seeds of revenge
Emergent markets, tech booming

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But then, the event got back to the Istanbul name, as it began receiving people from Africa, from East Asia, more from CEE—now it is an event focused on emerging territories, with stress both in finished products and productions projects. The main region is MENA — Middle East and North Africa— that is getting strong in pan-regional production ventures, for many countries at the same time.

New media/digital ventures are the new step. It is the new big thing worldwide, and takes a main attention this year in Istanbul. There are many VOD services appearing, from cable, from Internet, etc.

Many evolving news are taking place. Undoubtedly, Discop Istanbul is a good place to be nowadays at the content market.

Just to remember…

For those reading Prensario Internacional for the first time, this publication has 25 years covering the whole international market, and now it manages strong coverage and feedback from all regions of the world. We have very good online development, as well, with daily online newsletters during the markets.

At Discop Istanbul, please enter www.prensario.net to read them.

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Prensario has been witnessing the growth of Turkey since the very beginning, and the evolution is notorious. The local TV industry shows high-end quality productions and new trends on the series stories that mix dramas, suspense, thrillers and mystery in both, series and miniseries. Production companies are getting stronger and competing fiercely, while working independently from the broadcasters and distributors.

Seven out of 8 national TV channels broadcast 1-2个小时series every night, which means some 50-60 episodes every week. This means a lot of work and employees dedicated to this business that shows strength year-to-year in all aspects.

According to figures from the Professional Union of Broadcasting Organization (RATEM), Turkey has become the second biggest producer of content (in volume) in the world after the US, and before Brazil. The entity confirmed USD212 million in receipts for 2013, but still not has informed about the 2014 results. The top 6 distributors have seen their overseas sales grow by 20% last year (North/ South America and Asia), so it can be estimated that the content export figures will close up to USD 250-300 million in 2014.

All these production needs to meet the international market to complete the cycle… Turkish distributors have done a great work in that sense: there are new distributors and mergers (TRT has closed a distribution deal with ITV Inter Medya, for instance) and the remaining ones, are getting more professionalized with better investments on advertising and promotion, market coverage and stronger abilities to global tradeshows.

According to local sources, the total market is valued USD 5 billion, where TV takes 50-55%, that means USD 2.3-3 billion, making Turkey one of the largest ad market in Eastern Europe.

After the acquisitions in 2013 of ATV and Show TV by Kalysy Group and Cyaner Group, respectively, last month Istanbul’s 4th Administrative Court has annulled the sale of the latter and, as a result, Show TV is once again under the control of the Savings Deposit Insurance Fund (TMSF). This is the second time the court annuls the sale of the channel, TMSF confirmed then the appointment of a new general manager, Ömit Obaç.

The Turkey Statistical Institute reported in January that Turkish citizens have spent USD 5.5 billion on cultural activities in 2014. TV got the biggest share, 28%, or nearly USD 1.5 billion. Data processing equipment ranked second with 18.6%, followed by books with 13.4%, newspapers with 11.1%, magazines 9.7%, and Pay TV services with 3.7% share.

About the market, Prensario noticed since last year some changes on the drama production system because of the new People Meters from Kantar Media. These effects are being highlighted by the protagonists in this special report, and basically affect the target compositions, as well as the length of the series.

The Sultan is one of the leading series on Star TV since the very beginning, and the epic series keep reaching record numbers in 2014. Globally, Turkey is one step ahead this 2015. The domestic market continues to grow (and change) in all business segments and the movements in the ranking of channel, as well as the higher quality productions, keep motivating the advertising expenditure that has reached record numbers in 2014. Globally, the success of the Turkish series has allowed the international distributors to gain new markets, such as Latin America. Trends & figures in the report below.

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'There is tough and devastating competition in Turkey, so big investments are needed to bring more shares from advertising. At the same time, our dramas are picked up all around the world. This success has made local TV managers and producers to think globally. Through Global Agency, we are distributing some of our productions. The most recent sales and deals in the global arena are 'Village Girl, Runaway Bride, Rotation and Broken Pieces' , he says.

Startv.com.tr and its Facebook (3.1 million followers) and Twitter (600,000 followers) accounts are the most popular in Turkey. 'The corporate social media and shows accounts, managed by Star TV Digital, reach 10 million people with 36 active social media accounts,' Ozguner concludes.

Ozlem Ozsumbul, Head of Sales & Acquisitions, Kanal D describes 'Our main objective for 2014 was covering the whole audience. Every member of the family is important for us. All the projects that we have should contain many elements for those characters to be more attractive for TV audience.'

Turkey, in numbers – In Million (2015)

<table>
<thead>
<tr>
<th>TV Channels</th>
<th>Population</th>
<th>GSM Sales</th>
<th>3G Sales</th>
<th>Internet Users</th>
<th>Facebook Users</th>
<th>Multi Internet Users</th>
<th>SmartPhones Users</th>
<th>Multi Facebook Users</th>
<th>Twitter Users</th>
<th>Phone Devices</th>
<th>Tablet PCs</th>
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<tbody>
<tr>
<td>ATV</td>
<td>18.5%</td>
<td>46.3%</td>
<td>70%</td>
<td>37%</td>
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<td>12%</td>
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<td>16%</td>
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<tr>
<td>FOX TV</td>
<td>13.4%</td>
<td>28%</td>
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<td>25%</td>
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<tr>
<td>FOX International Channels Europe &amp; Asia</td>
<td>1.6%</td>
<td>4.1%</td>
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<td>3.7%</td>
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Regarding trends, she is very clear: 'Turkish dramas are still the most important content for free TV. Because of high competition and commercial revenues we all prefer to broadcast local dramas. Other important genres are Turkish features, studio based game shows and reality programs. Our in house format My Partner Kervan is still doing well at prime time and access prime time.'

'TV business is always the most important media to cover Turkey because we are watching TV too much: it is the cheapest and the widest entertainment. It is for everyone, no borders, no ages, no times, 24/7. This sustainable interest always helps and guides us. The new thing is facing digital world and its growing structure. Digitalisation is affecting TV business and audience day by day. We should keep learning about it and make good combination with usual media and new media in the best way.'

Adem Gurses, general manager, ATV: 'We have the #1 channel for many years but this season, as the Turkish TV market experience fluctuations, also affects us. New players such as TV8, the rise of FOX TV and the new rating system have impacted the TV market. The competition in the market is becoming fiercer everyday and the gap between the channels is decreasing.'

'There are days where entertainment programming is needed. For example, in the weekend the audience prefers talk shows, sitcoms and formats. During working days, there is a more tendency towards fiction. We can find most strong dramas on Mondays for example.'

'As an important change in types of Turkish content is visible due to the new People Meter. In the new panel, a majority of representation is shifted from all demo-group to CD, which is considered more rural. As a consequence, the productions evolved to local stories. We are also adapting to this trend by introducing new productions.'

'We are following the new media trends closely in order to adapt to digital changes, online live broadcasts, catch-up videos and reruns of the episodes can be found on our website. Audience interaction is also provided via social media (Twitter, Facebook). Partnering with online content service providers such as YouTube and mobile networks is also on the table and it’s likely that this aspect of our business will grow in the future, too,' adds Gurses.

'Our content is more diversified and we are getting better feedback in the international arena. The distribution strategy is to secure existing markets such MENA and CEE regions, but also growing in Latin America and Far East. Our best-seller TV drama, Ada, has been sold to Chile and will be on air very soon.'

By the end of 2014, Jan Koeppen, president of FOX International Channels Europe & Asia announced that the company has combined FIC Turkey and FOX TV into a single operational business unit, to be a more 'integral' part 21st Century Fox.

In Turkey, FOX TV is leading FTA national channel, broadcasting local series, shows and news, as well as top box office Hollywood and local movies. 'Even if you are the youngest station, its loyalty percentage is higher than the competitors. It is among the top 3 channels in terms of Top of Mind,' explains Burcin Gahse, Head of Marketing, FIC Turkey.

'It is perceived as a family channel offering the globe were for: productions. The most recent sales and deals in the international market. For one of our successful titles on prime time.

At the same time, according to the most recent sales and deals in the international market, it is in Turkey’s most watched TV series for the 2014-15 season in total audience, and it is also mostly #1 in NBC1-2+ segment on FOX TV.

Turkey, citizen spent on cultural activities, by media (2014)

Top shows for this TV season are the series Matter of Respect, a remake of an Italian drama that is also offered in the international market. 'Pair of the Roses is a simple, attractive drama with its romance, story and dynamism, and it is one of our successful titles on prime time. For My Son started on January and reached huge audience in a short time: it is #1 on Wednesday nights and has a good mix of romance, comedy and action triangle,' he adds.

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Turkey, One Step Ahead

For the TV season, TRT has produced the series. Filima, which was canceled in a different way but the general drama concept with their production qualities, sets created and content. TRT is a highly increasing trend mostly due to Turkish audience loves watching drama. It's has a very high and active social media interaction, almost every week on 12-19 age group. 'It has a very high and active first-on-TV movies and also, it is mostly #1 in ABC1 watched TV series for the 2014-15 season in a top position in the ranking. We'll have second seasons of The Hill and Little Bride this year. According to the executive, content trends are changing in Turkey: “The series are not being so long and their topics of them are mostly local issues. The epic series keep calling the attention of the audience, specially the stories from the Southeast Turkey: smuggling, traffic, bands, etc. Entertainment shows don't work much in our network, but neither in the country. Series leads by far.

In the distribution business, the company is doing well in Central Asia, specially, but also in CEE territories. After attending Naipor Miam in Latin America, where the Turkish series have successfully disembarked, Sadıkoğlu.

Among the top titles, it offers the brand new series Orphan Hearts about a man who grew up without love, and an orphan girl whose parents were murdered andando grown up in an orphanage. Three seasons of The Hill (37x90), about a commander that, while fighting for his country, he looks for his lost sister. And the soap Torn Between Two Worlds (45), with the story of a woman stuck between love and her son who she met after years.

Mehmet Demirhan, Deputy Head of TV Department, TRT, comments: ‘As the Public broadcaster, without making financial worries the priority, we take action keeping in mind the responsibility we carry and aim to produce programs that bring together variety and balance, information and entertainment.'

This year we have put our signature on 2 very high quality productions, Filinta and Rejuvenation. These were different from the general drama concept with their production qualities, sets created and content. Their meeting with the audience has been quite an exciting time for us. We are happy because of the feedback we have received so far.

We see that entertainment formats are at the forefront. Constant evolution in the world creates psychological and social changes within people, and that inevitably leads to new trends in the broadcast TV industry. People's interests change in conjunction with their social lives. Because of the historical accumulation and cultural diversity our country holds, it’s very difficult to analyze Turkish viewers within certain molds. Saying this, the #1 choice for prime time is still drama series.

‘Technological advancements have proven the importance of digital, especially the rising tendency of singular living within our societies has massively increased digital platform usage. We are working on creating content for these platforms, trans-media studies, web-based projects, Internet TV, etc.

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KAZAKHSTAN POSTPONES ANALOG SWITCH OFF TO 2018

Kazakhstan has decided to postpone the analog switch off to 2018. The introduction was initially planned for 2015. Digital TV services are currently reaching 3.5 million people in four cities. The government will spend a total of 22.5 billion tenge on the development of the DTT network in 2015 and 2016.

NEW CHANNEL LAUNCHES IN UZBEKISTAN

The President of Uzbekistan Islam Karimov has launched on January 1 the new TV and radio digital channel, Mahalla, operated under the structure of the National TV and Radio Company of Uzbekistan. The purpose of the channel is to inform the population, especially the youth, on the importance and significance of Mahallas in the formation of a democratic state and civil society, problem solution and covering the experience of activities of different Mahallas.

Most of the digital TV channels in Uzbekistan should be working 24/7 since the beginning of the year. UzDaily.az reports that those are Uzbekistan, Yorshul, Sport, Taashkent, Madanayyt va Mari-fat, Dunyo Bayilah, Mahalla, Kinoteatr, Navo, Ollavy, and Diyorn.

AZERBAIJAN SWITCHES TO DIGITAL BROADCASTING IN FEBRUARY

Analog TV broadcasting in Azerbaijan will be terminated before the end of February 2015. Currently, the total number of digital television signal transmitters working in the country is reaching 90. The population has free access to the social package consisting of 12 channels. The broadcasts are done in the MPEG-4 format. For the transition to digital broadcasting people must purchase a decoder. The cost of these devices in the domestic market is 23-30 manats.

