy Report, 2010, UNESCO). It is the only one in the region among the top 20 creative goods-exporting countries in the world.

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

In 2015, over 1 billion people in more than 100 countries watched the Mexican audiovisual product. In that year, 1,418 economic units (companies) were registered in Mexico as producing goods for the cable or satellite TV systems, films and video, animation, VFX and digital services (INEGI, Mexico).

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

At this time, the creative and media industry in Mexico represents 7% of the Gross Domestic Product (GDP). It is the 5th largest strategic industry, following aerospace, agriculture, food and automotive industries, with sales of over 20 billion US dollars and an average growing annual ratio of 8.3%, the biggest in North America. The Mexican media and entertainment market is one of the fastest growing sectors in North America: in 2013, box office revenues reached USD 2.7 billion in 2014, a 9.5% increase compared to 2013, when it reached USD 2.47 billion. The US has the highest market value for this industry at USD 598.5 billion, followed by Japan with USD 170.2 billion and China with USD 147.3 billion.

There are more than 400 million Spanish-speaking people in the world. By 2050, the number is expected to reach 530 million, of whom close to one third will be located in the US. Spanish is the third most widely spoken language in the world, after English and Mandarin (CSN Intelligence for Global Business).

Mexico has many cultural worldwide-recognized personalities/brands. In painting, Frida Kahlo and Diego Rivera, as expressions of folk music, the mariachi, bolero and ranchera genres; in rock, bands such as Mana, Cafe Tacu- iatl, Jesus Voegys. In cinema, exponents of the Cine de Oro Mexicano (Mexican Golden Ceni- eral) from the ‘40 and ‘50, such as pioneers An- thony Quinn (ancestor two Oceans) and Mario Moreno Reyes, better known as Cantinflas, the “Mexican Charles Chaplin”, and Roberto G ino- mez Bolaños, creator of “El Chavo del Ocho”, one of the most important kids properties from Television.

There are also big hits on Mexican cinema with award-winning and nominated directors, producers and actors, including Guillermo del Toro (Pan’s Labyrinth), Alejandro Gonzalez Inarritu (Iñarritu) and Alfonso Cuaron, Diego Luna (And your mother too), Gael Garcia Bernal (Cenicienta Perón) and Salma Hayek

**Television**

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

In 2017 the country will celebrate the 60th Anniversary of this genre, well known all over the world with important actors and actresses be- ing recognized at many worldwide markets, becoming TV stars. Singer and actress Thalía has been an out- standing case: she has been the lead character at Mariam (1994), Mite de la Barra (1995) and Rosalvita (1999), which are among the top telenovelas exports in history. She is also a successful and internationally awarded singer.

Verónica Castro (Las Rosas Tizón), Victoria Ruffo (El Troyito del Amor), Ana Luisa Arambula (La Patrona), Televisora, Sandra Echeverria (Ma- ri, Televisora) and Maite Perroni (La Gata, Television) are also renowned actresses, among many more.

Regarding actors, Rogelio Guerra (Azul Tequila), Gonzalo Vega (Cinco de Mayo), Fernando Colunga (La Usurpadora) y Edu-ardo Yáñez (Guadalupe Sabay), also Gabriel Porras, Eugenio Siller and Rafael Amaya who have built an enormous career at Univision Teleimages, starring the largest audie- TV hits in the US and several other international markets, with titles such as The Queen of the South, Queen of Hearts and two seasons of Lords of the Skies.

Kid product such as El Chavo del Ocho are among the most renowned Mexican brand of all times, with great footprints across Latin America, USA and Europe. Produced from 1973 to 1997, it is estimated that at least 30 mil- lion people have watched this series in at least 90 countries, having been a huge success in Chile, Peru, Argentina, the US (becoming the most watched Hispanic show), and Brazil, where Chavo has been an important show on Sivinos’ broadcast SBT.

Television and TV Azteca, delivering nationwi- de and local broadcast TV channels, are the two largest private television groups in Mexico; they also hold pay TV networks, among other key assets. Cadenatas, operated by Grupo Imagen Multimedia (Grupo Empresarial Angules) is the third largest private TV network. Public TV is equally strong: Canal Once (Instituto Politécnico Nacional), Canal 22 (Consejo Nacional para la Cultura y las Artes), TV UNAM (Universi- dad Nacional Autonoma de Mexico) and the recently established Sistema Público de Radiodifusión del Estado Mexi- cano (SPRE), created by the Federal Telecommunication and Broadcast Law, are some of its outlets.
Grupo Televisa: The DNA of Mexican Content

Emilio Azcárraga Jean started his career in 1980 as operations director of Channel 12 in Tijuana; two years later was promoted as VP of Programming at Grupo Televisa, and in 1996 became CEO and responsible of all the company operations. In 1997 he took over the presidency of the biggest Mexican media conglomerate, when he was only 29 years old.

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

It operates three of the largest TV networks in Mexico: Canal 2, Canal 8 and Gala TV, as well as the local news channel FOROtv (covering Mexico City and the Metropolis area). Through Televisa Networks it operates 24 pay TV networks in Mexico and abroad (50 feeds) reaching 37 million households on three different continents.

Others assets include football (Club America, Rayos del Nexca and the Estadio Azteca stadium), music, radio (Televisa Radio), print media (Editorial Televisa: consumer products, cinema, live shows (OCESA), digital media (Televisa Interactive Media) and telecommunications (Grupo Iusacell), which controls the remaining 50%.

Grupo Televisa also owns 14.4% of Spanish media group Icinema, and has an international joint venture with Lionsgate on Pantelion Films to distribute movies in the US Hispanic market: the alliance (2011-2016) is planned to roll out 8 to 10 movies a year. Televisa has also a strategic deal with Univision Communications, the most important media group within the US Hispanic market with two broadcast networks Univision and Univision, as well as cable networks Galavisión (+ six channels), Univision Studios, Univision Local Media (62 TV & radio stations) and Univision Interactive Media. Currently, it holds a 38% stake in Univision (after converting debt into equity) and will be the main content provider until 2025. The group has increased its share of Univision audiovisual revenues from 9.36% to 11.91% in 2010, and it is expected to increase to 16.22% effective December 2017.

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

These words from Emilio Azcárraga Jean, CEO of Grupo Televisa (*), show the great moment of the biggest Mexican media conglomerate. “We built a very strong balance sheet and expanded our telecommunications infrastructure, grew our pay TV offerings, and became a provider of voice and data services in the markets that we serve. The economic potential of both of Televisa’s key markets, Mexico and the Hispanic in the US, is rapidly growing and the outlook is very favorable,” he remarks.

In its home country, Televisa has close to 70% of the broadcast TV market, in terms of audience and advertising. It is also a key player in the telecommunications market by operating the leading DTH provider, SKY (in partnership with DirecTV), as well as cable operators Cablevision, Cablevisión Monterrey-TVI, Cablemas and Cablecom, accounting for close to 60% of the Mexican Pay TV market.

Future

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

And he concludes: “Mexico has undergone significant structural reforms, many of which were long overdue. Their effect will not be immediate, but these changes will have a dramatic impact on the economy, on consumer demand, and on the households that we serve. With the Federal Telecommunications and Broadcasting Law we will face increased competition from the new channels. But the new regulation is also opening great opportunities in the telecommunications sector, an industry where we have invested over USD 3 billion over the last six years.”

(* The information and data to produce this article was taken from the Annual Report of Grupo Televisa and its official website)
GROUP SALINAS, EXPANDING TO NEW FRONTIERS

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

Grupo Salinas companies operate in Mexico, the US, Brazil, Colombia, El Salvador, Guatemala, Honduras, Peru, and Panama. Azteca, now managed by its CEO Mario San Roman (see interview with him in this edition), was founded in 1993, when an investor group, led by Mr. Salinas, bought two national television licenses from the Mexican government. Under his leadership, Azteca ended Mexico’s long-standing television monopoly through the successful nationwide positioning of Azteca Siete and Azteca Trece (300 plus owned stations). Azteca is one of the world’s largest producers of Spanish-language TV programming, with an output of over 10,000 hours of content per year.

The family-oriented Azteca Trece and the mid-to high-income and youth-focused Azteca Siete cover 97% and 95% of Mexican TV households, respectively. Azteca Siete has produced in-house 70% of its programming hours in 2013, including news, entertainment, sports and movies, while Azteca Trece, focused on the mid-income Mexican families, has produced in-house 70% of its lineup including its main genre, telenovelas, six of which have been produced for prime time and have been the most watched contents on the channel.

The company also runs Proyecto 40, an over-the-air UHF channel that delivers cultural, social, economic and political Mexican opinion leaders together. And it has recently re-launched its pay TV networks portfolio under the brand AZ TVdePaga, offering channels AZ Mundo, AZ Click, AZ Comun, and AZ Cinema. In 2001, Azteca released Azteca America, the fastest growing network in the US: the company, led by its CEO Manuel Sheld, has affiliated stations in 70 cities, where 95% of Hispanics live. Moreover, Grupo Salinas operates several networks in Central America: Channel 31 and Channel 33 in Guatemala (Azteca Guate); Channel 44 in Honduras; and Channel 12 (El Salvador) and Channel 9 (Costa Rica) through AS Media, backed by Raimundo Alonso.

Grupo Salinas is composed of dynamic, fast-growing, and technologically advanced companies focused on creating shareholder value and improving society through excellence. We promote economic development in the countries where we operate by making technology accessible to all levels of society, highlights Ricardo Salinas Pliego, CEO of the group (*). The group is also involved in the production, co-production and distribution of telenovelas and series for its channels 13 and 7. This content is exported through Comarces, Azteca’s international sales agent.

