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NATPE BUDAPEST - SPECIAL ISSUE



## WELCOME TO THE NEW CEE CONTENT MARKET

I want to be honest with you, our readers... when we had to start preparing this Natpe Budapest issue, we were a bit disappointed, because many companies speak bad about the event, and the moment of Central & Eastern Europe is not good, with the economical crisis going on. But when we began making interviews and articles, we've got feeling better and better.

On one hand, in Central and Eastern Europe is being developed a huge new market, full of investments and new TV channels, a real new media multiplatform environment. Now there is no money, but soon, when the situation gets better, a bubbling river of opportunities and emerging businesses will take the scene. It is a question of waiting... and of working from now.

On the other hand, we could make an unique edition

showing this evolution, full of top broadcaster testimonies, figures and reports that we've never got so good before in the region. As you know, our publication is based in Latin America, and having so strong participation from CEE broadcasters and big content players, it is a big satisfaction for us. Even at the other side of the Atlantic Ocean, it is very difficult for us to generate an edition so rich like this one. Please read it and take your own opinion...

### THE BASICS

For those reading PRENSARIO INTERNATIONAL for the first time... this publication is based on Latin America as I said, but has more than 20 years covering the whole international market, and now it manages strong coverage and feedback from all regions.

As well, we've strongly developed our online services. At present we offer daily e-mail newsletters in English language during the week of the shows, with testimonies of buyers and the major market trends rising. If you are not receiving them, please enter [www.prensario.net](http://www.prensario.net).

Nicolas Smirnoff



### Undercover Boss: USA, UK, Canada, Australia

The global phenomena is now playing around the world as format and is available for completed programme sales in its American, Canadian, Australian and UK versions – all featuring emotional journeys of discovery by the incognito boss.

Completed (various) and Format



### Midsomer Murders: Series 15

With Season 14 all wrapped for Christmas at Midsomer – DCI John Barnaby has now settled into the rising crime rate of the shows 15th Season. A classic whodunit with an established pedigree, a favourite with audiences around the world.

Completed



### Miss Fisher's Murder Mysteries

The Honourable Miss Phryne Fisher – our lady sleuth – sashays through the back streets, jazz clubs and divine mansions of the 1920s, fighting injustice with her pearl-handled pistol and her dagger sharp wit. Miss Fisher's Murder Mysteries is a classic who-dunnit murder-mystery series – and one classy offering!

Completed



### The Almighty Johnsons

The Johnsons are four ordinary Kiwi brothers who have inherited the powers of Norse Gods. But Norse Gods lived a long time ago, and over many generations, their powers have become diluted. These everyday gods also have everyday struggles – striving to love stroppy women, overcoming sibling rivalry and fulfilling your God-like destiny, all while still finding the time to enjoy a few beers with your mates.

Completed and Format



### Fresh Meat

The perils and joys of house sharing and tutors in those first university years – a painfully amusing drama of self-discovery and errors of judgement, set on the brink of adult life. Further awkward moments, reinventions and appalling behaviour beckon in a second series.

Completed and Format



### Are You Normal?

Humans are a wonderful mixture of extraordinary, every-day and downright fascinating... and each day we might well ask ourselves what 'normal' is. This game show addresses that fundamental question in a revealing and entertaining fashion. Have you ever peeked at your boyfriend's emails? Compelling stuff...

Format

**ALLNEWPROGRAMMES ALLNEWFORMATS ALLNEWCONCEPTS**

**Prensario**  
**International**

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# THE HUNGARIAN TV MARKET 2012: TO BE MANY, TO BE STRONGER

PRENSARIO provides here its already traditional report about the Hungarian television market, in which the main TV channels RTL Klub, TV2, Viacat3, MTVA and SANOMA have been interviewed about how the local market evolves, taking into consideration the economical crisis of the European continent, the main projects they are working on, and the programming trends they see, among other themes.

Since the last two years, a larger number of TV channels are being launched in the Hungarian TV market, not only by the leading media houses operating in the country, but also from other companies interested in gaining market through a new way of content/channels distribution.

This situation is also happening in many Central and Eastern European countries, but Hungary is one step ahead on the trend. Nowadays, there are more than 100 Hungarian-speaking TV channels available in the territory, for a population of just 10 million people.

RTL Group has acquired by the end of last year 7 pay TV channels, now manages 8 channels (plus its leading free TV RTL Klub) and will launch the ninth —RTL II— by the end of 2012; ProSiebenSat.1 Media AG manages now 3 stations (one free and two cable networks); Modern Time Group (MTG), 2 free TV channels; and the public group Media Service Support and Asset Management Found (MTVA), 4 in total.



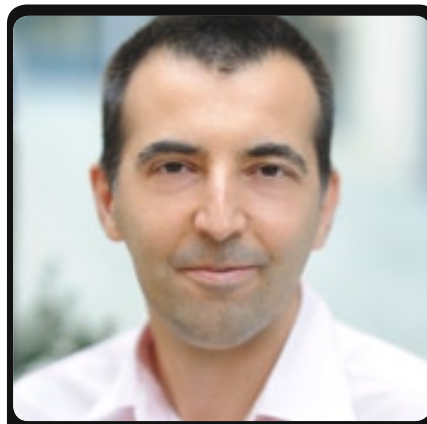
Tibor Forizs, head of program acquisitions and scheduling at RTL Klub

*'THE HUNGARIAN MARKET IS EXPERIENCING THE FRAGMENTATION, WHAT MAKES THE FREE TV CHANNELS TO LOOSE MARKET SHARE, AS IT HAPPENS ALL OVER THE WORLD. NOW, TO HAVE ONE STRONG TV CHANNEL IS NOT ENOUGH, YOU HAVE TO MANAGE A GROUP OF THEM TO KEEP THE LEADING POSITION.'*



Peter Kiss, programming director, TV2

*'BESIDES THE LOCAL CONTENT, THERE ARE GREAT PERFORMING INTERNATIONAL FORMATS AS WELL: THE MOST POPULAR ONES ARE THE US SERIES, SUCH AS HOUSE MD, NCIS. IN ADDITION, THE LOCALIZED INTERNATIONAL FORMATS ARE ALSO GREAT SUCCESS, LIKE OUR MAKEOVER SHOWS.'*



Péter Farsang, CEO of MTG Hungary

*'WE ARE SEEING AN EROSION OF THE DOMINANCE OF THE TWO INCUMBENT FREE-TV CHANNELS, AS A RESULT OF AN INCREASING NUMBERS OF VIEWERS TUNING IN TO THE GREAT RANGE OF CABLE TV, WHO ARE THE BIG WINNERS IN THE CHANGING ENVIRONMENT.'*



Edina Balogh, senior acquisition manager from Sanoma Media

*'ALTHOUGH TELEVISION WILL REMAIN A MAJOR ENTERTAINMENT TOOL FOR YEARS, ESPECIALLY IN HUNGARY AND THE SURROUNDING COUNTRIES, THE INEVITABLE GROWTH OF THE INTERNET PENETRATION AND USAGE WILL HAVE ITS STAKE ON THE TV BUSINESS. WE SHOULD SEE THIS AS AN OPPORTUNITY, AND NOT A THREAT.'*

(Among friends) continues being the other big pillar of our screen, with already more than a decade on air.

Something new? Forizs explains: 'At 7pm, we have scheduled last month All3Media's *Cases of Doubt*, a docu-reality performed by amateur actors, which is something completely fresh: it combines procedural with romantic, very involving plots. It is a German format, going pretty well'.

About the foreign product, Forizs stands out: 'For this new season, we will program the new *Dallas* version (Warner Bros.) and we decided to invest more on European TV series, which were improved the last years. For instance, the brand new French action series *The Transporter*, based on the hit feature film franchise of the same name'.

'The Turkish boom is not so strong as last year. The first TV series the broadcasters have put on air (*Ezel* or *1001 Nights*), were quite successful, but at the second wave the stories were not so fresh, some with less production costs, and the ratings were not so relevant anymore. We have now a better performance with the Mexican telenovela *Teresa* (Televisa) than TV2 with its current Turkish series called *Ask-i Memnu*'.

'The Latin American telenovelas are still a good cost-effective option for us in the afternoon. We work also with *Telemundo*, *Venevision*, among others. We would like to introduce locally produced shows in the afternoon when the situation is better. Both for Turkish and Latin American products, we see good future at our new cable channels'.

## SOME STARTING FIGURES

This market picture is generating what is known as "fragmentation", where the same audience is divided in more stations, so naturally the most traditional free TV channels loose share that goes to pay TV (mainly TV cable) business. And they need to manage a group of pay TV networks to keep their markets.

Even though the main two leading positions have not changed about market share in Hungary, with RTL Klub (RTL Group) first, and TV2 (ProSiebenSat) second, the third place is now for a cable channel from the first group, Cool, heading Viacat3 (from MTG Group), the traditional third broadcaster of the market. Other cable channel that is climbing is F+

from RTL Group, too.

According to the *Global Report* from AEGIS Media, the total Hungarian advertising market has been falling from USD 792 million (2009) to USD 684 million (2012, estimated) and will grow again since 2013, where it is estimated to reach USD 694 million. The television ad spending has descended from USD 239 million in 2009 to USD 190 million (2012, estimated), representing a fall of 22%, approximately.

A local source comments to PRENSARIO that an official information recently released shows that in 2011 RTL Klub posted a profit of 2.6 billion HUF (€8.6 million, approximately), while TV2 made a loss of almost 9 billion HUF (€30 million, approximately), which is literally 4 times more than in 2010.

## RTL GOES BIGGER WITH MORE CHANNELS

RTL Klub is investing strongly on the future of business, even though the European economical crisis is still there. The seven pay TV channels acquired last year are Cool (18-49 general entertainment urban), Film+ (18-49 male feature films), Film+2 (18-49 female feature films), Prizma (18-49 but less urban than Cool), Sorozat+ (18-59 female, telenovelas and US series), Muzsika TV (18-59 general music programming and clips), Reflektor TV (18-49 female, celebrity and lifestyle).

Apart from those, it will launch in the fourth quarter of this year RTL II, a 18-49 family enter-

tainment that will program local productions, like *Who Wants To Be A Millionaire*, weekly reality shows, dancing contests, news, as well as U.S. studio series and feature films, Latin telenovelas and Turkish drama series.

Due to this, Tibor Forizs, head of program acquisitions and scheduling at RTL Klub, stresses that the group is buying more finished programming and producing more own content than in the past, although it had reduced considerably its dependency on big and expensive U.S. studio deals.

'With the fragmentation, it's already not enough to have one strong channel: you have to manage a group of channels to keep the leading position. We are thinking also of the analogue switch-off, which would take place (although not confirmed yet) towards the end of 2014', he says.

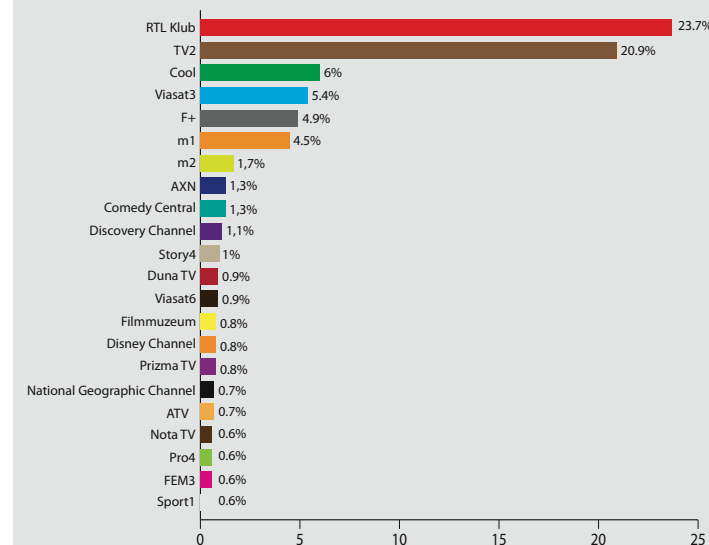
'The economical crisis is going on and, as we have not increased the incomes, its difficult

to support this evolution. We expect a light recovery in the advertisement pie for 2013, but we have expected the same for this year, and the market is declining a little bit. The challenge is to bet on the future: we have made the difference in free TV going 'big', and we'll do the same with RTL II on cable'.

This new venture will complement RTL Klub. 'We will share our format brands. We see RTL II as a bit more female oriented, with fresh programming... big brand, big channel and definitely not a repeat channel to RTL Klub', Forizs adds.

'The big talent shows continue heading the prime time of the Hungarian free TV 2012-2013 season. We will produce for RTL Klub the 3<sup>rd</sup> season of *X Factor*, which has delivered top ratings the last two autumns, while the main competitor TV2 is betting on *The Voice*. Also, the local daily sitcom-soap *Bárdok Közt*

## HUNGARY: AUDIENCE MARKET SHARE, BY CHANNELS – AGES 18-49, PRIME TIME (MAY 2012)



Source: AGB Nielsen Media Research

## TOP 5 PROGRAMS – AGES 18-49, PRIME TIME (MAY 2012)

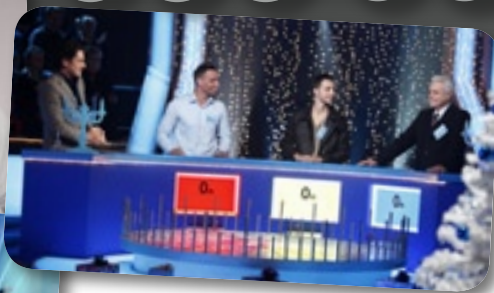
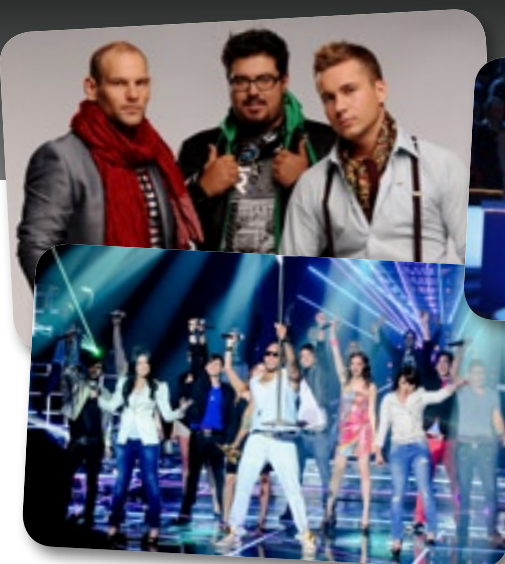
Pos.	Program	Channel	Share (%)
1	Hungary's Got Talent (local talent show)	RTL Klub	36.3
2	Raiders of the Lost Ark (US movie)	TV2	29.7
3	Eight Below (US movie)	RTL Klub	27.5
4	Indiana Jones and the Last Crusade (US movie)	TV2	29.5
5	Among Friends (local daily soap)	RTL Klub	28.3

Source: AGB Nielsen Media Research



The Hungarian version of the docu-reality *Cases of Doubt* it's programmed on RTL Klub. The main scripted series on TV2 keeps being *For Better Or For Worse*





The big entertainment formats on the Hungarian prime time: *X Factor*, a blockbuster on RTL Klub, *Megastar* that has reached outstanding rating on TV2, as well as the classic *Wheel of Fortune*, a top show on Story4

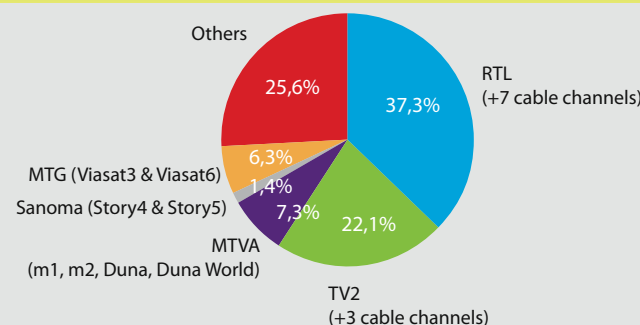
#### TV2: MORE INTERNATIONAL FORMATS

PRENSARIO wanted to know what has changed from one year to now. Peter Kiss, programming director of TV2, answers: 'We and the overall TV market have suffered from the economic downturn that is currently seen on the Hungarian market. The ad pie has declined massively, which forces us to look for alternative revenue sources, while ratings on TV2 have not declined that intensively.'

'Our cable channels, FEM3 (a female targeted channel) and PRO4 (its male counterpart), are increasing in viewing share and in revenues. The really interesting times are ahead of us, with the coming of analogue switch off at the end of 2014, and it seems that we will have many interesting projects coming up in the forthcoming months.'

As a consequence of the European financial crisis two important factors resulted in the television advertising market decline of over 40% since 2008. 'In addition, Hungarian government reacted by industry specific taxes — so called crises taxes — impacting the most significant players from an advertising standpoint (banking and insurance, telecommunications and, most recently, with the health tax FMCG companies producing high salt and sugar content foods)', says Kiss.

#### HUNGARY: AUDIENCE MARKET SHARE, BY GROUPS – AGES 18-49, PRIME TIME (MAY 2012)



Source: AGB Nielsen Media Research

'The combined impacts of lower consumer demand as well as increased cost base from the additional taxes have resulted in budgetary cuts on discretionary spending (e.g. marketing) as well as demand for higher efficiency of marketing spending (lower prices).'

'With the longer than expected recovery period, some companies have realized that their reduced marketing efforts were sufficient to achieve their goals, thus part of the spending cuts is not expected to reach previous levels. With the combined impact of a gradual economic recovery and current spending patterns, we expect the market to recover at 4 % per annum at this time.'

About programming, the daily news *Tények (Facts)* and the daily soap *Jóban Rosszban (For Better Or For Worse)* are permanently performing well. 'Our latest, local format singing talent show, *Megastar* reached outstanding rating results during the whole season, which ended last two weeks ago', remarks the executive.

One-third of TV2's content is local production with infotainment programs, news, realities or talent shows, daily soap, thematic programs, while the rest is ready-made content: 'Besides the local content, there are great performing international formats as well: the most popular ones are the US series. The localized international formats are also great success, like our makeover shows. There are more international formats on TV2 than local developments, however, the proportion of the local productions is bigger than the average.'

'Our morning grid is unique, as it is dealing with political, economic and tabloid, lifestyle issues as well. The access primetime starts with foreign acquisitions, generally South American or Turkish soaps. After that, local productions dominates: the one-hour news, which is one of our leading programs, a daily tabloid, then the double local daily soap — all of these

are TV2's key rating drivers', describes Kiss.

'On Mondays, we air crime series, on Tuesdays and Thursdays movies, while on Wednesdays we have *House MD* and *Desperate Housewives*. On Fridays we generally have a local show, the latest one was the sixth season of *Megastar*, which came to its end last week, and was a huge success among TV viewers. The weekend is about the thematic, advertising founded programs — lifestyle, auto-motor, health programs — in the daytime and blockbuster movies in primetime.'

#### MTG: SUCCESSFUL OWN PRODUCTION

MTG's Hungarian media house, comprising the *Viasat3* and *Viasat6* channels, has generated a combined commercial audience share of 9.4% in the 18-49 demographic in the first quarter of 2012, compared to 7.9% in the first quarter of 2011. The channels had a combined commercial audience share of 8.1% in 2011.

Péter Farsang, CEO of MTG Hungary, describes: 'We are seeing an erosion of the dominance of the two incumbent free-TV channels in Hungary, as a result of an increasing numbers of viewers tuning in to the great range of cable TV channels that are currently offered in the Hungarian TV market.'

'The many cable channels are the big winners in the changing environment, although it could also be argued that the Hungarian TV market is close to saturation when it comes to cable channels. Our both channels have benefited from the fragmentation. *Viasat3* is the third largest TV channel in Hungary in the 18-49 audience, although *Viasat6* is significantly smaller.'

Regarding programming, he says that the successful US sitcom *Two and a Half Men (Viasat3)* 'has performed well', and has been third largest show in primetime on weekdays. 'We also have *CSI*, *CSI: Miami*, *CSI: NY*, *Person of Interest*, *Covert Affairs*, *Shameless (US)*, *Nikita* and *Southland*'.

'On big channels, entertainment has proven to be the most popular, whilst cable TV channels more often specialize in scripted fiction, drama series, sitcoms and movies. Local content is the leading format, as well. We have had a number of successful own productions: *Éden Hotel* and *Négyesköv*, which have proven very popular. Viewers are more interested in local shows than acquired content, and TV channels are often able to generate an increased amount of publicity from locally produced content than from acquired programs.'

#### MTVA, A YEAR IN THE MARKET

The Media Law launched early 2011 has created a convergent media authority called Médiatek that supervises both the media



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Viasat3 is increasing the hours of own produced contents with more local reality shows like *Eden Hotel*, while MTV is betting on strong prime time game shows like the local adaptation of *Still Standing*

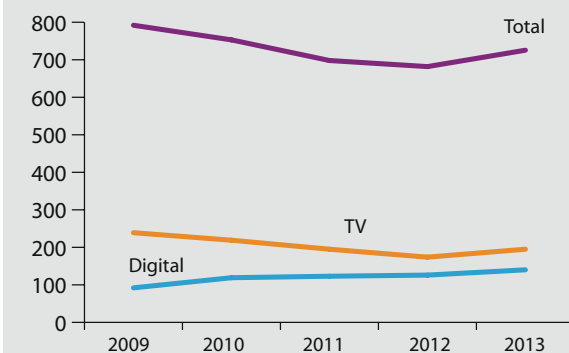
and telecommunications sectors. All the public services, TV (MTV with **m1** and **m2**, and both channels of **Duna TV**), Radio and Press are now gathered in a new one entity. The production of programs and acquisitions are managed by a new organization called **Media Service Support and Asset Management Fund** (MTVA).

During Discop East 2011, PRENSARIO visited to the studios of **Magyar Televízió**. The facilities were opened two years ago and it counts with seven full HD studios, one of them exclusively to produce fiction series and soap operas. **Lidia Márton**, director of international relations at MTVA, had explained at that moment that the new structure of the company and highlighted that there are 'new production opportunities' from now on.

'The integration of the TV, radio, press and online assets creates a more competitive player in both national and international markets. Now we can take advantage of being a *cross media* company and we are more aggressive on the production side, looking for co-production partners within Europe, but also worldwide', she remarked

**Andrea Zaras**, head of acquisitions at MTVA, has explained to PRENSARIO during last

#### HUNGARY: AD SPENDING EVOLUTION BY MEDIA (2009-2013, ESTIMATED)



Source: AEGIS Media



MIPTV the challenges of the public TV station in the Hungarian TV market: 'It's not only a question of money, but also to choose what to buy and how to program. Definitely, the challenges are more related to contents'.

'We are aiming to find strong, valuable TV products with a commercial appeal, targeting the whole family. In the international markets, we are looking various programs depending on the actual need of the public TV stations: series, movies for the prime time slots of our main channel **m1**; children programs for the afternoon slots of our secondary channel, **m2**; and documentaries and series for our cultural channel, **Duna**'.

#### SANOMA MEDIA: A MULTIPLATFORM STRUCTURE

**Sanoma Media** manages in Hungary two cable channels: **Story 4**, launched in 2006 and it is in 2.86 million households with 71.3% coverage; and **Story5** that appeared at the beginning of 2011 and now it is in 2.2 million households.