GEORGIA INTRODUCES REGULATIONS ON TV ADVERTISING TIME

At a meeting between the Financial-Budget Committee and the Committee of Sector Economy and Economic Policy of the Parliament of Georgia and the National Communications Commission was adopted the decision to reduce advertising volume on Georgian TV channels.

As stated by the Head of the National Communications Commission Vakhtang Abashidze, the reason for the amendment to the Law “On broadcasting” was the fact that Georgia has no limitations on the amount of commercials per hour, which has resulted in the broadcasting of TV commercials and ad sponsors for half an hour in the evening time slot.

According to the Draft Law, in 2015 advertising and sponsors’ block should be assigned no more than 15 minutes per hour and they shouldn’t be aired one right after the other. By 2016 it’s planned to reduce this time down to 12 minutes per hour. Abashidze is convinced that commercial broadcasters would not be affected by this change.

KYRGYZSTAN TO LAUNCH NATIONAL SPORTS CHANNEL IN THE FIRST HALF OF 2015

Kyrgyzstan’s first national sports channel KTRK Sport will be launched in the country in the first half of 2015, according to the Press Secretary of the Public Broadcasting Corporation (KTRK), Dinara Israilov, who said: “It will be thematically sports-oriented and will focus on physical health culture. Its main objective will be to support the development of sports in the country by promoting healthy lifestyles and attracting young people to engage in sports as well as in the distribution and promotion of national sports’.

The channel will operate in two languages, Kyrgyz and Russian and will broadcast 24 hours on the whole territory of the Republic. The core of the broadcasting network will consist of local and global sporting events, public broadcasts and commercials, including the relevant Government departments responsible for sports and health, sports federations and clubs.

MEDIA PREFERENCES IN TJAFZIKSTAN

The research and consulting company M-Vector, together with Central Asia Barometer, performed a national poll in Tajikistan that has confirmed that TV is the main source of information. The TV audience in the country is 87% of the population (aged 18 and older). The audience prefers watching local TV channels instead of the Russian ones. The most popular Tajik channels are Safir (36%), and Shahbaki Avar (15%), explains the report. The first one is most in demand by residents up to 44 years old, and the second one is most popular among the older generation.

The data from the National Information Agency of Tajikistan (NIAT) Hovar shows that Safir is also the most popular Tajik channel abroad and has a wide Russian-speaking audience. Russian TV is popular with 26% of the population: mainly its channels Rossiya 1, NTV Russia, and Perviy. Residents of middle and older age watch them more often than others do.

TOP NEWS FROM THE CENTRAL ASIA

KAZAKHSTAN POSTPONES ANALOG SWITCH OFF TO 2018

Kazakhstan has decided to postpone the analog switch off to 2018. The introduction was initially planned for 2015. Digital TV services are currently reaching 3.5 million people in four cities. The government will spend a total of 22.5 billion tenge on the development of the DTT network in 2015 and 2016.

NEW CHANNEL LAUNCHES IN UZBEKISTAN

The President of Uzbekistan Islam Karimov has launched on January 1 the new TV and radio digital channel, Mahalla, operated under the structure of the National TV and Radio Company of Uzbekistan. The purpose of the channel is to inform the population, especially the youth, on the importance and significance of Mahallas in the formation of a democratic state and civil society, problem solution and covering the experience of activities of different Mahallas.

Most of the digital TV channels in Uzbekistan should be working 24/7 since the beginning of the year. UzDaily.az reports that those are Uzbekistan, Yorshul, Sport, Taashkent, Madanayyt va Mari-fat, Dunyo Bayilah, Mahalla, Kinoteatr, Navo, Ollavy, and Diyorn.

AZERBAIJAN SWITCHES TO DIGITAL BROADCASTING IN FEBRUARY

Analog TV broadcasting in Azerbaijan will be terminated before the end of February 2015. Currently, the total number of digital television signal transmitters working in the country is reaching 90. The population has free access to the social package consisting of 12 channels. The broadcasts are done in the MPEG-4 format. For the transition to digital broadcasting people must purchase a decoder. The cost of these devices in the domestic market is 23-30 manats.

GEORGIA INTRODUCES REGULATIONS ON TV ADVERTISING TIME

At a meeting between the Financial-Budget Committee and the Committee of Sector Economy and Economic Policy of the Parliament of Georgia and the National Communications Commission was adopted the decision to reduce advertising volume on Georgian TV channels.

As stated by the Head of the National Communications Commission Vakhtang Abashidze, the reason for the amendment to the Law “On broadcasting” was the fact that Georgia has no limitations on the amount of commercials per hour, which has resulted in the broadcasting of TV commercials and ad sponsors for half an hour in the evening time slot.

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**DISCOP ISTANBUL 2015, THE IMPORTANCE OF BEING HERE**

**Turkey**  
Hakan Adiguzel, president of Globos Congress & Fair comments: ‘Turkey has become a major player in the global industry. Both as a marketplace for international content suppliers and as a production center with a plan to export USD 1 billion of TV content in the next decade. The city is now a strategic TV business hub for Central and Eastern Europe, Central and West Asia, North Africa and Middle East.’

Zuchovicki adds: ‘The Turkish product continues to grow worldwide, especially in Latin America. Popularity unscripted and scripted series formats for adaptation purposes are also on top. On the entertainment side, during the market we have the worldwide launch of Global Agency’s new format ‘It’s Showtime’, to take place at a press conference on the first day of the market’, says the executive.

About the region in general, he concludes: ‘Turkey and its surrounding regions are on working on the global media phenomenon, providing a unique view of what is at stake to work at the successful media outlet and what it takes to engage the current youth generation.

**New countries represented at DISCOP ISTANBUL**

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**Sweet figures**  
The 2014 edition had showed a growth of 33% totaling a record number of 1,048 delegates from 67 countries, and the organization expects similar numbers this year, the buyer increase has been also around +52%.

**Organizers** are confident with the figures showed by the end of January, which demonstrate that DISCOP ISTANBUL is having a great reception among the content regions, and newcomers both sellers and buyers, that have been confirmed.

The successful editions of this market in Istanbul have strengthened the position of DISCOP as a must-attend destination for the international TV content business. The 2015 show is going to be bigger, stronger than last year, remarks Patrick Zuchovicki, managing director, Basic Lead.

He continues: ‘There are three new regional pavilions, China, Korea and Gulf Countries, in addition to the Eastern and European pavilions. We have registered 750 more participants by the beginning of the month, which means 300 more than last year at the same time. We are expecting at least 1,000+ participants. There is an increase of 20% in sellers and 30% in buyers.’

Prensario estimated a buyer attendance of 400-450 acquisitions & programming managers. Among the new participants/countries coming to DISCOP as a buyer at the market on 26 February and features a morning presentation of today’s most adaptable dramas with international appeal.

It will be followed by a discussion and analysis of innovative concepts. During the afternoon, it will take place a pitch competition for independent international producers, who present their non-scripted TV format concepts to a panel and audience of TV executives looking for the next big talent. Finally, an award ceremony concludes DISCOP ISTANBUL 2015.

Other highlights is a day wide dedicated to licensing and merchandising opportunities in Turkey, organized in partnership with the LIMA association. And a special two-hour presentation from VCI Media editors: Bryan Grün, managing editor, and Benjamin Shapiro, senior editor and on-screen reporter, will share their experiences on working on the global media phenomenon, providing a unique view of what is at stake to work at the successful media outlet and what it takes to engage the current youth generation.

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**Participants & trends**  
East Asian community is also numerous in Istanbul. The Filipiner broadcasters GMA and ABS-CBN, and Trans TV (Indonesia) buy and sell here. Malaysia, through the state agencies FINAS, CCMA and MDEC, attends DISCOP with producers and distributors regularly.

Other countries with 200+ delegates on the event are Colombia (Carlavi, Venezuela (ELI), Poland (ITV), Romania (Maf Video, Imagina TV), Hungary, Croatia and Bosnia Herzegovina, are keen on Turkishseries. Istanbul this time is one of the global players in the market, among the fastest growing territories. Latin America has a strong presence of its traditional media distributors, providing both canarded formats and exploring co-production opportunities. They agree: ‘The Turkish product continues to grow worldwide, especially in Latin America. Popularity unscripted and scripted series formats for adaptation purposes are also on top. On the entertainment side, during the market we have the worldwide launch of Global Agency’s new format ‘It’s Showtime’, to take place at a press conference on the first day of the market’, says the executive.

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There is a wave of new countries taking part in the international tradeshows: their local industries are growing and evolving fast in both, content production and distribution, as well as new broadcasters and pay-TV channels.

Qatar will record 72% pay-TV penetration by the time it hosts the FIFA World Cup in 2022, with local providers reaching 71% of the population. However, regional disparities mean less than 10% of TV households in Algeria, Jordan, Morocco, Syria and Tunisia will receive pay-TV services.

The report estimates that the expansion was due to the growth of operators OSM, 1.16 million subscribers by the end of 2014, and beIN Sports, with 819,000. Piracy remains a major problem: there are 34.3 million FTA satellite TV homes in MENA sub-regions (excluding Israel, Turkey and Iran). The source believes that at least 10% of these homes also receive of premium satellite TV signals.

What’s new?
Prensario has noticed several new players at the market place, which will be at DISCOP Istanbul this year again, especially content associations such as the Georgian Association of Regional Broadcasters: “We are buying all kinds of contents for the smallest channels of the country,” explains Natia Kuprashvili, executive director.

The panel Focus in Iraq showed in the last year edition, that there is enough room to grow in MENA. Players from markets such as Tunisia, Saudi Arabia and Egypt agreed that the social revolution held the last 10 years (from Saddam Hussein fall in 2003 to the Arab Spring in 2010 and the Tunisian revolution in 2012) “affected positively” the media market. From the state monopoly to a vibrant open market with more and more content output options”, they said. Egypt is the oldest content producer in the region (1950) and ita productions cover the whole Arabic region, We have Over 40 projects annually and 70 studios”, comments Waled Shalaan, content manager at Rotana International, one of the main media enterprises in the country.

DISCOP Africa Express
Basic Lead has announced the launch of DISCOP Africa Express, to take place on June 2-4, at the Solitude Irene Hotel in Abidjan, Côte D’Ivoire, partner to its successful annual event DISCOP Africa.

Patrick Zachowicki, founder of DISCOP Africa & DISCOP Africa, expresses: “One annual Johannesburg based market continues to exceed expectations each year. Following a survey of a cross section of our participants in November, it became clear that the time is right to establish a second dedicated market, at the heart of Francophone Africa, to further the growth of this important region and become an essential partner to our thriving Johannesburg event.”

The Sandton Convention Centre in Johannesburg in November 2014, DISCOP Africa was attended by more than 1,580 delegates, including 280+ exhibitors representing global and regional entertainment content providers from Africa and overseas, alongside 400+ key acquisitions, commissioning and programming executives. The date for the 2015 edition is November 4-6 at the same hotel.
Muthar al Bakaa, CEO, al-GhadEEr (Iraq)

‘In 2003, after Saddam HuSSeIn fall, the market was opened and started to grow. We have 80 ft. Satellite Channels available in Arabic and Kurdish languages in the country. This big amount of network is in need of content, bought mainly from Turkey and other producers of the region. There are only 4 production companies, but still not generating great content.’

Hassan al-Hamdan, General Manager, Production and Programming, Saudi Broadcasting Corporation (Saudia Arabia)

‘Saudi tv was managed by the Ministry of Culture and Information and during 2014 Golden Jubilee, has been transformed into Saudi Broadcasting Corporation (SBC). Operating a media company in Saudi Arabia is a very important mission; receiving all the sector and regional.datum. We also have a Pan-Regional approach.’

Akif Ebiçlioğlu, Founder of Brand Entertainment Europe Menas Asia Association (Turkey)

‘The aim of beemaa is to gather production placement agencies from Europe in order to unify the sector and enable business better, as well as conducting an extensive research and finding solutions for the future. We also include MENA Asia, and merged Eastern and Western concepts, since we cover both regions together with Europe.’