In the past it has closed a deal with MGM, which broadcast throughout Latin America two in-house produced drama mini-series: Drenaje Profundo and Al Caer La Noche (aired by Azteca Siete in Mexico). It has also produced comedy Calle en Familia and two seasons of the sitcom, trying to make a difference in the Mexican market. With TV Globo (Brazil) it has co-produce Entre Nous Live and Doins (based on Mexican telenovela Mad Love), shot in Canada and Mexico and with good ratings levels.

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

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

In the Mexican telecommunication market, Grupo Salinas controls since 2003 Iusacell and is repurchasing from Grupo Televisa the 50% of this company acquired in 2011. It also runs Triple Play company TotalPlay covering Mexico City and its Metropolitan Area, as well as some regions such as Guadalajara, Toluca de Lerdo and Cuernavaca. There is international growth, too. The company has expanded through Azteca Comunicaciones: this division operates a fiber optic network of 34,000 kilometers in Mexico and Colombia and it was recently awarded a contract in Peru to build and operate a network of 11,000 km that will unify all the capital cities across the Peruvian territory. With an investment of USD 760 million, the aim of Azteca Comunicaciones Peru is to increase Internet coverage in that nation from 25% to 80%.

(*2) Extracts from Mr. Salinas speech during the inauguration of the new studios in 2012. Source: El Universal

Between love and desire was a co-production between Azteca y TV Globo. It was shot in Canada and Mexico and had good ratings.
The Mexican market is the second largest of Latin America, with yearly advertising billings of over USD 3.8 billion (SpendCheck), estimated in 2014, with two television groups Grupo Televisa and Grupo Salinas-Azteca accounting for most of the television advertising market share. The government is thus calling for two new nationwide digital broadcast networks, with decisions expected by 2015.

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

According to the Instituto Nacional de Estadística y Geografía (INEGI) 95% of the Mexican homes had a TV set at 2013, while the average TV consumption was over two hours a day (IOHEP).

**MEDIA GROUPS**

Grupo Televisa is the largest Spanish-language programming producer in the world, with 94,000 hours of content roll out in 2013; its exports amounted to USD 463 million through licensing and syndication in 1Q14. The company operates in several aspects of business. Free TV, with three nationwide TV channels and one local station in Monterrey, Nuevo Leon.

It is also a key player in the telecommunication market, controlling four cable MSO Cablevisión, Caldeños, TV1 and Cablecom.

**MXICO: Advertising market share, by channels (2014)**

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<th>Channel</th>
<th>Public</th>
<th>Televisa</th>
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<tr>
<td>Azteca</td>
<td>25%</td>
<td>65%</td>
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**DTH reception Sky, and telco Bestel.** It owns 50% of mobile telephone operator Iusacell, and OTT service VELO, launched in 2013.

Other assets include soccer teams, music, radio, magazines, consumer products, cinema, live shows, digital media, and more (more information on Emilio Azcárraga Osorio’s interview in this edition).

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

Grupo Empresarial Ángeles is the third largest private media group in Mexico. It is controlled by Olegario Vázquez Raña and Olegario Vázquez Alidrú with interests in the tourism, health and finance industries. The company owns Grupo Imagen, a communication unit that expands into TV, press, radio and internet. It owns the free TV channel Cadena 3, as well as the second-oldest newspaper in Mexico, Excélsior (100,000 copies sold per day), online news channel Excélsior Digital, and 20 radio stations with over 70 affiliates in Mexico and the Southern US.

Grupo Multimedios is the largest media conglomerate in Northeastern Mexico. It is also a very large programming producer in several realms of television (Multimedios Televisión, radio, telecommunication services (TVI-Multimedios Redes, Todo Televisa), as well as newspapers (El Financiero), outdoor advertising, publishing (newspapers and books) and movie theatres.

**BROADCAST TV**

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

Azteca is another leading producer of Spanish-language TV programming and main competitor of Televisa. It runs two national TV networks in Mexico, Azteca Texas and Azteca Minnesota, with 300 owned and operated outlets across the country (total coverage of 90%). All in all, Grupo Salinas’ networks have 180 licenses, including a local and an affiliate station, Proyecto 40 (since 2012 available con DTT and reaching 9 million homes nationwide), and accounts 49% of the total TV licenses in the country.

Originally a local network at Mexico City, Cadena 3 has achieved significant national coverage through affiliate stations in Ciudad Juarez, Mexicali and Nogales, as well as pay TV national distribution. It is considered the third-largest television organization with strong own production of news programming and fiction series, this through an alliance with top fiction independent producer Argos Televisión. According to a source from the network, Cadena 3 has 5% of the national audience share.

Multimedios Televisión manages 13 analog and digital stations in Mexico, Monterrey, Ciudad Victoria, Leon, Matamoros, Nuevo Laredo, Tampico and Torreon, and six stations in USA. Canal 12, located in Monterrey, Nuevo Laredo is a Top 10 network, enjoys high viewership, features locally-covered news, sports, children shows and general audience programming. The group produces daily over 20 hours of programming.

**Pay TV**

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

Recently launched AZ TV/Pad produces and distributes (through international sales agent Comstar) four pay TV networks: Azteca (formerly Azteca Internacional), Azteca Corazón (formerly Azteca Novelas) AZ Click (for young people) and AZCinema (movies). Multimedios Television operates a package of six Pay TV networks, including SIM2 (general entertainment covering Mexico and US), Cincuenta (movies), EVA TV (música), Multimax (erotico series and movies), Movistar (series, sport and Claro Sports (owned by Claro Mexico), and Viva (owned by MVS). Multimedios Televisión is also an important player here with Milenio Televisión (news), Multimedios Deportes (employs the old UNAM and Televisa (sport) network’s) with a total of 13 TV and Pay TV channels in Mexico and the U.S. The last independent cable operator can obtain programming from PCTV, originally an association of independents, with huge distribution and production facilities (including pay TV channels. PVC, distributed to its affiliates) now controlled by MVS Megacable, the country’s largest cable operator in Mexico (1.3 million of subscribers). More information about these two companies appears in the following articles.

LAMAC published a report —elaborated by IPSOS— about the perception of TV by the Mexican audience; based on a sample of 77,000 viewers polled find Pay TV channels to be of a ‘high quality’. Another finding is that they do not relate ‘high quality’ with ‘high audience’, while average TV channel ratings was 0.66%, the high quality qualification average was 45%. Viewers believe documentaries (history, science, technology), series, news and kids programming are the ones that have ‘high quality’, whereas telefuegos are found to be ‘low quality’.

**AUDIENCE**

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

No official data from Nielsen Ibope Mexico’s Television Audience Measurement was available at all times. Only audience measurements on nationwide networks 2, 5, 7 (Televisa), and 7 and 13 (Azteca) are available at the company website.

There is no information regarding Pay TV or Public TV channels.

Research by Private Advisor Consulting. Team reveals that sources agree on the following:

- Pay TV advertising budget is split in half per TV channels operating by Televisa and Azteca gather close to 90% of the total audience share in Mexico, with 65% and 25%, respectively. The remaining 10% is attributed to private channel Cadena 3 and Public TV networks Canal Once, Canal 22, TV Azteca and TV Azteca Una Voz Con Todos, among others, in equal parts, it is believed.

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

In another report, LAMAC asserts that the broadcast TV annual average ratings have dropped 3% from 2008 to 2011, while Pay TV audience grew 42%. Concerning audience share, while terrestrial TV dropped 7%, pay grew 38% in the same period.

In another industry source, it must be said that the Pay TV audience is growing a lot in Mexico, but the incumbent audience measurement company IOHEP does not have an accurate measurement on Pay TV or DTT channels, where Public TV is growing strongly. That’s why most of the advertising industry relies on the Private broadcast TV ratings data.

**ADVERTISING**

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

**MEXICO: TOP 3 PROGRAMS, by channel (Jio 2014)**

<table>
<thead>
<tr>
<th>Pos</th>
<th>Program</th>
<th>Channel</th>
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<tr>
<td>1</td>
<td>Una Voz Con Todos 1</td>
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<td>2</td>
<td>La Reina del Sur</td>
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<td>3</td>
<td>Que PAsó Ayer 2</td>
<td>2</td>
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</tbody>
</table>

**MEXICAN TELEVISION**

Source: Nielsen Bor 18 ROE Mexico

**CABLE**

1. **Televisa**

   - Canal 2
   - Canal 5
   - Cable Plus
   - Xlnet
   - Clic
   - Telehit

2. **Azteca**

   - Canal 13
   - Cable Plus
   - Telehit

**PAY TV**

- Azteca
  - Channel 7
  - Azteca Televisión
  - Azteca Internacional

- Televisa
  - Channel 2
  - Televisa Televisión
  - Televisa Internacional
  - Azteca Televisión
  - Televisa Deportes

**PAY TV NETWORKS**

- Azteca
  - Channel 7
  - Azteca Televisión
  - Azteca Internacional

- Televisa
  - Channel 2
  - Televisa Televisión
  - Televisa Internacional

**PAY TV NETWORKS**

- Cable Plus
  - Xlnet
  - Clic
  - Telehit

- Televisa
  - Channel 2
  - Televisa Televisión
  - Televisa Internacional

**SEGMENTOS**

- **Televisa**
  - Cable Plus
  - Xlnet
  - Clic
  - Telehit

- **Azteca**
  - Channel 7
  - Azteca Televisión
  - Azteca Internacional

**PAY TV NETWORKS**

- Cable Plus
  - Xlnet
  - Clic
  - Telehit

- Televisa
  - Channel 2
  - Televisa Televisión
  - Televisa Internacional

**PAY TV NETWORKS**

- Cable Plus
  - Xlnet
  - Clic
  - Telehit

- Televisa
  - Channel 2
  - Televisa Televisión
  - Televisa Internacional

The original data from the source does not include audience information, just the position and genre.
5% growth compared to 2013. This, according to data provided by SpendCheck + from DataCheck USA (data: 2467), in real time 80+ categories and 700+ brands and products – Digital Video Financing.