The first one targets mainly female viewers offering them less violent, slightly more sophisticated shows, and altogether tries to become a "feel good" station with a purpose to occasionally offer programs to male viewers as well. 'It includes first run and rerun studio products, European production and local shows, as well as leading football events, while the second is taking over the previous profile of Story 4 and remains a typical female channel with telenovelas and romantic series as well as period dramas', says **Edina Balogh**, senior acquisitions manager.

In the Hungarian market, described as 'stable' by **Balogh**, from the 100 Hungarian-speaking channels, three are national, and further 30 channels reach at least 50% of the households. The cable coverage is 80%. 'The market is expecting further audience segmentation in the TV field, where the national channels face continuous decline, while cables will increase', adds the executive.

'A channel can only attract viewers if it has a clear brand and can invest in local production. Buying formats with an elaborated production bible may prove more successful than trying out new developments. There seem to be a shift from knowledge based game shows to activity based ones and stronger channels may risk to test new genres such as docu-reality, like **RTL Klub**'s *A*

*gyanú árnyékában*, TV2's *Megasztár* or **MTV**'s *Maradj talpon* (*Still Standing*)'.

The economical crisis's affects are 'harsh and clear' says **Balogh** and adds: 'We do not expect that this would turn back to the level before 2008. This is a reality we have to live with and **Sanoma**'s answer is to take advantage of the multiplatform structure and alternative media solutions of the media house'.

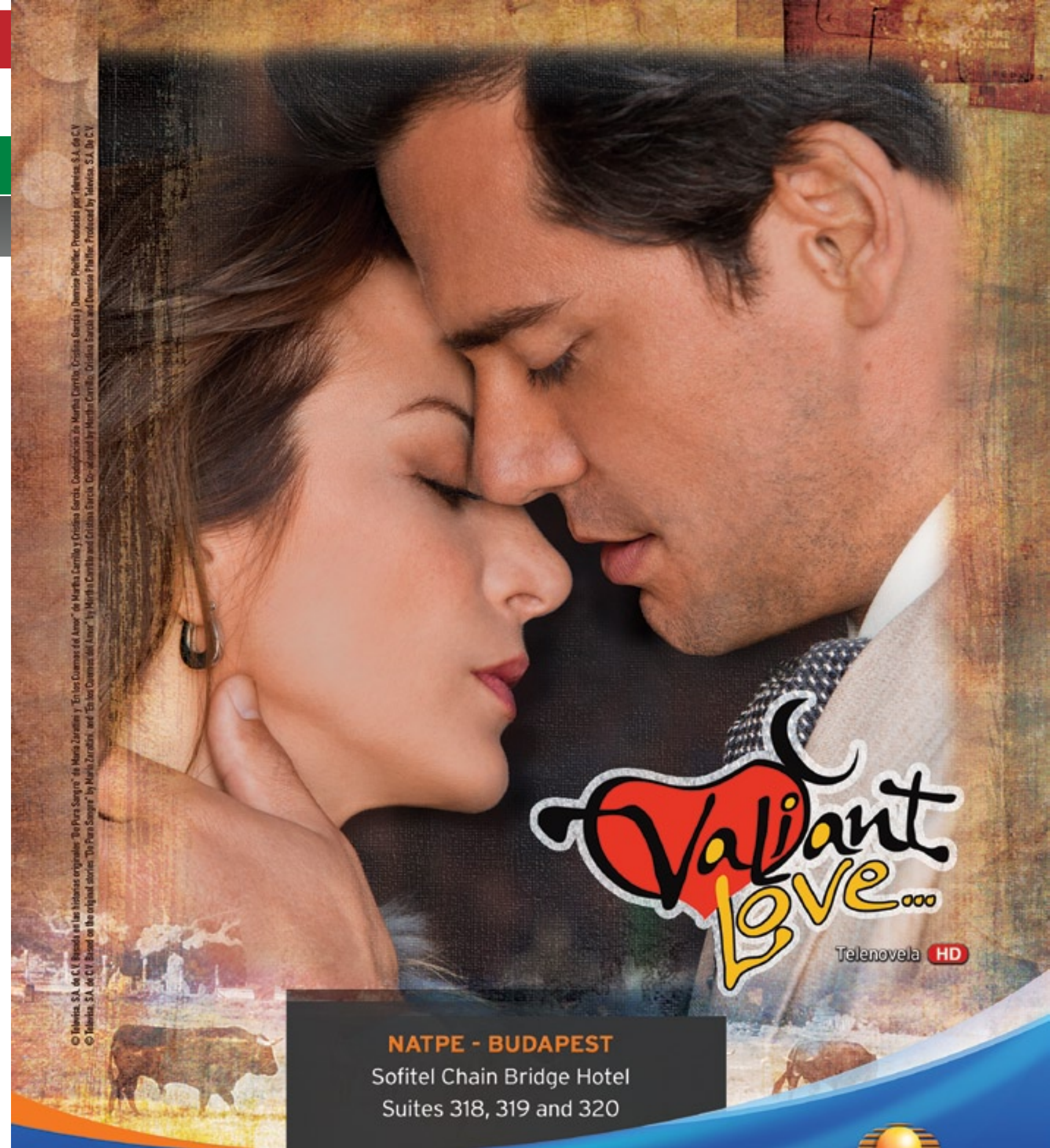
'The advertising revenue has shown a decreasing tendency for years now. In 2011 the total net-net ad revenue dropped by 6% compared to 2010 (non-spot and barter excluded). The spot advertising revenue of the terrestrial channels decreased by 10% but at the same time within the ad pie the non-terrestrial share grew by 28%. Yet, we have to take into account that 7 more channels gave data to the survey so the figures show 52 channels' revenue which means that it does not correspond to the expected growth of cables as more channels are producing this swing.

#### NEW MEDIA: A WAY OUT OF CRISIS?

The evolution is slow with the crisis, but according to **Forizs**, company's free of charge catch up service for their shows and series, is successful. He remarks: 'The daily unique visitor number goes from 75,000 up to 150,000 or even higher depending on the event programming. Again as with the new channels, we invest thinking of the future, when the economical situation is better. Sooner or later, the market will have again good business and then the multimedia environment that is being built now, will have its results'.

**Farsang** from **MTG**, highlights: 'As a broadcaster, we are focused on the development of new media windows and on new ways of content delivery and distribution. The **play.viasat.hu** website was launched earlier this year, and lets people access not only our own productions, but a wide range of third party content, including shows, series and movies. All of this is for free. We expect to see a wider public acceptance of multi-screen offerings, and we are focused in taking part in this development'.

**Balogh** from **Sanoma Media** completes: 'As for the near future, and thanks to the media law the revenue from product placement enhances the balance that gives a slight relief to the market players. However, as stated before, although television will remain a major entertainment tool for years, especially in Hungary and the surrounding countries where the living standard is lower than in Western countries, the inevitable growth of the Internet penetration and usage will have its stake on the TV business. We should see this as an opportunity, and not a threat'.



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# NATPE BUDAPEST 2012: THE FUTURE OF CENTRAL AND EASTERN EUROPE

Taking place on June 26-28 in Budapest, Hungary, *Natpe Budapest 2012* follows the legacy of what until last year has been *Discop East* and is the main programming content market focused on Central and Eastern Europe. The convention faces several challenges, posed by the meeting itself and, on the other hand, by the markets within the region. For both approaches, the motto to apply would be “Live the present in the best way possible, keeping an eye on the future”.

Regarding the convention in itself, the fact that it is being run under new ownership lends a touch of uncertainty. Natpe is a U.S.-based non-profit organization, whose main asset is its yearly convention in the States, which has recovered strength in the past two years by moving from Las Vegas to Miami after appearing to be in danger due to little support from the Hollywood studios. At the same time, it acquires the former *Discop East* at a troubled moment, when Central and Eastern Europe appear weathering a three-year long crisis of the economies and no visible signs of recovery are in sight. Better conditions were hoped for this year, but the free TV advertising billings in most nations (with the exception of Russia and some other case) have remained flat or even falling slightly below their earlier levels.

In addition, the Hollywood Studios have chosen the same week in Budapest for holding private Screenings, taking the participants away from the Sofitel Hotel. This has been noticeable



Daniela Smirnova, senior acquisitions manager, TV Channel Peretz (CTC Media, Russia); Shakira Hoffmann (SevenOne, Germany); Olga Selikhova, senior acquisitions manager, TV Peretz, and Stefanie Strobel, junior acquisitions & sales manager, SevenOne (Germany).

**RUSSIA IS THE STAR MARKET OF CEE, IN ALL WINDOWS OF BUSINESS: FROM HIGH-END PRODUCTION PROJECTS TO VANGUARD NEW MEDIA VENTURES**

in 2011, prior to the ownership change; this year the situation has improved, as it may be seen in the listing of Screenings that is part of this report: there are three of them, one a day earlier and two in the afternoons of the show days, leaving the mornings for business as usual. And, the Screening attract an additional number of visitors flocking to Budapest; Natpe has published the Screenings dates on its website in order to allow the distributors to better arrange their schedules.

About Central and Eastern Europe itself, it must be said that the region faces a dual situation. On the one hand, there have been three years of crisis and remains one of the most affected

regions of the world because the worldwide financial situation has slashed foreign investments coming from the U.S. and Western Europe. Hungary, for instance, has been one of the most affected nations, facing a political and economy crisis and frequent presidential changes in short time. Of course Greece, the Baltic countries, are very still complicated, too.

But, almost at the same time, the region has been evolving fast towards the new media environments, with new channels being launched on free TV, pay TV, DTT, IPTV and OTT. Even, though the crisis, Central and Eastern Europe has been the region in the world with most new free TV channels launched in the recent past, and announcements about new pay TV and IPTV channels are being released every week. In Russia, IPTV channels flourish like flowers in Spring; Hungary, with a population of 10 million people, has now more than 100 TV channels, most of them on cable since the “analog blackout” will happen in about two years from now.

The prospects are that, with this array of new channels available, the situation will improve strongly as soon as the economy conditions are better. So, the best approach would be to weather the present turmoil and bet on the future, a strategy valid for both Natpe Budapest and the Central and Eastern Europe markets in themselves. Those who manage to keep a high profile under the present circumstances, will be better positioned for the times to come.

## MARKET OUTLOOK

In this issue we feature more than 15 interviews to top broadcasters from the region, reflecting the points of view of the industry regarding this outlook. **Tiber Forizs** at Hungarian leading channel **RTL TV Klub**, offers one of the most revealing comments. Until 2011 it was just a free TV channel, but now has also seven pay TV channels and at the last 2012 quarter, will launch **RTL2**, a new cable channel but formatted as a free TV signal, with strong in-house production. Forizs asserts that “We are market leaders and want to remain being so. Today it is not enough to have a single channel, you must manage groups of channels. The current

## Major Screenings during Natpe Budapest 2012

- **Warner Bros.: June, Monday 25, at 8.30hs (the previous day)**
- **NBCUniversal: June, Tuesday 26, at 12pm**
- **CBS Studios: June, Wednesday 27, at 2.30pm**

situation remains flat or falling a bit, but we must bet on the future. So, based on the new channels, we are acquiring and producing more programming than last year’.

From recent shows as the L.A. Screenings and MIPTV, there are quotes as **Kaspar Pflueger’s**, who is programming manager at RTL Croatia: “The economy situation is now stable. This is enough to keep us evolving, we feel fine with this. Concerning free TV vs. new media, you can bet both on fiction or entertainment, if you retain a large-scale strategy, if you go ‘Big’; it is the way to remain relevant. We bet on big talent shows’.

**Mariana Dimitrova**, manager of global acquisitions at **Fox International Channe**: “We are very active regarding new developments. We have two new channels, **Fox Movies** and

**THE FORMER YUGOSLAVIAN TERRITORIES HAVE NOW STABLE ECONOMIES AND THEY ARE DEVELOPING MANY NEW TV CHANNELS**



Croatian broadcasters: Zrinka Jankov, programming schedule and film editor, Nina Mikola, head of acquisitions, and George Makris, general advisor to the Board from Nova (borders), with Zvezdana Djuranek, program Acquisition Business Affairs, and Djelo Hadziselimovic, Head of Foreign Programming, both from HRT

**24hs. Kitchen**, a re-branding of *Utilisima*. From Sophia, I have moved to the global planning of FIC in London’. **Gordon Bobinac**, **KIP Croatia**: “We attend the international trade shows looking for new VOD and IPTV content complying with the 4G LTE standard. It will be the next “big thing” when the governments arrive to force the service providers to improve service quality, and they will do it soon. A very strong multi-media phase is coming to Central and Eastern Europe’.

**TV Markiza** Slovakia plans to launch its third channel in mid-2012. Russian producer **Anedia** is launching four generalist pay TV channels starting in February 2013. Canadian **Stingray Digital** has launched in Serbia its *Music Choice* service on **Telekom Srbija’s Open TV** IPTV platform. **UPC Poland** is adding six new channels to its output, four of them are in HD. In Latvia, **MTG** has acquired free TV channel **LNT**.

Polish public TV channel **TVP** has launched a HbbTV application at his flagship channel **TVP**. Russian DTH platform **Tricolor TV** has expanded to Ukraine. Russian cable **MSO ER Telecom** has launched a “revolutionary project” to attract music fans in 42 cities in that nation... and so on elsewhere.

## PRODUCTS, GENRES

At what stage is the balance between in-house production and finished product purchases at this time in Central and Eastern Europe? All the countries are rolling out in-house product for their prime time lineups, very few broadcasters have not followed this trend. But, there is no money; so, in most cases they apply to very low-cost entertainment formats. Some small nations produce at costs as low as 2,000 U.S. dollars per hour, although it sounds impossible.

At the high-level production stratum, the



TVP, Poland: Maria Nadolna, director international affairs, Paulina Ryzewska-Bednarczyk, head of film department (TVP1), Malgorzata Czyz, programming editor (TVP2), Krzysztof Bartolomiej Jaworski and Agata Ziomek, sales

**POLAND IS OTHER OF THE CEE MARKETS THAT IS NOW PLAYING IN THE MAJOR LEAGUES, BOTH ABOUT FINISHED PRODUCTS AND ESPECIALLY THE PRODUCTION BUSINESS**

**THE BALTIC COUNTRIES ARE STILL NOT RECOVERED FROM CRISIS, BUT PROMISE TO EVOLVE FAST WHEN THE SITUATION IS BETTER**



Lithuania: Daiva Andrade Gonzalez, director of programming & acquisitions, and Liutauras Elkimavicius, CEO, both from Baltijos TV, with Marijus Gradauskas, acquisitions manager and Indre Zelbaitė-Ciesiuniene, creative director, both from LNK.





Buyers from Turner: Yesim Yunak, programming director, and Rasim Yilmaz, acquisitions, both from TNT Turkey; Indrid Orstadius, Sr. Manager, Corporate Development, Turner EMEA

**THE PAY TV AND DTT BUSINESSES ARE EVOLVING HUGE IN TURKEY AND MANY CEE MARKETS. A STRONG MULTIMEDIA ENVIRONMENT IS EMERGING IN THE REGION**

production of big entertainment shows has got reinforced as be the best way to counterbalance the advances of new media. The broadcasters say: "we have to roll *Event* programming that gathers the entire family and will be later commented by people". For this purpose, talent shows are the most effective, as in most parts of the world. Dating and talk shows in different time slots may fulfill the same purpose.

All in all, the situation is not bad for "canned" product: under the crisis, even the large channels cannot produce by themselves all the fare they would like, and find finished product to be convenient. To the international distributors, this has opened markets that seemed to be closed; and, the new channels demand finished programming, too.

Once again, the major problem is scarcity of funds to pay for programming: there are more channels, but advertising pies remain the same. This results in lower prices, even at the largest markets; the final result depends on

the bargaining power of each part, and on a customer-retention strategy until the situation and the commercial terms improve.

Concerning production genres, as it may be seen at the separate report we provide at this issue about the L.A. Screening (the major show for the Hollywood studios; they unveil their new product there) there is a degree of divergence between the evolution of the U.S. domestic market and what the Central and Eastern European countries appreciate most. In USA, the recent top successes were comedies, so the studios new productions have made focus on this genre. And after most of the series launched last year have failed to be renewed for a second season, new thrillers in the style of "Lost" are back, which must be watched every episode to understand the story.

Most Central and Eastern European markets, though, care more about soap-drama product such as "Dallas", where you can skip one of two episodes without losing touch with the evolution

of the story. And there are cases, such as "CSI Miami", which is a big hit in Europe but has been cancelled in the States. All this does not affect the fact that the U.S. series remain being the major fiction content in most prime time TV layouts within the region --along with entertainment shows-- but many of the buyers have started to increase the purchase of European fiction and especially British, French and German product, which is showing improvements both in production quality and script dynamics.

#### ABOUT THE COUNTRIES

Russia remains the "big" Central and Eastern European market. As highlighted at the last Mipcom, there are more than 300 active TV channels, and its advertising billings are expanding at a 15% yearly rate. This environment helps high-end projects, the launching of new channels and "futuristic" new media developments to flourish. Broadcaster CTC for instance offers three systems: VOD (VideoMore), SmartTV (set-top box) and mobile (Apple and Android). At Year End 2011, SmartTV had exceeded the IPTV count, reaching 3.7 millions vs. 3.4 millions subscribers. Now it is close to 5 millions.

There are also other markets that have gained force in the recent past, Turkey is one of them, becoming a huge production hub for series and entertainment and achieving a high production level. In the last 2-3 years, several Turkish series became the new *boom* within the region. As it happens with all chain-production drives, this year its expansion has been a bit more moderate, but remains strong. Poland is another country with important expansion recently, with investments in infrastructure and new channels; it now produces actively and at the same time purchases a significant amount of "canned" product.

Romania, Bulgaria and Ukraine are moving ahead, too. The Czech republic has diversified actively into new media. With the exception of Greece and some punctual cases, the nations within the region --large or small-- have been able to stabilize their economies.

So, due to all of these, it is worth enough to work on this Natpe Budapest 2012 as much as possible, and to continue betting on Central and Eastern Europe, both broadcasters, sellers and new coming players. The future can be great.

## Three major hits... from the premiere provider of consistent top-rating series in the Philippines

A man must decide between eternal love and revenge

**My Eternal**  
(Walang Hanggan)  
80 episodes (approx.) x 45 minutes

\*Currently airing as the # 1 Primetime Drama  
Highest-rated episode at 40.8% with 57% audience share

Witness how love can go the distance, cross boundaries and overcome differences

**Jade**  
(My Binondo Girl)  
50 episodes (approx.) x 45 minutes

Highest-rated episode at 31.4 % with 51 % audience share

See true happiness through the eyes of a man who'll forever be an innocent boy

**BUDY**  
50 episodes (approx.) x 45 minutes

Highest-rated episode at 32.4 % with 50 % audience share

## Get to know more of our top-rating shows!

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**THE PUBLIC TV CHANNELS ARE PARTICULARLY STRONG IN THE FORMER CIS TERRITORIES; NOW THERE ARE NO MONEY, BUT STRONG PROJECTS FOR THE NEAR FUTURE**



Sergei Kukhto, director of TV Channel, Konstantin Pogotsky, international relations chief specialist, Konstantin Vorobyov, head of acquisitions, and Aleksandr Kapenkin, director of TV1, from Belarusian TV and Radio Co., with two Russian producers and distributors: Sergey Kudryashov, Nove Vremya, and Sergey Senjin, Rufootage.ru



## REN TV: 'WE ARE NOT AFRAID OF EXPERIMENTS'

Ren TV is one of the largest private Russian TV channels, with a potential audience of more than 120 million viewers, and owned by **National Media Group**, one of the largest private media holdings in Russia, which consolidates the assets of key segments in the Russian media market.

According to the ratings given by **TNS Russia**, as of May 2012, it reached the 6,6% share in the audience 25-59 y.o., thus it increased its own results by 43% as compared to the beginning of the current TV-season (september 2011). 'Ren TV has always been called *different* with regard to the products that we offer to the viewers and with regard to the grid as well', remarks **Andrey Praslov**, general producer of the broadcaster.

And he adds: 'The peculiarity of our grid is based on the fact that we are actually not afraid of experiments. For example, we actively use *vertical programming*. We can offer viewers special grid during the whole

workday—just the way we did recently with the Russian version of the popular show *Hell's Kitchen*. The results were amazing: the maximum share that day reached 10% in total audience of 25-59 y.o. and 13,8% in the female audience of 25-59 y.o., what made us the first among all the channels.'

### NEWS & DOCU-REALITY, ON TOP

Ren TV's main hallmark is news. 'This year we got seven **TEFI Awards**—the most prestigious television Award in Russia—and in "informational" nomination, we got absolutely all awards. We produce informational programs by ourselves, like *Novosti 24*, an analytic weekly show *Week with Marianna Maksimovskaya* and reportorial stories *Reporterskie Istории*. The other shows, documentaries or, even, *Hell's Kitchen*, are produced by local production houses.'

'At the present time, most of the Russian TV channels are trying to do the formats that include real relationship and personal conflicts, so called docu-reality. The channel that would make a successful project in this field could jump on the main stream and occupy top position', considers **Praslov**.

Nobody has done any successful doc-reality shows, he says and adds: 'There is no such product in the local TV market. But channels are trying to. There are many documentary entertainment shows but still it is not that doc-reality, that exists in prime-time on many European TV channels.'

### NEW MEDIA

Internet videos in Russia gain ever-growing popularity; its exposure is about 15 – 18 million people per month and professional licensed video content is a main trend today. 'Movies, series and TV programs dominate in all amount of viewing. Almost half of the Russian Internet users watch video on-line. Obviously, such a glut of popularity that we can



News programming, like *Novosti 24* are a hallmark on Ren TV



*Hell's Kitchen* is a top show on the channel

see today is just the beginning', remarks the executive.

'The most interesting things are ahead: monetization of the videos, the usage of different advertising options. As for our plans and strategies for broadcasting within new media (Internet, mobile phones, iPads, etc.) in August 2011 we started **Ren TV** multimedia website. It's a brand new web portal gives viewers an opportunity to watch live on-line and even to construct a personal TV'.

'Moreover, there is a huge media library of our most popular projects of the previous years. Today the coverage of our website is 95,000 of unique users a day, 12,500,000 views a month in 5,025 cities, more than 23% of it in Moscow and Saint Petersburg. This year we plan to prepare a platform for broadcasting within mobile phones, pads etc.', completes **Praslov**.



Ren TV won seven TEFI Awards, the most prestigious television award in Russia



Andrey Praslov, general producer



## AMOR CAUTIVO

Telenovela  
120x60



*Love will set her free.*





## MARKIZA: HOW TO LEAD THE SLOVAKIAN MARKET FOR 15 YEARS

**Markiza** has been the leader on the market for 15 years since it has been launched in the Slovakian market. On the first quarter of the year, achieved a market share of 35.6% as a group, which means including the core channel (28.1%) plus **Doma TV** (7.5%), the woman-oriented channel launched three in Slovakia and one year ago in Croatia.

'The main channel **Markiza** is more modern family-oriented while **Doma** offers programming aimed at women. Thanks to a recent successful local telenovela, *Only Love*, the former one became the third player on the market', explains to Prensario **Elza Strapkova**, acquisitions manager of both stations.