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‘For the future, there will be more quality content and better production values with increased internationalizing. We are keen to adapt international scenarios, content and story; in forward and working towards the future when our productions can travel worldwide and be adapted elsewhere.’

Andrew Eetern, President & CEO of Octopus TV (UK)

‘We have in connection that people don’t watch technology; they watch good quality content. Simplicity is the new sophistication.’

Ross Biggam, Managing Director, Association of Commercial Television (Europe)

‘Why do we attend Discop Istanbul? Two reasons: Firstly, the atmosphere and innovation in program making from this part of the world is simply what we need to know about the EU institutions. The other reason is simple. What is created in Istanbul today will be exported to Switzerland, Italy, France, Spain and Turkish tomorrow.’

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OSN, THE FIRST WINDOW PROPOSITION IN MENA

Leading Pay TV network OSN brings to the Middle East and North Africa (MENA) audience the widest choice of premium Western, Arabic, South Asian and Filipino entertainment with a broadcast footprint that covers 24 countries across the region. It is the home to over 140 channels, offering blockbuster movies (100 uncut and uninterrupted premieres a month), top-rated series, sports, documentaries, news, kids entertainment and live talk shows. All content is subtitled in Arabic and is available with a dual-language EPG.

OSN operates 46 HD channels and is currently the only network offering a full HD bouquet of channels as well as SD entertainment. It was also the first to launch the OSN DVR HD, the region’s first online TV platform, OSN Play; the first on 3D, HD, Internet enabled satellite receiver and recorder, OSN Plus HD and the first VOD service. In mid-2014 launched, the group launched Go by OSN, a premium online TV service providing subscribers access to thousands of hours of content, contract and commitment-free.

Khulud Abu Homos, EVP of Programming & Creative Services at OSN, explains: ‘We know from experience that moving to a digital platform is the only way to keep viewers and audiences engaged. We’re delivering a premium premium service that is contract-free.

The programming on the platform, be it premium Western or Arabic, is based on the “first window proposition” that includes movies being offered to viewers first – that is closest to their theatrical release and series airing at the same time as the US. A lot of effort was invested in making content available to both producers and licensors as a counter to piracy and creating synergy with the way youth and viewers are consuming content today.’

It has also embarked on original Arabic productions that resonate with local tastes and preferences appealing to all demographics. ‘We led the proposition of premium Arabic content with the launch of the OSN Tahala channel bouquet, the premier destination for quality and premium Arabic entertainment, specially adapted versions of successful Western dramas. The introduction of international quality benchmarks has positively influenced Arabic productions quality both technically and from an editorial perspective.’

‘The focus is on drama brands and formats with social relevance to local issues in MENA, like the Italian format You Got Mail that was adapted and focuses on forgiveness a virtue: Al Menasame Karim was headlined by George Karale and brought human-interest stories to life. Another self-developed concept was The Boss and Saudi Doctors that incorporates elements from international shows however are significantly relevant to local and regional preferences while also tackling bold and edgy issues within accepted parameters.’

‘The appetite is growing for locally relevant content and the success of Turkish dramas and long format shows indicate the shift of investments from American TV shows to locally produced content. The latest and hit Hollywood movies however continue to be the most preferred choice among regional viewers,’ she says.

‘DVDs such as Saud Doctors incorporates elements from international shows, however are significantly relevant to local and regional preferences. They attract the viewers who are used to watching movies and are used to the way content is produced in the West and in Turkey. This also means they are more interested in the production quality both technically and from an editorial perspective.’

‘Similar to what we are seeing globally (movie stars talking on more TV projects), within the last five years Middle East drama productions have also seen a leap in both production and editorial quality with the shift of cinema or movie stars, directors and producers moving to TV. We are setting the trend when it comes to delivering a new and comprehensive viewing experience.’

‘With TV and video viewing habits in the Middle East being rated as the highest around the world driven by a digitally savvy audience, it opens opportunities for non-conventional concepts and story lines with an increasing appreciation and acceptance of out of the box’ concepts. There is a further move towards new genres, specifically satire in all forms, standup, comedy and action-driven concepts as compared to repetitive stories in drama and slapstick comedy that used to dominate our screens’.

‘We have seen a leap in both production and editorial quality with the shift of cinema or movie stars, directors and producers moving to TV. We are setting the trend when it comes to delivering a new and comprehensive viewing experience’.

‘Over the last 12 months we have witnessed a peak in consumption of shows such as Game of Thrones when we provide previous seasons box sets alongside the day/date airing of the latest season. OSN has also offered full seasons of House of Cards via its digital services, as well as the latest season of Homeland and Downtown Abbey airing close to their US/UK emission, while also offering full season box-sets of all previous seasons of these shows’.

Hemos concludes: ‘The expansion will come with creating enhancements to the viewing options presented to viewers with second screen experiences, live studio based and daily shows that bring interactivity with the viewers. The future is engaging via content and getting viewers to engage with the content, integrating social media elements and interactivity. Furthermore personalizing the viewing experience will be a key aspect to TV viewing albeit via multiple connected devices.’
FIC Turkey, solutions for big global and local clients

Jan Koeppe, president of Fox International Channels Europe & Africa announced by the end of 2014 that the company has combined FIC Turkey and FOX Turkey into a single operational business unit. By combining our Pay TV business and our FTA channel we have made them a more integral part 21st Century Fox. We have created a stronger partner for advertisers and platforms, as well as a powerful creative destination for producers.

After a structured operational integration process over the last months, it was defined that Mehmet Icagasioglu, leads Ad Sales for the business, Sebnem Askin, continues to run programming at FOX TV and Dogan Senturk continues in his role as head of News and Programming at FIC Turkey. ‘We operate 10 channels in Turkey, which are distributed in the main Pay TV platforms, such as Digiturk, D-Smart, Tele5unca, TurkcellTV+ and FICTurc, has recently launched its own linear brands that let viewers to connect and watch content every time, everywhere.’

‘We created the most preferred sales team in Turkey not only representing our own channels but also other strong channels such as Disney Channel, Disney XD, Gullustv, Fox Crime, Da Vinci Learning and more to come. We incorporated the first 360° project team in house, Factory, offering turn-key, customized and innovative solutions for our partners. Additionally, FIC Content Sales Team offers a wide range of content to the market including series, documentaries, entertainment shows and cooking shows. Among the shows currently aired, head of marketing initiatives, Jihad Sali, comments that ‘we have local shows and/or local short content for Nat Geo channels such as recent Tracking the Brown Bear and Inside: Turkish Airlines documentaries. Besides, we produce three local cooking shows for 24Kitchen: For the Love of Food with Gabriele Sponza, Art of Tast and Maksut’s Neolocal Kitchen with Maksut Askar and Tom’s Istanbul Delights with Tom Aikens.’

Gulsen comments that ‘Turkish media market is competitive’, but linear TV remains the leader. However, Pay TV penetration is not that high, it’s around 35%, 6 million households. Our main motivations are affiliate and Ad Sales. We are the one and only group who do not offer ad-sales solutions only for our own channels but also for big local and global clients. When our clients experience the high quality service we provide to them, they keep coming back for more campaign briefs even if it has nothing to do with our TV businesses.

‘On the content side, we have two very important output deals with the world’s biggest content provider studios: 20th Century FOX and CBS. Also, we believe in the importance of localization, so we act really careful when choosing content, scheduling and promoting it. We try to make sure that Turkish audiences feel that these are tailor-made channel managed according to their need and habits. That’s also why we invest on local production opposed to our competitors.’

As a trend, she visualizes that ‘there is no more fall and mid seasons in Pay TV; it is now a 4 season business with more summer dramas than comedies. The biggest change in content is that movie stars are now on TV. TV series are hosting the biggest Hollywood movie stars. ‘Audiences are increasing enjoying the convenience of time-shift technologies and second-screen applications all around the world. We are already seeing major studios and platforms releasing their own OTT offerings. With the output deals that we closed, we have the VOD and Catch-up right almost for all of our highlights. Our upcoming Fox Play app will allow the users to reach their favorite shows wherever and whenever they want.’

‘On the other side, Pay TV in Turkey is still suffering from illegal web streaming of the foreign series. It is getting more important to broadcast premium US content at the same time with US, like we do for The Walking Dead, Homeland, Galatasaray TV, Da Vinci Learning and more to come. We incorporated the first 360° project team in house, Factory, offering turn-key, customized and innovative solutions for our partners.’

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CTC Media, Russia: Adapting to the Digital and Content Trends

CTC Media is a leading Russian independent media company, operating four networks in that country, CTC, Domashniy, Peretz and CTC Love, as well as Channel 31 in Kazakhstan and a TV company in Moldova with combined audience over 150 million viewers. Apart from that, it operates international versions of CTC (North America, Europe, Central Asia, Armenia, the Middle East), Peretz (Belarus and Kyrgyzstan), several digital assets such as video games, online gaming, and Odnoklassniki.

Yuliana Slashceva, CEO, CTC Media, said: ‘We confirmed our full-year outlook for OIBDA margin at around 30%. Devolution of the ruble, which lost 15% against the USD dollar during 3Q, significantly affected our performance. The ruble declined 17% year-on-year. However, a set of cost management initiatives is helping to maintain efficient cost control. We expect that our full-year programming expenses will increase more slowly than our revenues. This will help us to keep high margins in extremely challenging macroeconomic conditions.’

The core audience of the group flagship CTC Channel are young adults (25 & 35), which generates ‘exceptional’ demand for news and information about what’s going on in the world and their country, she says, and adds: ‘All new launches on CTC Channel enjoyed higher-than-average audience shares including The 80s, Angelika and Family Business’. The executive states that there have been changes in the demand for content generated by the audience enjoying entertainment shows. ‘The demand is shifting from humor and sitcoms to drama and happy-ending reality shows. We took this trend into consideration for content production, and CTC Media came up with a series of new projects in these genres that we are expecting to launch across our channels in the coming months.’

The updated programming and content policy of Domashniy is attracting significantly younger audiences to this channel: the share of women aged 50-59 fell to 2% compared to 8% in 3Q. We are evaluating whether to switch from women aged 25-59 to women aged 25-50, which is a more attractive demographic from an advertising standpoint, starting from 2016. We are also considering to increase our ad prices faster than the market average starting from 2015, as well as evaluating a potential transformation of Peretz, which took the hardest hit from the transmedia content. The transaction included the CarambaTV.ru, a producer of digital and transmedia content. The transaction included the CarambaTV.ru and Odnoklassniki web portals, which together receive over 2 million unique monthly visitors. CarambaTV content generates over 75 million views per month, including 20 million views of online content.

It has also launched the first fully developed mobile game in Russia based on the network’s popular Molodezhka multimedia TV series, developed and released in cooperation with the gaming company Game Insight. Since last December, the game has been free-downloaded by over 300,000 users.

In Moldova, CTC Media has started a gradual transition to sub-license the content of its international channels, while intends to begin selling content to other TV channels in the country. It has closed the subsidiary, I.M. Telecalli S.R.L., which was broadcasting at CTC Mega since 2005 to focus on the cable and satellite distribution of CTC Media channels.'
With a population of more than half being under 25 years old, and a high penetration of mobile phone and Internet in all target groups, the Middle East is a region that is attracting media and advertising companies. Moreover, average daily viewing time per individual—even though conducted with different measurement instruments—has increased in most countries. This is likely to improve in the years to come as new media hubs are being created to facilitate local relationships and boost foreign investment, likewise the deployment of technological advancements is making it possible to identify viewers’ habits.

**A Little Background**

With the increase of Satellite TV channels over the last decade—since 1990—TV producers and broadcasters experienced an intense pressure to provide quality content and innovative concepts that appeal not only to locals, but also at regional level. Since launched-Satellite TV channels are capital-intensive companies, their goal is to capture new audiences as possible. However, the difference of TV audience measurement (TAM) in the region did not allow a forecast of potentially successful formats. This made TV channels to import a number of formats towards the creation of new content and therefore prompting the broadcasting of Turkish and Mexican TV series.

Evolution of content creation in the Arabic TV industry was mainly done through successful shows and series. However, because of the strong religious and cultural values, the reality-shows as Al Ray’ was, the adaptation of Endemol’s format Big Brother, were prohibited after several days of broadcasting on MBC4, another Arab version of American Idol! The Super Academy, or the reality-show Super Star were highly criticized.