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

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

programming genres

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

The Statistical Yearbook from IMCINE describes “TV series used to be produced only by the networks; but, in the years new players have appeared. That’s the case of Arpis, a production company, which was the fourth largest producer in 2013, trailing networks Televisa, Canal Once and Cadenatres.

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

PUBLIC TV

The Sistema Público de Radiodifusión del Estado Mexicano (Public Broadcasting System of the Mexican State), gathering 32 Public TV with the main goal of providing a non-profit broadcasting service, was created along with the Federal Telecommunication & Broadcast Law enacted in July. At present, it operates 16 stations in 14 Mexican states covering 56% of the national population. Local state governments run 24 channels, while 4 are federal channels operated from Mexico City, and another 4 depend on Public universities.

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

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

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

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

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

SPECIAL REPORT | MEXICAN TELEVISION

20 PRENSARIO INTERNATIONAL

Mexico, an exciting television market

MEXICO: TV SERIES (2013)

Source: Statistical Yearbook of Mexican Cinema - IMCINE
Canal Once, social responsibility in the digital era

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

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

Programming

The network has steadily increased its original production, investing 70% of the 2013 budget in the development of fiction series together with independent producer companies. Some of them are El diván de Valentina, Bienes Raíces, XXV, Los Minúsculos, Pacientes, Paramédicos and Soy tu fan, among others.

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

Regarding documentaries, it is worth mentioning Historia de la Educación en México and Maestros (7 episodes); Historias de Vida walks the path of important people in Mexican, and Antropológicas (13 episodes) is about local anthropology, archeology, and history. Also, Cronicas y relatos de Mexico and Elégios de la Ciudad Mexicana. In terms of kids-youth and preschool, there’s the 26th season of game show A la Cachi Cachi Porra, kids magazine Pie Raya, and Cronicas y relatos de Mexico (fourth season premiered in August, and Pilares, Montebello: ‘We reach 70% of the Mexican population with free TV, and are present in almost 500 Pay TV operators all around the country. Also, we cover USA and part of Canada with special programming at our international channel, and we have two digital channels with exclusive content for kids and young people.’

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

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

MIPCOM

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

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

‘Mexico has been a benchmark in Latin America and the world TV production industry since mid last century. We have to take advantage of this status and the new technologies to fully participate in the global dynamic arena. We will keep interacting with broadcasters from different countries, producing high quality contents, opening horizons and consolidating as a broadcaster with social responsibility in the digital television era,’ Cabrera concludes.”
At Churubusco Studios offices, Prensario interviews Raúl Cremoux, General Director of Canal 22 from Mexico, with Ana Cruz, Production and Programming Assistant Manager, and Gastón García, Corporate Image Director.

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

‘We’ve been 16 months at the general direction, and we have established five aspiring lines of action. Firstly, we want higher quality programming, both in-house and acquired. Our strategy is to show the diversity of our culture to the world the images of our artists, composed by 10 episodes to bring the best of public TV from other latitudes, their understanding of “public function”, how they manage to survive and how they have other resources that may be difficult to think about. “For example, the BBC has a budget of more than €3 billion. We have €5 million and we try to make the most out of every cent. In terms of co-productions, we focus our work on research and production script, and we allow ourselves to work together with big producer companies for documentaries.”

TV (Spain) proposed us to work together,” he points out. “With the arrival of Raúl, we started to export our productions. At MIPTV, in April, we released new series with big names of Mexican art, composed by 10 episodes to bring the world the images of Frida Kahlo, Diego Rivera, Onipacio Paz and Juan Carlos Ruíz, among others, produced by well-known Mexican documentary filmmakers. The goal is to show the diversity of our culture to the most demanding public. We have been producing HD for five years and two years ago we digitalized 18,000 hours of our video library; there are still another 10,000 hours.”

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

Inspiring entertainment from FremantleMedia

Mexico

Canal 22: Public TV for Export

Raúl Cremoux adds: “We have 30% of in-house production, but a cultural TV might represent ourselves.”

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

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

“We have 30% of in-house production, a small percentage of co-production and a majority of acquired programming. Here, we want to bring the best of public TV from other countries with a cultural approach, beyond the mere entertainment. Last year, we had the first public TV meeting, where representatives from 12 countries from every continent scenario by doing more close-ups. People express their needs in short films and videos, and we have to roll out co-productions to include them.’

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

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

The fifth line of action is the digital agenda or, in Cremoux’s words, ‘to produce in a different way.’ He explains: ‘Thanks to smartphones, human beings communicate in a different way, and we have to adapt to this
TV UNAM, THE CULTURAL MEXICAN TV CHANNEL

Belonged to the Universidad Nacional Autónoma de México, TV UNAM is one of the three most important public TV channels in Mexico celebrating nine years in operations (this 2014). Through Red Edusat, it reaches by satellite most of Mexican homes, and after the agreement with the Mexican Public Broadcasting System (formerly OPMA), it now covers through DTT signal 16 cities (56% of the total audience). Since 2013, the channel website can be accessed from any mobile device, and since next year it will reach all the national territory through DirectTV and cable systems that have not included the TV network before, having presence in more than 400 cities.

Ernesto Velázquez Briseño, general director, explains: "TV UNAM has been recognized national and internationally because we have privileged the local artistic expressions, as well as the habits of the students, increasing their participation in the projects and TV programs. It produces 33% of its programming in house, while 33% comes from third-party producers—programming exchanges deals—and the remaining 34% are acquisitions. Top productions are El Pueblo Mexicano and the investigation program Observatorio 2012, as well as the documentaries Entre dos mundos. Historia del Mexico antiguo (co-produced with Austrian Public TV channel ORF) and Maestros detrás de las ideas. We have strengthen our international presence. We host twice the Semifinal of the Emmy International Awards in the categories of "Art and Documentary" programs, explains Velázquez Briseño, who has also been president of the board of ATEI, Educational and Cultural Television Association of Ibero America. It has also been a president of La Red (2005–2007) and has created Alianza Mexicana de Televisoras Universitarias. TV UNAM has collaborated with the most important European public broadcasters, such as ARTE (France), Rai (Italy), BBC (UK), TV3 and Canal Vaso (Spain), PBS (USA) and RTVF (Belgium), and the Latin American Encuentro and Construir TV (Argentina), TV Ciudad (Uruguay) and Canal 15 (Costa Rica), concludes the executive.

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

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

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

By the end of the 26 transmission stations offering in house productions, co-productions and international acquisitions. The line up features news, science/investigation, culture/art programming. From January to June it has produced or co-produced 14 series with 299 episodes, adding 391.5 hours to the programming portfolio. The main ones are 'Arte por todos' (urban cultural expressions), 'Noticias de la Patria, Patrias Adentro' (showing the different Mexican regions), 'Ciencia en la Ciudad' (scientific discoveries, recognized in 2013 by the Consejo Nacional de Ciencia y Tecnología, CONACYT) and two seasons of 'México Olivia'. Also, the series 'México Tropical' (music), '¿Por qué en México?' (foreigners living in Mexico), 'Uruguay 52' (cinema), 'Colecionista' (fiction series about history), among others.

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

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- Benefit from Canadian funding and incentives through a Canadian partner
- Discover the wide range of production locations to fit any scene as well as post-production facilities

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Stand P-1.A51

Canada MIPCOM 2014

The Sistema de Radio y Televisión Mexiquense (Mexiquense TV) was the first Public State-Owned TV station with national coverage in HD - on free TV (Canal 34) and Canal 34.1 HD in Valle de Mexico and Mexico City; Canal 12 y Canal 12.1 HD on Valle de Toluca), with Pay TV it reaches more than 25 Mexican states (Televisión, TotalPlay, Megaicable and SKY), and US/Canada with SATMEX; and Internet it reaches all the world. 'Our main purpose is to broadcast the Mexican society culture and promote our identity. We generate high quality original production that has allowed our channel to reach wider audiences in Mexico and abroad,' explains Lucila Orive, managing director.

Its main shows are MDQ Noticias (three editions), De Buenas a Noches, Reportaje (Germany), 100% Grupero, Fondo para que no caygas and Va en Serio. Over 65% of our line up is produced in-house, especially series. The most populous and economically powerful State of the country has a universal vision, so we also broadcast series from England, US, Korea, Spain, Germany, etc., which balance our programming offer,' adds Orive.

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

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

Lucila Orive, managing director

The Red de Radiodifusoras y Televisoras Educativas y Culturales de México (La Red) was created on November 2005 and gathers 64 affiliated TV channels, of which 63 are Public TV & Radio systems —governmental, educational institution, cultural and civil entities— and SATMEX, an eventual partner in an honorary capacity. It was launched to make possible the coordinational mutual collaboration between all these radio and TV channels. These media depend on the Government and state organisms such as federal institutions and public and private universities. The network covers an estimated audience of 25 million of viewers and radio listeners in 30 federative entities, which has made La Red as the third national broadcast network.

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

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

Mario San Roman, CEO of Azteca, stresses the evolution of the group: ‘We are buying many TV stations in different countries, betting strongly on pay TV business, redesigning TV channels, and entering new businesses as fiber optic services. This is what you have to do nowadays to grow significantly. Genre twists, TV channels, and entering new businesses as a multiplatform and multi-business company is our current challenge.’

‘About content business, our focus now is to produce high quality contents for TV’s new platforms: Internet, mobile, etc. Today, 10% of our production is for new media. We are producing shorter stories, easy to understand, with a good hook to catch fast the audience. We have short novela series, sports, music channels, and near future comparing to TV you have to produce smaller but many more projects.’

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

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

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

‘Today nobody in Latin America has great success not only in Mexico but also internationally. With the new media the audience is much more than broadcast TV. Televisa is much more than broadcast TV. We have 24 cable networks, digital platforms, and all kind of audiovisual productions. We want to consolidate four pillars: 1) digital platforms; 2) specific content for native digital audience; 3) strategic alliances; 4) world-class technological support.