'**Markiza** is dominated by local productions, which occupy slots from 5pm to 11pm. We carefully balance the mix of news, local fictions series and reality shows. In Slovakia we experience a significant success of reality entertainment: currently we are airing



the second season of *The Farm*, we renewed *Wife Swap* and are continuing with the feel good show *Best Wishes* and the talent show *The Voice*', she comments.

'As mentioned, we strengthened **Doma's** programming structure with a new local fiction series *Only Love*. The channels grid includes also new Turkish long-running series *Sultan - The Magnificent Century*, *Ezel* and the Latin American novellas *La Madrastra*, *Pasion de Gavilanes*, among others.'

### LEADERS FOR 15 YEARS

'All of the series are an excellent contribution of the channels to the performance of CME



The local telenovela *Only Love* allowed Doma to become the third broadcaster of the market, gathering 7.5% of market share

**Group** in Slovakia. We also see a lot of potential in our SVOD platform **VOYO**, which was successfully launched in February 2012.'

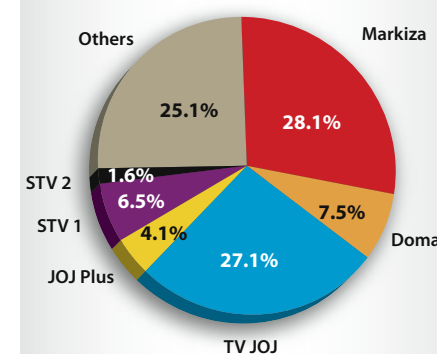
'Our main goal has been to maintain leadership on the market and continue to bring new programming that is attractive to our viewers. We aim to keep a well-balanced programming mix with news, local fiction, reality and entertainment and foreign acquisitions.

'Currently the reality content is the key driver of the market. **Markiza** is screening the second season of *The Farm* (average ASHR 32.8% in Q1) and we also launched the first season of *The Voice* (ASHR 39%). We are planning to bring more reality shows this year such as *Masterchef*. We are also preparing a new local fiction series called *Hot Blood*', completes **Strapkova**.



*The Voice*, the biggest talent show on Markiza with 39% of market share

### SLOVAKIA: AUDIENCE MARKET SHARE (1Q12)



Source: PMT, TNS

## UNSCRIPTED FORMATS

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SENTIMENTAL SHOW  
WEEKLY PRIME TIME  
Adapted in 16 countries!

The Anti-Talent Show



TALENT SHOW  
WEEKLY PRIME TIME  
Adaptations: Brasil (Option)

Date me!



DATING SHOW  
DAILY DAY TIME  
Adaptations: Spain

That's Talent!



TALENT SHOW  
DAILY DAY TIME and WEEKLY PRIME TIME  
Adaptations: USA and UK (Option)

DONNAVENTURA



DOCU - REALITY  
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## RTL, CROATIA: 'THE ECONOMIC CLIMATE FORCES US TO BE EVEN MORE CREATIVE'

Kaspar Pflueger, programming director of RTL Televizija (Croatia) explains to PRENSARIO the moment of the broadcasters and highlights: 'Fragmentation has continued in the local TV market, with more channels and entertainment offering than ever before.'

'Nonetheless, we continue to be extremely well positioned, thanks to our strong mix of new and established brands, and our younger channel RTL2, which confirmed its position as market leader among second generation channels', adds Pflueger.

And he continues: 'The economic climate continues to be very challenging, forcing us to be even more creative and nimble with our program investments. And of course this means I cannot nearly invest as much into programming as I would like to, but that's probably what every program director thinks.'



### PROGRAMMING

The executive affirms that the station has a very clear three-pillar programming strategy: can't-afford-to-miss local entertainment, best series and blockbusters from around the world and top news and infotainment programs.

'Our prime time mainly consists of stripped programs, with a focus on our new local daily drama series *Ruza Vjetrova* and big

stripped entertainment shows like *Big Brother* or *Survivor*. In access-prime-time we have also introduced scripted reality series, which are very successful', he describes.

How do you finance big prime time shows like these?, asks PRENSARIO. Pflueger answers: 'It's very simply: we had to look across the border to make them happen. We have co-produced both with partners in the region. These days, co-operation on big shows is an obligation, otherwise it would just be impossible to fund these big events.'

'Sometimes it's challenging, trying to get different parties from different cultures to agree, but our experience overall has been very positive and you learn a lot about each other. And recently we have even had the first cross-border engagement of two former *Big Brother* contestants.

So who's to say that television doesn't help international relations?'

RTL introduced Turkish series to Croatia in 2010 and by doing that it was followed by the other commercial channels. 'Turkish series combine very engaging stories with great production values, and a setting that is much closer to Central and Eastern Europe, than that of series from Latin America or the US. However, we believe they can only be one part of a successful program-lineup. We continue to follow a more diverse approach, offering our viewers the best drama series from all key markets, including the *CSI* franchise or *The Mentalist*. Therefore, if we buy Turkish series, we focus only on such series that bring something fresh and unique – like the upcoming *Magnificent Century* (The Global Agency), which we have bought and are very excited about.'

### LOCAL PRODUCTION

'We launched *Ruza Vjetrova* last fall, our first original daily drama series. We are very happy with the results; it clearly wins the slot and is a great lead-in into our later prime time. It's a big love and revenge drama, about two families waging war against one another, and two lovers that get caught in



*Ruza Vjetrova*, RTL's first original daily drama series

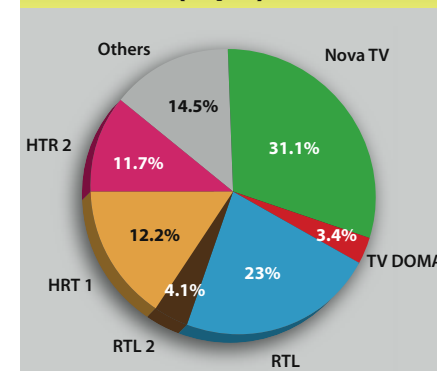
the middle. It's a universal story, set against the beautiful Croatian coast.'

FremantleMedia produce the show in Split (one of the most beautiful beaches in the Croatian Coast) so the setting is amazing. 'We are really proud that we manage to get great stories and production value for one hour each day, as this is not done in many territories. We are in the middle of planning for season 2, which looks very promising with great new characters and even bigger drama', comments.

### DIGITAL

Like everywhere else, the offer in digital entertainment is growing – but so is, again, like in many territories, TV viewing in Croatia. In 2011, TV viewing in Croatia increased to 337 minutes per day, from 331 in 2010. So television viewing in Croatia is in a very healthy state. Nonetheless, we are of course continuing to build our digital offers, to allow our viewers to access our programs whenever and wherever they want to. Our free catch-up offer RTL Sada, launched in 2011, is proving to be very successful and continues to grow. So this is an area that we will continue to expand into.

### CROATIA: AUDIENCE MARKET SHARE PRIME TIME (1Q12)



Source: AGB Nielsen Media Research



Kaspar Pflueger, programming director



*Survivor* is very expensive show to produce, so RTL had to find partners to co-produce it. 'Co-operation is a must on these days', says Pflueger



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## ProPlus, SLOVENIA: WINNING NEWS FORMATS

In the first quarter of 2012 CME's Slovenian channels, **Pop TV** and **Kanal A** remained undisputed leaders. In April, the combined prime-time share in target group 18-49 was 53%. The average prime-time audience share was over 50% for first quarter of 2012.

'Currently, the top performing show is first season of local version of *X-factor* with 22% rating and 60% share. Local news and current affairs programs are producing solid ratings as well', explains to PRENSARIO **Branko Čakarmiš**, programming director of **ProPlus**, which also gathers **Pop Non Stop**, a bouquet of six subscription channels.

'Our programming strategy is based on three main programming pillars. The first one is news, second local fiction and entertainment and foreign movies and series. The last element is becoming less important for free TV channels due to increasing number of cable channels with Hollywood products'. 'ProPlus is also without a doubt producing winning formats in the field of news. Both of our news shows



are the top rated in the country: *24Hours* on **Pop TV** at 7pm and *World* on **Kanal A** at 6pm, and *Confirmed!* on **Pop TV** remains the most watched informative magazine show on Slovenian television', he says.

'Our leadership is based upon the quality of our programming, excellent execution of local shows and of course our multiple distribution platforms (Internet, SVOD). Our free TV schedules and local content are today devised for multiplatform usage', remarks **Čakarmiš**.

**Pop TV** aims to remain the first choice in Slovenia for viewers in competitive multi-channel environment due to strong local shows, especially in the field of entertainment and original fiction. 'We are looking forward to launching the first local format of a daily reality show soon', he comments.

The top rated shows in Slovenia are all produced by the content division **Media Pro Entertainment (MPE)** of the broadcaster and include the *X factor* (54.6% average share), the main news (45.3% average share) and the format *Minute to Win It* (35.2% average share).

### POP NON STOP

**Pop Non Stop** is a bouquet of six subscription channels launched in September 2011.

'Its rich schedule is available to viewers receiving a digital signal from the operators **Telemach** and **T2**. It is Slovenia's first and only subscription package', explains **Čakarmiš**.

The channels are **Pop Kino** that broadcasts 150 blockbuster films and independent film productions every month; **Pop Kino 2** that complements Kino with 120



Both news shows, *24Hours* on Pop TV and *World* on Kanal A, are the top rated programs on the local TV. The first one has the most visited web in Slovenia: 24ur.com

classic films per month as well as prestigious events such as *Champions League Football*.

**Pop Fani** offers a wide range of comedy series and top comedy films, which will appeal to all generations, and **Brio** is a female niche channel that shows more than 10 popular series every day, including pre-premiers of favourite local programs, film classics and local and international reality shows'.

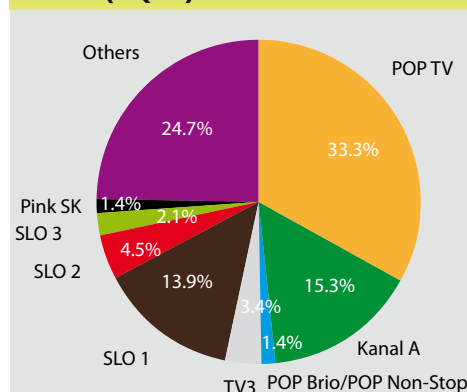
Lastly, **Pop Oto**, the first and only all day-translated children's TV channel in Slovenia. It includes international hits such as *Dora the Explorer*, *Angelina Ballerina* and *Beyblade Metal Fusion*; and **Pop Spot** for music lovers.

### TOP SHOWS OF POP TV

Program	Type	Average Share
X factor	Entertainment	54.6%
24Hours	News	45.3%
Minute to Win It	Entertainment	35.2%

Source: AGB Nielsen Media

### SLOVAKIA: AUDIENCE MARKET SHARE (1Q12)



Source: PMT, TNS

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# CME GROUP AND ITS BUSINESS MODEL: One Content, Multiple Distribution



On April 30<sup>th</sup>, CENTRAL EUROPEAN MEDIA ENTERPRISES (CME) announced that it had entered into a series of agreements with its major shareholders, TIME WARNER INC. (TW) and RONALD LAUDER, to reduce its indebtedness. PRENSARIO interviews ANTHONY CHHOY, EVP, Strategic Planning and Operations of the CME Group, who speaks about the moment of one of the main European media groups.

'Time Warner has agreed to provide us with a loan facility of up to US\$ 300 million to enable the group to fund recently announced tender offers to purchase some of its Senior Notes', explains Anthony Chhoy, EVP, Strategic Planning and Operations of CME Group.

And he adds: 'Additionally, they agreed to purchase at least 9.5 million of CME's Class A shares in order to increase its ownership in CME to 40% on a diluted basis and RSL Capital LLC (an affiliate of Mr. Lauder) agreed to purchase 2 million Class A shares. In connection with these subscriptions, all Class B shares will be converted to Class A shares.'

## BROADCAST & PROGRAMMING

'Our business model is *One Content, Multiple Distribution*. **Media Pro Entertainment** (MPE) is the core of this business model delivering ratings boosters to our broadcast channels and driving 3<sup>rd</sup> party revenue growth. Some of the blockbusters that we launched in 2012 included *Sunday League*, the second best performing local movie in the Czech Republic, *Got Talent* and *Las Fierbinti*



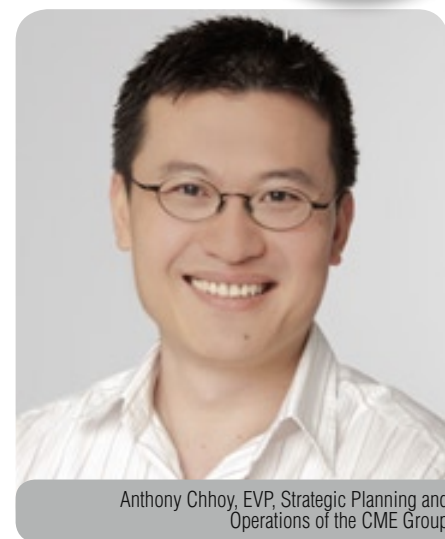
The prime time long-running Croatian series *Lara's Choice* is a success in the local market

in Romania, *The Farm* and *Only Love* in Slovakia, *Lara's Choice* in Croatia, *Home Wars* in Bulgaria and *X Factor* in Slovenia.

'In the Broadcast division, we are the undisputed audience leader in all our markets. We generate the majority of the advertising inventory in all our countries, which is a unique characteristic of our broadcast business model. We have an overall market share of 65%, ranging from 55% in Croatia to 80% in Slovenia. Our leadership in broadcasting provides the strong foundation for the future growth of our business into paid and subscription revenues', comments Chhoy.

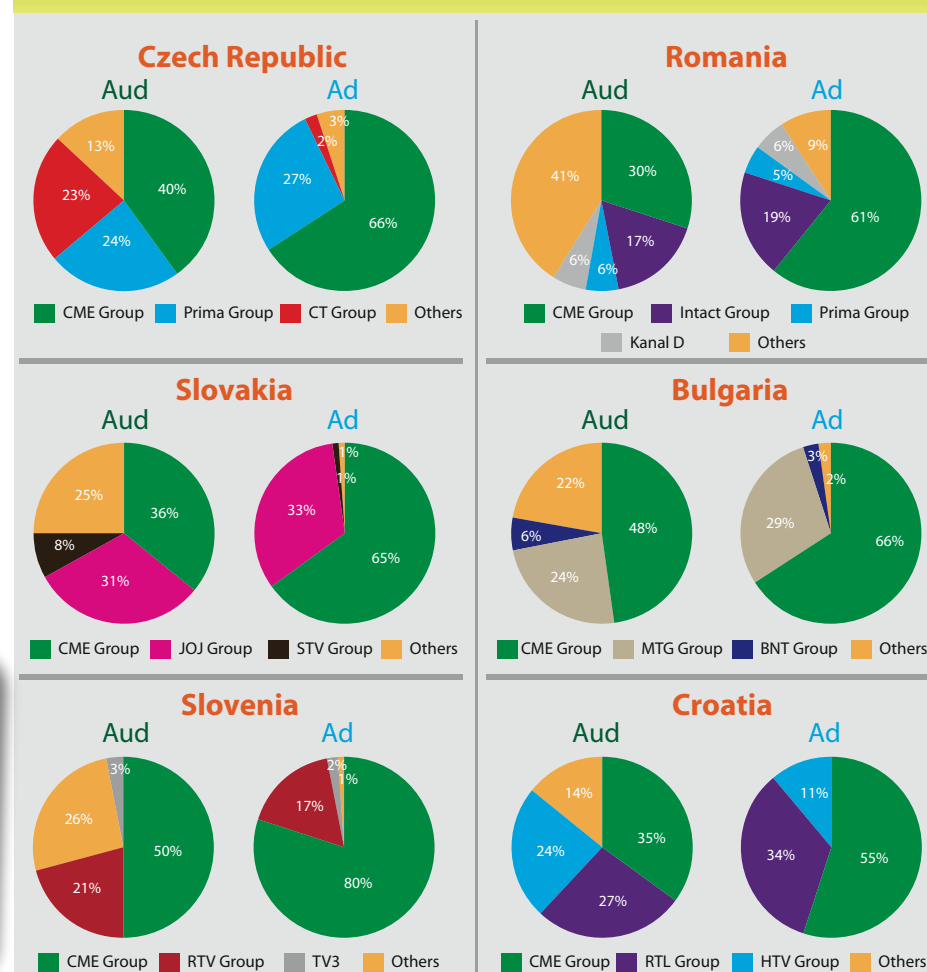
## NEW MEDIA

In the New Media division, CME Group



Anthony Chhoy, EVP, Strategic Planning and Operations of the CME Group

## AUDIENCE AND AD MARKET SHARE, PER MARKET (2011)



Sources: AGB Nielsen, Kantar Media; ATO; PMT/TNS SK; TNS-TV Plan/GARB

## WHAT ARE THE KEY CHARACTERISTICS OF OUR MARKETS? (2011)

	Czech Republic	Romania	Slovakia	Bulgaria	Slovenia	Croatia
Population (*)	10.5	20.6	5.4	7.4	2	4.4
GDP/Capita	USD 20,509	USD 8,387	USD 17,73	USD 7,175	USD 25,714	USD 14,754
TV Ad Market (*)	USD 408	USD 229	USD 146	USD 125	USD 89	USD 121

Source: CME Group/Investor Presentation

(\*) In MILLION

## THE PHENOMENON OF SUNDAY LEAGUE

The movie *Sunday League: The Last Match of Pepik Hnatek* was produced by CME's content division **MediaPro Pictures**, and its a spin off from a cult **TV Nova** hit series, which began in 2010.

Co-produced by **TV Nova**, the movie draws on the talents of the writers and director from the original series, also called *Sunday League*. The movie expands on the story of the Slavoj football club, beginning with the death of the football team's founder, Josef Hnatek, and going back in time to chart his struggle to form a minor league team from less than enthusiastic locals.

The dark comedy, which hit the cinemas on April 2<sup>nd</sup>, received 40% of its funding through product placement, sponsorship and rebates. It can now claim to have the second most attended box office opening weekend in Czech history, surpassed only by the film *Kajinec*, also co-produced by **TV Nova**. In its second week it showed no sign of diminishing in popularity, attracting 67,000 more viewers than the much-

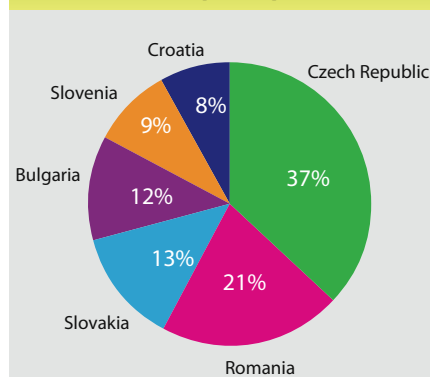


Co-produced by TV Nova, *Sunday League* was the second best performing local movie in the Czech Republic. After the cinemas will be released on DVD, TV Nova and Voyo hyped American film *Hunger Games*.

General Director of TV Nova, **Jan Andrusko**, explains: 'It became so iconic that we decided to make a movie. **Nova** has long supported Czech film industry through production, co-production or pre-buy of broadcast rights. In fact the top three most successful box office opening weekends in Czech cinema have all been co-produced by us. Starting this year we will also support the State Fund for the Development of Czech Cinematography, with around CZK 100 million a year (USD 3.9 million).'

Following its cinema appearance *Sunday League* will also be released on DVD, **TV Nova** and **Voyo**.

## BROADCAST REVENUES, BY GEOGRAPHY (2011)

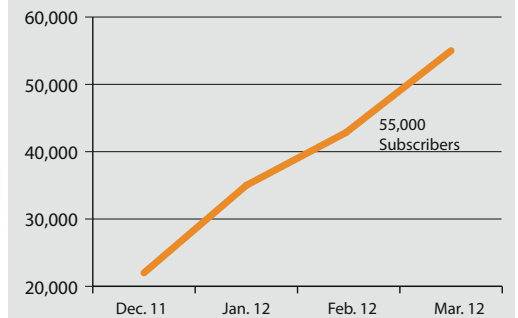


Source: CME Group/Investor Presentation

has 75 online products with over 12 million real users visiting their websites. And in the first quarter of 2012, it deployed **Voyo's** SVOD service in all the countries. 'In the first quarter of 2012, it attracted 55,000 subscribers and the business was profitable', remarks Chhoy.

'The growth of **Voyo** is driven by CME's content, especially our local fiction and reality and entertainment shows. In fact nine out of the ten most watched titles on Voyo in April were produced or commissioned by MPE. Overall, two thirds of the consumption by viewers is local productions including library and feature films.'

## VOYO SUBSCRIBERS' EVOLUTION (DEC. 2011-MARCH 12)



Source: CME Group/Investor Presentation

'One of the key differentiators of the service is that the exclusive local content is available on before it is shown on TV, sometimes as much as a week in advance', says the executive, and adds: 'Far from affecting broadcast viewing figures, we have found that it has actually helped raise awareness and create buzz.'

Voyo is currently available on PCs, tablets and Internet connected TV and is aiming to reach all TV sets of the more than 20 million households in our region. 'We will expand the platform by adding liner channels and additional products in transactional and subscription services', highlights.

## 2012: A CHALLENGING YEAR

'Since 2009, we learned to expect the unexpected and reshape our business to outperform the markets. With our new business model fully implemented and deleveraging actions taken, we have set **CME** on a firm path to growth for many years to come.'

'Our focus in broadcasting is to strengthen our audience and market leadership while maintaining cost discipline. We built a strong content engine with multiple distribution platforms in each country of operations and will further diversify revenues from advertising to paid and subscription windows.

'We will continue to grow revenues from third parties in **Media Pro Entertainment**. And finally, we aim to expand Voyo into the leading distribution digital platform in our region', completes Chhoy.





## TV3, LITHUANIA: 'WE NEVER UNDERESTIMATE OUR DEMANDING AND HIGHLY EDUCATED AUDIENCE'



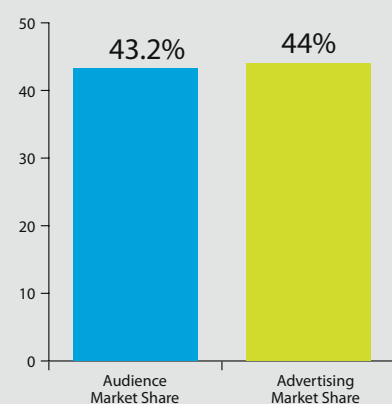
Laura Blazeviute, CEO, TV3 Lithuania

Owned by **Modern Times Group (MTG)**, **TV3 Lithuania** is a broad, family oriented, and entertainment broadcaster with a well-balanced gender distribution. Channel's average viewer is approximately 38 years old and it has been the leading Lithuanian channel in the 4+ demographic for a number of years now.

The group also manages **TV6**, launched in 2002: it was the sixth largest station in the 15-49 demographic in 2011. The channel primarily targets male viewers, and has an average viewer age of approximately 37 years.

**TV8** was released in October 2011, and is therefore still in the process of establishing itself in the market. It has performed well since its launch, and has grown strongly, currently report-

### MTG MEDIA HOUSE AUDIENCE AND AD MARKET SHARE (1Q12)



Source: TNS

ing nearly 1% commercial audience share and has a 47% penetration in Lithuania. It targets a female, 35+ demographic, and the average viewer is approximately 44 years old.