Recent government efforts to create new media hubs within the region —besides the well-known media cluster in Egypt— have been made, especially within the Gulf countries as the recent media center Twofour43 (UAE). Aware of the indirect and direct benefits of film and TV productions, countries like Lebanon, Saudi Arabia and Jordan are starting to create policies that promote foreign media investment and increase original Pan-Arab content production. Moreover, the adoption of people-meter at TAM in the most relevant countries for the Pan Arab TV advertising market —UAE, Saudi Arabia and Egypt—are widening the TV Landscape for producers and broadcasters.

A lot has been said about the TV satellite channel explosion and its consequences. Some divided it in a simplistic manner by stressing out that after the Arab TV industry was liberalized as a natural evolution of the economies of media production—Western production would rather “demonstrate” the industry or “innovate” by forcing the adoption of formats. Though, these two views are paradox, they took place, not at the same time; they occurred gradually, and several external factors contributed to it. This was more evident for the news programs at the beginning of the channel Al Jazeera, who later adopted more practices creating a tremendous success leading to regional competition. The channel competed with MBC’s news channel Al-Arabya in 2003. When launched, TV groups are capital-intensive, such as CBC Group (2011) and Al Nahar (2011), and they do not figure as the main producers of original content. However, groups, established with several niche channels such as MBC Group (1991 e.g. MBC1, MBC Drama, MBC Masr), Abu Dhabi Media Company (1990) or Nile TV International (1994 e.g. Nile Life, Nile Culture, Nile Family) are producers of most of the original content broadcasted in the UAE and Egypt.

The original production in 2014 in Egypt was mainly fiction, with series and sitcoms. Entertainment and factual shows were produced and adopted in a lesser degree in the format Alhayat. MBC and ElMelhwar were the TV channels with more new original formats broadcasted in Egypt.

**Tell Me what’s Going on**

Looking to create a link with viewers, original series in Egypt were mainly focusing on portraying oppositions instead of daily life situations in humorous ways such as Dubai Bentah broadcasted on Alhayat and on AlNahar showed the clash among social classes; meanwhile, El Wehaba El Marem and El Dream 2 revolved around the conflict between the new and old generations, while El Sahab (MBC Masr) covered a comedy transferring in the portrayal of social matters.

**Comedy**

Comedy, but also reflects the political and social changes following the Egyptian Revolution. Likewise, El Elsheikh on Al hayat’s Seeg El One on Dream 2 had political events in Egypt’s storyline, and the latter reveals the life of the ex-President Gamal Abdel Nasser and his Ministers of Defense, Marshal Abdel-Hakim Amer.

Story-based series about women such as Sarye Alshbeyr on MBC1 were also relevant; the production was considered the year’s biggest business production with a number of well known actors from the Arab world and had a considerable budget. The series deals with women conflicts on the period of time between 1866-1890. Along the same line, Sign El Nisaa inspired by a play written by once a political detainee—Faris Al Asad—illustrates real life events around three Egyptian women in prison.

The trend of portraying social situations was also followed by the South with original productions such as Mstaief Sagherat on MBC Drama, which discussed the phenomena of early divorce in the Gulf Society. Derek Al Fareej and Seaoy Al Bal on Abu Dhabi Al Ouda were also social series with a narrative comedy.

**Let’s Talk and Portray**

Portraying a Pan-Arab culture was also the theme of most of the original series on AlMehwar, which aimed to find the most talented halls and dance in the world. This was the only talent show that did not include celebrities as participants in 2014. Other original formats in Egypt as Fresh El Mba’a and L’avenir El Frasou had different famous stunts as hosts; in both programs, celebrities are victims of a joke that is revealed at the end. With the same “Behind the scene” notion the programs Shams El Ghali and Aqida on Alhur were calculated the reactions of children when interviewed by the Egyptian comedian Ahmed Hefny, while the latter spot celebrates children’s reactions facing terrifying situations.

On the factual genre, several talk shows that analyze political and economic topics. Al Asweesa on El Melhwar invites guests to know their opinion about the situation in Egypt; meanwhile, the program Anti Al Assam, deals with the latest presidential elections in Egypt, hosting the famous interviewer Hala Sarhaan.

Contrary to Egypt’s obvious trends, the UAE’s entertainment and factual productions remain diversified with game shows, cooking talent programs, or formats inviting the audience to participate by phone calling.

**A Pan-Arab Flow and Beyond**

With the increase of costs due to the production of new contents and low spending on TV advertisement, one program is usually broadcasted on several channels. Sign El Nisaa was broadcasted on 9 different Satellite TV channels throughout the year in Egypt, Saudi Arabia and UAE. The series Ad Travezol and El Menouja were broadcasted by three different channels such as El Melhwar, CBC, etc.

Therefore, in order to maintain viewers, there has been an inflow of foreign programs, with fiction being the most imported genre in UAE, Egypt and Lebanon. In Egypt and UAE, MBC Group was the one that imported fiction origins in UAE & Egypt (2014)
The Evolution of Pan-Arab Advertising Market

Prensario summarizes below the key figures in the evolution of the Pan-Arab advertising expenditure by media, according to the report Arab Media Outlook 2011-2015, which highlights that Satellite TV continues to account for a majority of the advertising spend, thus explaining the lower proportion of domestic TV advertising spend at country level.

For the purpose of this analysis, it has been considered digital advertising spend in individual markets based on an assessment of the number of internet users, ICT infrastructure, Internet usage and consequently the volume of traffic of the various markets across the Arab region.

While the Internet has by definition a Pan-Arab reach, the report has attributed digital advertising spend to individual markets to reflect actual online consumption and consequently advertising budgets for each country in the outlook. As a result, it was seen varying levels of digital advertising spend across the individual markets but have not reported Pan-Arab digital spending.

The regional unrest, which occurred in many markets coupled with the overall economic climate in 2011, resulted in a decline of 12% of Pan-Arab advertising spend between 2010 and 2011. Since 2012, there was a slight growth of 4% and we expect advertising spend in 2015 to grow at a CAGR of close to 6%, to reach approximately USD 1.65 billion.

Overall, TV is the only pan-Arab platform which is foresee relatively strong growth (apart from digital which has been analyzed for instance using dedicated transmission feeds for the majority of top watched channels particularly in the GCC, the introduction of the Purple Mover systems in both the UAE and Saudi Arabia brought to light some distortions with the current ratings and benefit some smaller channels.

The market for pan-arab news channels has seen a number of entries recently and became even more competitive in with the introduction of new news channels like Sky News Arabia, and Alarab. The Pan-Arab FTA market has already witnessed growth of 44% between 2009 and 2011 in relation to news and current affairs channels in the region, with this segment becoming increasingly competitive compounded by the regional disruption.

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The audience measurement initiatives in Saudi Arabia and the UAE improved transparency in the market, increasing the confidence of advertisers (regional and international) in the platform and generated value for the industry as experienced in other markets where TV audience measurement was introduced.

Whilst the number of FTA channels continues to rise (reaching close to 600 channels) the rate of growth is slowing down and we see further consolidation of new channel launches around the main FTA players. This in turn builds scale, increases advertising premium and ensures higher budgets are allocated to quality content production, increasing the overall value of the pan-Arab advertising market.

Broadcasters on Pan-Arab are investigating new ways to better target sub-regional audiences, for instance using dedicated transmission feeds to specific markets.

Overall, the study anticipates that satellite TV advertising on the pan-Arab platform will increase at a CAGR of 6% over the projection period, reaching nearly USD 1.5 billion by 2015, 94% of the total pan-Arab advertising expenditure.
Pakistan is a strategic market in Central Asia of 190 million people, where 67.1% are below the age of 30. It is divided into four provinces: Sindh, Punjab, Balochistan, and Khyber Pakhtunkhwa. Each with a unique ethnolinguistic identity, together with the Islamabad Capital Territory, the north-western Federally Administered Tribal Areas (FATA), the northern semi-autonomous Gilgit-Baltistan region, and Pakistan-administered Kashmir (known locally as Azad Jammu and Kashmir). Pakistan’s middle class has doubled to 70 million people in the past decade, and consumer spending increased at an average rate of 26% (2010-2012) compared with 7.7% for Asia as a whole. Household incomes in the urban areas rose faster than inflation by an average of 1.5% per year (2006-2011) and the retail sector grew at an average rate of 26% per year. This explains high levels of media consumption and the exponential growth of the telecommunications sector.

Television was relatively slow to grow in Pakistan as it wasn’t until 1994 that Pakistan Television Corporation (PTV) was launched, but this state monopoly ended in 2002 and the market was liberalized. This led to the boom in new private TV channels that have only received licenses for cable or satellite online, so PTV is the only channel that provides terrestrial services. After the deregulation of electronic media industry, TV sectors remain vibrant. There are more than 80 TV channels out of which 15 are major news channels and the remaining cater for entertainment, music and religion. According to the Pakistan Electronic Media Regulatory Authority (PEMRA), there are only 12 million TV sets in the country, approximately 3 million people while private surveys put the number at about 18 million.

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

Pakistan’s advertising spent, by media

<table>
<thead>
<tr>
<th>Media Type</th>
<th>2005</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Outdoor</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Print</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Digital</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Television</td>
<td>51%</td>
<td>50%</td>
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</tbody>
</table>

Pakistan's advertising spent, by media

Pakistan's TV viewership, by media

<table>
<thead>
<tr>
<th>Year</th>
<th>Satellite</th>
<th>Cable</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>23.9%</td>
<td>46%</td>
</tr>
<tr>
<td>2010</td>
<td>6.5%</td>
<td>46%</td>
</tr>
</tbody>
</table>

(*) The writer is a consultant to electronic media industry and presently associated with India TV Network in Pakistan, and can be contacted at ravdahanif@hotmail.com and (92) 300-620-8110

By Mohammad Hani Ravda (*)

**Pakistan in Numbers (2014)**
- Pakistan has 190 million people, where 67.1% are below the age of 30.
- 80 TV channels out of which 15 are major news channels and the remaining cater for entertainment, music and religion.
- There are 12 million TV sets in the country, approximately 3 million people while private surveys put the number at about 18 million.
- 86 million television viewers in Pakistan, the low number indicates that commercial television watching is popular.
- 38 million viewers can access digital satellite channels that are primarily distributed via analog cables owing to the high cost of purchasing satellite dishes.

**Pakistan: Advertising Spent, by Media**
- Radio: 6% in 2005, 4% in 2010.
- Print: 30% in 2005, 30% in 2010.
- Digital: 2% in 2005, 4% in 2010.
- Television: 51% in 2005, 50% in 2010.

**Pakistan: TV Viewership, by Media**
- 2005: 23.9% Satellite, 46% Cable.
- 2010: 6.5% Satellite, 46% Cable.
Television markets in such Central Asia countries as Tajikistan, Uzbekistan, and Turkmenistan differ a lot from the points of view of their volume, number of broadcasters, TV-content production facilities, and trends of development. TV markets in Tajikistan and Uzbekistan, for instance, are just starting to evolve and integrate into global TV tendencies.

From the other hand Turkmenistan is a closed for TV business activities territory because of its inner governmental policy. In this article we’ll give a short analysis of three Central Asia territories from the point of view of current situation on their television markets. Unfortunately, data on TV ratings and share of the TV channels in all these countries is not available because of the absence of national-wide TV researches there.

**Turkmenistan**

Turkmenistan is situated in central Asia with an area of 491,200 km² and a population of 5.36 million people. There are a total of 1.6 million television households and an estimated 2.2 million television sets in use. Approximately 76% of the television households still rely on the analogue terrestrial platform for their primary television reception.

Satellite television (DVB-S) has been seriously compromised following the decision by the President of Turkmenistan requiring that all satellite dishes be removed from the rooftops. However, cable television will be introduced although content will be strictly censored by the government.

The Ministry of Communication is the legislative and regulatory body responsible for broadcasting in Turkmenistan. It is responsible for proposing and implementing legislation in the area of electronic communications. Currently 6 national broadcasters are available on the analogue terrestrial platform. They are: Turkmenistan (inforntational), Alty Ayr (general interest), Vysiyl (entertainment), Miras (cultural), Turkmen tv and Turkmen Sport. There is also a Gaba TV channel, which broadcasts only for the territory of Ashgabat.