‘Close to 100% of the flagship network Channel 2-Canal de las Estrellas program is produced by Televizia. We have our main newscasts and free new episodes of our novelas every single weekday. It targets the whole family, with special emphasis on women. These novelas are our key programs and concentrate the majority of the audience and ad dollars,’ describes Baston.

‘Channel 5 targets younger audiences, from children and teens in the morning and early afternoon, evolving into a more adult alternative in the evening and night. ‘We are producing new content for prime time that targets young adults that demand a much more interactive experience. The new shows include a digital component, and we also program international and local series. We are focused on our audience, and our plan is to adapt to them. We are concentrated in the quality of our content: a good content will always be the key to compete,’ he concludes.

Digital

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

‘Televisasports.com, noticiasdetelevisa.com, TV and entertainment integrate Televisas in digital ecosystem. For instance, we are adding some properties from the free and pay TV channels to specific

Telenovelas or TV series? ’Press loves this discussion, but for us the Televisa is and will be the king. The main successful fictions in Latin America are telenovelas, it is the most profitable genre for us. The TV series are more expensive and too short to make business right. The U.S. market is another opportunity you can afford a cost of USD 800,000 or more per episode, within a 13-episode weekly model. In our region we call TV series to 40-60 episode programs that in fact are telenovela-series.’

José ‘Pepo’ Baston, VP of Televisions and Contents Group, explains to Paris based—if necessary—how they concentrate the majority of the audience and ad dollars such as music, cinema, radio, movie production, editorial, etc. Our key product, the telenovela, must become 100% digital in order to be able to be consumed anytime, anywhere,’ he added.

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

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La Gira, The Color of Fiction, La Malquerida and My Heart has always been a big challenge, says Baston, ‘It is another story, they can afford a cost like this. The TV series are more expensive, bigger, very expensive, and they won’t be able to concentrate the majority of the audience so long with the same thing.’

‘TV series to 60-80-episode programs that in fact are “telenovela-series”. This said, I agree that “TV series” to 13-episode weekly model. In our region we call televisa-series. ’

‘Telenovela is much more than broadcast TV. The big challenge is to monetize what you put on air is easy. The difficult matter is to get fresh money for it.’

‘The future is towards there, with Second Screen applications, multiplatform developments. The big challenge is to monetize what you do in new media. To produce is easy, to put on air is easy. The difficult matter is to get fresh money for it.’

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

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

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After acquiring radio frequencies and newspaper Excélsior—the second oldest in Mexico with 100,000 units sold per day—Grupo Expansión Angales (GEA) bought TV channel Televi- sión Azteca in 2007 and refocused its strategy by founding Grupo Imagen Medi- quima (GIM), which manages GEA’s interest in the communication business. The group also added new business areas, such as First Division football team Los Gallos Blancos de Querétaro.

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

Series such as Bajo Everywoman (Las Aparicio) were very ‘well received’ by audi- ences, says Bastida, who adds: ‘It was a ratings achievement and has allowed us to be a true option to the market, promoting the TV offer in Mexico. It was produced by Argos Comunica- ciones and globally distributed by Telemedio International (USA).’

Cadenatres has a co-production deal with Televen (Venezuela). The three productions following this alliance are broadcast by Tel- emundo International: the first two were Bé- tevero and Nosu, which will be premiered in Mexico in February 2015. Though we have followed our agreement to the letter, we are now in an stand-by position as for the third project due to the social and political situation in Venezuela,’ explains Scripted Series Executive Producer Eric Reid.

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

Important shows on Cadenatres are the news programs CN3 Tercera Emision with Francisco Zeta (7pm), a series from MCN (Colombia), alias, El Mexicano, and Infames, which has generated many debates inside the Mexican society. A backward-looking series slot, with titles like Escenario Cometa, Get Smart, Bewitched and I Dream of Jeannie, is broadcast from Monday to Friday 3pm-5pm.

‘We have a permanent interaction with our viewers through the social media, from where we take information about what they want to watch,’ further comments Bastida, how adds: ‘We have announced our next original pro- duction Amor sin reservas, a drama series co- developed with Corazon TV with an intense plot and a story about couple relationships. All in all, we have a varied grid, including news shows such as Y no me extraes buenos and Milko- net, which has changed the paradigms of the digital consumption of TV programs on Inter- net, which has grown a lot in Mexico. ‘There is much expectation about what is going to happen. We see a trend of “fragmentation” of the audiences: there will be more and more diversified content and the TV channels will find new niches.’

**Digital**

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

‘We are focused to create 360° scripted se- ries, as well. It is important to have an online offer because when the audiences like a show they look for it anywhere. We have some cre- ative executives thinking in new scripted for- mats for Internet. We’d like to be aggressive in this field. It is a matter of time,’ conclude Reid and Bastida.
Televi$$a Networks: ‘A bigger demand comes with new challenges’

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

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

In September 2013, the company partnered UFC to develop UFC Network that is 100% dedicated to MMA for Latin America, and is now available in 12 countries. It has also produced the reality The Ultimate Fighter, broadcast live in Mexico. ‘UFC Network has positioned us as one of the leaders in sports programming with Televi$$a Networks: ‘A bigger demand comes with new challenges’

Bruce Boren, VP at Televi$$a Networks

fastest growth in the world and strengthens Televi$$a’s sports offer significantly,’ he says.

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

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

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

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

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

MVS Television

MVS Television operates a package of six Pay TV networks, including SLMX (general entertainment covering Mexico and US), Cinelatino (movies), Eta TV (music), Multipremier (erotic movies and series), MC (movies, series, sports) and Claro Sports (owned by America Movil, operated by MVS).

The premium Spanish-language movie channel Cinelatino is co-owned with Hemisphere Media Group (73% InterMedia Partners and 27% Azteca Acquisitions Corp.), which also owns WAPA TV (Puerto Rico) and WAPA America (US cable network).

PCTV, services for the pay TV industry

PCTV’s teleports fully-digitized MPEG4 facilities can handle more than 20,000 houses of programming; at present it handles more than 60 pay TV signals —among them international channels such as Discovery, Disney/ESPN and MCA, as well as local networks Teleformula, Cadenantes, KW, and in-house produced TVC Networks, among others.

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

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

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

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

Among others, Tony Dalton and Naida Norvid (Sr. Avila, HBO), Marco Treviño (Antonio Banderas’ movie The 33 about the Chilean miners); Tessa Ra (El Capitan, MundoFox); and Erik Hayser (Camelía La Texana y Los Misables with Aracely Arambula, both for Telemundo).

‘We closed a development deal for a TV series for Fox Studios US that has been developed in house, as well as other development contracts for the writers we represent in Mexico and Latin America. Regarding finished product, we have licensed the TV series Paranoia (32.3k@240p, Lemon Films) to MundoFox, as well as El Albergue (1440i@60, Adicta Films) and La Clinica (1152x60, Adicta Films) from Gustavo Loza to MundoFox, he adds.

‘We aim to grow in the quantity and quality of the talent we represent and identify the next generation of content creators and emerging stars. With just two years in the market, The Agency has become one of the largest agencies in Mexico, Latin America and the US Hispanic market. We are working in two projects or more as for Injaus, we are dedicated to identify the writers who can generate these types of stories. The idea of the company is that the producer can come to us to find the characters and dramatic lines they need without having to review many script options,’ explains Pablo Orden, CEO.

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

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

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

**Injaus: Story Writers**

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

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The Mexican film sector will be worth USD 1.95 billion by 2023, according to INEGI, a 25% increase from USD 1.55 billion in 2013, according to ProMéxico.

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

INTERNATIONAL

In 2013, Mexican movies obtained 127 international awards at film festivals around the world. Among the most outstanding recognitions, Amat Escalante was named “Best Director” at the Cannes Festival, Fernando Eimbcke was “Best Director” at the San Sebastian Festival. La jaula de oro (which was co-produced with Spain) was the film achieving the most awards. 50 festivals were held around the world in 2013 with Mexican movies, and 15% of Mexican movies achieved more than 10% of what is earned during the traditional exhibition process. This places Mexico among the countries with the largest number of movies released with 400 prints or more in 2013, and the Mexican industry depends heavily on box office results. Industry players must continue to encourage a more inclusive approach in targeting audiences, be it at the international film festivals or the domestic box office. For instance, the book trilogy written by the Mexican author Carlos Ruiz Zafón, El laberinto del fauno, whose lead role in France received 8 nominations and 2 awards in different international film festivals, was a great success in recent times. As for the cultural circuits, the Cineteca Nacional performed outstandingly in 2013, distributing close to 20 titles, both at its main facilities as well as in other theatres in various cities. The movies distributed independently deserve a special mention, which were placed at commercial cinemas and alternative circuits during the year.

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We are a ONE STOP SHOP with our own production and postproduction facilities. One of the largest and most influential independent production companies in Latin America. We have created internationally acclaimed content for 22 years, sharing our vision with the best in the industry.

TELENOVELAS • SERIES • TV MOVIES • FACTUAL TV • LIVE TV • FILMS
Pedro Torres, a renowned Mexican producer and founder of El Mall, believes in Parralla the origins of the company: ‘El Mall is a 100% Mexican company, with an established track record as creator and producer of content and entertainment for multiphormats, and that put us as leaders in the local market with an accelerated international growth due to an aggressive business diversification’.

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

Over the years, El Mall has managed to become a ‘spearhead’ in technological innovation to find solutions and content in Mexico, thanks to a group of specialized work units called shops, dedicated to offer always a solution with added value appropriate to the customer’s needs.