**Laura Blazeviute**, CEO, **TV3 Lithuania**, explains to **PRENSARIO**: 'MTG's Lithuanian media house had a combined commercial audience share of 43.2% in the 15-49 demographic in the first quarter of 2012, compared to 42.2% in the first quarter of 2011, and reported a 44.0% commercial audience share for the full year 2011. **TV3** broadcasts an overwhelming majority of the most popular shows in Lithuania.'

2011 saw the popularity of the *Eurobasket* championship, which was played in Lithuania. However, premium entertainment content continued to be popular, and one of the most popular shows was the daily local drama/sitcom *Women Lie Better*. 'Other popular formats include large-scale entertainment projects such as *Lithuania's Got Talent* or *Clash of the Choirs* (9.8 We also had a number of high rating movie titles during the year', says **Blazeviute**.

### PROGRAMMING STRATEGIES

At present, a majority of content that broadcast on **TV3** is acquired, but a significant proportion is commissioned and produced locally. 'Access prime and prime time is still dominated by own productions, as the majority of viewers still expect to watch local shows on the main channels in the evening. However, we have also managed to build several very strong acquisition slots, which are able to go head to head with rival channel's own productions.'

'This is late prime time on weekdays, where we show the cult US series like *Dr. House*, *Desperate Housewives* or *Prison Break*, and early prime time on Fridays, as well as some Saturdays and Sundays, where premium movie titles perform quite strongly. **TV3's** weekday daytime schedule is comprised of own production fast runs, animation, teenage live action series and Latin telenovelas. Weekend mornings are mostly dedicated to specialized AFPs, whilst weekend daytime is filled with family movies.'

On the acquired side, the channel buys movies, series, animation, and entertainment shows comprise a significant part of our schedule.



One of the most popular shows on TV3 is the daily local drama/sitcom *Women Lie Better*.



*Lithuania's Got Talent* is one of the top entertainment shows in Lithuania.

'**TV3** and **TV6** have built a strong position as the channels with the best-acquired content in the market. Volume deals with US studios play a pivotal role when forming our acquisition inventory, the most important of the studio deals are with **Fox**, **Disney** and **Paramount**'.

'In general, the schedule is entertaining, informative and provides the greatest variety on the market - every family member can find something to watch, and almost half of our own productions are talk-of-town projects and, as such, a "must-watch" affair for the whole family.'

'When scheduling or selecting the formats, we never underestimate our audience, which is very demanding, highly educated, and with a good taste for quality entertainment. Our goal is also to be the first to air innovative new programmes and formats. We experiment a lot, and therefore we sometimes make mistakes, but as the saying goes, *You cannot fear to fail if you want to succeed*'.

### NEW MEDIA

**TV3** was the first player in Lithuania to launch an **AVOD** service (<http://tv3play.lt>), which provides viewers with the opportunity to watch channel's own produced shows online: 'Viewers are also given opportunity to preview some of the shows before the premier on TV. In the future more and more acquired formats will be added. The service is advertising funded, and can therefore be therefore free', completes the executive.

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## NOVA BULGARIA: 'OUR STRATEGY HAS ALWAYS BEEN TO EXPERIMENT WITH DIFFERENT GENRES'



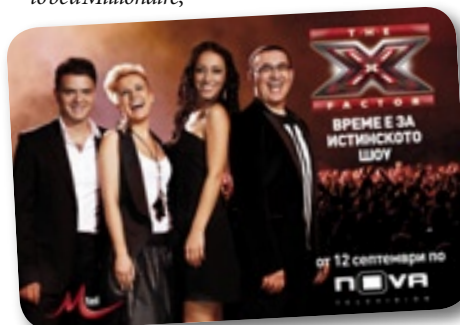
Svetlana Vassileva, CEO, Nova Television

**Nova Broadcasting Group (NBG)** owns and manages five TV channels —four free TV and one paid—, which are focused on different target audiences and therefore cover the full spectrum of viewer taste. **NBG** is the largest channel in the 18-49 demographic.

**MTG's** Bulgarian media house reported a combined commercial audience share of 29.1% in the 18-49 demographic in the first quarter of 2012, compared to a 28.3% share in the first quarter of 2011. The media house reported a 28.1% combined commercial audience share in 2011.

**Nova Television** is a national free-to-air channel, targeting a broad general audience. It is highly popular among 18-49 year olds and modern families, especially in the capital and other large cities. 'Its typical viewer is open minded and cosmopolitan, and looks for high quality entertainment and information,' explains to **PRENSARIO** **Svetlana Vassileva**, CEO.

'Our strategy has always been to experiment with different genres. We were the first to launch the reality show genre with *Big Brother*, the first in launching primetime game shows like *Who Wants to be a Millionaire*,



*X Factor*, one of the top brands of Nova

and the first to produce daily drama series *Forbidden Love*, she says and adds: 'We offer an alternative point of view with award winning investigations, news and public affairs programs, and top quality entertainment and reality shows like *X Factor*, *I love Bulgaria*, *Farmer wants a wife*, *Beat your host* and many others.'

'At present, more than half of our content is locally commissioned and produced for us, while the rest is acquired content. Our goal is to increase our level of own and locally produced content even further in the future. However, one should keep in mind that top quality acquired content will always be of key importance for any national channel as well.'

Local shows on **Nova** are *Nakafe* (a daily female talk show); *Direct Karbovski* (Saturday live talk show); *Bon Appetite* (daily cooking show); *Four eyes* (Sunday live talk show) and local comedy series *Condominium*, among others.

**Vassileva** explains that from Monday to Friday it broadcast 'stripped' programming in daytime, access to prime time and late prime time. 'Prime time is usually diverse every day of the week and offers different genres to suit a wide range of audience tastes. On weekends, we have long blocks of entertainment/talk show programs in the daytime; public affairs programs and light daytime movies. Prime time is high grossing studio features.'

'We are maintaining a very strong mix of US studios and independent US and European content in our stations. *CSI* and *House* have become an integral part of **Nova's** brand and we are continuing the tradition of airing the best US series, with titles such as *Hawaii Five-0* and *Castle*. We have volume deals with **NBCUniversal** and **Paramount**, with franchises like *The Fast and the Furious*, *The Mummy* and *The Bourne* trilogy.'

### THE OTHER CHANNELS

**KinoNova** is for movie lovers with core 30-49 year old urban audience profile. The channel is a great choice for the people with an urban and dynamic way of living, who demand high quality relaxing

content, movies and top series brands.

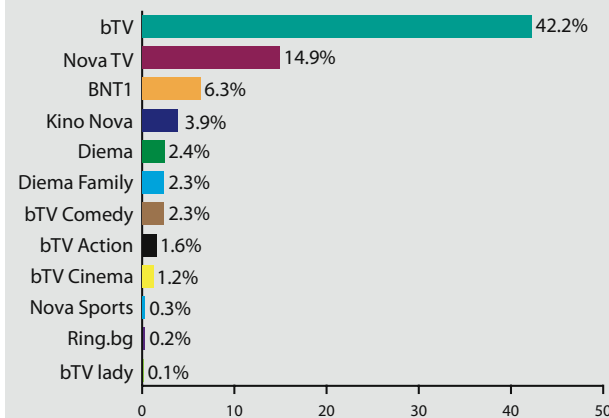
Targeting a 40-49 year old audience, **Diema Family** strives to be the best companion for women all over the country and its audience wants telenovelas, drama and romance content. 'Our acquisition strategy also includes buying the best the Turkish-produced TV series, on air on **Diema Family**: *Ezel*, *Gonulcelen* and many others are all showing excellent results, which is commonly known as the home of the best Turkish series,' remarks **Vassileva**.

**Diema** is a male focused channel targeting the 30-49 demographic, and offers a wide range of content that is appreciated by traditionally male audiences. The channel's offering includes a wide range of action movies, football and classic series: *Alarm for Cobra* and *Kommissar Rex*, which are delivering excellent results.

Lastly, **Nova Sport**, a top quality sports channel with premium football selection and studios, including Barclays Premier League and UEFA Champions League. It also offers a range of other sports like boxing, golf, athletics and speedway. The channel targets an 18-54 demographic. **NBG** is also the first one to launch an Internet TV platform: <http://play.novatv.bg>.

'Although Bulgaria is still lagging in terms of internet penetration and video content viewing on the internet, the trend is global: more and more content is being consumed online. Being the only high quality video content platform free to the end user, **Nova Play** is in a very good position to benefit from this transition,' completes **Vassileva**.

### BULGARIA: MARKET SHARE BY CHANNELS (1Q12)



Source: TNS

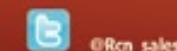


OUR GOAL IS MAKING THE BEST TELEVISION FOR ALL THE PEOPLE, BRINGING ENTERTAINMENT TO A BRAND NEW LEVEL: FUN, POSITIVE AND UNIVERSAL. THANKS TO THE QUALITY AND ORIGINALITY OF OUR PRODUCTIONS WE ALWAYS REACH BEYOND.

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# Ad Spending in Central & Eastern Europe: Growing Opportunities Along with Digital Consolidation



Central and Eastern European countries have registered heavy falls on its advertising pies during 2009 and 2010. But, a new *Global Report* from AEGIS MEDIA highlights that the figures of the region in 2011 remained stable in most of the markets and that they will get better in 2012. From 10 countries of the region analyzed, only two of them will fall, according to the company estimates: Hungary (-2%) and Slovak Republic (-5%).

At the same time, two markets will evidence the strongest growth: Russia, with 15.2%, and Turkey with 5%, two of the largest advertising markets of the region, reaching USD 11,437 million and USD 2,182 million, respectively (2012, estimated).

The smallest territories, Estonia and Latvia, will also finalize in good shape with 5.6% the first, and 5.5% the second. Other markets that will show increases are Lithuania with 2.6% and Czech Republic with 2.4%, as well as Poland with 1%, while Romania will remain stable.

This picture is much better than the one from 2009/2010. The same report from AEGIS noticed that from the 10 countries studied, 7 have decreased its ad pies during that period of time: Czech Republic (-10.7%), Estonia (-6.9%), Hungary (-4.8%), Latvia (-13.2%), Lithuania (-1.3%), Romania (-12.2%) and Slovak Republic (-6.7%).

Globally, the figures estimate that Europe will decrease its advertising pie in 1.5%, while US will do in 5% in 2012. But, Asia will grow in 14.7% and Russia in 9.4%, and Latin America will do in

10.7%. Another interesting thing is that "Digital Media" will become since 2012 the second most important medium after TV, reaching close to USD 3,200 million of ad spend (16.7% of the total).

## THE WINNER: RUSSIA

The Russian ad market grew by 28% in 1H 2011 compared to the same period in 2010. In 2H 2011 the growth rate slowed to +18%, however this is partly due to the tougher comparators: the end of 2010 showed very high growth. 2011 saw growth of 20% as previously forecast.

TV in Russia is still the primary medium taking more than 50% Share of Ad Spend by Medium (SOM). This is not expected to change significantly in the next 5-10 years. In Q3 2011 Internet achieved 17% SOM overtaking print media (16% SOM) to become the second most popular medium. In the coming years its share will continue to grow and may reach 20% by the end of 2012. In Q3 2011, Internet showed the highest growth rate (+57%) vs. Q3 2010. CSTV the second highest growing medium (+41%) but its share is still too small (c.1%).

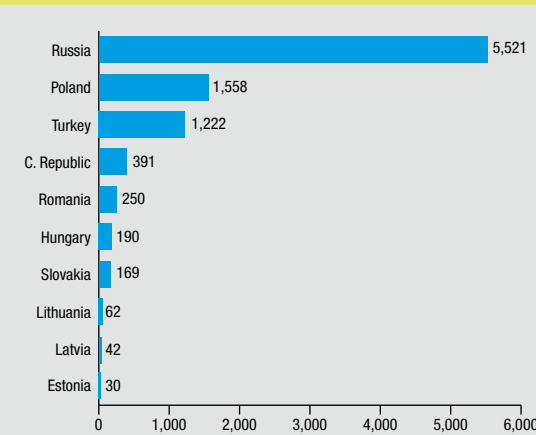
During the big sports events, like London 2012 Olympics and UEFA Euro Football Championship, the advertising activity tends to increase. Similar thing has happened with the presidential election in March.

The TV market increased by +19% in 2011, the growth rate is expected to slow however this year to +10%. The largest seller of TV advertising **Video International** will have to abandon some TV channels as its share exceeds the 35% allowed by law. The Russian president introduced a bill creating public TV with no advertising (with planned financing by commercial channels).

Year to year the younger demographic is switching from TV to greater online usage. From 2012 TV channels will change buying target audiences in favour of the older demographic. The total ban of beer advertising on TV from July 2012 will lead to c.4% of free inventory in prime time.

The rapid growth in Internet usage continues in Russia, leading to a constant increase in advertising investment. Results in Q3 2011 saw Internet spends overtake print and Out of Home (OOH) and become the second most popular

## CEE: TV AD SPEND, PER COUNTRY (2012, ESTIMATED). IN MILLION OF US DOLLARS



Source: AEGIS Media

medium after TV. For Q1-Q3 2011 the market saw growth of 57% with the full year growth rate at +42%.

Video advertising is one of the fastest growing segments with a 4% share of the total online market. Forecasts are that this will grow up to 15% in 3-5 years. In September 2011, Russia became the number one market for the number of active online users in Europe. Also Russian sites were amongst the top 30 most popular in Europe according to **Comscore** with **Mail.ru** at number 10.

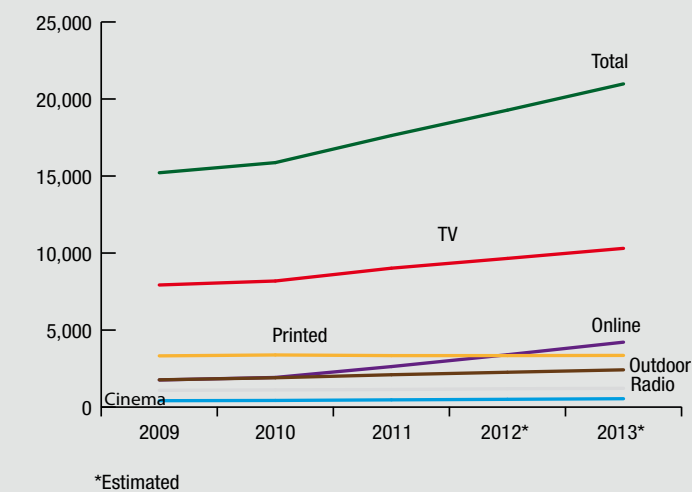
Social media is very popular, too: Russia is the #1 market worldwide in terms of time spent on social network sites (9.8 hours a month). In October 2011 the Russian audience on **Facebook** increased by 16%. This year some sites have started selling advertising in terms of GRPs like for TV.

## TURKEY AND POLAND

Poland is the second largest advertising market in CEE, and Turkey has become the third. The Polish advertising market decreased by 1% in Poland in 2011, mainly attributed to the last quarter of 2011 with economic uncertainty in Greece and other European countries. An increase of 1% for the total 2012 year is expected.

Because of the negative European economic climate, TV lost huge budgets in the last quarter and recorded 0.5% decrease. Even it is still the strongest medium in terms of reach, and costs per point, it's observed a slight decrease in time spent as Internet VOD services grow.

## CEE: ADVERTISING EXPENDITURE, PER MEDIA (2009 - 2013, ESTIMATED)



Source: AEGIS Media

The conversion to digital broadcasting next year will offer a bigger choice to consumers and will reduce the shares of the biggest channels and put cable/satellite channels in a stronger position. This may result in lower TV costs with these channels having a lower cost per point than the top four TV channels.

Digital media is also the fastest growing—achieving a 25% of increase—and continues to attract increasing numbers of audience and advertisers. The fastest growing trend is online video. There are more players and an increasing VOD offer. **YouTube** is still the biggest but the two biggest private TV networks are also investing.

2011 was a challenging year for the Turkish advertising market. After a strong recovery in 2010 with +27% USD 1.9 billion the market faced its first challenge in 1H 2011 in the form of new regulations restricting TV and radio ad space resulting in high inflation. Full year 2011 closed +9%, USD 2.07 billion.

Digital transition continues with emerging Social Media, Search and Mobile. It is expected that Digital will reach a certain plateau and there will be a new balance in terms of share of spend. TV and Digital will be the two most dynamic media types followed by Outdoor.

Digital will become the third medium and TV will keep growing, says AEGIS report. Major regulations were in place by February 2011 and started to be effective from April 2011. The key provisions on advertising & media are: 1) dura-

tion: 15% max of daily transmission time, 20% max within a given one-hour period; 2) product placements, political ads and OTC ads are allowed. OTC part still needs additional by-law; 3) the law allows foreign investors to own at most 50% of a Turkish media company. A media group's total income cannot exceed 30% of total market ad spend.

Which are the main effects of Law? a) High media inflation 40-45%; b) Sles houses pushed product placements and scenario

ing data for almost 20 years. The sector now has a measurement vacuum until May 2012 when TNS releases new data. For 2012, positive growth +5% is expected even if the pace will be slower than previous years.

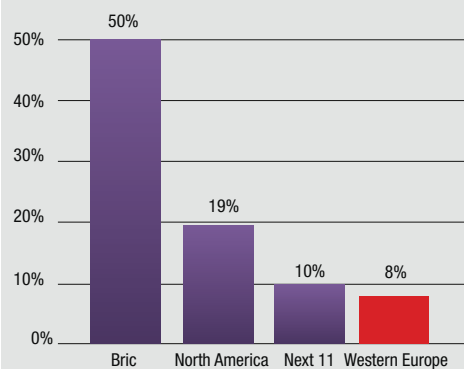
Turkey is becoming a hotspot for regional and global investments. **Naspers** acquires 70% of **Markafoni** shares. **Amazon** has acquired a minority stake in **Ciceksepeti.com**. **Perkins Caufield & Byers** invested USD 26 million into **Trendyol.com**. Germany based **Ballroom International Network** acquired **Reklamz**, which offers digital advertising and services in Turkey.

**Multiscreen media** consumption is becoming a norm. In addition, Internet TV (i.e. **Tivibu**) platforms will get bigger. Mobile media is growing exponentially (**Mobile** search, **mcommerce** is gaining momentum), and Social continues to grow but it is not only **Facebook & Twitter** anymore.

Rise of new start ups (**pinterest**, **google+**) require brands to invest in all elements of social media to gain first mover advantage and adapt social features to their campaigns. Russian Search Engine leader **Yandex** is in Turkey.

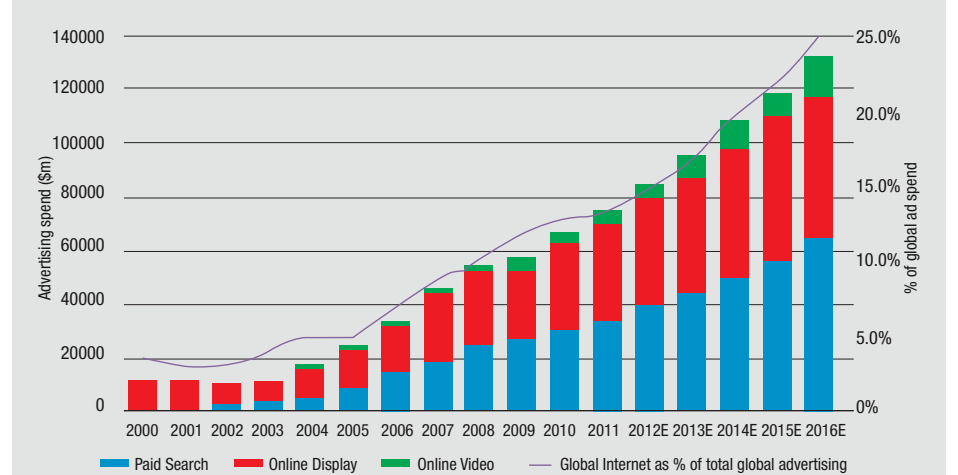
The **Internet Audit Bureau** (IAB) of Turkey is planning to start sharing figures of non measured sites like Google, **Facebook**, etc. with a software platform at the end of Q1. Also IAB is working on establishing online video and mobile measurement.

## KEY CONTRIBUTORS TO ADVERTISING MARKET GROWTH - EMERGING MARKET WILL CONTINUE TO DRIVE GROWTH (2011-2015F).



Source: AEGIS Media

## GLOBAL INTERNET & MOBILE ADVERTISING SPEND (2000-2016E).



Source: AEGIS Media



## HBO CEE: NEW SERVICES TO EXPAND ACROSS THE REGION

With headquarters in Budapest, Hungary, **HBO Europe**, owned by **HBO, Inc. (USA)**, currently provides basic and premium channels to 15 countries: Hungary, the Czech Republic, Slovakia, Poland, Romania, the Netherlands, Bulgaria, Moldova, Slovenia, Croatia, Serbia, Kosovo, Montenegro, Macedonia and Bosnia and Herzegovina.

It offers five high quality movie channels, **HBO**, **HBO2**, **HBO Comedy**, **Cinemax** and **Cinemax2** and six HD channels, **HBO HD**, **HBO2 HD**, **HBO3 HD**, **HBO Comedy HD**, **Cinemax HD** and **Cinemax2 HD**, as well as the subscription video on demand service **HBO On Demand**, and the broadband SVOD service, **HBO Go**.

In the Netherlands, **HBO Europe** provides **HBO HD** and SD channels, **HBO On Demand** and **HBO Go** through **HBO Nederland**, a joint venture between **HBO** and **Ziggo BV**.

'**HBO** and **Cinemax** and their multiplexes



Burning Bush, directed by the internationally acclaimed Agnieszka Holland



The World of Ion Barladeanu, and award-winning documentary produced in Romania

and value-added services bring the biggest blockbusters, award winning original productions, series, exclusive events, evergreen movies, film festival hits, international and European movies into viewers' homes', explains to **PRENSARIO** **Gerry Buckland**, PR manager, **HBO Central & Eastern Europe**.

The executive remarks: 'We continually look for new areas of business. We have already launched **HBO Go** in ten territories, which is accessible on home computers, connected TVs and most portable devices. We expect to cover our region completely by the end of the year. As premium PayTV providers, our SVOD service is complementary to the standard linear subscriptions'.

### PRODUCING IN CEE

He continues: 'Our top shows are our own produced series that are popular round the world: from *Game of Thrones*, *Boardwalk Empire* and *True Blood* to *The Sopranos* and *Sex and the City*, together with the best acquired series, including the **HBO Latin America** series *Capadocia*, produced in Mexico'.

'We generate original content, both drama series and up to 20 documentaries a year in local languages across the region in Hungary, Romania, Poland and the Czech Republic. These productions win many festival awards: in 2010 **HBO Romania** won an International Emmy for the documentary *The World of Ion Barladeanu*'.

'We produce drama series in local languages from acquired formats including the successful *In Treatment* series—a long-running format which was also produced by **HBO** in the USA—, which Romanian adaptation was *In Deriva*. We also look for



In Deriva, the Romanian version of the Israeli format In Treatment

material created by up and coming writers from the region'.

**HBO Europe** has just completed production of the three-part drama *Burning Bush* in Prague, directed by the internationally acclaimed **Agnieszka Holland**. It tells the story of a young Czech student who burned himself to death as an act of freedom in Czechoslovakia in 1968 and it will be due for transmission early 2013.