Unlike the other countries of the former USSR, which have made some progress towards the implementation of their DTT platforms, Turkmenistan has not yet begun DTT trials. This can be attributed to the state’s information policy, which may effectively conflict with the introduction of digital technologies. Data on TV ratings and share of the TV channels in Turkmenistan is not available because of the absence of national-wide TV researches in this country. The TV industry in Tajikistan is the less developed among other CIS countries but for Turkmenistan, which is the only one “closed for the others eyes” market of the region with only 7 TV state-owned channels and without private TV stations at all. According to the TV and Radio Broadcasting Committee of Tajikistan there are totally 57 TV stations in the country, 17 of which are private and the others are state-owned ones. The main distinctive feature of the local TV market is absolute dominance of regional and local TV broadcasters (the majority of local TV channels are operating in the province of Sughd, one of 4 administrative divisions of Turkmenistan situated on the north of the country).

Currently there are only four national-wide TV stations in Tajikistan that cover more than two thirds of the state territory by means of terrestrial and satellite distribution. They are: First Channel Tajikistan (99.7% coverage), TV Saffa (74.4%), Chahonnamo (77.5%), and Babhoriston TV (72.1%). And all these TV channels are state-owned. National-wide private broadcasters absence is the main obstacle of the country TV industry development. Local authorities actually stopped giving new broadcasting licenses in 1999 – from that time and till the beginning of 2015 only one TV channel was “awarded” by TV license – it was private NTT channel (stands for Independent Television of Tajikistan) which started broadcasting in summer 2007 and covers with its signal the capital of the state Dushanbe and its suburbs. TV advertising market in Tajikistan is rather small: less than USD 20 million exceeds the one of Tajikistan more than twice – there are near 3.6 million households and 8.1 million television sets in use in the country. The terrestrial platform is hostile 77%% of all television households. Cable and satellite television delivery platforms are becoming increasingly popular with viewers and account for 10-15% and 7-9% of all television households, respectively.

Although a government decree officially eliminated state censorship in 2002, it has continued to severely restrict independent media. In 2006 authorities further tightened state control by requiring re-registration by all media outlets not passing a summary review of qualifications. In 2012 almost 40 independent private television stations and 9 state-owned regional TV channels were operating in Uzbekistan, but four state-owned television stations, run by the Television and Radio Company of Uzbekistan, dominated the market. They are: Uzbekiston, Yoskar, Sport TV, and Tajikiston. By the end of 2013 the biggest and the most popular private TV channels (Markaz TV, NTT, Forum TV and Softic) were closed by the government. TV advertising evolved rapidly in Uzbekistan till 2014. Its volume in 2013 reached almost $60 million, and its annual growth was forecasted for further few years at the 12-15% level. But due to the closure of main private broadcasters at the end of 2013, the TV ad spend in 2014 dropped more than 40% . TV content production is just starting developing in the country. The main producers of TV series and TV movies are state-owned Uzbekteftelin and Ubdekkino companies. In the last two years some private productions and TV stations started shooting local series and TV shows (no international TV formats are officially adapted in Uzbekistan).

In June 2008, the first DTT pilot project in central Asia was launched in the capital city of Tashkent. Viewers could access 8 standard-definition television services using MPEG-4 AVC compression technology. In September 2008, the further multiplex was launched offering viewers in Tashkent and Bukhara access to four government-owned television services. Regular DTT broadcasting started in September 2009 offering 12 DTT channels (the service was a mixture of 4 government-owned and 8 commercial pay-DTT channels). By the end of 2013 DTT-multiplexes covered near 42% population of the country. ATT switch-off is planned for the end of 2017.

**Uzbekistan**

Uzbekistan is also situated in Central Asia and has an area of 447,400 km². The population of Uzbekistan totals 30.2 million people. From the TV households number point of view the TV market of Uzbekistan is rather small: less than 20 USD million.
MTG: ‘IT IS ALL ABOUT SHAPING THE FUTURE OF ENTERTAINMENT’

MTG, one of the largest European media conglomerates, offers pay-TV subscriptions through its own satellite service and via third party networks in Scandinavia (Sweden, Norway, Denmark and Finland) and the Baltics (Estonia, Latvia and Lithuania) countries under Viaplay brand. It operates over 100 free-TV and pay-TV channels in its portfolio and can be watched in over 140 countries, having sold more than 130 million subscriptions. MTG is all about Shaping the Future of Entertainment. Over 25 years we have been at the forefront of changing consumer behaviour in offering new products and services. Our most recent developments have been investing in the Nordic largest Multi Channel Network Splay and launching new online services such as a video driven celebrity portal in Scandinavia and a news portal in Latvia, Captains Aleks Habdank, COO Pay TV Emerging Markets.

In 2014 the company expanded to the MENA region and Turkey. We launched the factual channels Viatat History HD, Viatsat Nature HD and Viatsat Explore in Turkey, while the Russian language movie channel TV1000 Russian Kino was launched in Israel, targeting the growing population of 1 million Russian speakers there. “We also acquired the global youth media brand and pay-TV channel operator TRACE that has the TRACE Urban and TRACE Sports Stars channels available in all North African countries on platforms such as Morocco Telecom and Canal+ Overseas. In the Middle East, TRACE Urban is available on the OSN platform while TRACE Sports Stars is available exclusively on beIN Sports for Egypt, Jordan, Morocco and Tunisia, remarks Habdank. “Until 2014 our presence in the region had been limited to our Russian Viasset and TV1000 branded pay-TV channels, which have been available in the Central Asian states of Kazakhstan and Kyrgyzstan for almost ten years,” he adds.

Regarding programming, Habdank says: ‘Our strength lies in the fact that we acquire and commission content that is relevant for our audience irrespective of where the production company is based. For instance in our recent commission Wicked Inventions (Like A Shot) we look at inventions that have been made all over the world, not just in the US or the UK. And the upcoming Spy Masters, also features some great local stories that are relevant to the countries we broadcast in. We are always looking for great local stories that resonate with a wider audience’.

In Sub-Saharan Africa MTG has a production company Modern African Productions (MAP) that produces content for the two free-TV stations in Ghana and Tanzania, Viastat 1 and TV1, respectively, as well as for other broadcasters in the region. ‘We see MENA region as an area of potential growth, however still to fulfil its potential because of significant piracy, nonetheless a perfect MTG emerging market’, comments Habdank. ‘We believe that by working with operators to offer a strong locally relevant content proposition supported by enhanced access rights reflecting how consumers in the region engage with content, further bolstered by the TRACE brand and product set, which uniquely connects with the younger consumer, we are very well placed to benefit, especially considering our global scale’.

About digital media, the executive says that in the MENA region has been a clear growth of mobile platforms offering interactivity. ‘We offer full catch-up rights for the programmes on our channels to the benefit of our partners in Turkey and Israel. Digiturk and Yes, which have great advanced TV services. MTG operates eight DTH satellite platforms in Europe so we know how important advanced TV services are to retain subscribers.’

‘TRACE has evolved from a traditional linear TV company into a 360° brand with the growth of digital platforms, not only in the MENA region but globally. Linear TV remains at the core of the business but TRACE content is now distributed on digital platforms like YouTube and Daily Motion’, he says. ‘The consumer is at the heart of everything we do. We always strive to follow their interests and needs by creating widely available content and brands that they can easily relate to. Being operator of DTH satellite platforms and the streaming service Viaspa, as well as owning the Nordic territories largest production studio Nice Entertainment Group we can take every area into consideration’.

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ENDEMOL TURKEY EXPANDS INTO SCRIPTED

Ahead with the significant growth of its scripted programming business in the last five years, Endemol launched a new slate of prime time scripted series in Turkey, including the contemporary comedy drama Sparrow Palace, which has been commissioned by Star TV to air early this year.

Set in Istanbul and locally known as Seve Sarayi, the series is directed by the Turkish TV director, Mecude Erozan (Falling Leaves).

Also, Endemol Turkey has also been commissioned by ATV to produce Overture, a modern day family saga about love and revenge, which has been renamed to Alif. It is expected to launch in a peak time slot next year with Kadir Dogulu (Fatih Harbiye) in the leading role. Series will be directed by Aydan Bulat (Blumurul Altında).

Also, Endemol Turkey’s first scripted romantic series Sparrow Palace & Broken Pieces, two successful broadcast series on Star TV Turkey will premiere on Star TV early December.

Global Agency, which picked up worldwide distribution rights at MIPCOM 2014 has already secured interest from ten broadcasters.

Marina Williams, Endemol’s CEO of CEE, Middle East/ North Africa operations, says: ‘In the last year, we’ve seen Endemol Turkey expand from a purely non-scripted producer to become a significant player in drama production. We are very proud that our development and investment in this area has resulted in three new commissions for key broadcasters in Turkey.’

The company has seen a 75% growth of its scripted programming, which today represents a quarter of the company’s worldwide business. Other Endemol drama productions around the world include Hell on Wheels, four seasons on AMC, Kingdom (recently picked up for two further seasons on DirecTV), The Fall (BBC Two), Black Mirror (Channel 4) and coming soon Galipoli (Nine Network, and TV3 New Zealand) and Fortitude (Sky Atlantic).

Endemol Turkey’s scripted business has been launched by the team headed up by Managing Director Gokhan Tararer. Other recent credits include The Money Drop (Kanal D), Still Standing (Star TV) and My Man Care (Star TV).

FREMANTLEMEDIA, MULTI-YEAR, MULTI-FORMAT DEAL WITH MBC GROUP

Fremantle Media International (UK) announced a multi-year deal with media conglomerate MBC Group for the recommissioning of the pan-Arab versions of Got Talent and Arab Idol, which will have three further seasons each. It has also acquired the format rights to the Syco TV created entertainment format, The X Factor and the fashion competition, Project Runway for three seasons each.

Ananita Kheder, SVP, Middle East, Africa and South Eastern Europe, FremantleMedia International: ‘Together we have already launched the very successful pan-Arab versions of Arabs Got Talent and Arab Idol. The Middle East region has evolved a great deal in recent years with audiences wanting something a little special, and with the introduction of The X Factor and Project Runway, MBC will deliver just that!’

Ali Jaber, TV Director, MBC Group, adds: ‘MBC is always keen on delivering premium content coupled with the best TV productions in the MENA region. With the introduction of global formats a couple of years ago, they soon became top-rated TV shows and have created unprecedented engagement with the audiences on multi-platforms.’

The X Factor format, co-owned by FremantleMedia and 19 Entertainment, has now been produced in 21 territories worldwide. Arabs Got Talent, became MBC’s number one show in both 2012 and 2013 consecutively.

Co-owned by Syco Entertainment and FremantleMedia, the global Got Talent phenomenon officially became the Guinness World Records’ Most Successful Reality TV Format Worldwide in April this year and has now been commissioned in 65 territories worldwide. The X Factor will join MBC’s impressive roster of programming for the first time. The pan-Arab version takes the format to 51 territories worldwide. The Syco Entertainment owned and created format is co-produced/licensed by FremantleMedia worldwide. Since the launch of The X Factor UK in 2004 the British-born TV show has been watched by more than 360 million people around the world and can be seen in almost every country on earth.

The Weinstein Company owned and created Project Runway has been produced in 13 territories including the US, Australia, Canada, Latin America and the UK.
Al Salam Media Group, at the center of TV drama in Kuwait

In a market with 11 FTA TV channels (KTV, Al Watan, Al Rai, Funoon, Scope) and 3 big satellite platforms (OSN, ART and Al Jazeera) distributing thousands of free and Pay TV networks, it is a hard work to become the best alternative in content production. But Al Salam Media Group (Kuwait) has become a true option for these players, celebrating its 40th Anniversary this year.

Founded in 1975 in Kuwait, Al Salam Media Group focuses in the production and distribution of TV series for local broadcasters, film, documentaries, cartoons and theater plays (70 titles).