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

Regarding to the local market, Torres concludes: ‘Mexican offers ideal conditions for the production and content creation. There are more and more opportunities and a greater support to Mexican creative industries from governmental entities. Mexico is a country rich in locations, gastronomy, but especially in creative and innovative ideas, allowing us to compete with other global creative potencies’.

**ARGOS: ‘We want the TV we deserve’**

*PRODUCERS*

*By Ángeles Pérez Aguirre, Prensario media correspondent in Mexico*

Argos was created in 1996 by Ibarra, his wife Veronica Velasco, Hernan Vera and the journalist Carlos Puyol Vélez. It has produced Expediente 18/22/38 and the telenovela Nada Personal (1996) both for Azteca. This telenovela inaugurated a new era in Mexican TV, which was accustomed to Ven- eranhd Brazilian productions. With its new approach, we have created a new audience.

Mirela de Mejia (Azteca) best Televisa for the first time on prime time, he says.

During the last 20 years, Argos has produced 16 telenovelas, 15 series and more than 18,000 hours of live TV, with an annual average of 500 hours of fiction content. It has also produced and co-produced 18 movies. Our productions are being broadcast in 32 countries, globally. In Mexico, we have produced 880 hours for Cadena7 (Behind every story) and for international partners (more information on the report “Mexican audiovisual content expands across the globe”: ‘We are maybe the only Mexican independe- nt producer with a One Stop Shop, six mobile units, own studios, etc. We can generate from a simple idea to the ready-made version for export. We will build a new production center with four new studios which will be added to the two we have in Tlalnepantla and the two in Estudios Churubusco’.)

The Mexican market is closed and com- plicated to work in because the two biggest companies made the mistake of concentrat- ing production and distribution. The big goal from Ricardo Salinas Pliego (Grupo Salinas C3IO) was to open production to independ- ent houses. ‘We hope that the new networks to come can an active presence in Europe, especially in Spain (because of the language), Germany (because of the re- sources), and France (because of the focus). It is time for independent producers to expand to other horizons. We have a 360º vision and that put us as leaders in the local market with an accelerated international growth due to an aggressive business diversification’. In addition to its talents and a modern in- frastructure, Torres recognizes the value of the service, quality, creativity and innovation as the main pillars of the company that today has created a new concept of global communication: Social, Media and Content Shops.

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**CANANA: MOVIES AND TV SERIES**

Canana is an independent production company founded in 2015 by Mexican top actors Diego Luna, Gael Garcia Bernal, Pablo Cruz and Julian Levin. It has mainly developed movies, TV series, documentaries and branded content, telling stories that ‘respect the current context and entity of the country’, said from the company.

Since 2010, it began to explore new creative formats. In coll-aboration with Canal Once, a successful path of TV productions started, finding a good response from the audience and addressing a wide variety of themes and genres on screen. The co-productions were two seasons; Nitos Santos (also broadcast on That within Latin America) and Aagin Maa. Other shows are I’m your fan (season two).

The movie sales are done through Mundial, a joint venture between Hollywood production financing and distribution company IM Global and Canana. It focuses exclusively on worldwide sales of Latin and Ibero American cinema and provides a full service international distribution platform for Latin American filmmakers.
Mexican TV industry has undergone a steady process of consolidation amongst key Latin American players. Broadcasters have developed their own identity and at the same time the ability to quickly understand the changes throughout its market, focused on innovation, programming renewals and strong pan-regional presence strategies, Mexico has opened the door to our trendsetting formats', adds Santucho.

"Thanks to our commitment to provide fresh and high quality content, Mexican broadcasters have transmitted successful local versions of our big formats Family Food (100 Mexicanos Dijeron), The Clinic (2013), about a mental health institution (psychiatry), a big show that sets Mexico's Got Talent (Guantazo), etc. In 2014 we will produce Men's Got Talent (Mexico tiene talentos), a big show that sets Guinness Record for World's Most Successful TV Format in order to find the best co-production partners throughout the region. Strategic and valuable alliances will enhance our practices to develop quality and original content for pan-regional and local markets in Latin America," concludes Santucho.

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

**FIC Latin America, focus in Mexico**

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

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

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

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

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

**ADICTA FILMS**

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

For instance, it has produced Heroes from the North (seasons 1, 2, 3) for Televisa, which was the most successful Spanish-language Mexican comedy TV series in the US and Mexico in the last decade. It tells the story of a Mexican band, from their early beginnings to their rise to stardom. Also, Chlorofemor (2011), a drama TV series based on the world of box, as well as the sitcoms The Shelter (2012), about an atypical family full of lazy people who struggle to make a living; and The Clinic (2013), about a mental health institution (psychiatric hospital) and the people who live there.
BluePrint, the new face of the original content

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

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

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

On the other side, it closed an output deal for an extreme sports docu-reality, including a series + two miniseries, a book and apps. These canned series are available for different platforms.

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

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

Caponeto: branded content & formats

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

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

Branded content is a good way the company has founded to expand abroad: ‘We have produced scripted content for Axe, Old Spice, Rexona, as well as Google/YouTube. All of the formats created have been really successful, with millions of views and high production values. On a pan-regional level, it has developed content for A&E/Ole Networks (Los dias en la vida, El Escalador, Una Idea Historia), Viasatun (Spaykereos was a top rated show on MTV Mexico), ‘With Endemol we produced Juventud Ano, 20 años mas and Comunidades Extremas (Discovery) and with Navajo we produced Manifesto for Giglict,’ he says.

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

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

Lemon Films, truly independent

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

‘We have produced +60 commercials (awarded with many Cannes Lions), two series, three movies: a total of 40 hours annually. We attend the MIPs because the TV business has become very important for the group and we want to generate alternative sources of income and reach new clients and markets,’ he says. Lemon Films has co-produced with the Mexican Red Cross two seasons of Furiosidades, which was a success on Canal Once. It has also produce HBO series Sex, Ter, Arde, and regularly works for Discovery, Televisa and Arteca. But we believe that a true expansion will come if we get into the international co-production business: we are able to generate projects in many genres, such as fiction, animation, documentaries, etc. It is a great moment for Mexico in the international market,’ concludes Alamo.

PRODUCERS
Based in Mexico City and founded in 2006, Renderfarm Studio has always promoted "quality" as a key characteristic of its contents, which includes cinematic, trailers for videogames, VFX, 3D animation for cine and TV. All these designed with a transmedia strategy, remarks Fausto Cantu, CEO. He continues: ‘We seek to position our contents and production services in the international market: the quality obtained in the recent years has allowed us to develop creative content for any platform or device. We have experience in generating cinematic for publishers in the US, outsourcing arts for The Unipro Group (UK), Creaffión (Spain) and EpicFX. Nowadays, we have an alliance with Gridmarkets (Singapore) to make the first Renderfarm on the cloud.’ Cantu concludes: ‘Mexico’s animation industry is growing steadily with over 120 studios. The main universities of the country are implementing animation and digital content careers, while the Government is pushing different initiatives and the ecosystem is growing and adapting to compete in the worldwide market.’

CAMALEON FILMS
Camaleon Films gathers a group of companies dedicated to the production of TV shows, advertising, production and postproduction services in Mexico, as well as Spanish (neutral) dubbing and digital production (augmented reality, rich media, digital RTL apps and web development). The firm has fully equipped video and audio studios. Among its top productions, it brings to Cannes the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine. Lastly, the travel and cooking program From Plate to Palate (13×45, Full HD), which is finished. People learn from chefs and cooks in order to create wonders of Mexican cuisine.
Mexico is a leading performer in the world-wide audiovisual industry as main Spanish-language content exporter. Its two main representatives are Televisa, International Broadcasting Co. and COM; but, since MIPTV 2014 (with the support of ProMexico) they are promoting its historical, cultural and educational documentaries, series and movies to the global market.

For instance, Canal 22 is emphasizing its documentary series focused on big personalities of Mexican culture, such as Frida Kahlo and Diego Rivera, among others. Same for TV UNAM with the series Posadas de México, one of the most important pieces of the Pre-Hispanic culture, a co-production with Austrian Public broadcaster ORF.

Canal Once is producing with Lemon Films the second season of its successful drama series Panamericano, with assistance by the Mexican Red Cross.
Televisa International: the name of Spanish-language content

Televisa Internacional is the face of Grupo Televisa in the world. Through the leadership of its VP, Fernando Perez Garilan, this strategic division has allowed the giant media company to take its content to a global scale. But not only its finished and successful telenovelas, which are on air in over hundred countries in the world, but also a growing business area, entertainment formats, in which the company has closed a strategic joint-venture with La Competencia (Spanish) and deals with other providers, to build a strong slate of formats available for global clients.

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

The company is also betting on co-production partnerships: La CQ or Max XY were successful teen series co-produced with Cartoon Network and Viacom, respectively, while Señorita Polvora is the most recent co-production with Sony Pictures Television, and The Black Widow and Shot of Grace were done with the

To gain markets, Televisa Internacional projects will be presented at MIPCOM, the leading forum for content buyers and sellers in Cannes. Televisa Internacional will present, for the first time, its new prime time talent show Stand Up (‘120), the story of a humble young girl with noble feelings; Until The End Of Time, where a daughter returned to her mother hacienda casting a shadow over her happiness; and The Color Of Passion, where a beautiful and distinguished woman is in charge of a chocolate maker empire; Malquerida (150x’60), where a woman and a man destiny will intertwine due to hatred and revenge. Also, the comedy My Heart Is Yours; and Everybody and their brother.

At MIPCOM, Televisa Internacional is highlighting the classics telenovelas I Don’t Trust Men (150x’60), the story of a humble young girl with noble feelings; Until The End Of Time (150x’60), where a beautiful and distinguished woman is in charge of a chocolate maker empire; Malquerida (150x’60), where a daughter returned to her mother hacienda casting a shadow over her happiness; and The Color Of Passion (150x’60), where a woman and a man destiny will intertwine due to hatred and revenge. Also, the comedy My Heart Is Yours (150x’60).