*Man@war* is a documentary about people who play virtual WW2 air battles in real time; *In Deriva* is the Romanian version of *In Treatment*, which just finished shooting its second series; *Shall we Kiss* is an **HBO Hungary** comedy drama serial based on an Israeli format. On the acquired side, **HBO Europe** aims to bring the 'most popular and successful' movies and series across all genres acquiring a limited number of carefully selected series, which 'complement' HBO original production series, says **Buckland**. And completes: 'For film acquisitions, we have deals in place with all the major content providers, we also acquire selected European and world cinema movies, primarily for the popular **Cinemax** channel'.



Man@war is a documentary about people who play virtual WW2 air battles in real time



TV SERIES / First season Completed 13x45min  
**One for All and All for Life**

**The Red Band Society**

WINNER Best Screenwriter  
NOMINATED Best Mini-Series  
SPECIAL COMMENDATION Best Production of the Year

SEOUL INTERNATIONAL DRAMA AWARDS  
PRIZE OF THE JURY 2011

Executive Director TWO JORRI NOURE Executive Producer TWO CONNA OHLA  
Executive Producers SANDRA FERNÁNDEZ JULIO FERNÁNDEZ CARLOS FERNÁNDEZ  
Executive Producer PRO FRIEDAS Associate Producers ALBERT ESPINOSA ELISA SALINAS  
Original Idea and Script ALBERT ESPINOSA Director PRO FRIEDAS



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The first season (13x45') is completed.  
Principal Photography Second Season Begins on: Mid June 2012

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Executives attending:

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## ENDEMOL CEE: 'OUR TV BRANDS DRIVE GAMERS AND VIEWERS TO VARIOUS PLATFORMS'

**Marina Williams**, CEO of Central and Eastern Europe, **Endemol**, describes to PRENSARIO the good moment of one of the largest production companies in that specific sub-region of Europe.

'We are targeting over 120 clients in CEE, predominantly free-to-air national TV stations. However, we are pleased that in some markets, and Poland in particular, thematic cable and satellite channels started to open up their budgets for local productions. This included both local players as well as international brands like **MTV**, **Discovery**, **Fox**, **National Geographic**, etc. Our catalogue of over 3,000 formats allows us to tailor our offer to both major and small productions'.

'Our biggest successes in the region are still *Big Brother*, which is still running in

Bulgaria and the rest of Balkan region, *All You Need is Love*. *The Money Drop* has turned out to be the real hit, with over 300 episodes produced in 2011 across CEE. This included Russia, Ukraine, Kazakhstan, Serbia, Bulgaria, Estonia, Latvia, Lithuania, Turkey, Greece, etc.'.

Among the smaller shows, the reality programs like *Snog Marry Avoid*, *Hotter than my Daughter*, *Conveyor Belt of Love* ran also across several territories with 'great ratings', according to the executive.

She continues: 'We are also happy to bring our new music entertainment show *Your Face Sounds Familiar* from Spain into our territories. It has been sold in Ukraine and was very successful on **Antenna TV** station in Romania this spring. It is also currently in production in Turkey for **Star TV** (recently sold by **Kanal D**)'.

'We have also expanded into scripted and scripted reality in major markets of operation like Russia and Poland. We had the first commissioning last year from **Canal Plus** in Poland for crime series *Penoza*, originally developed by **Endemol Netherlands** team, this strong scripted format was also picked up by **ABC** in the States'.

In Russia, **Endemol's** team is developing 'brilliant' local scripts and working across all broadcast networks in various genres, soap, drama, crime, TV movies, scripted reality. 'Based on proved track record, we are now offering *Caramel* romantic comedy (40 episodes) to international territories as well as scripted reality *Real Life* (105 episodes). We are also seriously looking into Turkish scripted market to define our development strategy there', remarks **Williams**.

### NEW DEVELOPMENTS: DIGITAL AND GAMES

Company's big reality shows, like *Big Brother*, have great extension in mobile and web and generate additional revenues to the



Marina Williams- CEO of Central and Eastern Europe, Endemol

core business, TV. 'We also maximize the value of social networking sites to bring more viewers and votes to our shows.'

One of our developing areas is games and we are especially active in CEE in Turkey which has a huge online community: we have recently developed *DOND* flash game and are commercializing this opportunity together with **Google**'.

'Our well-known TV Brands clearly drive gamers and viewers to various new media platforms and this is a growing opportunity which we want to capture in full. Among the new shows we are bringing to Natpe Budapes are game shows developed by creative talent in UK and France: *The Bank Job* and *Code* and fantastic music talent show *Number 1* from our talented creative Spanish team', completes **Williams**.



Endemol is pushing internationally the scripted reality *Real Life*



*Penoza* is a crime series developed by Endemol Netherlands for Canal Plus in Poland. The scripted format was also picked up by ABC in USA



The Romanian adaptation of Spanish music show *Your Face Sounds Familiar* on Antenna TV. It was also sold to Ukraine

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# ACT: SPONSORSHIPS, DIGITAL DEVELOPMENTS AND SELLING CONTENT ABROAD TO GO THROUGH THE CRISIS



Founded in 1989 and with its headquarters in Brussels, Belgium, the Association of Commercial Televisions in Europe (ACT) is a key organization to understand better how the European private stations are sailing the financial crisis. PRENSARIO speaks with Ross Biggam, director general of the entity, who describes the channels strategies and explains which the main challenges are for the future with the expansion of the digital business.

In the recent study *Audiovisual Content and Online Growth* made by e-Media Institute for the Association of Commercial Televisions in Europe (ACT), Philippe Delusinne, president, and CEO of RTL Belgium, explains: 'The European TV market is today a €4 billion sector. The report concluded that biggest commercial groups have invested a total €5.1 billion in program content during 2010'.

'When the contributions of public broadcasters and smaller operator are also taken into account, we concluded that overall around 40% of broadcasters revenues are reinvested in the next season's schedule. The media business will continue to invest and to innovate so as to ensure that the strengths of our sector are also reflected in the online world', completes.

Gathering 33 broadcasters from 37 countries, the ACT has been working in the recent months in many key issues. 'We are seeking to discuss this report with the EU policymakers

ers. This study is part of our response to a number of very pertinent questions posed by the European Commission, in its *Green Paper* on Audiovisual Content, in the Digital Agenda, and in other policy documents', adds Delusinne.

'Television has never been stronger, with the average European citizen watching linear TV for 228 minutes per day. Our member companies aim to build on their existing strengths to tap into new revenue streams and better serve consumer demand. If all players – broadcasters, producers, distributors and regulators – can rise to the challenge of the new era, then we are confident we can deliver a strong presence for European content online', explains Ross Biggam, director general of ACT.

And he adds: 'But there are also other things like the future European regulation about the TV industry, for example product placement and the restrictions on advertising. The European Union regulators are working on new rules and we will need to make clear our own views when the EU is revising them'.

The report arrived to three main conclusions: 'First, the European commercial broadcasters are key contributors in terms of growth, jobs, innovation and the creation of audiovisual content. Second, demand for online video has surged over the past few years and commercial broadcasters are investing in a "second cycle" of digitalization, developing a wide range of Internet based non linear services'.

'Third, online cross border distribution may represent an opportunity for some broadcasters to reach wider audiences beyond their domestic remit, and current copyright licensing frameworks are able to encourage this development in a single market, rather than presenting obstacles to online cross border



Philippe Delusinne, president of ACT and CEO of RTL Belgium

'THE EUROPEAN TV MARKET IS TODAY A €4 BILLION SECTOR. THE REPORT CONCLUDED THAT BIGGEST COMMERCIAL GROUPS HAVE INVESTED A TOTAL €5.1 BILLION IN PROGRAM CONTENT DURING 2010'.

distribution', completes the report.

## HOW CRISIS IMPACTS THE MARKET?

The most recent news about some European economies, especially in Southern and Central and Eastern Europe, have shown that the crisis has not stopped; on the contrary is getting worse in some countries. Even Biggam recognizes that the TV situation is 'less optimistic at present' in Italy and Spain, he says that there are other territories showing good health, usually following the macro-economic health of the country in question.

'Scandinavia and some Baltic countries, like Estonia, are showing growth, while the UK and Germany keep strong. In the UK, one of the reasons is the Olympic Games, starting in July', explains.

'To go through the crisis and the ad pies falls, broadcasters are betting on more sponsorships and product placement, apart from strengthening their investments on digital developments, like Connected TV. Also, the channels are selling their contents



Ross Biggam, director general ACT

'SCANDINAVIA, GERMANY AND SOME BALTIC COUNTRIES, LIKE ESTONIA, ARE GROWING, WHILE THE UK IS ALSO STRONG. IN THE UK, ONE OF THE MAIN REASONS IS THE OLYMPIC GAMES, STARTING IN JULY'.

abroad in order to find new and fresh ways of resources'.

## PROGRAMMING

According to Biggam, the main content trends in Europe during the last years were the news programs, reaching growing ratings because they reflected the several faces of the crisis and the election processes all across the continent.

'The predictions of a few years ago that broadcasters would move en masse from drama to reality shows, talent, talk-shows, etc. as are they are cheaper to produce have not really been borne out. By contrast, there are new sources of drama, with a current strong run of Scandinavian productions, specifically with Danish and Swedish detective series travelling well and filling a niche market across Europe', remarks Biggam.

## DIGITAL SWITCHOVER 2012

There is a growing number of DTT channels in the region, after several analogue switch off. '23 countries have completed digi-



talization. Delays are expected in Bulgaria, Poland, Romania and possibly also Hungary. There were 375 new DTT channels launched in 2011', highlights the executive.

As we enter 2012, the EU deadline for switch-off of digital terrestrial television is fast approaching. In 2011, a further three EU member states completed the transition: Cyprus, France and Malta, bringing the EU total to 15. A further eight EU countries are expected to complete ASO (the United Kingdom, Greece, Ireland, Italy, Lithuania, Portugal, the Czech Republic and Slovakia) in 2012. Switch-off has also taken place in non-EU countries such as Switzerland, Iceland, Croatia and Norway.

Digital terrestrial television services are quite advanced in several countries, with more than 60% of homes being DTT only in Italy and Spain at the end of 2011. In France and the United Kingdom, 62% and 74% of homes respectively, were using DTT in their homes (on primary or secondary sets).

At the end of 2011, 31 pay-TV platforms were available in 19 European countries. At the same time some planned Pay-DTT services in Spain and Portugal have not materialized, services have ceased elsewhere (Italy) and in several smaller countries the development of a financially successful model for pay DTT is proving difficult.

Recent data from the MAVISE TV database,

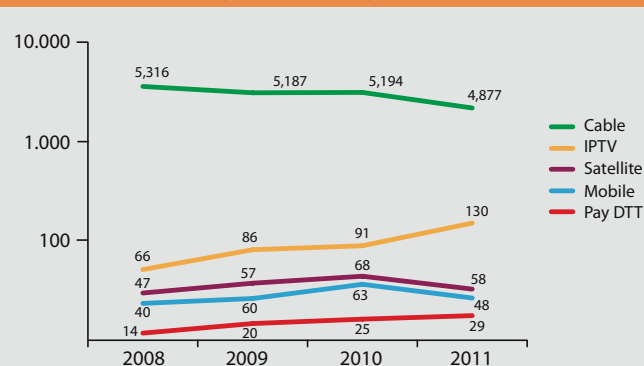
developed by the European Audiovisual Observatory (EAO) for the DG Communication of the European Commission, shows the current status of the European television market. 'At the beginning of 2012, there were 7.400 TV channels established in the European Union. A further 1000 channels are available in these countries but are broadcasting from third countries (including a large number of satellite channels from outside of Europe)', states the report.

Regional and local channels represent about 40% of the total channels available. Among the channels available in the EU and candidates countries, cinema (and fiction) and sport channels represent the two most predominant channel genres (when one excludes local and regional channels), with 644 and 575 channels, respectively.

In 2011 the growth of HD channels had a 'major impact' on the overall growth of the market. According to MAVISE, at the end of the year there were approximately 612 HD channels available in Europe, an increase from 414 at the end of 2010 (and 274 at the end of 2009). This figure includes both HD specific channels and simulcasts of SD channels. Sport remains the most important genre in HD television (approximately 20% of HD channels), followed by film and generalist channels (each around 15% of the total).

The distribution of HD television chan

## NUMBER OF TV DISTRIBUTION PLATFORMS IN THE EUROPEAN UNION (2008-2011)



Source: MAVISE/European Audiovisual Observatory



## ACT: SPONSORSHIPS, DIGITAL DEVELOPMENTS AND SELLING CONTENT ABROAD TO GO THROUGH THE CRISIS



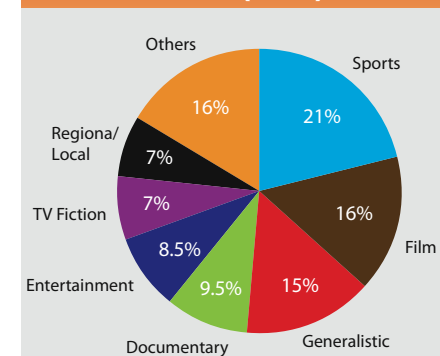
nels also continues to grow. In 2011 satellite packages offered more than 50 HD channels in Italy, Poland, the United Kingdom and Ireland, and more than 30 in Germany, France and the Netherlands. The strongest HD offers on cable are available in Portugal (40+), the Netherlands and Germany (30+). At the end of 2011, more than 30 HD channels were made available in IPTV packages in Switzerland, Poland, Portugal and the Netherlands. HD channels are now available on DTT networks in eighteen countries (as compared to three networks at the end of 2009).

"The growth of distribution platforms has also remained stable. The number of IPTV platforms and Pay DTT services continues to increase, while satellite packages and cable offers have declined since 2010. This is partly due to consolidation in these sectors', finalizes the report.

### FUTURE

The broadcasters are thinking in a *new business models* in the television industry. "The multiplication of digital platforms operating in Europe has changed dramatically the media landscape and the channels are following that trend launching its own systems of Connected TV, Mobile services, IPTV and DTT channels. The player map is growing and growing, but the TV is stronger than ever', completes **Biggam**.

### HD CHANNELS AVAILABLE IN EUROPE BY GENRE (2011)



Source: MAVISE/European Audiovisual Observatory

## FACTS & FIGURES OF THE EUROPEAN TV MARKET

### ECONOMIC VALUE

- € 84 million is worth the European TV market (2011). Up to 40% of the revenues are reinvested in content
- € 12 billion is worth the sector in Italy. An investment of € 800 million is drawn to the production of TV drama and other audiovisual works, with an additional € 1.5 billion earmarked for in-house production (IsiCult, 2011).
- In the UK, investment in content production amounts to €4 billion (Communication Chamber, 2011)
- In France, Canal+ and CANALSAT invest more than € 2 billion in content, which represents 50% of their pay TV turnover

### VIEWING TIME

- TV remains phenomenally popular, with average daily viewing in Europe increasing to 228 minutes per person in 2010 (Eurodata TV/RTL Group).
- More than 97% of European households (310 million) have a TV. Almost 50% of them have an HD set.

### CONTENT & FORMATS

- Live TV and sport continues to dominate the most viewed programs
- The UK sports more formats than any other nation (44% of the total). Total international revenues generated by independent producers alone grew by 34% last year to €50 million. Selling British formats abroad accounts for a quarter of the sector's total revenue.
- In 2010, the most popular talent show was *Got Talent* (FremantleMedia); it entered an impressive eleven new markets. The *X Factor* achieved an average audience of 14.1 million (up from 12.9 million in 2009) and has since gone on to travel to a further five markets.

### ADVERTISING & PRODUCT PLACEMENT

- In 2010, TV ad revenues grew by 8% in Western Europe, outperforming economic growth and the overall advertising market (Television 2011, International Key Factors)
- In most markets, product placement will contribute up to 1% of the total advertising revenues by 2015
- Germany has the biggest potential for product placement until 2015 in terms of absolute incremental revenue: €50 million (ScreenDigest, 2011)

### DIGITAL & NEW MEDIA

- In France, 44% of the people owning tablets stream TV programs in real-time, utilize catch-up services or access video-sharing platforms. 28% use VOD on Internet
- Catch-up TV is increasingly popular. 55% of the internet users watch TV with this service, with 81% of catch-up users stating that they are watching as much TV as previously
- In Q1, 35% of individuals claimed to have used the internet to watch catch-up TV services (OfCom, 2011)
- The transition to the digital era has reached its final state with 72% of EU households and 55% of Europeans watching digital TV
- In 2011, a further 5 EU countries will complete the transition, bringing the total to 16 EU; 20 European (European Audiovisual Observatory).
- There are now Pay DTT services in 14 EU countries (19 European)
- By the end of 2010, in total, more than 9,800 TV channels had been established in Europe
- HD channels are available on DTT platforms in 13 EU countries

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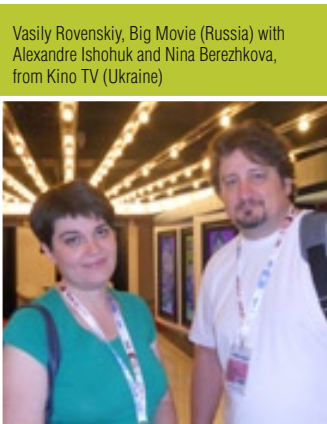
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## 2012 MORE ATTENDING BUYERS & PRODUCERS



Sony Russia: Jeff Lerner, SVP, development & current programs, international production, and Sahana Kamath, director, scripted development & production.



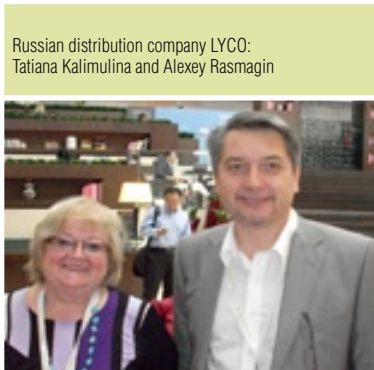
Vasily Rovenskiy, Big Movie (Russia) with Alexandre Ishohuk and Nina Berezkhova, from Kino TV (Ukraine)



AVK Production, Russia: Olga Volodina, Elena Kotunova, Yeva Darkbinyan



Intra Communications, Russia: Igor Fedorov, director of Acquisitions, and Antonina Udalova, Senior acquisitions executive



Russian distribution company LYCO: Tatiana Kalimulina and Alexey Rasmagin



Filip Bobinski, CEO, Dramedy Productions, Czech Republic



Nova, Czech Republic: Alexandra Bezpalcova, acquisitions manager, and Petra Bohuslavova, acquisitions executive



Antonella Ungureanu, executive director of Nova Cinema Czech Republic



Ceska Televize: Lenka Slovackova and Jitka Bodlakova, import executives



Dita Krivska, acquisitions manager, HBO Czech Republic and Slovakia, and Martin Havlicek, acquisitions and new projects manager, HBO Central Europe



TV2 Hungary: Daniel Zamuczki and Klara Paszternak, program manager



Okros Gergerly, producer, TV2 (Hungary), Kristof Dombovary, production director, and Silviu Epure, development ad acquisitions manager, Paprika Latino (Romania)



Peter Marshall, CEO Paprika Latino, and Erika Tothová, head of acquisitions at TV Joj (Slovakia)



Hungary: Gabor Gisher, channel manager of Cool TV, Prizma TV, Sorozat+, and DoQ (IKO TV)



Havas Ágnes, general manager of the Hungarian Film Fund



The new MTVA Hungary acquisition/programming team: Lorand Poich, program director, Andrea Zaras, head of acquisitions, and Bianca Balaz, head of film department

The international department of MTVA Hungary: Lidia Marton, director of international relations, surrounded by Katalin Szigentuari, Simon Barna Gábor, Adam Cselleng, Szilvia Puspok and Ilidkó Komáromi



MTVA, Hungary: Mártha Horváth and Klara Barabás, program managers, with Zsuzsanna Kálmista, director content sales and acquisitions



Televizija Vijesti, Montenegro: Boban Savic, production manager, and Aleksandra Radoja, production consultant



Albanian buyers: Mirela Oktrova, director of TV of the Albanian Public Television (TVSH/RTSH), and Edmond Topi, executive director from distribution company MMS Nositi



Albania: Fatos Risto, content and scheduling director of the an online platform Tring



Lubomir Nemec, head of controlling and finance of Prorom Media-Trade, a distribution company that buys for Romania



Viacom Hungary/Poland: Gergely Litkai, Head of Channel, Central Comedy (Hungary), with Daniel Reszka and Bartolomiej Major, MTV Networks (Poland)

## 2012 MORE ATTENDING BUYERS & PRODUCERS



ASTRO, new Polish Pay TV channel: Karolina Szymanska, CEO, and Ryszard Krajewski, management Board Proxy



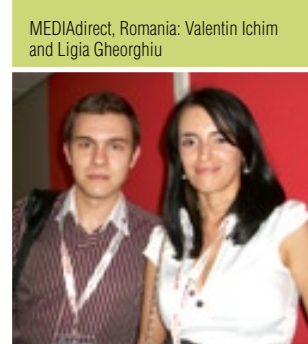
Pawel Jordan, managing director, TVN Turbo, Poland



Poland: Magdalena Garbacz, from the production company ATM Grupa, and Dorota Stec, from TV Puls. ATM would handle a DTT channel next year



Maciej Taras, Pol-Media, Poland (home video player); Petr Vasenda, managing director, Vapet Production, Czech Republic



MEDIAdirect, Romania: Valentin Ichim and Ligia Gheorghiu



Sorina Big, acquisitions director, Pro TV (Romania), and Cristina Cepi, head of acquisitions, CME Internet Division, Czech Republic



Johana Salmela, acquisitions YLE Finlandia, Melissa Pillow, sales Telemundo Europe, Ruxandra Ion, MediaPro Pictures, and Ines Turturica, acquisitions ACASA TV, both from Romania



Mari Koivuhovi, acquisition executive, YLE TV, Finland



Ricus Jansegers, SVP, International programming, ProSiebenSat.1, Germany for Central & Eastern Europe



TVR Romania: Mioara Dumitrescu, acquisitions co-ordinator, Cristian Tabara, film department channel and Luminita Boerescu, acquisitions



Viasat UK: Natasha Allen, Anita Kiss, Victoria Watts, acquisitions managers, and Violeta Galinyte, acquisitions executive



Chello Central Europe: Sarlotta Muranty, acquisitions assistant, Eniko Harsanyi, head of business administrations,



Mariana Fernandez and Julieta Gonzalez, Arter Argentina, with Dániel Spollár, Head of film portfolio, and Marta Kertész, channel manager, from Chello Central Europe

Romanian cableoperator AKTA: Ciprian and Gheorge Minea



Malyatko TV, a kids channel from Ukraine: Khristyna Kmetyk, deputy director, and Volodymyr Kmetk, managing director



Ukraine: Martynov Yuri, from music TV channel AITI TV and producer Lykhovyl Svitlana

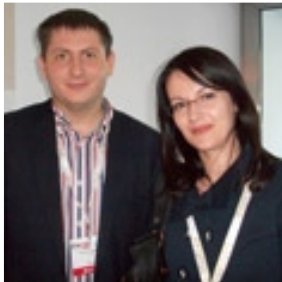


The acquisitions team of Kanal 2, Estonia: Jaanus Noormets, Kai Gahler, Nele Paves, Liis Luuri