Abdulaziz Al Mesallam, chairman describes his company: ‘Since 2010, we are looking for partnerships in and outside the State of Kuwait in the field of media services. We are the exclusive program distributor of Gulf Cooperation Council Joint Program Production Institution (GCCJPPI) and the brand ambassador of Egypt’s TV series (Al Asel), a traditional series which also showed old communities, houses, old shops and streets. It has achieved success and had distributed to several Gulf channels’. Regarding TV production in the Middle East, he explains: ‘The production of TV series are mainly divided into Gulf and Arabic. Dubbed Turkish series into Syrian accent also acquires market share of Arabic series, Turkish series does not affect the Gulf series. The production of Gulf series is estimated at an average of 40 series (8x45). The government channels and popular private channels produce up to 40 series per year with approximate USD 30 million on costs’.

‘Most of the ideas are repeated and similar due to absence of Gulf characters (typically as either owner of a private firm or government employees) unlike with Turkish and Egyptian series, which have Bedouin, farmers, on people living in the mountains. Thus, environment or geographic location also plays a big role in creating new concepts and portraying characters. Storywriters are continuously experimenting to go beyond from ordinary and the same stories’.

The success of a Gulf series relies also to the actors playing the roles. ‘Normally, it is one of the main criteria for selling and distributing the series to the channels. Not surprisingly, producers and channels only select famous actors considering the talent fees are high. And these famous stars do not exceed 20 productions’.

‘The industry for Arab and Gulf TV productions are normally controlled by the government stations. Unfortunately, there are no criteria for development. Relations and favoritism usually end winning the distribution and bureaucratic management which makes these difficult mostly to private producers held up only to short term strategies and left behind from a fast – changeable market’.

For 2015, Al Salam Media Group plans to produce its TV and other projects abroad. ‘There is an upcoming Gulf TV drama series that takes place partly in Kuwait and Europe. The story is totally new and unique, about the family experiencing a vacation in a farm, where life becomes simple. Thru this series, we will rebuild their relationships and a place where life becomes simple. Thru this series, we represent a love story, farm events (unique from most Gulf countries) and most importantly, cultural understanding between Muslim and other communities’, concludes Al Mesallam.

and has other ambitious projects, which need of strategic partners. ‘Since Kuwait is the center for the TV drama in the Gulf States, most productions were made here and distributed to all channels within the GCC and to other parts of Middle East’.

‘We seek to expand our media services outside Kuwait by distributing our contents and establishing live performances. Furthermore, to make partnerships in the field of technology, equipment for TV production, rentals for sound and lighting’.

Al Mesallam continues: ‘For TV, we have produced numerous Gulf series that showed important topics, which achieved popularity to many private and government channels: Frej Swaileh, Al Asel, Nor keri (shot in Kuwait and Europe) and Aledak, a traditional series which also showed old communities, houses, old shops and streets. It has achieved success and started to several Gulf channels’. Regarding TV production in the Middle East, he explains: ‘The production of TV series are mainly divided into Gulf and Arabic. Dubbed Turkish series into Syrian accent also acquires market share of Arabic series, Turkish series does not affect the Gulf series. The production of Gulf series is estimated at an average of 40 series (8x45). The government channels and popular private channels produce up to 40 series per year with approximate USD 30 million on costs’.

‘Most of the ideas are repeated and similar due to absence of Gulf characters (typically as either owner of a private firm or government employees) unlike with Turkish and Egyptian series, which have Bedouin, farmers, in people living in the mountains. Thus, environment or geographic location also plays a big role in creating new concepts and portraying characters. Storywriters are continuously experimenting to go beyond from ordinary and the same stories’.

The success of a Gulf series relies also to the actors playing the roles. ‘Normally, it is one of the main criteria for selling and distributing the series to the channels. Not surprisingly, producers and channels only select famous actors considering the talent fees are high. And these famous stars do not exceed 20 productions’.

Continues Al Mesallam: ‘The Gulf resources are limited. There are needs to outsource directors and other technical crew from Arab countries. In general, the market for Gulf series is limited as well as with the revenue. It is obvious that influx of series from Turkish, Asian and Western makes the competition a lot tougher. Due to advancing technology and accessibility of entertainments through different media platforms, the culture of the Arab world are continuously been influenced by what are in and trending worldwide. “The industry for Arab and Gulf TV productions are normally controlled by the government stations. Unfortunately, there are no criteria for development. Relations and favoritism usually end winning the distribution and bureaucratic management which makes these difficult mostly to private producers held up only to short term strategies and left behind from a fast – changeable market”.

For 2015, Al Salam Media Group plans to produce its TV and other projects abroad. “There is an upcoming Gulf TV drama series that takes place partly in Kuwait and Europe. The story is totally new and unique, about the family experiencing a vacation in a farm, where life becomes simple. Thru this series, we represent a love story, farm events (unique from most Gulf countries) and most importantly, cultural understanding between Muslim and other communities”, concludes Al Mesallam.
LBCI, LEBANON: INNOVATIVE PRODUCT OFFERING

The Lebanese Broadcasting Corporation International (LBCI) is the number 1 private TV channel in Lebanon since its launch. Over the years, it has proven itself as a market leader and has maintained its position in the Lebanese market with an approximate 27% market share (2014). LBCI stands as a pioneer in the broadcast industry aiming continuously to set new standards. It is a general entertainment channel always thrilling to offer its viewers highly entertaining top quality programs. The Blues, Got Talent, Celebrity Splash, Celebrity Duets, and Star Academy are some of the top international entertainment programs aired on LBCI during the past years.

The grid consists of a variety of shows targeting all family members such as adapted international formats, in-house formats, Lebanese, Pan Arab and Turkish series in addition to current affairs & news programs. The local TV market is competitive and constantly evolving and the channel’s mission remains to deliver content with high production values.

With an innovative product offering and well-defined brand equity, LBCI broadcast locally produced social & variety shows as well as Lebanese drama series are the trends in our market. In terms of digital media, it currently ranks as the number one entertainment website in Lebanon and LBCI News is the leading mobile application in terms of downloads. The company’s future plans include focusing on the VOD platform, launching new mobile apps & sites.

PICKBOX.TV CLOSED NEW AGREEMENTS

Launched in May 2014, Pickbox.tv is a leading SVOD service for the region of ex-Yugoslavia with 3,000 hours of TV shows, films, documentaries, children’s shows, as well as an exclusive content from BBC, Disney, ARK, CBS, ITV, MGM, and Sony. It was launched in Croatia, Slovenia, Serbia, Bosnia and Herzegovina, Macedonia and Montenegro, and available across all platforms, through iOS and Android operated devices, as well as its web app.

Last month, it launched its application for Smart TV, and it is exclusively available on Samsung’s TV sets from the 2013 and 2014 generation, and on the newest models. The platform has also signed a deal making the SVOD service available on Gigabyte’s leading telecom communication company T-HT’s IPTV platform, MaxTV. More than 70 TV series and 300 movies are now available.

Sanja Božić Ljubičić, CEO of Pickbox, says: “We are very happy to have entered into new business collaboration with the biggest regional telecom companies, as well as TV manufacturers. Pickbox.tv brings now flexibility of watching TV series and movies, which can be accessed when the subscribers want on a variety of devices.”

About contents, the SVOD platform signed a deal CBS is exclusively streaming the shows Modern Family and Extant in the region. The first one is CBS’s new Sunday Night hit starring Teri Hori Leonard, premiered to more than 17 million viewers, it ranks as one of the top-rated new fall series.

It is available on Pickbox’s Hidden section, where the subscribers can watch a new episode, subtitled only 24 hours after it aired in the US. The service has secured the exclusive deal for the region where it’s available for the next 6 months.

Moby Group, Afghanistan: ‘The media market is truly booming’

Television in Afghanistan has first top players capturing over 80% of the audience with the Moby Group. Tolo TV (45%), and Lemar TV (65%), representing half the market, according to a special report by Alhai Consulting done in 2010 and being the most updated map of the local TV landscape.

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

‘Afghanistan’s media market is truly booming. There has been more than 20% annual growth in the number of outlets each year since 2006, with over 75 active TV channels and 175 radio stations identified. There are a few hundred print media outlets and dozens of websites.’

‘The media sector has between USD 75 million and USD 100 million revenue per year, with 60% of that driven by advertising revenue; TV has 8% penetration in urban homes and 28% of urban homes own a computer. About a third of Afghans watches TV for more than 2 hours per day. Six million Afghans have access to the Internet.’

‘Nowadays, Tolo TV holds a 59% market share in Afghanistan and is the country’s most popular TV channel, while Lemar holds the most popular Pashto-language channel in Afghanistan: is the third most popular channel overall, and holds a 4% of the market share. Tolo TV has approximately 40% in-house production and 60% acquired shows.’

The channel’s flagship program, ‘Afghane Star, a musical singing competition featuring Afghan talent; The Voice, the Afghan version of the popular franchise; and The Defenders, Afghanistan’s first full HD original series.’

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

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

Rotana Group

Rotana Group is one of the leading diversified media companies operating in the Middle East. The group’s portfolio comprises music production, film and series production, management services, TV channels, radio stations and publishing. This media conglomerates is Arab World’s largest entertainment company, primarily owned by the Saudi Prince Al-Waleed bin Talal, with an 18.97% share held by News Corp.

The large pan-Arab media conglomerate includes a film production company, a magazine (Rotana Magazine), television (Rotana TV), seven music channels (Rotana Radio), a record label (Rotana Records), and others. On the TV business, it operates a bouquet of leading free-to-air TV channels including general programming stations Khalijiya and Masriya, and the women channel Rotana Women.

AL ARABY LAUNCH

A new Qatari-owned Arab satellite television channel called Al Arabiya TV Network has launched across the Middle East and North Africa (MENA) from its base in London. Available from Sunday 25 January, the free-to-air channel aims to be ‘a platform for Arab youth, talent, energy and aspirations’ with content ranging from news to entertainment.

Fahad Al-Aradi, the Qatari company that owns the pan-Arab daily Al Arabiya Al Jadid (The New Arab) and its online editions, is behind Al Arabiya TV. ‘We are interested first and foremost in people and their concerns, rather than in regimes, businessmen and religious extremists’, said Islam Lotfy, CEO, Al Arabiya TV, who added that 60% of the content is politics and news and the other 40% is entertainment, with drama, music and independent films.

Pickbox TV mobile app and website

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**KANAL D EXPANDS TO NEW TERRITORIES**

In 2014, Kanal D Sales Team (Turkey) reached new territories like India, Pakistan, Estonia, Latvia, Chile, Uruguay and Argentina. Its titles had good results where they were broadcasted, and now it aims to keep that success and try to become one of the best Turkish content providers. Kanal D is among the top 3 Turkish distributors.

Explains Ozlem Ozsumbul, Head of Sales & Acquisitions: ‘All in all, we reached 86 countries with our 61 titles. Rich culture, content, strong stories and production quality cause that international expansion’s getting bigger and bigger each day. In 2014 we started to work with Latin America which was a great step for our business, and the success is so good that we are very proud of it’.

Last year the company also started to provide not only finished programs but also started to work on script and format rights of their dramas and programs. Our new targets for near future are North America, Africa and Far East. We are sure that it is so close to happen’, ensures Ozsumbul.

Top shows for this TV season included the series ‘Matter of Respect’, described by the executive as a ‘really good remake of wonderful Italian drama’, and that is also offered in the international market. ‘War of the Roses is a simple, attractive drama with its romance, story and dynamism, and it is one of our successful titles on primetime. And Per My Son started on January and reached huge audience in a short time. It is #1 on the 12 months that follows. And Ros Mat (20x60) is a drama that follows three strong chess players that will stand as opponents. In Trail Of Suspience (16x50) 13 strangers find themselves stranded in an isolated hotel, somewhere in the fierce, uninhabited mountains of Greece. Lastly, the second season of Bridko, The Group Of Passions (19x50). The first season of this one-hour drama romance was sold in 25 territories.

**ANTENNA: DRAMAS & COMEDY**

Antenna International Enterprises (Greece), the distribution arm of Antenna Group dedicated to worldwide sales of TV content produced by Antenna’s television in Greece, Serbia and Slovenia, as well as independent producers from the region, introduces at Discop Istanbul its catalogue of dramas and comedies.