On formats, the distributor launches its brand new prime time talent show Stand Up (‘120), which turns the current viral phenomena sweeping the web into television stars: parent-children duos now show what they have got in a TV studio in front of a strict jury, the public.

Little Giants (‘120) is the most successful Latin America and Hispanic USA talent show for kids. The Spanish version on TeleCinco was the rating leader on its premiere (September 11) with 25.1% of market share and 3.3 million people, and it was a success on social network, reaching 40% of the “social share” in Spain with 118,000 mentions of #pequeñosgigantes. On fiction format, the comedy series Los Grandes (26x’30) is the first TV series that jokes about real hidden cameras, mixing fiction and reality.

Maria and Carlos Castro, directors of sales for Asia and Africa, and general sales director for Europe, with Pedro Font, president & CEO, Global Media Distribution, formerly distributor of Televisa’s product for more than 15 years.
Azteca/Comarex: diversification in all senses

Founded over 30 years ago, Comarex has adapted and evolved bringing new programming in all genres to the entertainment industry by distributing over 42,000 hours annually in over 310 countries. Its catalogue is composed of Azteca’s telenovelas and series, feature films, documentaries, game shows (from Azteca, as well), sports, kids programming, news, music, reality shows and mobile content.

Apart from Azteca’s content and pay TV networks (with the brand new division AZ TVdePaga, which has an exclusive article in this edition), Comarex is the sales representative in Latin America for Mediastat Distribution (Italy) and Studio100 Media (Belgium).

For some European territories, Asia and Africa, it distributes a couple original series from MTV Networks and HBO Latin America.

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

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

Once you are mine, Daniela, Under a Red Sky, The Grace of a Woman, A Love to Remember, as well as the series What Women Keep in Silence, sold in both format and ready made to over 150 territories.

One of the most successful adaptations was in Chilevisión (Chile).

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

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

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

During MIP TV 2014, Comarex closed a strategic deal with Malaysian satellite broadcaster Astro. Both have signed a Memorandum of Understanding (MoU) to co-produce in Malaysia three Latin telenovelas in three years, through the local production company Global Station. In August, the companies announced the first adaptation of Azteca’s hit telenovela A Love To Remember; production commenced that month with a Fall 2014 premiere on Astro. Astro had produced in the past two Azteca telenovelas, but this time it is a co-production and the two players will share the distribution of the new products, even in Asian countries.

The National Film Development Corporation Malaysia (FINAS), a government entity that promotes Malaysia in the global market, will provide 30% cash rebate of total production.

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

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

Among others, Lezano has produced productions not included—the top grossing Mexican movie of all times—Amores Perros, Per & Libre, Amar & Duende and Pamela Cortes’s Alebrije also represents huge US movies (American Pie, Blair Witch Project and Butterfly Effect). Says Gadea: “This alliance allow us to enter into the distribution sector with more than 150 titles for all media.”

In a second phase, Celuloide established Digital Content Brokers (DCB), whose main objective is to deliver content anywhere, anywhere, any platform. “We became an iTunes aggregator in Mexico. By the end of 2014 we expect to have more than 101 titles available at the iTunes store, and by 2015 we expect to be the top aggregator in the region,” adds the executive. “We expect to establish new alliances at Mipcom, which will enable us to have our contents available worldwide. Our main goal is the specialization on digital platforms and thus become the leading independent distributor of Hispanic movies for that specific niche.”

Celuloide also has a production and distribution agreement with Alejandro Franco’s Sentido Común (Warp TV, Day after, Music time and the show Sesiones with Alejandro Franco, broadcast in Sony and El Entertainment TV). Sesiones (8 season, 136'60”) features international guests such as Blondey and The XX, and is available for all territories. We are releasing the music documentary For Those About To Rock – The story of Rodrigo y Gabriela, produced by Franco’s team simultaneously in both Spanish and English.

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

In the production area, the success of El Fantástico Mundo de Juan Orol stands out with 63 awards. “Our production continues to expand, headed by Alejandro Blasquez, founder of Celuloide. During IQ 2015, our second feature film, the romantic comedy Tiempos Felices will be released and it will be distributed by Cinepolis in Mexico and Latin America. During IQ 2015 we will start shooting our third feature film El entierro del Guiro’.”

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

“We have also a team of writers headed by Jorge Ramírez and we are developing the series El Lider (60’60)” with the guidance of one of the largest Spanish-language content producers. In 2015 we are planning to launch two web channels: Arteco TV, for a youth audience (18-26 years) offering comedy, music and alternative content from the Mexican scene, and Warp TV, with mainstream and international contents. “Sentido Común will lead this project’.”

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

Excellence in Comunicaciones y Tecnología (Excomunic) is another important Mexican technology provider, with presence in the TV, cine and radio businesses for over 20 years. It is the exclusive distributor for Mexican of international manufacturers such as Miranda, For.A, Videk, Belden, Sonimheiser, Telestream, Nevron, among many others.

Jorge Castañeda, president, says: “The first six months of the year have been very busy because of the Football World Championship in Brazil and we have several projects running for the second half of the year. We will be consolidating our sales and technology supply.”

“Definitely, our main priority is to maintain the commercial relationship with Grass Valley, to be the exclusive distributor of their products in Mexico. We are venturing new areas and brands for the next years, after attending important markets such as NAB. We bring to Mexican
Founded in 1990, On Screen Films has been related to the different areas of the entertainment industry in Mexico and Latin America. It is dedicated to movie rights, purchasing and selling different rights for DVD’s, VHS, Free TV, Pay TV, corporate sales, etc.

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

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

We also distribute films in the theatrical business and TV sales, with an important revenue and income coming from that part. We have developed an important product portfolio with 4 important product lines: feature films, special interest and documentaries (SID), kids products and TV series and miniseries.

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

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

Regarding Netflix and other SVOD services, they explain: ‘Although these services are still considered niche, 75% of Internet traffic in Mexico is for video consumption, which has launched a “price war” in this market. The content suppliers Apple Store, iTunes and Argentina free-movie streaming platform, Cuevana, were the first to reach the Mexican market in 2009, while Netflix (the leader with 68% of the market) entered in 2011 and was followed by Walmart’s Vudu and Sony’s Crackle. Then, TV, cinema operators and chains joined.’

Of the three factors that determine the success of this market, content is the key, which has made the American Netflix the highest market share (66%) despite having the highest cost of 99 pesos monthly. For broadcasters, the challenge is to compete with higher quality of information or providing Telecommunication services to production companies like Netflix to use their network infrastructure’, concludes Ruiz Sotelo.

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

**On Screen Films, #1 corporate sales and retail in Mexico**

**Magnum, at the technology forefront**

Founded in 1991 by Eng. Jorge Camacho, Magnum Digital is one of the leading technology distributors in Mexico, working with top brands such as Yamaha, LiveU, Sony, Sharp, PreSonus, Linear Acoustic, for Mexican broadcasters and Pay TV networks. Since 2004 Lic. Jorge Camacho heads the company, who has introduced new lines of audio and video products and brands, taking the company to a new level.

He explains: ‘This year was very special because all the Mexican broadcasters have invested in high-end technology because of the World Cup Championship Brazil 2014. We will continue focusing on the new solutions and products that allow a better mobility and transmission, production and post-production facilities.’

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

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

**Recognition at Telemundo**

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

**Distributors**

- Transmisión de Televisión HD por Internet
- Distribución de contenidos audio y vídeo a dispositivos móviles y tablets
- Detección y censura de contenidos

**Centro de Servicio Alimentado Yamaha**

**Servicios de producción**

- Producción de Televisión HD por Internet
- Televisión de video en vivo con equipos de alta tecnología de larga duración
- Fiscalización de la difusión de la televisión NS y HD
- Transmisión de contenidos de video a través de tecnologías HDMI y SDI
- Servicios de Contenidos HD
- Producción y transmisión de programas para radio y televisión NS y HD
- Servicio de señal de video en alta definición a través de tecnologías HDMI y SDI
- Servicio de emisión de audio en alta definición
- Servicio de emisión de video en alta definición
- Servicio de edición no lineal

**Gestion y integración de actividades de divulgación periódica para Radio y Televisión**

**Gestion de producto**

- Detección y censura de contenidos
- Detección y censura de audio y vídeo a dispositivos móviles y tablets
- Detección y censura de contenidos

**Distribuidores**

- Linear Acoustic
- PreSonus
- Sony
- Sharp
- Yamaha
- LiveU
- 3D Live Transmission
- Audio systems from Yamaha

**On Screen Films**

- Feature films
- Special interest and documentaries
- Kids products
- TV series and miniseries

**Magnum Digital**

- 4K products from Sony
- 3D live transmission from LiveU
- Audio systems from Yamaha

**Telemundo**

- HD production
- Digital transmission
- Audio systems

**On Screen Films**

- Feature films
- Special interest and documentaries
- Kids products
- TV series and miniseries

**Magnum Digital**

- 4K products from Sony
- 3D live transmission from LiveU
- Audio systems from Yamaha

**Telemundo**

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

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

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

Mexico’s pay television market has been growing at a healthy pace, but it has not yet reached its full potential. The industry faces some challenges that must be addressed to ensure its continued growth. The following sections provide an overview of the current state of the pay television market in Mexico and discuss some of the key issues and opportunities for the future.

**Telecommunications in Mexico: The Future and Its Twist**

*Source: companies and Private Advisor*

**NEW BROADCAST TV NETWORKS**

The new law calls for two new digital broadcast TV networks that will compete on a national level with the channels produced on a local basis. The law also mandates that the new networks be free-to-air and that they must be available to all households.

The bidding process held by the IFT started on September 2, 2014 after several groups interested in submitting proposals for the new broadcast television services. The process was designed to promote competition and encourage local and national artistic and cultural TV and radio stations to compete on a national level with the channels produced on a local basis.