Shant TV Armenia: Laert Soghoian, executive director, and Arthur Yezekyan, president



Hrach Keshishyan, producer director, and Hrachuhi Utrazyan, manager of international relations, from ATV Armenia, with Manush Melkumyan, head of marketing of UCOM, a television service provider also from Armenia



Star Net, IPTV player from Moldova: Alexandru and Dina Machedon



Moldavian TV channel: Valeriu Sova, Diana Leahu and Serge Zanoaga



## 2012 MORE ATTENDING BUYERS & PRODUCERS



Emrah Kerim Turna, Ezgi Ural, Ozlem Ozsumbul and Amac Us, acquisitions and sales, Kanal D Turkey (borders) with Dragana Kos, program acquisitions manager, and Kaspar Plueger, program director, both from RTL Croatia

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



Catherine Stryker and Izzet Pinto, CEO, both from The Global Agency Turkey; with Nigol Bezjian, Think+, Lebanon



Turkish Radio & Television: Meltem Tumturk Akyol and Hande Turan Asknin



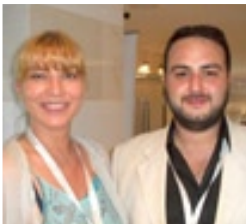
Mariana Dimitrova, manager of global acquisitions Fox International Channels, and Mariana Grozdeva, acquisitions coordinator, Fox Bulgaria/Balcans



Blizoo, number 1 Triple Play operator in Bulgaria: Zornitza Grozdanova and Sofia Shireva, programming managers



Lina Waked, RCN Colombia and Vassela Dimitrova, Senior Acquisitions manager from bTV Media Group, Bulgaria



Old School TV, production company from Bulgaria: Evelina Kirilova, consultant international clients, and Hristo Hadjitanev, head of research and development



Elisabeth Costa, EVP, Lakeshore, with TV7 Bulgaria: Evelina Koleva, executive director, Nadia Kostova, head of acquisitions

DI&MA Vision, distribution company from Serbia: Antonina and Mirko Vojinovic



Radio Television Vojvodina (Serbia): Sonja Kokotovic, project manager, and Predrag Novkovic, Program Editor in Chief



Dexin Film, Serbia: Dana Petrovic and Ljupka Trifunovic



MZE, Georgian broadcaster: Anri Getsadze, head of commercial department, and Zaza Tananashvili, general director

A1 Televizija, Macedonia: Tatjana Tabakovska, program coordinator, Zoran Siljanoski, marketing manager, and Elena Stojanoska, acquisitions executive



BH Telecom, Bosnia Hersegovina: Dzenan Smajic, expert associate for the Planning and Content Development, and Sejdalija Heljic, business development specialist



Radio Television of Republic of Srpska, a regional public broadcaster: Branko Lazic, deputy program director, Lada Tomasevic, editor program schedule, Aleksandar Seva and Dunja Krcic, promotions



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



Sitel TV, second channel of Macedonia: Natasha Velkovska, executive producer, Robert Janevski, marketing, and Risto Samardjiev, editor



Alsat, Macedonia: Dejan Zerajic, acquisitions manager, and Lirim Hajredini, COO



RTK Kosovo Radio Television: Aferdita Alaj and Mirlind Shala



Manuela Caputi, Mediaset Italy; Lukasz Brezezinski, programming director, SPI International Poland, Almudena Campo, general manager, SPI International Spain & Portugal



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

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# WHAT'S UP IN THE POLISH TV MARKET?

By JULIA BOURLÈS

The TV market in Poland is one of the most dynamic and competitive markets within the European Union. Poland has reached a very high level of equipped TV households and is characterized by a large number of pay TV channels. TV consumption has been very stable since 2009: in 2011, the average daily viewing time in Poland stood at 4 hours and 2 minutes per person per day, a slight decrease of 2 minutes in comparison with 2010. This score is above the average daily viewing time in Europe that stood at 3 hours and 48 minutes in 2011.

The Polish TV market is dominated by TVP, the public broadcaster, with its flagship channels TVP1 and TVP2, and by its two commercial rivals TVN and Polsat. While TVP1 lost 2 points in a year in terms of market share, TVN resisted well (15.2% market share versus 15.0% in 2010) and Polsat posted a 14.5% market share in 2011 (+ 0.7 points versus 2010).

Within a quickly fragmenting TV landscape, with DTT launched in fall 2010, all the heavy-weights are betting on a multichannel strategy. In 2010, a year driven by political events, the

news channels TVP Info and TVN24 performed strongly, while both channels lost market share in 2011. The other niche channels, such as TV4, TV Puls, TVN7 and Polsat 2, are generally in good health.

In terms of content, the top five programs in 2011 shows that events and news arouse strong interest but fiction still dominates the TV landscape. The fictions *Ranzco* (*Ranch*) and *M jak miłość* (*L for love*) still compete for the first place. Last year, *Ranzco* was the most watched series with its best episode gathering 8.5 million viewers, an increase of 1.2 million people compared to 2010. The popular soap opera had to settle for second place.

Last year in Poland was full of events and three of them appeared in the top 10 programs, whereas there were no occurrences for this genre in 2010. On 23<sup>rd</sup> March, the superstar skier Adam Malysz took his final ceremonial jump during a gala featuring other famous jumpers and music artists. More than 7.2 million Polish viewers were mesmerized by this moving ceremony. The beatification ceremony of Pope John Paul II was also

an emblematic event of 2011, gathering a very large audience of 6.8 million viewers in Karol Wojtyła's birth country. Finally, the annual TV awards ceremony *Telekamery 2011* pulled in more than 6.7 million viewers.

As far as news programmes are concerned, TVP1 flagship shows *Teleexpress* and



*Ranch* was the most watched series in 2011 on TVP1 with its best episode gathering 8.5 million viewers, an increase of 1.2 million people compared to 2010

*Wiadomosci* remain in the top five in 2011, both improving their performance compared to 2010. Broadcast on Polsat, the show *Wydarzenia* also benefited from this appetite for news output.

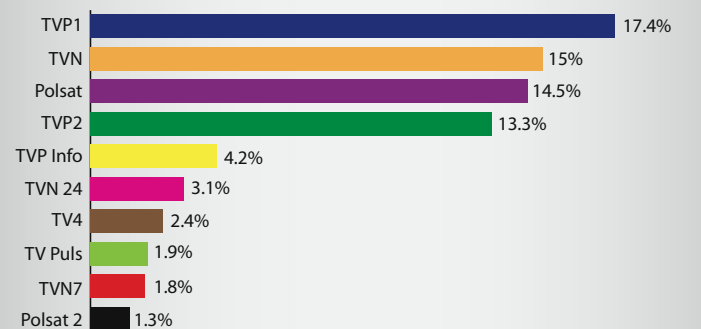
Overall, a major trend emerged in Poland in 2011: the local adaptation of international TV shows, among which adaptations of talent shows performed particularly well. Newly launched *X Factor* was a great success on TVN in spite of the fierce competition of *Ranzco* on TVP1. Polish viewers also discovered *Must be the Music* on Polsat and *Clash of the Choirs* on TVP2, and both shows outperformed the channel average results. The trend continued in 2012 with the adaptation of *Got to Dance*, which was also a big success on Polsat.

Fiction wise, TVP2 adapted the Canadian format *Les Parent*, a comedy series focusing on the daily life of young parents with three children. The show was an ongoing success and the channel has already broadcast a second season in 2011, while the third is scheduled for fall 2012. The adaptation of the Austrian series *Komissar Rex* was also a hit on TVP1 at the beginning of 2012. Many foreign sitcoms were adapted in Poland such as the American series *Rules of Engagement* and *Everybody Loves Raymond* and the French show *Que du bonheur*. Constructed reality also made an appearance through the *X-Diaries* format broadcast on Polsat, in which viewers could follow the romances and conflicts of Polish tourists on holiday.

Globally, due to the increasing competition, the biggest channels took more risks by launching many new formats, original programmes or adaptations.

Poland is hosting the European Football Cup during the summer 2012 and will have a huge opportunity to gather millions of viewers. This major sport event should have a very positive impact on the TV market, especially as regards daily viewing time.

## AUDIENCE SHARES OF THE MAIN CHANNELS (2011)



Source: Eurodata TV Worldwide / One TV Year in the World / Nielsen Television Audience Measurement – All rights reserved

## TOP 5 BEST PERFORMING PROGRAMS 2011

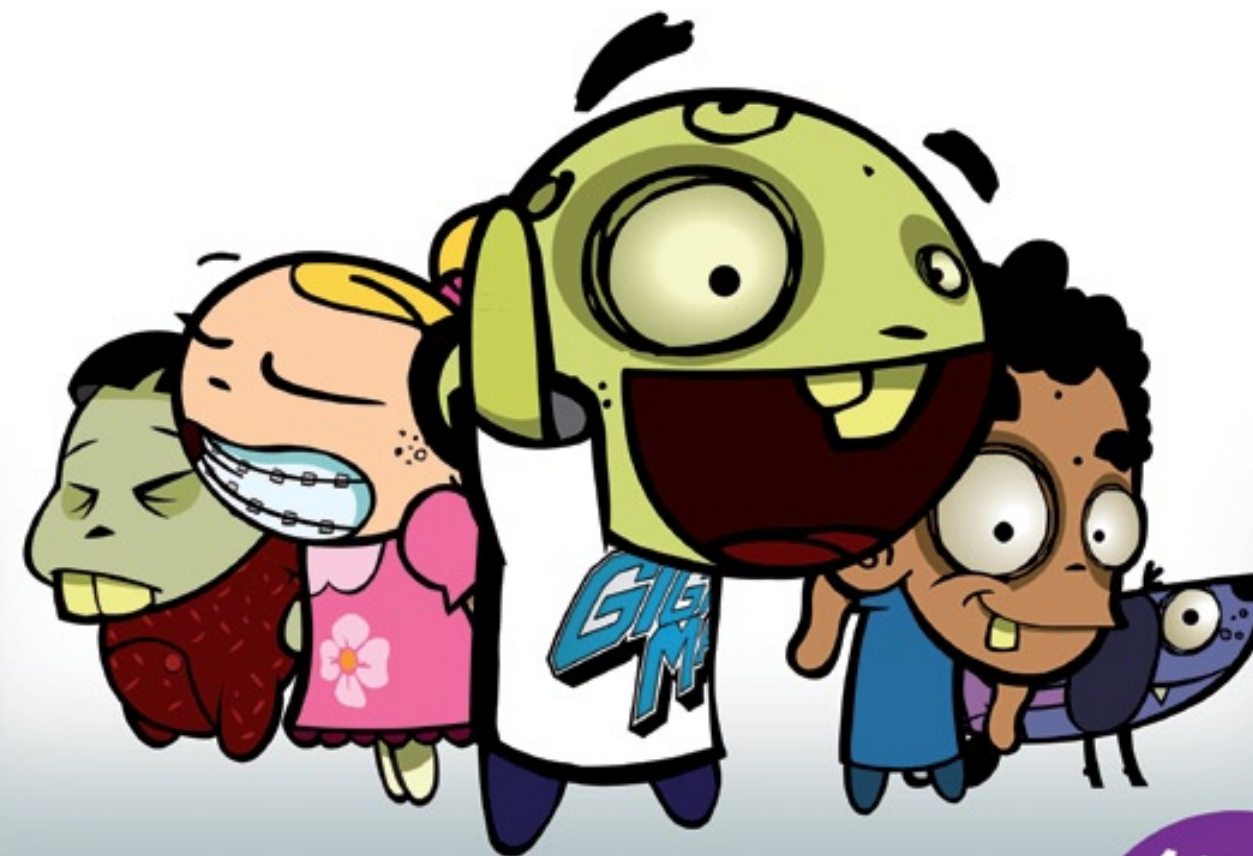
Channel	Day	Date	Time	Program	Genre	Rat%	000'	Share%
TVP1	Sun	06/03/11	20.23	Ranch	Series	23.8	8505.2	46.7
TVP2	Tue	18/01/11	20.47	L for Love	Soap Opera	23.5	8406.5	49.1
TVP1	Sat	26/03/11	17.11	Benefis Adama Malaysza	Event	20.3	7253.7	50.7
TVP1	Thu	06/01/11	17.04	Teleexpress	News	20.3	7236.9	46.2
TVP1	Sat	26/03/11	19.30	Wiadomosci	News	19.3	6907.9	41.8

Source: Eurodata TV Worldwide / One TV Year in the World / Nielsen Television Audience Measurement – All rights reserved

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## SONY: 'CEE REMAINS A REAL GROWTH AREA IN THE FORMAT BUSINESS'



Ed Louwerse, SVP of Format Sales, International Distribution

SONY PICTURES TELEVISION (SPT) is among the Top 5 entertainment formats distributors in Europe, with its flagship program *Who Wants to Be a Millionaire?*, that has become the third title by value created in Europe in 2011, according to the *TV FORMATS IN EUROPE* study. The complete report is being published in the next page.

Ed Louwerse, SVP of Format Sales, International Distribution at Sony Pictures Television, explains to PRENSARIO the moment of the company in Europe and remarks: 'Central and Eastern Europe remains a real growth area for us in the format sales business, and we have strong relationships with broadcasters throughout the territory'.

'We license formats across the whole region, including Russia, the former CIS, Poland, Hungary, Slovakia, Bulgaria, Czech Republic and across the Adriatic. CEE continues to offer growth opportunities, especially as SPT owns

one of the biggest catalogues in the industry', he adds.

Company's most established hits include *Who Wants to Be a Millionaire?*, which was currently licensed in Russia, Moldova, Romania, Albania and Hungary, and *Dragons' Den* that will be adapted in Czech Republic, Poland and Romania. 'Our talk show *The Dr Oz Show* was licensed in Armenia and in Russia, where more than 500 episodes have been produced'.

Other top titles from the distributor are *Breakaway* ('45), a game show format where six players take to a giant track to answer a series of general knowledge questions in a bid to win a cash prize; and *Cover Me* ('60), an entertainment show with a rap star and his homeboy that meet up with a seasoned pop artist and are sent a seemingly impossible task to create their own version of the other's hit.

### SCRIPTED, TOO

Apart from the wide entertainment catalogue described above, SPT has a great expertise on the scripted format side with other key titles. 'In CEE, we have also licensed scripted formats, for example *Everybody Loves Raymond* in Russia, through *Lean-M*, and Poland', says Louwerse.

'As SPT's format sales team, we are able to look at international format potential from original series produced by SPT's international production business. For example, we are bringing out a scripted format specifically for the CEE region called *The 80s*, originally developed by our joint venture production company, *Lean-M*, which became a successful



SPT before the Screenings in Los Angeles: Ed Louwerse with Alex Marin, SVP Sales for Latin America & The Caribbean and Mike Wald, EVP, International Distribution

dramedy for CTC in Russia'.

*The 80s* is about a group of students living in 1980s communist Russia, a time a of great changes but with all the story lines of students life you'd expect such as romance, parties, friendship and family. 'Against the backdrop of 1980s life under communism, it has many themes universal to all CEE territories so it's an ideal concept as a format', completes the executive.



Breakaway, new game show for Europe

### SPT: WAYNE GARVIE, NEW CHIEF CREATIVE OFFICER

Sony Pictures Television announced at the end of May the appointment of **Wayne Garvie** as Chief Creative Officer, International Production, SPT. He is responsible for driving creative development across SPT's global network of joint venture companies and its production studios outside of Los Angeles, turning locally developed properties into global formats and fostering co developments across the group. And reports to **Andrea Wong**, president of the division.

SPT's International Production business covers Europe, MENA, Asia, Latin America and the US. It runs wholly owned production companies in Russia, Germany, France, Lebanon,

Egypt, Dubai and Miami, and joint ventures in the UK (**Gogglebox Entertainment**, **Victory Television** and **Silver River**), France (**Starling**), Netherlands (**Tuvalu Media**), Russia (**Lean-M**), Italy (**Toro**), China (**Huaso**), Brazil (**Floresta**), Colombia (**Teleset**) and the US (**Embassy Row**).



Wayne Garvie, Chief Creative Officer

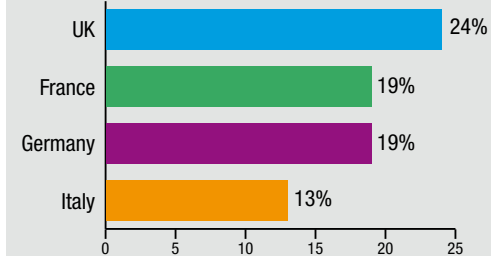


The '80s, a scripted formats developed by SPT's Lean-M that has become a successful dramedy on CTC in Russia

## TV FORMATS IN EUROPE: NEW COMERS ON TOP; ESTABLISHED, DOWN



### VALUE CREATED IN EUROPE, BY COUNTRIES (2011)



Source: TV Formats in Europe

PRENSARIO publishes here "TV FORMATS IN EUROPE", a special report made by the consultancy companies **ESSENCIAL TELEVISION STATISTICS**, **MADIGAN CLUFF** and **DIGITAL TV RESEARCH**, about the main titles developed during 2011. Top distributors are: **ITV**, **ENDEMOL**, **SONY**, **FREMANTLEMEDIA** and **ZODIAK RIGHTS**.

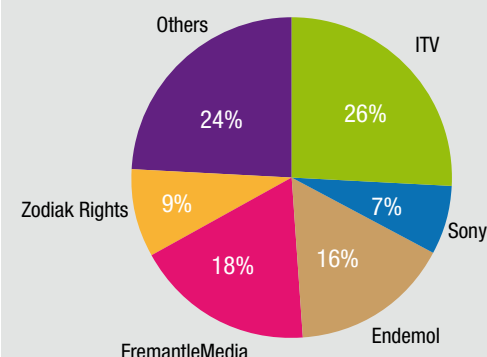
*Come Dine with Me* (4,126 hours), from **ITV Studios** was the most screened TV format in Europe in 2011, according to a new report that covers 50 major formats across 16 countries. The *TV FORMATS IN EUROPE* report calculates that the hourly total of **Endemol's** *Big Brother* has fallen considerably since 2009, with *Who Wants to Be a Millionaire* (**Sony**) also declining.

**Jonathan Bailey**, co-author and managing director at **Essential Television Statistics**, added: '*Money Drop* (**Endemol**) was screened for 615 hours and *The Voice* for 312 hours in 2011 – impressive considering that both shows only started in 2010. Both are expected to grow sharply in 2012'.

Relative newcomer *Money Drop* has already become the second title by value created across Europe. More established titles such as *Big Brother*, *Who Wants to Be a Millionaire*, *Wheel of Fortune* and *Deal or No Deal* saw considerable falls in value for calendar 2011 compared to 2009 and 2010.

Total format hours (for the 50 titles covered)

### ALL-DAY FORMAT HOURS BY DISTRIBUTOR IN 2011, EUROPE



Source: TV Formats in Europe

in Europe were 16,856 in 2011, comparable with 2009 and 2010. The UK was the leading country, but its 2011 total was considerably lower than in 2010. Five began transmitting *Big Brother* in 2011, transmitting many fewer hours than **Channel 4/E4**, the previous broadcasters. Despite **Channel 4's** format output halving in 2011 (to 705 hours), it was still one of Europe's top five broadcasters. E4's format output fell from 1,339 hours in 2010 to 297 in 2011.

**Michael Cluff**, co-author and director at **Madigan Cluff**, said: 'The value created by the 50 major formats was USD 2,019 million in 2011 for 97 channels across 16 European territories. The 2011 figure was 8.4% up on the 2010 total,

with the number of hours broadcast increasing by only 2.4%, demonstrating that the

Essential Television Statistics, **Madigan Cluff** and **Digital TV Research** category still has expansion potential despite tough times for European broadcasters'.

The UK is the TV formats powerhouse in Europe. Not only does the UK screen the highest number of format hours, it is also home to several major formats' producers and distributors. The value of formats for UK broadcasters was USD 475 million in 2011. The UK, France (USD 382 million), Germany (USD 381 million) and Italy (USD 260 million) accounted for three-quarters of Europe's total value in 2011.

All-day format hours by distributor in 2011

**Simon Murray**, co-author and managing director of **Digital TV Research**, said: 'Five distributors accounted for three-quarters of the format hours in 2011. **ITV Studios** is the largest distributor by hours, mainly due to *Come Dine*



With *Come Dine With Me*, **ITV Studios** has become the largest distributor by hours in Europe

*with Me*. However, **Endemol** (USD 439 million) was the leading distributor by value created in 2011, closely followed by **FremantleMedia** (USD 431 million). The top six distributors accounted for 82% of total value created'.

NOTE: The values in this report are the financial benefit (sourced by activities such as advertising revenues or a proportion of annual household license fee) that broadcasters receive by screening these formats. This proprietary information has been compiled from program schedule databases collated by **Essential Television Statistics**. **Madigan Cluff** supplied the program value calculations, which are based on net revenues and income derived by the broadcasters for each day part.



# ALL3MEDIA CREATED A NEW HYBRID GENRE: CONSTRUCTED REALITY



Louise Pedersen, managing director of All3Media International



Stephanie Hartog, EVP International Formats of All3Media International

*Constructed Reality* is a new genre of programming by created in Germany by **Filmpool**, an **All3Media** group company. **All3Media International** is distributing the programs worldwide.

The genre is a hybrid: *Constructed Reality* embraces all the tension of classic drama story-telling – whilst using amateur actors and a production, scripting and filming technique that has evolved out of factual entertainment. The genre can contain infotainment, like *Just Sue Me*, which features an on-screen lawyer giving accurate local legal advice about a variety of conflict situations, as well as straightforward dramatic, dynamic and youth-appealing narrative approaches, as seen in *X Diaries* and *Berlin, Day and Night*.

The roots of the genre lie in the drama of real-life events in highly emotionally charged



*Families at the Crossroads* increased its time slot average on RTL Germany in 80% and ground daily with an outstand average of 27%. A lead of more than 10% over the second best competitor

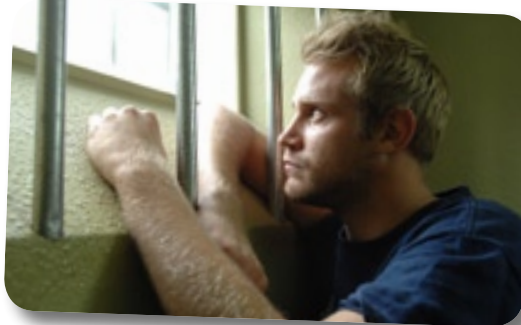
situations. In the series *Cases of Doubt* and *Families at the Crossroads*, amateur actors, placed in these everyday situations are given a script outline based on true stories and are encouraged to enact their genuine reactions to the events outlined. This adds a very compelling air of authenticity and rawness that truly engages and resonates with audiences worldwide.

**Louise Pedersen**, managing director of **All3Media International** comments:

‘It’s a ground-breaking new genre, accessible, compelling and featuring the reality of people’s lives rather than fantasy vision. The quantity of scripts available is enormously helpful whilst the unique production method adds authenticity and speeds up the production process, which is incredibly valuable to our buyers and us. **Filmpool** is leading the way here in Germany, and we are delighted with the success of the genre to date in Central & Eastern Europe’.