Head the slate, Tiareni (26x50), a series centered in the life of a barbershop owner in Athens and his two children. In Waltz with 12 Gods (26x’26), the second season of Drakers (26x’26), an animated series based on R. L. Stevenson’s masterpiece, while Cat (26x’26), the second season of Deryezy (26x’26), as well as Dshahri (26x’26), the second season of Denyfro (26x’26), Playtime Buddies (26x’33) and Sayy Zae (26x’21). Denyfro was launched in France on GULLY, and Mondo TV closed a deal with Al Jazeera Children Channel in the Middle East for a couple of programs.

Other top titles are Bug’s Ranger (52x’11), a story that revolves around a group of best friends who spend their time bugging on down the boardwalk of life. In Stoneworm (52x’11), 13 billion years ago, after The Big Bang’s explosion a contact point between the world of Matter and the world of Antimatter was created, the limit between good and evil. Coproduced with Rai Fiction is The Treasure Island (26x’26), an animated series based on the R. L. Stevenson’s masterpiece, while Cat Leopard is a coproduction between Mondo TV and Russian Mobile Television. This comedy is about the adventures of a very kind and precise cat and twoNaughty naughty mice.

**MONDO TV: HIGH QUALITY ANIMATIONS**

Mondo TV (Italy) owns one of the largest animation libraries consisting of more than 1,800 episodes of TV series run outright for all over the world together with more than 75 animated movies for video and theatrical release.

The international sales team is headed by Micheline Azoury, in charge of the French-speaking territories worldwide as well as MENA, Europe, Australia and Asia and Alessandro Venturini who handles Eastern Europe. In order to support the sales activities in the Eastern European markets, the Group assigned Theo Kourouglou as sales manager for Greece, Cyprus & Ex-Yugoslavia.

At Istanbul, the company brings its new shows Sirt The Young Empress (26x’26), as well as Drakers (26x’26), the second season of Denyfro (26x’26), Playtime Buddies (26x’33) and Sayy Zae (26x’21). Denyfro was launched in France on GULLY, and Mondo TV closed a deal with Al Jazeera Children Channel in the Middle East for a couple of programs.

**THE SECOND SEASON IS COMING**

Wednesday nights. It has really good combination with romance, comedy and action triangle’, she adds.

Lastly, the distributor offers the dramas Life as It Is, about a private hospital in Istanbul that lose some of its best doctors after having some financial crisis, and Waiting for the Sun, centered in a self-sacrificing woman who has raised her daughter as a single parent.
Through Karina Etchison, SVP Europe, Africa and Middle East, Telemundo Internacional (USA) participates for one more year at Discop Istanbul, where it brings its most important titles, highlighting the brand new “super series” Masters of Paradise (8x40), centered in a world of crime, violence and dangerous alliances, a betrayed woman rises as its ruthless queen. It is a co-production between Telemundo Network and Television Nacional de Chile (TVN) that has become the best-ever premier of the network with cumulative audience of 3 million total viewers and 1.8 million adults (18-49), according to Nielsen.

The distributor also exhibits the telenovela Land of Honor (13x60), a story of passion, secret affairs and betrayals where the destiny of six individuals will be taken over by the uncontrollable strength of their feelings, while in Part of Me (12x60) two women share a tragic and supernatural destiny that binds them together even after death. Produced by Cadenativas, Love without Reservation (12x30) tells the story of two young souls separated by the prejudices of their families.

Etchison explains: “Part of the business philosophy of our international division is to identify new development ideas to create original content and generate innovative businesses for the different television platforms. Following Telemundo offer is Los Inmortalbles (12x60), a co-production between Argos Television and based on the Victor Hugo’s best seller and narrates the story of a woman accused of a crime she didn’t commit and is persecuted by the man she loves. In Queen of Hearts (14x60) a woman suffers an accident that will cause her to forget the last eight years of her life. Now she feels that she doesn’t belong to the world of luxury and power that surrounds her and will strive to discover her own truth. Lastly, the entertainment format I’m The Artist (1x1:30) from Reset TV (Spain) searches for that one-of-a kind talent who can do it all… sing, dance, perform and captivate audiences with his/her charisma.”

Through Telemeduno Internacional (USA), TVN distributes its drama series, including the new co-production between both companies: Masters of Paradise, about the drugs bands in the ‘80 that was the best-ever premier on Telemundo in the US Hispanic with +3 millions of viewers. The four shows in distributions are Calle 7, Apuesto Por Ti, Peloton and Juga2. This former one has a celebrity-version on air with 15 rating points. We are focusing our efforts in developing new sub-genres, which we expect to launch in the next markets MIPTV, LA Screenings and MIPCOM concludes Piwonka.

Ukrainian formats, at Discop Istanbul

UA Formats is a catalogue of almost every Ukrainian format made on local TV with a common feature a great success story of broadcast: either in terms of ratings, number of seasons on air or number of local adaptations in CIS countries or all three. UA Formats project launch was initiated by Iryna Kostyuk, co-Founder of Media Resources Management (MRM), put together the most successful original Ukrainian TV formats, developed and produced by Ukrainian producers and TV channels. Among the top shows are the sensational political talk-show Freedom of Speech, the talent-show Chance Crossing Europe, the most beloved travel-shows of Ukrainian at the beginning of the century and the social reality show Auditor.

Many of these formats have never been presented to the holders on the international market, but these shows have proved their success with high ratings and strong Ukrainian viewership. Some of them have been aired and produced in other CIS countries.
**Televisa Bets on Formats to Gain New Markets**

Televisa International (Mexico) releases in 2015 a full new catalogue of entertainment formats, genre that has given the leading Latin American distributor the opportunity to penetrate new television markets in the world. Among the top of them are: *The is your song* (140’/60), *Night Shift* (52/120), *True or Trick* (30/’60), and *Los Géneros* (scripted).

“Through our entertainment department we have developed a catalogue of 22 formats with promos in #4 countires.” Ricardo Ehrsam, managing director, Europe, Asia and Africa. **Stand up for your Country**, an interactive talent show for the family, which has had record sales during its launch at MIPCOM 2014, called the attention of many Latin buyers during last Natpe Miami where it was sold to 9 countries in the region. “The show attracted so much attention to our customers than those that can’t produce it locally are expecting the Mexican version to be released in April.”

“In Miami, Televisa had a ‘good volume’ of deals closed for entertainment formats, as they traditionally done with telenovelas. ‘We have a very successful strategy in terms of content development, have invested strongly and also managed strategic partnerships. That, in addition to our ability to distribute, let us achieve success so far,’ he describes. ‘Telenovelas will remain be star and for the moment, formats just a supplement. We are introducing solutions that allow the different channels to program telenovelas and accompany that with entertainment formats’,” concludes Ehrsam, who highlights the new telenovelas *Italian Bride* (150/’60) and *Shadows of the Past* (30/’60).

**BANJAY, IT’S ONLY TV ON LEBANON**

Banijay International (UK) has licensed its hilarious, high rating format *It’s Only TV* to MTV in Lebanon, announced Sebastian Burkhardt, SVP International Distribution.

Originally produced by Banijay Group company H2O Productions for France’s D8, the irreverent TV-themed panel show is being adapted for Lebanon by Studio8vision, known locally as *Menna w Jerr* (39/’60) and will debut next month as a prime time weekly show. *It’s Only TV* has aired in France with the local title *Touche pas à mon poste* par à mon poste since 2010,

**ECCHO RIGHTS, ABC USA ORDERED PILOT BASED ON THE END**

ABC USA will produce a pilot based on the Turkish series *The End*, respectively, as well as the daily series *If* on TVT and *Can’t Run from Love* from Eriker Film on Star TV. On entertainment, it represents the hit format *Crack from Up* from Studio Krystal (Ukraine), with over 10 versions around the world. *Beat the Champions* (TVAsia) and *Exit (NTV)* are top formats from Japan. In terms of distribution the company is doing it directly, but in Latin America it has a co-operation deal with Somes Distribution (USA).
**Calinos: Feature Films & Dramas**

Established in 1997, Calinos Entertainment was the first company to sell Turkish TV series and films overseas which eventually lead to a phenomenon all around the world. The company appeals to a large audience with its selection from world cinema.

The company also acquires Home Video and TV rights for titles to reach a broader audience. At Discop, Calinos brings a wide offer of contents, including its own productions and films overseas which eventually lead to their international success.

**Global Agency: It’s Showtime**

At Discop, Izzet Pinto, CEO of Global Agency continues to demonstrate why it is one of the leading Turkish distributors in the international market. It is launching for this market a brand new entertainment format, the singing talent show It’s Showtime, which is being presented on a press conference on February 24 at 11 am in the venue’s conference room. Moreover, the company organizes the traditional party on Wednesday at 10pm at Shangri-La Bosphorus Hotel.

One of the top companies of the last year was the enormous evolution it has shown in Latin America with its groundbreaking drama series 1001 Nights. After the huge success in Mega Chile (it was the #1 show in 2014 on the local TV), it is being broadcast in US Hispanic (MundoFox), Colombia (Canal Caracol), Argentina (El Trece) and Uruguay (Canal10), with great results.

Izzet Pinto, CEO, Global Agency: ‘After six years trying to enter to Latin America, we are now very successful in all of the territories. In Chile, the first to air the series, it became an immediate leader in the prime time ratings and the most successful foreign series in the history of the country. This opened other markets in Latin America.’

This year, it will premiere in Ecuador (Ecuavisa), Peru (Latina), Bolivia (United) and Brazil (Band). The distributor expects to complete sales of the series all across the region by the end of 2015. Globally, it was sold to more than 55 territories.

Other top news are the acquisition of the international distribution rights of the dance show format Dance with Me, created by Ami Glaim, CEO of Studio Glam, and the sale of Shopping Monster to RTL (Greece), Tring TV (Albania), RTL Netherlands and Polot Café (Poland).

The format was also aired in Bulgaria (TV7), Hungary (FEMS), Romania (Prima TV), Ukraine (K1), Russia (CTC) and Latvia (TV) and has been optioned to Greece, Turkey and Australia. In Turkey, Kanal D has aired 700 episodes of the format.

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**Smilehood, Multiplatform**

Most new, the first fiction series co-produced by Coca-Cola and Warner Chappell will be seen in US and Japan. Created by Sebastian Melillo’s One Loop, the series was released on DIRECTV Entertainment Television with over 50 songs of the Warner Chappell library.

**Record, Quality and Fidelity**

Record TV Network (Brazil) continues to grow steadily both in the domestic and the international market thanks to its catalogue, headed by high quality biblical series Delmar Andrade, International Sales Director: ‘In 2014 we consolidated our operation not only in the local market but also internationally. Sins was chosen as “Best Miniseries” at the Rockie Awards (Canada) and the first season of Miracle of Jesus received the “Best Integrated Production” award at the Rockie Awards (Argentina).’

Among the bets for this year stands Moses and the Ten Commandments, a 150 episode’s series that follows the story of Moses, from birth to journey to the Promised Land. ‘The series, which is completely faithful to the Bible, seeks to change the history of biblical productions in the international market,’ remarks Andrade. The launch is scheduled for March 2015.

‘One main concern is to be sensitive to the needs of our clients and ensure that our products are commercially and artistically viable for all markets,’ emphasizes the executive. ‘According to Andrade, audiences are becoming more critical and starts looking productions more technically, which generates a need to have even an bigger care with the quality and fidelity of the topics covered.’ Quality and fidelity are characteristics always present in our products and that makes them attractive both for the domestic and international markets. ‘We invest very strongly always to keep our professional equipment always updated.’
Through Comarex, Azteca (Mexico) exhibits at Discop its brand new telenovelas Así en el Barrio como en el Cielo (120x60), a story that shows what happens when the roulette of life leaves the rich poor and the poor millionaires, and UPIV. Un Escenario Para el Amor (120x60), about a woman who decided to work in a night club to take care of her youngest sister after their parent's death. The Movie Of Your Dreams (135x60) is an adaptation of the Argentinean version of the series produced by Telefe, while I'm Your Double (45x60) is a reality show where 24 contestants compete to demonstrate their singing skills and ability to imitate the voice, movements and personality of a chosen/ well known singer. A Love to Remember (330x60) was recently adapted in Malaysia by the production company Global Station for Astro.

Other top titles are Lucky Me (140x60), Forbidden Love (95x60), The Agency (105x60) and Destiny (105x60). Regarding series, The Other Side Of The Soul (124x60), and the reality show La Academia Kids (17 weeks) that seeks to discover the child artists of tomorrow, and the telenovelas Timid Love (150x60) and The Kings (125x60).