According to the schedule established by the IFT, the decision will be made by mid-2015. The IFT has estimated that each of the new digital broadcast TV networks will require an investment of around 65 million pesos, equivalent to about USD 4.2 billion in television entertainment during 2013 —a record increase in 2012—, and this is expected to grow 10% this year. The biggest increases were on Pay TV, with 2 million new subscribers, the distribution was USD 2.9 billion. Blu-ray has grown 15% and placed Mexico at the fifth global market during 2013.

Digital video grew 9% reaching USD 6 million and will reach USD 68 million by 2018. SVOD represented 6% of the total in digital video during 2014. For 2014, it is expected to grow 70%, this is the result of a better broadband network in Mexico, which has now a penetration of over 50%, conclusions.

**Broadband**

The IFT has addressed a number of issues that will have a direct impact on the Internet market in Mexico. These include an auction of radio frequency spectrum slots at the 700 MHz band, as well as changes to the supervision and enforcement of the law. The IFT has also been active in promoting competition and encouraging local and national artistic and cultural TV and radio stations to compete on a national level with the channels produced on a local basis.

The following sections provide an overview of the current state of the broadband market in Mexico and discuss some of the key issues and opportunities for the future.
The number of wired broadband connections will increase at a CAGR of 3.3% over the same period, to reach 19 million by end 2018. Mobile Internet access revenue will surpass wired broadband revenue in 2013 to account for USD 7.3 billion by 2018, representing 60% of the total Internet access revenues at that time, concludes the study.

**TELEPHONY**

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

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

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

The Mobile Virtual Network Operator (MVNO) field is another segment for growth. Following Megacable, Mascom and Virgin Mobile, British prepaid telephony operator Lyca announced in August that it will exploit the license obtained from the IFT earlier this year, using Telefonica’s infrastructure to launch its service in Mexico, its first operation in Latin America. Lyca-mobile provided services to 30 million clients in 17 countries around the world in 2013.

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

**OTT**

Over The Top programming providers are arising as relevant competitors to linear pay television in Mexico. According to consulting company The CII, there are eight major providers of this type of service, including Netflix, Crackle (controlled by Sony); Vudu (Wal-Mart); Claro Video (operated by DLA, a company controlled by America Movil); iTunes Movies (Apple); Klik (by movie-theater operator Cinemex, controlled by Grupo Ramírez) and VEO (Televisa). Sony Networks Entertainment International announced in June the launching of Video Unlimited, a rental and self-serve online service available to game consoles PS4, PS3 and PS Vita, as well as to Smartphones and Xperenta tablets, Bravia TV sets and Blu-Ray players if connected to Internet. It may be also reached on Windows-operated PCs.

While services differ among various providers, all of them offer local content as well as foreign movies and series, available as rental or self-sell through. Some of the services offer Televisa and Azteca content. According to The CII, Netflix is a dominant player with 68% of the total subscriber base. Digital TV Research estimated Netflix had 64,000 subscribers by June 2014. Per The CII, Claro Video has 10% of the market; iTunes accounts for 8%; VEO-Televisa 6% and other vendors reach 8% of this particular market.

**WIRELESS TELECOM**

There are over 100 companies in Mexico dedicated to create and produce videogames, according to the Camara Nacional de la Industria Electronica, de Telecomunicaciones y Tecnologias de la Informacion (National Chamber of the Electronic, Telecommunication and TV, CNNEETI). A report by PricewaterhouseCoopers & ProMexico titled Designed in Mexico Roadmap for the Creative Industry reports that in Mexico the video game industry experienced strong growth during time period 2014-2009 (22.9%), reaching USD 698 million in 2009. PwC indicates that, by 2013, industry revenue was worth USD 773 million, an additional 11% expansion. These figures place Mexico among the top 15 video game markets in the world; in addition, being the largest market in Latin America, it accounts for 50% of the total, followed by Brazil (20%), Argentina (8%), Chile (7%), Colombia (5%) and Venezuela (4%).

Mexico’s total video games revenues are expected to grow by an annual rate of 7.7% to reach USD 1.12 billion in 2018, according to the Global Entertainment and Media Outlook 2014-2018 from PwC, which adds “The total videogame consumer revenues are spearheaded by console and mobile playing: total console game revenues in 2013 were at USD 127 million while mobile game revenues were at USD 297 million, jointly accounting for 81% of the total of videogame revenues.”
La Revolución de Juan Escopeta

The evolving Mexican animation industry

But since two years ago, Anima Studios is betting more in TV, through its own international division—in charge of Gaston Cami, VP International Sales—and, also on international co-productions. The average number of animated movies premiered in Mexico is one a half, while the best year was in 2011 with three: Don Gato y su pandilla and La Leyenda de la Llorona (Anima Estudios) and La Revolución de Juan Escopeta (Animex). Regarding cost, animation is not so extensive to produce in Mexico, but in the last year the quality has improved a lot. And now, international and successful companies are watching Mexico to generate high-end animation for worldwide distribution, explains to Prensario a local source that knows very well the animation business.

The animation industry expansion and consolidation has a strong relation with the support from the National Cinematography Institute (IMCINE) through its different lines of promotion. Trust for Quality Film Production (POPROCINE) and FIDE-CINE have supported the production of animated films, says ProMexico/PwC's Roadmap to the Creative Industry. ANIMEX and ANIMA Studios Primetime Group have the content that places Mexico on the map of production and contract manufacturing of this type of entertainment product. The former one has achieved its current position thanks to the production of a franchise-style TV series: the animated El Chavo del 8, which has had a huge impact on the Mexican and Latin American markets and is being exported to other regions and markets around the world, while ANIMEX has created entertaining formats with a classic animation style that have been widely accepted by their audiences.

Don Gato y su pandilla was sold to 25 countries including UK (14 million and positioned in the TOP 5 for five weeks), and Turkey. Now it is still among the TOP 5 of Mexican movies, and it was the most viewed Mexican movie in 2012. Huevocartoon produces web, TV and movie content in 2D, 3D and CGI animation, as well as live-action. Certified by Toon Boom, it offers great opportunities of co-production and animation development with both technically and creatively talented animation artists.

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

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

We are working in one of the most ambitious projects in Latin America in the last years: the animated series of one of the most well known Mexican comedian Mario Moreno Caminflas, which first three seasons (28×11), including a song for each episode, a licensing guide and apps for personal devices. An animated movie and the global licensing is also considered in the project, explains to Prensario Yeampablo Perez Anaya, CEO/Producer at Gyrocopisci.

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

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

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

We have always been related to the best animated Mexican cinema with huge successes such as Don Gato y su pandilla (Top Cat Café)—on lease theatrically in 25 countries, and among the Top 5 most successful Mexican movies of the history—, El Chapulin Colorado (co-production with Dreamworks Classics), as well as La leyenda de la Llorona; its sequel La Leyenda de las Marias, currently in production, will be the third movie in the franchise, which will be released theatrically in Latin America by Videocine this month, both executive comments.

Regarding TV, Cami continues: ‘Teenage Fairytale Dropout was licensed to Gloob Brazil, and to the OTT systems DLA (www.clarovideo.com) and Netflix in Latin America. And our international distributor 8 Story (Canada) has closed deals in Asia (HBO and Sun Network India), Pacific (ABC Australia), Europe (Orlando Kids Europe), and to the OTT systems DLA (www.clarovideo.com) and Netflix in Latin America, HBO, DLA, and the USA (The Hub), among others. Since 2006 the company produces for Tele-\n\nvisio and Grupo Chepequiro the animated series El Chavo—one of the highest rated shows in Latin America, on Free TV and Pay TV through Cartoon Network and Televisio Networks’ kids channel Tim— and it has recently begun production of El Chapulin Colorado Animated Series, based on another character created by Mexican legend Roberto Gom\n\nerez Bolaños.

The big news for 2015 is the release of Don Gato, el minico de la pandilla (Top Cat Begins), an ambitious CGI movie to be released in August 2015, distributed in Mexico and worldwide by Warner Bros.

“We have three movies in production and four original TV series in development and preproduction,” they add. The digital land-
TCP, beyond licensing

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

Maca Rottier, executive director, Televisa Consumer Products.

“After more than 12 years, we are now relying in the creation of new IPs that will be translated in more revenues with projects born inside the company. After the successful story of El Chavo animated series (+135 episodes) we will launch it: toys and apparel… then accessories and stationary… or digital.”

Sometimes the important thing is to be very careful with strategies of how we reach the audience, now is more universal and immediate.

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

EXIM: ‘WE KNOW THE TARGET’

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

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

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

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

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

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

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

Maca Rottier, executive director, Televisa Consumer Products.

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

Mexican industry in the international market is a key player. The Dubbing House, for example, is one of the pioneers and one of the main Mexican dubbing houses. With 29 years in business (19 of them formed in Mexico), he is a very well known face of the Mexican movie industry in the international markets, which have been attending with Dubbing House's VP, Paola Felgueres. Both are authorized voices to understand how this industry was built in Mexico, and they are celebrating the company's 10 anniversary.

‘Today, 67,000 programs are produced annually in the world of which 55% are done here in Mexico. In our country there are over 30 dubbing companies, apart from independent studios, that generate close to 2,800 direct and 7,000 indirect jobs. Through the dubbing, Mexico exports culture. The company has dubbed programs into Spanish dubbing has created a natural language that can be understood in all the countries, no matter the local twist. The biggest contribution from Mexico is that the industry here is becoming more and more modern every year,’ they explain.