**Stephanie Hartog**, EVP International Formats of All3Media International, adds: ‘One of the great things about having **Filmpool** in our group is that they are such a creative team. Having come up with a new hybrid genre, they then immediately moved on to the next genesis of the idea – taking it forward into a new environment, for a new audience and day-part, giving us a great variety of content to offer to our buyers. We have half hours and one-hour series, we have studio and location, domestic drama and dynamic legal investigation’.

‘We have more female- oriented family entertainment, daytime series, more soap style content and we have more youthfully appealing edgier drama. In essence our team delivers something for every day-part and every budget, which is exactly what you want as a distributor, and the corresponding production/budget systems. We are delighted with the progress we have made internationally in 2012 and will be announcing a number of new shows in the coming months’.



*Cases of Doubt*: over 500 episodes were produced on RTL Germany, over 100 in Russia,

**Simon Tucker** has been line producer on *Cases of Doubts* and *Families at the Crossroads* in Russia and here he gives a few indications on the benefits of working with **All3Media International** and **Filmpool**: ‘Scripted reality is a great way to tell real stories that the audience can relate to without having to spend weeks teasing out the drama from real contributors’.

In the Russian market, the TV channels are not prepared to spend a lot of money or time to produce something where the producers cannot guarantee a good ending. Scripted reality is a controllable, economical genre where we can tell good tabloid stories with a broad appeal and guarantee a big, dramatic ending. It’s a win-win situation, which gives the channel more bang for their buck’.

‘We are currently in the third season of *Cases...* (180 episodes) and the second season of *Families...* (140 episodes). They run in daytime at 2pm and 3pm respectively and are the corner stone of **Ren TV**’s daytime schedule. The channel is delighted because they can afford to have two products that have the same appeal as drama in daytime’, finalizes.



*Just Sue Me* is an infotainment show about a lawyer that gives legal advice about conflict

## SERIES & TELENOVELAS FORMATS



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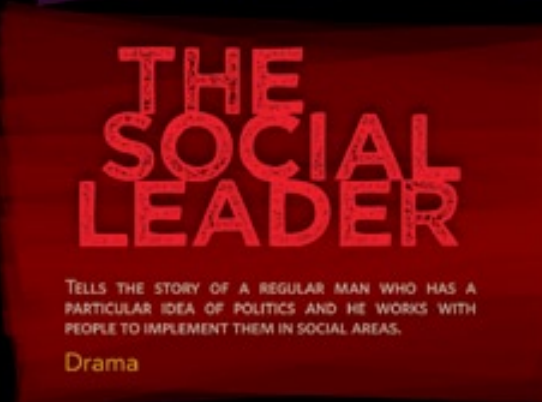
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## TELEVISA EUROPE EXPECTS 20% OF GROWTH IN 2012



Televisa: Claudia Sahab and Ricardo Ehrsam, general director of sales Europe (middle) with Manola Martin, business manager, Eastern Europe and Nordic, and Beatriz Rodriguez, business Manager, Eastern Europe

**Televisa International** (Mexico) continues betting strongly on the CEE markets, and highlights at Natpe Budapest a varied catalogue of telenovelas, series and entertainment formats. Based in Madrid, Spain, **Claudia Sahab**, director Europe of the company, describes that the distributor faces a 'great in Europe, remarking that it is expecting a growth of 20% by the end of the year.

'In the last years, the European office has totalized an expansion of 80% and, if everything ends as we expect, we will complete a growth of 100% in five years. We are very happy with the results, as now we

have several volume deals and have recovered slots in Hungary, Poland (with products in the three main broadcasters, **TVP**, **TVN**, **Polsat**) and Slovenia, as well as a consolidated our position in countries as Romania and Croatia', she adds.

Even the crisis continues and Turkish product has gained markets like Bulgaria or the ex

Yugoslavian countries, **Sahab** stresses that sales have not stopped in the region. 'We see that clients pay a bit later, but it's also true that we have more re-runs in small markets and we exploit the titles in more platforms, as new DTT and Pay TV channels are being launched all across the region'.

So, she considers that **Televisa** is 'stronger' than ever in the region. 'We have had premium telenovelas last year, which allow us to become the #1 Latin distributor in the region with five of them on air'. The company brings to



Parodiando

## TELEVISA NETWORKS BETS ON HD

**Bruce Boren**, VP of **Televisa Networks**, comments to PRENSARIO that the company Pay TV networks are now available in more than 56 countries all across the world: USA has turn into a 'key' market with the distribution of the main broadcaster of the US Hispanic market, **Univision**.

'But Africa has become truly important, too, with Angola, where we distributed **TLN**, the Portuguese-language network originally created for Brazil and Portugal', adds **Boren**.

About the international strategy, as producer and content buyer, he says: 'We will continue producing more and more programming for the paid channels, pushing the OTT services and seeing what kind of contents are the best for these platforms. Our greatest ef-



The Mexican president, Felipe Calderon at Televisa Networks booth during Canitec: Fernando Muniz, Yolanda Andrade and Bruce Boren

forts are on the HD'.

The company is looking for 'fresh and alternative' contents for the networks. 'We are focusing in the music formats, the ones we already produce for our free to air channels in Mexico. Also, series and, specially, sports, where we see the largest opportunities', adds **Boren**.



SBT in Brazil has adapted the Mexican format *Carrossel* and Televisa has the international rights for distribution

*Budapest Me, her... and Eva!*, *Valiant Love*, *A Shelter for Love* and *Abyss of Passion*, and the new young series *Carrossel*, a Mexican format adapted by SBT, the third Brazilian broadcaster, and from which **Televisa** has the rights for the worldwide distribution. The original format was *Jacinta Pichimahuida*, from Argentina (1966).

'We believe strongly in the youth/teen product, as we have many more opportunities for 360° developments. Series like *Miss XV* (co-produced with **Nickelodeon**) and *La CQ* (with **Cartoon Network**) have great potential to be developed as a TV product, live shows, merchandising, music, etc. We want to invite the biggest broadcasters to be part of these businesses, which are longer than traditional (one year and a half) and gives the product *awareness* and *reputation*', says the executive.

On the entertainment side, the company brings two blockbusters: *Parodiando* and *Little Giants*, on its second season. 'The entertainment has become a key driver for us in Europe, because it is cheaper than fiction to produce. In Poland, for example, the three main TV channels have entertainment formats on its prime time slots', explains **Sahab**, who recommends these titles that has had 'tremendous' audience levels in Mexico.

'Also, during the crisis, the programming right holders run with advantage because producing contents by their own is much more expensive than acquire them. It is another factor we are taking to have a better present', completes **Sahab**.



Valiant Love

## IN THE NEW TELEVISION SCENARIO THE ONLY THING PERMANENT IS CHANGE

Hello!

We are **Bernarda Llorente** and **Claudio Villarruel**, founders of **OnTV**, a production company of fiction and entertainment contents and creative consultants for television production and programming worldwide.

Between 2000 and 2010 we headed the programming and contents department in Argentina's leading network (**Telefe**), which we kept on top of ratings for ten straight years.

In 2001 we created **Telefe Contenidos**, in-house production company for the network, which allowed us to create and export our formats to over 30 countries all over the world.

In 2008, our series *Televisión x la identidad* won us the first ever International Emmy Award for a Spanish-language Mini-Series. In addition, our series *Contra las cuerdas* received a nomination for Best Telenovela in 2011.

In 2010, we started **OnTV Contenidos** in order to develop our own projects independently and to share our experience of 20 years in media. We partner with our clients through consulting and conferences to find creative solutions for television production and programming in an increasingly competitive scenario.

In 2011 we created **360tv**, Argentina's first HD network specifically developed for Digital Terrestrial Television.

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321 A GANAR  
<http://www.youtube.com/watch?v=tehrY0GhXY4&feature=related>  
360 TV  
[www.360tvdigital.com](http://www.360tvdigital.com)



## ALL3MEDIA: SERIES, SPECIALS AND FORMATS



Sabrina Duguet, VP International Format Sales

**All3Media International** (UK) highlights at Natpe Budapest a slate of series, specials and formats, pushing especially the seventh season of its flagship series *Skins* (6x'60) about a group of boys that loved each other, hated each other, screwed each other in one of the most hedonistic, irreverent fun ever shown on TV.

A globe-spanning line-up of talent takes the stage in celebration of Queen Elizabeth II's Diamond Jubilee in *All the Queen's Horses* ('120), which features performances by the nation's cavalry, Il Divo, Susan Boyle, and the cast of

Disney's *The Lion King*, it's an awe inspiring, wholesome family delight.

*Churchill's Traitors* ('60) is an account of when Britain's WWI allies, the Japanese, became its foe. As Sir Winston Churchill learned of the dramatic loss of life at Malaya and Pearl Harbor, little did he know that amongst his trusted peers were the treacherous few who made these attacks possible.

**Sabrina Duguet**, VP International Format Sales, recommends two titles, begging with *The Pitch* (8x'60), which episodes see two of the most creative advertising agencies in America go head-to-head as they pitch for a major new contract with huge financial gains to be had. Follow the creative process and feel the tension mount as the deadline approaches.

And *Bollywood Star Australia* (4x'60): Bollywood, world's most glamorous and prolific



Churchill's Traitors

film industry, is on the hunt for a new star and it's looking to diversify. Making this search global, hopeful candidates from all backgrounds are already lip-synching and shaking their hips in Australia as the auditions begin.



The format The Pitch

## M-NET: SERIES, DOCS AND LIFESTYLE

M-Net (South Africa) launches at Natpe Budapest its brand-new daily drama series *The Wild* (208x24') from its in-house production team that tells the story of three families from different racial and cultural backgrounds, whose lives intersect to provide a visually stimulating and explosive African narrative.

The distributor also recommends the epic drama series *Jacobs Cross* (104x48') and the highly acclaimed documentary *Playing the Enemy - The True Story of 'Invictus'* ('54) with the real story behind the South African rugby team, 'Springboks' and its miraculous road to glory at the

1995 Rugby World Cup.

Lastly, the documentary series *Great Africans* (5x'52) about African leaders, the docu-drama series *Crimes Uncovered* (13x'44), the new cooking series *Cooking with Siba* (13x'24) produced by Homebrew Films for M-Net, and the cop & psychological thriller *Snitch* (44x48'), described as a modern-day Romeo and Juliet story with suspense and humor.



Mandy Roger, Head of Sales, Acquisition and Business Development

VIEWING BOX B24

## FILMAX: MORE SERIES AND THRILLER MOVIES



Irene Airolidi, Sales Executive

**Filmax International** (Spain) arrives Natpe Budapest with three aces: first, its flagship TV series *The Red Band Society*; second the TV Movie *The visitor of Prisons*; and third, a new movie thriller slate. The person in charge of the market is **Irene Airolidi**, Sales Executive.

*The Red Band Society* is an acclaimed series about the friendship of a group of kids in a hospital: 'We've closed a deal in France and we are in advanced negotiations with Germany. We are exhibiting this series for the most important territories in Central and Eastern Europe during Natpe. Moreover, in the next weeks is

starting the production of the second season, to be on air by the end of 2012', explains **Ivan Diaz**, head of international business.

*The visitor of Prisons* is a TV Movie highly praise during MIPTV in April, where **Filmax** showcased to the TV stations for the first time. Based on the real story of a woman that in the XIX Century worked with jail prisoners—and imposed for the first time concepts as 'reinsertion' and tools to give them opportunities for a better life—it will be ready for MIPCOM and, then, premiered by **TVE** during the *Woman's Day*, in March 2013.

About the theatrical titles, the ones launched during the Cannes Film Festival on May were several thrillers in English: *The Returned*, *Torment*, *I'll Die Tonight*. 'The first two will be shot

in Canada in October, while the last one will be done next year', says **Diaz**.

At Natpe, the distributor also presents the Spanish movie *Stranded* and the Festival of Malaga winner *The Wild Ones*. 'These titles plus the ones we already have in distribution, like *REC 3* (a success in all the world), *Childish Games* (in competition during *Berlinale* and premiered on *Videocine México*), *No rest for the Wicked*, *Sleep Tight* and *Invasor* (it will be one of the top Spanish titles in 2012) make us have an excellent movie offering for the international market.'



The Red Band Society, focus on CEE buyers

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# LA SCREENINGS 2012: THE CONTENT MARKET EVOLVES WITH TWISTS

The LA Screenings 2012, the two-week event where the Hollywood studios introduce their new season of TV series and films to the worldwide content buyers, was held in late May. Which are the main conclusions? Though the European crisis, about 1,500 worldwide buyers attended the market, five percent more than last year, due to the new media irruption. Now there are digital managers at the current broadcasters, and many brand-new buyers have appeared from everywhere —about PayTV, DTT, VOD, IPTV new channels.

Last year, the Hollywood studios wanted to change the approach: less medical and legal TV series, less serialized shows that you have to follow chapter by chapter as *Lost*, and more refreshed, good quality soap operas in the *Dallas* tradition, to get the audience involved but with the chance to skip some episodes. *Retro* series appeared, as *Sony's PanAm*, *Charlie Angels*, *The Playboy Club*. And the procedural series got stronger (the spin-off of *Bones* from **Fox**).

But the results were not so good. Most of the last year new TV series were cancelled, and the big-big recent successes continue being comedies: *Modern Family*, *The Big Bang Theory*. So, for this year, Hollywood bets again in comedies, and bets again in classic formulas as police and procedural drama series. The *Lost*-like thrillers are back stronger (supernatural or just with twisting suspense) and with the hit of *Modern Family*, the 'dysfunctional' relationships are on the move: homosexual couples wanting to be parents, etc.

On one side, some studios have stressed that the *Event programming* is back this season: big-big TV series to hit the prime time. But on the other, some buyers have said that there are not so big Theatrical figures starring TV series this year as in previous seasons, due to the tight budgets. Though, many of the new TV series were well commented by them: At **Sony**, *Last Resort*, *The Mob Doctor* (which replaces *House* in **Fox**) and the comedy *Men at Work*, which is emitted after *The Big Bang Theory* in **TBS**. At **Warner**, *Revolution*, from the creator of *Lost*, J.J. Abrams; *The Following* with **Kevin Bacon**; and *Arrow*, a new comic-based series about Green Arrow.

At **NBCUniversal**, TV series like *Chicago Fire*, the thriller *Infamous* and the comedy *Go on*, with Matthew Perry, from *Friends*. **CBS Studios** made



Katja Hofem-Best, sixx (Germany); Nina Lorgen Flemmen, FEM (Norway); Ruediger Boess, ProSiebenSat (Germany); Karin Kraft, SBS TV (Sweden); Bente Engebretsen and Benedicte Steinrud, TV Norge (Norway); and Katarina Eriksson, SBS TV (Sweden)



Spain: Juan Ignacio Jiménez, acquisitions director at TVE; Luis Fernambuco, programming director, and Alejandro Flores, acquisitions director, both from laSexta; Javier Uriarte, programming manager, Carlos Fernández, content director, Mercedes Gamero Hoyos, head of acquisitions, all from Antena 3; Elena Bort from NBCUniversal; Gemma Sánchez, programming director at TVE



Globo TV Brazil, programming and acquisitions: Roberto Buzzoni, Paula Miranda, Ramona Bakker (production manager) and Suzy Ubij

focus again in cop and procedural series, with *The Lady and the Beast* and *Elementary* (Sherlock Holmes meets *Monk*). **Fox** was full of comedies: *1600 Penn*, about a dysfunctional family in the White House; *Arrested Development*, produced for **Netflix**; and *Ben and Kate*, about a male nanny. At **Lionsgate**, *Anger Management*, the new comedy with Charlie Sheen after *Two and a half men*, made the difference.

Meanwhile, the independents are getting market share. Big Britain, French and German



M6 France: Christine Bouillet, programming director, Bernard Majani, head of acquisitions; Bérangère Terouanne, fiction selection manager; and Sidone Garrett, acquisitions & marketing senior manager



Canada: Louis Pearson and Lucie Quenneville from V Interaction, and Elaine Mourez, Astral (above) with André Beraud and Louise Lantagne, from Radio Canada, and Jacinthe Brisebois, ARTV



RTL Televizija, Croatia: Filip Zuncic, head of Film and Series; Kasper Pflueger, programming director; Marco Doslic, head of schedule and research

producers are making TV series, miniseries and TV movies with 'American appeal', in English Language, to enter the U.S. Domestic market and top broadcasters worldwide. And many of them have now slots at the U.S. networks, even in prime time. In the feature films arena, it is the same story: big-budget, Hollywood-star productions are taken also through independent distributors. The market is more opened and there are opportunities almost everywhere.

Broadcasters testimonies? Most of them agree



Vladimir Denyatkin, Disney Russia; Olga Zhurova, Fox Crime and Fox Life for Russia, CIS and the Baltics; Oleg Batluk, Disney Russia; Mariana Dimitrova, now in UK for Fox International Channels; Vitaly Lomtev, VP head of distribution, Disney Russia



Portugal: Gonzalo Moura, programming, Assumpção Loureiro, VP (3rd from left) both from Fox International Channels, with TVI, the leading broadcaster: Margarida Pereira, programming director (2nd) Fátima de Jesus, acquisitions, and Bruno de Lima Santos, formats and content director



The Philippines: Leo Katigbak, head of ABS-CBN Special Projects; Macie Imperial, head of program acquisitions, Creative Programs, Inc., a subsidiary of ABS-CBN; and Grace Poe Llamanzares, chairperson of the Movie and Television Review and Classification Board (MTRCB)

they are betting on own production more than in the past. With the competence of PayTV channels and new media, they need big-big productions to make the difference for free TV. But to be right on the fiction TV series, continue being a key element of their programming.

**Ruediger Boess**, SVP Group Programming Acquisitions, **ProSieben.Sat1** (Germany): 'In my opinion, 'the product' of the new season will be *The newsroom*, from **HBO**. It will be released this June, and it is a fiction series about the 'behind the scenes' of a fictional cable news channel'. **Kasper Pflueger**, programming manager **RTL** Croatia: 'Now the economical situation is stable, for us it is enough. In Free TV you can bet both on fiction or entertainment, if you do it big-big'.



Malaysia, acquisitions: Seelan Paul (Media Prima Radio Networks); Jeremy Kung, TM Group; Sherina Mohamed Nordin (TV9); Siti Nurlisia Mohd Nadzri and Cheng Imm (TV3); and Emily Ab Rahim (ntv7)



Mexico: Adrián Echegoyen, Alberto Ciurana and Jaime Aguilar, acquisitions and programming from Televisa, with Ana Lidia and Karina Montoya, acquisitions from Televisa Networks (pay TV)



Sorina Big, head of acquisitions Pro TV Romania, with Tomaz Krzicnik, head of acquisitions ProPlus Slovenia

**Tibor Forizs**, head of program acquisitions scheduling, at **RTL Klub** Hungary: 'This year we saw a problem: some U.S. domestic needs of the studios did not match with the priorities of the international buyers. In the U.S. market they want more sitcoms, in Europe we want more soap dramas, *Dallas*-like or good procedurals like *The Mentalist* or *Bones*. Unfortunately studios have cancelled some hit shows that are very successful in Europe, including **RTL Klub**, such as *CSI Miami*. We don't like this at all. The *serialized* TV series *Lost*-like are back again, but you have to watch all the episodes to follow the plot. For this new season, we will program the new *Dallas* (**Warner**) and we decided to invest more on European TV series, which were

improved the last years. For instance, the brand new French action series *The Transporter* based on the hit feature film'.

**Macie Imperial**, head of program acquisitions, **Creative Programs, Inc.**, a subsidiary of **ABS-CBN** (The Philippines): 'I'm buying for six pay TV channels of the group. The segmentation of the contents is a key issue. More and more, we see that the niche channels are gaining viewers. Even they don't have a big amount of subscribers, they reach the top ABC targets'.

In Portugal, the Government has decided to sell its main TV channel, **RTP1**, due to the crisis. Brazilian, Angolan investments and even **Al Jazeera** are candidates to acquire it. And the Government will reinforce **RTP2**, with programming of **RTP1**. **Margarida Pereira**, head of acquisitions at **TVI**: 'The TV market is bad, and we don't expect a recovery soon. But we are fine leading with 25 percent of market share. Our big success of the year is *Tu cara me suena*, from **Endemol**'.

**José Miguel Contreras**, CEO **laSexta** (Spain): 'The Spanish TV market is on an edge, about to concrete in few weeks (lastly!) the broadcaster merge between **Antena3** and **laSexta**. The challenge now is to deal with the new DTT era, where 40 free TV channels have to survive in a crisis market where only 5-6 channels performed in the past'.

At the end... do you want something 'freak'? **Luis Woldenberg**, of the Mexican consulting company **Nodo TV**, says: 'Society is changing and most of the TV channels don't react. Most of them look for 'Familiar' content, but now 3 from each 10 families have only a woman in charge. There are more divorces, later marriages, less children from couples. The target that will dominate free TV business from now is 60+ years, which will grow 400 percent. Which broadcaster is programming for them?'





## GET ENTERTAINED WITH MEDIASET



Manuela Caputi, international sales manager

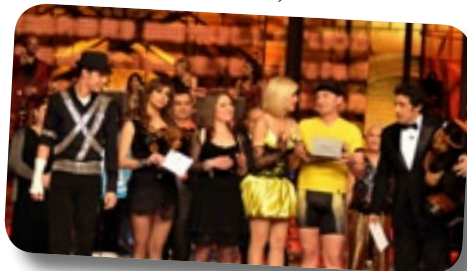
As part of the strategy initiated in January 2012, **Mediaset Distribution** (Italy) highlights in Budapest its brand-new catalogue of entertainment formats, apart from the well-known scripted formats and ready-made series.

*The anti-talent show* (228 episodes) is a talent show for non-talent people in its 19<sup>th</sup> season in Italy and now it has been optioned in Brazil. *You've got mail* (169 episodes) is a sentimental show in its 14<sup>th</sup> season programmed weekly on prime time and adapted in 16 countries.

In its 16<sup>th</sup> season, *Date Me!* (3,138 episodes) is a daily dating daytime show which aim is to form a couple that could stay together for the

life; it was adapted in Spain. Lastly, *That's talent*, the most-watched talent show of the Italian TV that includes a real school of performing arts for young people who want to be singers, dancers and actors. It was adapted in USA and optioned in UK.

**Manuela Caputi**, international sales manager, explains: 'Now, we have more options for our buyers. It's a new genre we are exploring and, since the launch at MIPTV, most of them have

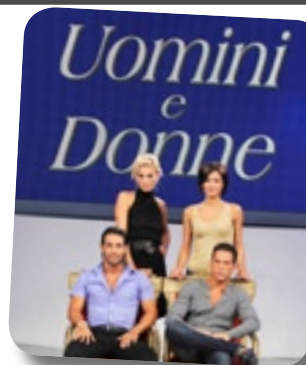


*The anti-talent show gives a twist to the talent shows*

a great reception'. Another strategic area of business is **Mediaset Italia**, a 24-hours channel offering the best the mainstream channels

**Canale 5, Italia 1** and **Rete 4**, targeted to the 60 million Italians living around the world.

Lastly, the distributor highlights the weekly docu-reality *Donnavventura* (124 episodes) that features both passion for travel and the experience of working on a TV show. And the new ready-made programs: the sentimental drama series *Tuscan Passion* (12x'90 or 24x'45), where a dramatic murder interrupts the love story of two young people; and *Gourmet Wars* (15x'50), a family entertainment series where food can bring them together as well as tear them apart.