From the independent catalogue, Comarex highlights Kitchen To Fame ('98), a cooking reality show that follows 14 cooks with no professional experience as they compete to win big prizes, and the second season of Ninos Mal, a youth drama produced for MTV Networks. From the same producer, it brings Senior Year (70x60), Popland! (70x60), and three seasons of Gachi (75x60, 81x60 & 50x60), produced by Nickelodeon. Lastly, the transmedia format Comexotics (24x60), from New Sock (Argentina).

We finished 2014 with two new recording studios, for a total of 8 facilities rooms in Miami, five in Mexico, one in Barcelona, one in Los Angeles and other one in Paris, explain Hernandez and Lopez. And continue: “We aim to grow in translating content in Portuguese and open to new territories like China, Korea and Japan.”

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

Radiotelevision Española (RTVE) participates in Discop with a sales team led by the executives Raúl Molina and Antonio Perez, who assist at Istanbul to keep pushing the hit series Isabel (26×70) in these territories. ‘We continue stepping forward towards the production of high quality series such as Isabel, which in its third season maintains its unique aesthetic and captivating narrative, Agnès Rejor Cuesta’, highlights Rodolfo Domínguez, commercial director of TVE.

The executive assures that the company’s channels have reached maturity not only locally but also internationally thanks to the ‘unusual products in the market’. He continues: ‘We started a new strategy focused in reach new markets with our extensive audiovisual catalog, our new TV series and movies that cross borders and can be of interest to other international audiences that are looking for quality products.’

According to Dominguez, to reach these new international markets it is ‘essential’ to create not only a strong sales structure and a catalog of high quality formats, but also a strategy of co-production with some of the most important players. ‘A new stage for the company’, he states.

One of the biggest bets of RTVE for this year is Victor Ros (7×70), a fully HD drama series that follows a brilliant police detective of the late 19th century who must tackle the most mysterious crimes of the city of Madrid. The distributor also exhibits Victor Ros and Isabel and highlights the launch of El Prado, A Panorama For Painting (52). Filmed in 4K, this documentary shows the extraordinary painting collection of the Museo del Prado, located in Madrid, Spain.

CISNEROS, NEW DEALS TO EXPAND

Cisneros Media Distribution (CMD), one of the leading Latin American distributor, attends Discop Istanbulagain, through the representation of Cristobal Ponte, from Sahara Management Holdings, the long-time exclusive independent sales representative of the company catalogue in Europe, Africa and the Middle East.

CMD has also signed a deal with Cesar Diaz, former CMD’s VP who has launched 7A Media, to serve as an independent representative for Asia, in addition to evaluating and developing strategic projects.

‘To increase our presence in core markets, while expanding our client’s portfolio, we defined a solid strategic plan that includes the implementation of new sales strategies, revitalization and enhancement of our vast portfolio of products securing an exclusive mix of formats, scripts and productions that target a wide range of viewers,’ emphasizes Marcello Coltro, EVP of Content Distribution for Cisneros Media.

Following this guideline, the company announced during Natape 2015 the signing of many strategic deals with Turner Latin America (to develop content for their networks), and with ONY Productions (USA) to market their teen series Rebelde Way, Cinderella, to AT&T’s new drama, and with Mediaset Italy’s Mediaset Distribution (Italy), the international distribution branch of Italian group Mediaset, exhibits at Discop Istanbul a catalogue of more than 500 titles, including drama series, as well as scripted and unscripted formats. As finished programs and also as scripted format, For Love Alone (10×90) it’s a new, compelling story of two couples, a family decides to ask their fortune in the hope of ensuring a more dignified life in a small town in northern Italy in the ’30s. The Devil’s Shadow (25×50 or 12×50) tells the story of three siblings haunted by a secret, the code to an account which contains the loot from a bloody robbery, while Kissed by Love (12×50) is a new family comedy series full of sentiment, joy and funny twists.

Lastly, Mediaset offers the two seasons of the family series Gisverser Ninos (13×50) and the twice awarded Best Egyptian Soap Opera, Powerful Secrets (16×50).
Mexico is one of the most important global players in the audiovisual industry: its creative industries contribute up to 7% of the country’s GDP, and are one of the most rapidly growing sectors in the economy, in terms of income generation, job creation and export earnings. It is the 18th largest exporter of creative goods in the world and the leading actor in Latin America.

**ProMéxico, International Expansion**

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**Dori Media Distribution (Switzerland)’s** continues evolving in the international market. On the one hand, the company launched at North Miami Selfie Challenge, an innovative, contemporary, dynamic reality game show filmed around the world that draws its inspiration from the cross-culture “selfie phenomenon” through a competition between two groups of friends. On the other, it signed a new deal with Sony, this time to co-develop new digital platforms in Israel. From two platforms –satellite and Pay TV, the company will have seven: an EFPY platform and new OTT’s Nadar Pals, CEO Nadar Pals, CEO highlights the launch of Game of Chef, a reality game show that seeks to exploit the “boom” of culinary formats.

**Dori Media hits Social Media**

**Carnaval, Unscripted Formats**

Carnaval TV Internacional (Colombia) exhibits its catalogue of series and telenovelas headed by Emeralds, the color of ambition (60x60), about a small town that may be very well described as a “green hell” where the ways of the jungle is law, fed by the greed awakened by emeralds; and Beets of Love, Nice (120x60), a story about music, passion and romance.

In Fugitives (40x60), a renowned civil engineer must escape from justice after being accused of the murder of his best friend’s wife, while Men Cry Too (40x60) tells the story of a man who thought that he had everything in life but when he doesn’t receive the most coveted job promotion, his life takes an unexpected twist.

Regarding to unscripted formats, the distributor launches TV Maniacs (60x60) a fresh and entertainment format created by Carnaval TV. In this context, two families made up of members from three different generations must pass knowledge and skill tests, based on TV shows and films that have been broadcasted, to advance on an interactive board to win prices.

Lastly is the International Honor Festival 2014, composed by 20 exclusive episodes in which 70 artists from 27 countries, perform high-quality shows that vary from stand-up comedy; magic, imitation and fantastic dancing and light shows, Chile, Mexico, Argentina, Germany, Brazil, Taiwan and the United Kingdom, are some of the countries that will be present in this version of the International Festival of Honor in 2014, which has been bringing talent and fun to homes for 21 years.

**ProMéxico, International Expansion**

Mexico is one of the most important global players in the audiovisual industry: its creative industries contribute up to 7% of the country’s GDP, and are one of the most rapidly growing sectors in the economy, in terms of income generation, job creation and export earnings. It is the 18th largest exporter of creative goods in the world and the leading actor in Latin America.

**ProMéxico** is the governmental agency of the Mexican government, the private sector and the academia. Mexico is the most attractive incentive schemes created to attract international projects. Our incentives are the PromExico, the ProFonds, EJFICINE and HONDICE—amongst the most competitive ones and are designed to boost the local and foreign film and content sectors, he concludes.
Markiza TV Slovakia (borders) with Izzet Bicakcioglu, acquisitions manager, and Gaye Arman Bicakcioglu, acquisitions coordinator, and Ana-Maria Pentea, acquisitions manager.

Doma TV

Bte Dolamit, sales & acquisitions executive, Break Media Group, Tunisia, sales manager at Elena Production Group, and Jazline Rose Marini, TV program and film coordinator, at Awni Al Lababidi, chairman, Saudi Arabia Producers & Distributors Association.

Nova, Croatia: George Makris, producer, and Dana and Andejla Petrovic with Ljupka Triunovic, media and communications manager, at Happy TV, with Dexin Film executives.

TV1 Afghanistan

Middle East buyers: Amin A. Lanka- vai, Future Film (Estonia), Ibrahim El Masri, COO (Egypt), and Awni Al Lababidi, chairman, Saudi Arabia Producers & Distributors Association.

Al Jazeera UK

Patrick Juvet-Zuchanski, managing director of basic channel, at Disney Channel London (Paris)

Middle East buyers: Mohamed Al Qahtani, executive director, Al Sama Media Group (Kuwait), Ahmad Khrais, general manager, Libya Arabic TV (Libya), and Mohamed A. Al-Hammadi, chairman, Qatar Arab Producers & Distributors Association.

Tunay Ergin, foreign formats & media acquisitions manager, and Fadi Ismail, acquisitions manager, at MBC Max, Mia Edde, acquisitions manager, at MBC2, and Sarah El Kheny, development coordinator.

MBC Max, Mia Edde, acquisitions manager, at MBC2, and Sarah El Kheny, development coordinator.

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Al Jazeera UK

Khalid Al Rashed, general manager, at MBC Max, Mia Edde, acquisitions manager, at MBC2, and Sarah El Kheny, development coordinator.

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Let us see (13x’60) is a new drama series about a private hospital in Barcelona that takes some of its best doctors after having some financial crisis. **Distributor:** Novela D Salas (Turkey)

**Land of Honor** (130x’60) is a story of young people from different social background who find the courage to face the impossible struggle of their relatives. **Distributor:** Telepolis International (USA)

11 Knots (150x’45) tells the story of a young woman returning from military service who is set up by his brothers and friends and ends up in prison for life. **Distributor:** Basket Ribags (Turkey)

The entertainment format **Power Couple,** which makes eight couples wrestling into a village for 6 weeks facing each week extreme challenges. **Distributor:** Dori Music Distribution (Spain)

Epic (155x’45) tells the story of a young woman returning from military service who is set up by his brothers and friends and ends up in prison for life. **Distributor:** Basket Ribags (Turkey)

Set in the 60’s, **Bozo Tell (5x’100 or 12x’150)** tells the story of three siblings around by a secret the code to an account, which contains the loot from a bloody robbery. **Distributor:** Mundo Distribution (Turkey)

Theanimated comedy series Cat Lionelo is a co-production between Monico TV and Russian Million Television, about the adventures of a very kind and mischievous cat and two mischievous naughty mice. **Distributor:** Mundo TV (Turkey)

Awarded as “Best Miniserie” at the Rose Awards (Canada), 1x’75 tells the story of a family that appears to break, in the early ‘70s to escape the police and the criminal structures of a big city of mail. **Distributor:** Radio Televisión Española (Espana)

Created (13x’60) is a 3D + Live Action novel based on AHS stories with services from Pol-Ara Producciones that invite audiences to immerse themselves with its visuals and be an active part from the other side of the screen. **Distributor:** Mundovisión (Mexico)

**Arizona** is a prime time studio-based entertainment format which weight people with extraordinary activities that surprise audiences, which has been extensively seen in Spain and Argentina. **Distributor:** TVN (Colombia)

**Eclipse** is a historical TV series that aims to tell the story of the institution of Qasr, which was ranked historic and memorably throughout the history of Ottoman Empire, to younger audiences. **Distributor:** TRT Salas (Turkey)

The New of Today is a strong comedy series with charismatic and traditional modern mixture, which are the most popular types in Turkey and the most requested internationally. **Distributor:** ATV (Turkey)

**Spanishity** is a new drama series with catchy pilot and traditional modern mixture, which has been extensively seen in Spain and Argentina. **Distributor:** Mundovisión (Mexico)

**Salinazo** is a story of young people returning from military service who is set up by his brothers and friends and ends up in prison for life. **Distributor:** Basket Ribags (Turkey)

The non-fiction comedy genre series with catchy pilot and traditional modern mixture, which are the most popular types in Turkey and the most requested internationally. **Distributor:** ATV (Turkey)

**Playmobil: The Movie** is a new feature film that follows a young Environmentalist in her battle against the most powerful industrial in Valley Bonito. **Distributor:** Gomedia Music Distribution (USA)

**Township** is a new animation comedy series with catchy pilot and traditional modern mixture, which are the most popular types in Turkey and the most requested internationally. **Distributor:** ATV (Turkey)

**Lightscreen** is a new feature film that follows a young Environmentalist in her battle against the most powerful industrial in Valley Bonito. **Distributor:** Gomedia Music Distribution (USA)

The non-fiction comedy genre series with catchy pilot and traditional modern mixture, which are the most popular types in Turkey and the most requested internationally. **Distributor:** ATV (Turkey)