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

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

The company has dubbed programs into English (indigenous language) for educational TV networks, as well as the animated series El Chavo (dubbed into English), the Mexican movie Top Cat (Animex Estudios) and the iconic series Señorita Coira (dubbed into English), the Mexican movie El Chavo (dubbed into English), the Mexican movie La Luz (MGM) and the iconic series Señorita Coira (dubbed into English), the Mexican movie El Chavo (dubbed into English), the Mexican movie La Luz (MGM).

Whether in TV or film, there is always a constant demand of voices in every market. The company has created its own dubbing house overseas. We have worked with international companies such as NBCUniversal, FOX (Modern Family), Starz (Spartacus, Magic City) and we have done some works in Portugal, adds Arregui.

In Mexico there are more than 1,200 dubbing actors. Among them, Dubbing House works with Emilio Rafael Treviño, a young actor that has dubbed programs and movies (MegaMedi) for Disney Channel and Disney XD. ‘Giving live to a character is like having two lives: the normal one (when I go to school) and the other one where I play the role. Determination and discipline are the key to success’, he stands.

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

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

Diana Santos has 38 years of experience. His father was the representative of Walt Disney in Mexico, and she has worked in several classics such as 101 Dalmatians, The Beauty and the Beast and Minnie Mouse. Nowadays, she is one of Dubbing House’ dubbing actresses director. ‘In this profession you must be an actor in order to transmit the acting with the voice, but without moving’, she concludes.
The summer of 2004 was especially rainy in Mexico City, just as it has been the current season. While the rain was pouring down and heading into a heavy rainfall, the tiresome executive of a dubbing studio, in between sips of coffee, made comments on this particular reasoning: “Today, dubbing TV programs or movies has no difficulty. Anyone can do them, because the necessary equipment is cheaper and easier to manage. That is why now, we face more competition.”

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

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

Caaliope: ‘Dubbing is a new literary genre’

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

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

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

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

Mexico’s animation and design landscape has grown and developed in a very positive way over the past years. At the present, it has a lot to offer to the International Markets and its creative companies are capable of achieving the same level of quality that is seen and demanded overseas. Its lower production costs and geographic strategic location makes Mexico a very strong competitor among other countries that might offer the same services and outsourcing capabilities’, concludes Puig.

Don Porfirio: Branding solutions

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

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

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

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

Boxel: Animation, 3D, new media

SERVICES

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

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

Valerie Creighton, president and CEO at Canada Media Fund (CMF), adds: “Audiences are more and more social and like to consume content as a social activity. With a new digital series set in Nova Scotia, Canada, ‘The Book Negroes’ will have world premiere screening at MIPCOM. The documentary series, directed by Catherine Hill and filmed in Nova Scotia, Canada, completes a focus on a series of B2B promotional and business development activities. Our objective is to elevate global awareness of the quality and genres of Canadian-produced content in Canada and abroad.”

“The Book Negroes” is a co-production between Telefilm Canada and Valerie Creighton, Canada Media Fund. The project is produced by Entertainment One, producer Clement Virgo, and key cast will attend the screening.”

Telefilm has had a Latin America strategy in place since 2012-2013. Explains Brabant: “It includes striking business development partnerships with key festivals and markets in Latin America, such as the Bogota Audiovisual Market (BAM). As part of this priority, coproduction with this region for the last 5 years has resulted in USD 80 million in production volume as well as on feature films and TV projects. In 2014, CMF is introducing a new program to provide matching fund contributions for co-development and/or coproduction of TV and digital media content with foreign partners. A budget of USD 2 million has been earmarked for this program: comments Creighton, who concludes: ‘As part of this incentive, at “Roadshow Festival” in 2013, together with JoBioFilms, we announced an agreement to join efforts to support the co-development of TV projects and related digital media content’.

“We also have taken an active role in other key industry events in Latin America and around the world. Sunny Side of the Doc (France), TV Business Exposers (Argentina), etc. After MIPCOM, we will be speaking at Aunties’ (Bancroft, Ontario) about Canada’s children’s content industry”, comments Creighton.

“Together with the Canadian Media Production Association (CMPA), Manitoba Film & Music, OMDC (Ontario) and SODEC (Quebec), we have partnered with the San Sebastian Film Festival (Spain) to organize a special Canadian Focus with over 10 Canadian producers taking part in the third annual Europe-Latino America Co-Production Forum, in order to build their international business networks and to foster their expertise on co-producing with Spanish-speaking countries’, adds Brabant.

Creighton: “Mexico is an important market for us due to its mature audiovisual industry and effective financing structure. We want to do more in terms of coproduction. Over the last years there has been four coproduction projects (two features, two TV projects) between both countries. Brabant: ‘Most notably was The Boy Who Smells Like Fish, directed by Aureliano Cal y Mayorga and produced by Toronto’s Nie Fichman. Telefilm Canada will again be present at the Los Cabos International Film Festival in Mexico. Since 2012, this event has hosted a forum for dialogue and collaboration between Mexican cinema and its North American cultural commercial partners. Formally named the MIP International Film Festival, this year the Festival is holding its first-ever ‘Mexico-USA-Canada Coproduction Forum’.”

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**Smilehood Media: Integral Proposals for Producers and Buyers**

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

Describes Silvana D’Angelo, director: ‘At Smilehood Media, a division that includes the distribution and acquisition of content for international markets, we incorporate original and universal productions in order to satisfy the needs of international programmers, either of self-produced series, co-productions or others. Our expertise in animation content began with the production of the series Plim Plim, property that keeps achieving recognition both in Argentinian market and worldwide after its success in Disney Junior Latam. Plim Plim has been sold to over 35 territories including Discovery Family (USA), Tiji Russia and OTT services like Netflix (Latin America) and DIRECTV in USA, among others.’

Another of the highlights of the company’s Wake Up, the teen series recently released on E Entertainment Television (USA) and DIRECTV in USA, and acquired by other Latin American companies, and probably MIPCom in November’, says D’Angelo.

**DW, Continuous Growth in Mexico**

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

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

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

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

**Paramount Pictures Opens Offices in Mexico City**

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

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

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At Exim Entertainment/tech, we dedicated to create, produce and execute for all Latin America and Hispanic USA territory shows for the most successful children’s characters in the industry, not with adding to the innate potential of the brand our creativity and experience on the field.

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

On the other hand, Exim Tech establishes a way of communication with consumers using social media, which are great tools of price/value to generate highly effective contact. ‘With InPulse Digital, partner in the implementation of digital strategies, we are in the process of launching three programs in 2H 2014, two with the most important major licensors of the industry. We also generate and implement monetization tools, mainly gaming and apps with our strategic partner QB9 (Grupo Clarin, Argentina),’ he says.

‘We must first, to develop our ability to analyze evaluating variables such as quality and quantity of content, appeal to consumers, strategic partners, direct and indirect competition, licensor’s ability to communicate and promote Doki and Hello Kitty, two of the most important brands managed by Exim Tech, its license to the final consumer. Second, appeal to our sensibility and instinct to see the imperceptible, and try to imagine or figure out if the property will be successful… or not.’

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

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

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POLEKA, EYES ON MEXICO

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

In addition to the establishment of strategic partnerships with both networks, Azteca and Televi-sa, it has a special relationship with Pedro Torres (El Mall), who was the producer of the Mexican version of Pedro Torres, adapted and produced by Neilo Torres, CEO of El Mall.

Epitafios was one of the most successful formats produced for HBO Latin America, as well as local versions of Desperate Housewives for Argentina, Colombia, Ecuador, Brazil and US Hispanic.

Pedro Torres became the producer of the Mexican version of Amor en Custodia (Azteca), which was also adapted two times: Los Roldan (Televisa), and Amores Verdes (Televisa). Amor en Custodia, which is the Mexican version of our formats to the US and the Latin American panregional market, explains Daniel Otaola, content distribution manager at Telefe Internacional, "is a key market for us, and we will continue betting on it. It is not only the biggest Spanish-language market in Latin America, but also a big opportunity to take our Mexican versions of our formats to the US and the Latin American panregional market, explains Daniel Otaola, content distribution manager at Telefe Internacional. The most recent format sold to Televi-sa was Sweet Love, adapted as Hasta el final del mundo te amare, broadcast on Canal de las Estrellas prime time (9pm), while Gruasto was adapted by Azteca. The success of two telemovels was so big that both channels adapted in different periods of time: Los Rejones was Los Sanchez (Azteca) and Una Familia con Suerte (Televi-sa) and Una Familia con Suerte (Televi-sa) and Amores Verdaderos (Televi-sa).

Along with these titles, other big successes in Televi-sa were Muñeca Brava (El Diablo con nos-tros), which is on Canal de las Estrellas prime time, and Killer Women, adapted and produced by Pedro Torres, CEO at El Mall.

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

Telefe Internacional (Argentina) has a long time building relationship in the Mexican TV market in three main business areas: selling contents, TV formats (First TV) and ready made pro-gramming (Paz TV), and its 24-hours network, Telefe Internacional, which is available in four Mexican operators: Cablevisión, Cablevisión Monterrey-TVI, Ast-tel and Totalplay.

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MEXICAN BUYERS

ACQUISITIONS EXECUTIVES ATTENDING THE INTERNATIONAL MARKET

Below: Elsa Vizcarra, VP Programming, Televisa; Belinda Me-mendez, president, and Maria Sanchez-Munoz, SVP, Latin America & Iberia, NBCUniversal; and Ana Lydia Montoya, acquisitions, Televisa Networks; Adolfo Grenier, CEO, Multimusic; and Ricardo de Leon, programming director, MVS Television.

Televisa Networks: Fernando Munoz, commercial director; Ana Lydia Montoya, acquisitions & programming; Grover Hernandez, CFO; and Ana Maria Ramirez, director, and Carolina Rojas, programming manager, Canal de Radicatres.

Canal Once: Mayolo Reyes Ballesdor, strategy director, and Rodrigo Moctezuma, head of content and acquisitions.

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

MÉXICO COUNTRY OF HONOUR 2014