The new dating show *Date me!*

SUITE # 324

## TTF, IN SEPTEMBER 19TH TO 21ST



**Hochan Entertainment** (Taiwan) attends Natpe Budapest to promote the *Taipei TV Festival 2012*, which will be held on September 19<sup>th</sup> to 21<sup>st</sup> in the Grand Hotel Taipei, Taiwan.

**Hsiao-Chi Chou**, project manager, explains: 'This trade event is a vital platform tying together the entire worldwide Chinese-language TV market

and a major portal for the massive emerging Asian TV industry'.

The executives will have access for networking and exchange with leading Asian media agencies, TV channels, cable/satellite /IPTV channels, online streaming TV players, and assorted new platform operators and program content buyers.

SUITE #221C

## ENTERTAINING CONTENT FROM FOXTELECOLOMBIA



Ana María Barreto, directora comercial

**FoxTelecolombia** is the production house for one of the main Colombian broadcasters **RCN** and the pan-regional Pay TV channels of **Fox Latin American Channels** (FLAC). Its distribution arm attends Natpe Budapest for the first time, as part of its strategy of worldwide expansion. The company can provide very fresh ready-made products and production deals to CEE broadcaster.

*Lynch* (13x'60) is the first original series produced by the company for the Premium pay TV channel **Moviecity**, and will have a second season next year, while *Kdabra 2*, premiered on **FOX**, will have its third season of 10 one-hour episodes. **Ana María Barreto**, commercial director, also highlights the third season of

*Tabu Latin America* (4x'60) a record-breaking documentary series produced for **NatGeo Latin America**.

'This is a very important market for us, after attending Natpe Miami & LA Screenings. It gives us the opportunity to contact and meet the Central and Eastern European clients', says the executive, who highlights the variety of its slate with formats, reality shows and ready-made series. 'Moreover, we are representing worldwide the catalogue of **Utilísima**, the cooking & lifestyle channel of **Fox**', she adds.

In Colombia, the company is developing various projects: two telenovelas, *Amo de Casa* and *La Traicionera*, and the teleseries *El Capo 2* for **RCN**; the reality *Reto al Chef 2*, shot in USA and Colombia, and a reality show of the Mexican chef **Aquiles Chávez** —who moves from Mexico to Houston— and a new series for **FOX**

Moreover, it has in pre-production two documentaries. 'We are at the top of our production capabilities nowadays. There are not many companies that could do this quantity of projects, but the most important thing is that all of them are being produced with the highest production levels the market requires', says **Barreto**.

The international sales division has had a very 'interesting' growth according to the executive, who completes: 'We are more consolidated as distributors with a catalogue that has been increased substantially. We have products for each need and budget: formats, telenovelas, series, documentaries, variety shows, among others'.



Lynch

SUITE #112 B



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## THE GREAT MOMENT OF TELEMUNDO IN CEE

**Telemundo Internacional** (USA) brings to Natpe Budapest three top telenovelas: *Fearless Heart* (13x'60), *Dangerous Affairs* (130x'60) and *Maid in Manhattan* (130x'60) produced in association with **Sony Pictures Television**. From **TVN Chile**, it highlights *I'm the boss* (100x'60), *Esperanza: love destiny* (80x'60), and *Alicia's Maze* (80x'60).

'We are passing through a great moment in the CEE market, because our catalogue provides what clients demand: telenovelas with great storytelling and high production value, which represents high ratings. A great example of this is the case of *Maid in Manhattan* which, after being sold throughout the CEE earlier this year, is currently on air in Latvia, Poland and Hungary and will soon launch in Lithuania, Albania, Serbia, Bosnia, Macedonia, Slovenia and several of the CIS countries', explains **Melissa Pillow**, sales director for Europe.

'In addition, format acquisitions and production are once again on the rise in the region, and we are also enjoying success. The local version of

our original format *Maria's Heart* is currently on **Channel One** (Russia) with great success. Plus, the Kazakh version of our entertainment show *My Teen Dream* is in pre production, and we have just licensed the rights to produce the local version of *Where is Elisa?* in Bulgaria'.

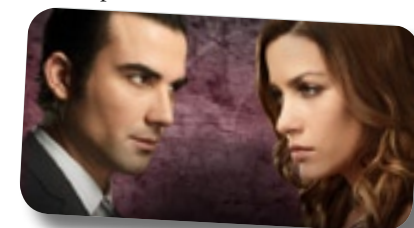
'*The Queen of the South*, our top rated series of all time on **Telemundo**, continues to be sold in Europe and has recently been licensed for national Free TV broadcast in Russia', she adds.

According to **Pillow**, the most notable trend in the past two years has been the large number of niche cable channels launched around the region. 'Only a small number of these channels are targeted to women, but slowly the situation is changing, giving us new opportunities'.

'The CEE buyers prefer the traditional telenovelas, and this is good for the Latin distributors', continues **Pillow**, who adds: 'This like runs even for cable, which tends to allow for a slightly riskier programming. They are also looking for scripted formats in the comedy-drama category, as well as scripted realities'.



Melissa Pillow, sales director for Europe



Fearless Heart, new proposal for Natpe Budapest

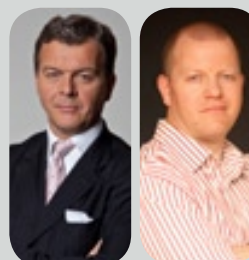
### FROM PAPRIKA LATINO TO MTG STUDIOS

**Modern Times Group** (MTG) content division **Modern Studios** has acquired 53% stake in **Paprika Latino** for an undisclosed cash consideration. Modern Studios business segment has been rebranded into **MTG Studios**.

**Peter Marschall**, founder and largest minority shareholder in **Paprika** (with offices in 7 countries), will remain CEO of it, and will be appointed as VP CEE **MTG Studios**, reporting to **Patrick Svensk**, Chairman and CEO of MTG Studios and EVP of Content at **MTG**. Founded in 2004, Paprika Latino is currently developing a low cost production hub in Serbia and a production hub for adventure reality shows like *Survivor*

in Costa Rica.

MTG Studios owns the production group **Strix** and well renowned contract publisher **Redaktörerna** in Sweden. **Hans-Holger Albrecht**, president and CEO of **MTG**: 'This operation provides us with a significant boost to our content production and acquisition capabilities in Eastern Europe. We are focused on the expansion of MTG Studios' reach and footprint across our territories'.



Hans-Holger Albrecht and Peter Marschall, new VP CEE MTG Studios

## BAFC: BUENOS AIRES, AN AUDIOVISUAL PLACE

**Enrique Avogadro**, general director of Creative Industries of the Government of the City of Buenos Aires, explains to **PRENSARIO** that 2012 has been a key year for **Buenos Aires Film Commission** (BAFC), after organizing a commercial mission to *Marché Du Film* during the Cannes Festival, where five companies have looked for coproduction projects and partners.

'This is the same model adopted in 2011 with the animation production companies that

visited the MIFA during the Annecy Festival in France, too. It was developed again this past May with six companies from Buenos Aires: **Nuts Studios**, **El Perro en la Luna**, **Astrolab Motion**, **Hook Up Animation**, **Can Can Club** and **CampMeia Studio**'.

Beyond this, the Government of the City of Buenos Aires has installed own stands for business meetings during the Cannes Film Festival and AFCI Locations Show (Los Angeles). 'We have organized a special event in the Cannes Lions International Festival of Creativity International and we will do one more during MIPCOM, next October', says **Avogadro**.

International producers like **Fox**, **Disney**, **Turner**, **Viacom**, **Pramer** and **Endemol**, continue choosing Buenos Aires to generate contents for Latin America and the world. 'The professionalism, awarded creativity and the highest capacity of the industry has transformed it in one

of the most selected cities in the world for this kind of production. Commercials, movies and TV shows have been shot here for USA, France, London and Berlin', he adds.

2012 has been a different year, because of the Audiovisual Law that declared this industry as strategic. And the local Government has bet strongly in the *internationalization* of the sector through **BAFC**. 'The Law contemplates this promotion in order to receive new audiovisual investments with tax benefits for international companies. The objective is to consolidate Buenos Aires as a worldwide production hub, the most important from Latin America and the world', completes **Avogadro**.



Enrique Avogadro, general director of Creative Industries



Several commercials, movies and international TV shows has been shot in Buenos Aires



TELENOVELA DRAMA MULTI AWARDED PROGRAM

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## VVI, A GREAT MIX OF LATIN TELENOVELAS



Daniel Rodriguez, sales director for Latin America, and Cristobal Ponte, exclusive independent representative for Europe, Africa & Middle East

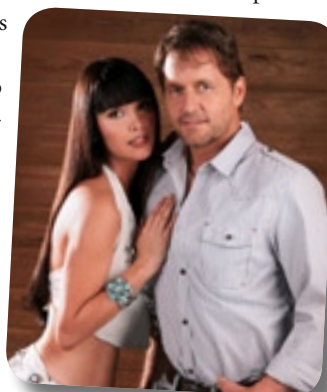
World-renowned telenovelas, such as *Pasions of the Heart* (111x'45), *The Talisman* (120x'45), *The Love Curse* (120x'45), *Natalia* (184x'45), *The Black Widow* (142x'45), *Gabriel's Family Tree* (120x'45) and *Eva Luna* (114x'45) are at the forefront of **Venevision International** (Venezuela/USA) offering at Natpe Budapest.

The distributor highlights seven captivating products with internationally successful track records created by the production companies of the **Cisneros Group: Venevision Productions**, the largest independent producer of

Spanish-language programming in the United States, and **Venevision**, the leading broadcaster in Venezuela.

'We are recognized around the world for our high-end productions, having assembled a strong programming proposal for the CEE buyers in Budapest', emphasizes **Cesar Diaz**, VP of Sales of VVI. The company is producing from 6 to 8 titles a year, 'providing us with an array of love stories featuring star-studded casts of world-renowned actresses and actors—a recipe for success in any market'.

The slate includes also series, documentaries, reality clips, and extreme sports from top independent producers. *Extreme Sports* (+100 hours) offers a mix of actions, sports & events such as *Airtime* (55x'48), *MMA H.E.A.T.* (13x'30) and *Half Pint Brawlers* (6x'30).



*Pasions of the Heart*

From **Sierralta Entertainment**, *Latin Angels* (26x'30) is a travel and beauty variety show that takes viewers to exotic locations around the worlds, while *Bikini Destinations* (50x'30) brings a perfect balance of physical and natural beauty as each episode captures startling swimsuit models in spectacular settings on earth.

Lastly, the funny *Home Videos & Bloopers* (+200 hours) from the French production house **Novavision**: these non-dialogue comical programs include *Hilarious Home Video Show* (120x'26), the best of more than 65,000 home video clips, and *Extreme Sport Bloopers* (450+ clips), the mishaps of athletes brings about uncontrollable laughter.



*The Talisman*

SUITE #117

## ABS-CBN: ASIAN PRODUCT LANDS IN CEE



Laarni Yu, Head of International Program Sales

The leading *Filipino* broadcaster, **ABS-CBN**, arrives Natpe Budapest to push in the CEE territories, the series that have been an important success in the Asian markets. The company is now present at the main content shows of the international market.

Year to year, the channel has increased the number of hours produced, which naturally enlarge the catalogue promoted in the international markets. **Laarni Yu**, head of international program sales, attends Natpe Budapest where the company highlights three

top drama series.

*Jade* (50x'45) is the new series with a story about the adventures of a young girl who gives up her dreams, even her identity, to be accepted and loved by her father, a Chinese businessman that has always expressed his preference of having a son rather than a daughter. It was not easy for Jade to juggle a double life as a girl and as her father's son.

*My Eternal* (80x'45) shows an owner of a winery falling in love with one of their work-



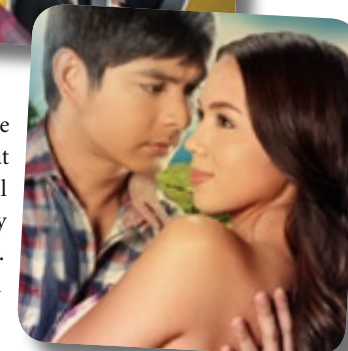
*Budoy*



*Jade*

ers daughter, whose mother is against that relationship and will make sure that they don't end up together. She puts Emily in prison and her grandchild up for adoption while the man builds a family with another woman, but she will return for revenge and will do whatever it takes to be rich.

In *Budoy* (50x'45), a doctor almost had it all, a successful career, a highly respected family, and a beautiful wife. But as they remain childless, the doctor decided to perform an in vitro fertilization procedure on his wife. The son, Budoy, was born mentally challenged causing delays in his intellectual development.



*My Eternal*

## SEVENONE: NEW GAME SHOWS

SevenOne International (Germany) highlights in Natpe Budapest three game shows of the last year. First, *Body & Brain* (60 episodes), where two contestants go after a huge cash prize, and *My man Can* ('90) with four women gamble with the abilities of their partners.

Then, *The Nagging List*, where men are transformed into better husbands: six hopeless husbands are taught to improve. Also, the series

*Lilyhammer* (8x'45), starring **Steven Van Zandt**.

Lastly, the TV Movie *The Revenge of the Traveling Whore* ('120), where an evil noble avoided being burned at the stake and is after about a woman that leads a happy life with her husband until he has to go to war.



*Lilyhammer*

SUITE #224

## MEDIA BIZ, 'THE' BUSINESS AGENT



Alex Lagomarsino and Virginia Berberian

MediaBiz, the company founded in 2006 by Alex Lagomarsino, CEO, has specialized itself at the international entertainment market in two main areas: contents and business.

Led by Virginia Berberian, director of International Business, MediaBiz's contents area represents major producers and companies from Latin America to the world, while distributing their catalogues and fiction formats such as Pol-ka Productions, In post We Trust, Quark Content and Aries Cinematographic from Argentina, Prodigio from Brazil and Be-TV from Colombia.

With the experience obtained through the years and the vast network that the company manages, in the other area —business— the company has successfully closed important sales and agreements, made convenient

alliances and co-productions, providing to all its clients a comprehensive overview of the business in addition to all the advice and strategies for success.

'MediaBiz has created a new bridge of services with its customers, representing talent, welcoming to top Latin writers, known for their creativity and quality of their products, providing by this way original ideas and developing projects for any market of the world', explain Lagomarsino and Berberian.



## YAIR DORI PRODUCCIONES JOINS SILVANA D'ANGELO



Silvana D'Angelo, sales director

**Yair Dori Producciones** is the new venture of the veteran executive from the TV industry **Yair Dori**, which was launched in 2011 in Buenos Aires, Argentina. The company has appointed **Silvana D'Angelo** as international sales director, after the merge of **Flor Latina** catalogue to the new company.

'We have started to develop projects in different countries and Silvana is one of the most experienced executives in international field to promote them', remarked **Dori**. D'Angelo has already worked with him when **Dori Media Distribution** was launched; he has left that company and has nothing to do with it.

Some of the projects are *Historias de divan*, *Señales* and *Paraíso Urbano*. **Yair Dori Producciones** will develop multiplatform products, especially the young programming to be exploited in 360°, like mobile contents, merchandising and live shows.

## GLOBO: SERIES AND DOCS

Globo TV International (Brazil) exhibits at Natpe Budapest its action packed telenovela *Irrational Heart* (140x'45) and the mysterious and seductive *The Illusionist* (50x'45). Other telenovelas are *Destiny River* (105x'45), *Looks and Essence* (160x'45) and *The Enchanted Tael* (100x'45).

In series, the distributor brings *The Invisible Woman* (5x'30), *Internal Affairs* (14x'30) in its third season, the funny and comedy series *Macho Man* (14x'30) and *Slaps & Kisses* (37x'30). Lastly, the documentaries *Extreme Planet* ('40 or 3x'25), *After the End* ('52) and *The Color of Culture* ('45).



*Irrational Heart*

SUITE #226



## RTVE: LONG-RUNNING SERIES AND NEW TV MOVIES



RTVE sales: Rafael Bardem and Antonio López

**Radiotelevisión Española (RTVE)** brings to Budapest a very good portfolio of products, especially long-running series that are a big success in Spain, but also documentaries, historical miniseries—a top trend in the last years in the Spanish market—and a new slate of TV Movies.

"Thanks to the outstanding acceptance of our series and documentaries, we want to consolidate the growth seen in 2011 coming from content sales division", says **Rafael Bardem**, programming sales director, who recommends the brand-new historical series

*Elizabeth* (13x'60) with life of one of the most important women of Spain, Queen Isabel the Catholic, and the documentary *Real Madrid, the best club of the world* (6x'46).

**TVE** series are audience leaders in Spain and continue to reap international recognition thanks to the awards received: *Love in difficult times* is another star of the catalogue, after seven seasons on air; *Remember when* is in its 12<sup>th</sup> season with the story of a typical family who go through the main political, economical and cultural events in Spain. Also, *April 14<sup>th</sup>. The Republic*, the series *Vintage*, *Mom's detective* and *La Señora*, all broadcast on prime time.

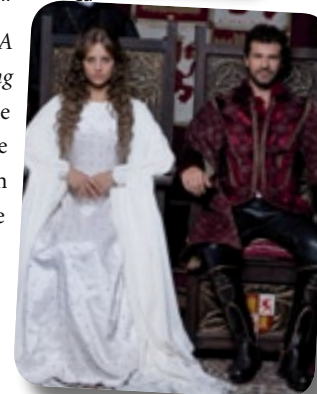
The distributor also has a large number of TV movies, some of which have already been successful in Spain and have been internationally acknowledged in various international festivals, like *Operacion Jaque* about the kidnapping and rescue of Ingrid de Betancourt, awarded with the bronze medal in the "Miniseries" category during the 2012 New York Festivals International Television and Film Awards.



14 de abril La República

The documentary *A Country worth Eating* was also awarded the bronze medal in the "Travel and Tourism Documentary" in the same festival.

Other TV Movies are *Clara Campoamor*, *Objetivo Carrero*, *La Memoria del Agua* and a long etcetera of Isabel la Católica productions, some of which are currently being produced, such as the one that tells the life story of the singer Julio Iglesias.



## TRT: FIVE OPTIONS TO CONSIDER CCI: NEW MOVIE THRILLERS

The public **Turkish Radio & Television** brings to Budapest five top productions, beginning with the historical series *Once Upon A Time Ottoman Empire* (13x'95), where a group of men try to start an insurgece, aimed to agitate the public against the Otoman State.

*Blue Butterflies* (26x'75) is another historical product based in a human tragedy that took place in Bosnia-Herzegovina during the civil war in 1992; *Keloglan my friend* (26x'13) is an adventure story with a legendary hero who organizes an exciting travel into our world; and *Pepee* (52x'10) is an animation series about a boy and his friends, who has won the heart of the Turkish audience.

Lastly, *The law of the wolf* (18x'65) produced by **Pana Film**. It's the story of a man who was once a king in Istanbul, and who, after the İzmir Assassination, saw all the doors get closed to his face and in want of a safe haven. A group of Committee of Progress and Union members found themselves sidelined and outcast after the Turkish War of Independence.



Law Of The Wolf

Through **Federico Vargas**, director of sales, **CCI Entertainment** (Canada) highlights in Budapest its new TV Movie thrillers catalogue that includes six titles—some of them co-produced with **Mediaset Italy**—, which were sold to France and Spain.

"We are aiming to close deals in CEE territories this market", says **Vargas**, who recommends *Vision of Murder* ('94), about a *medium* who dreams a brutal assassination of a little girl, *Twins* ('91), where a series of murderers panic a small Italian town, and *Souvenirs* ('92) with a detective that leaves the FBI after his wife death. Other titles are *Tailor-Made Murder* ('85), *Linder Protection* ('92) and *The Captives* ('95).

Another strong focus of the company is the kids programming, like the co-production *Guess how much I love you* (11x'52), *Joe & Jack* (7x'39) and *Artzooka* (30x'46). "The lifestyle programming is getting more and more important in CEE territories, too. We bring *Candice Tells All* (30x'52), where the protagonist explores a major design principle in each episode", completes **Vargas**.



Federico Vargas, director of sales

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## TELEFE & THE CONTENT EVOLUTION



Fernando Varela, international business director



Maria Eugenia Costa, in charge of Natpe Budapest

**Telefe International** (Argentina) is a good example about what is going on among the top Latin distributors: it was traditionally focused on the telenovela genre, but nowadays it has a diversified catalogue, offering from drama/comedy series to entertainment formats and documentaries.

'We cannot be considered as simple distributors. On the opposite, we have to be very active providing

different kinds of products and services, as the competence is bigger than ever', stands out **Fernando Varela**, International Business Director.

Among the main strategies, the company is enlarging its catalogue, with focus on alternative territories (especially the Nordic countries with a new entertainment format slate) and to recover time slots in Central and Eastern Europe. 'The competition with the Turkish series is tremendous so we need to analyze the new trends and try to adapt our products to their content needs', says **Varela**.



*The Chairwoman* obtained 29.9 of rating points and close to 50% of average market share during its premier in April

Two of the most important titles at the Budapest show, are the series *The man of your dreams*, directed by the Oscar winner **Juan José Campanella** (100 Bares), which was sold to **HBO Latin America** as finished product, and to Ecuador, Colombia,



*The man of your dreams* arrives to Budapest in its second season

Mexico, Chile, Italy, Spain, Turkey and India, as formats. And *The Chairwoman*, a weekly series with a legend star of the Argentinean TV co-produced with **Endemol**.

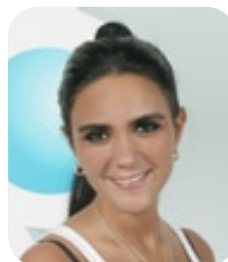
*Candy Love* is a traditional telenovela co-produced with **LC Accion**, while *Graduates* is the top product of the production company **Underground** and, nowadays, is the most watched series on the local prime time on **Telefe**. Also, the award-winning telenovela *The One*, the drama series *Mistreated* and the children show *Z TV*, co-produced with **Cienpies Contenidos**.

**Telefe** has developed a wide catalogue of entertainment formats through the production company **Nanuk**. There are three main titles highlighted by the executive: the game shows *Check In- Check Out* representing each step of an airport check in process, and *Weight For Money*, and the quiz show *Money Order*, in which 50 contestants have the possibility of competing for money.

BB4

SUITE #327

## KANAL D: TURKEY BETS ON CEE

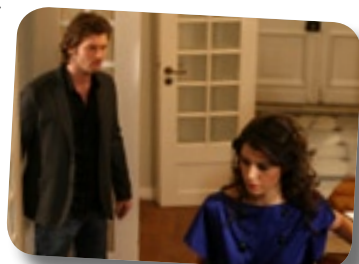


Ezgi Ural, sales and acquisitions specialist

**Kanal D**, the leading broadcaster in Turkey, attends Natpe Budapest for the first time with a stand, highlighting the most important titles of the Turkish television like *Forbidden Love* (79x'90), a story that mix love and passion with betrayal.

Also, the brand-new series launched at MIPTV *Kuzey- Güney* with the story of two brothers with different ambitions and paths that struggle to survive in their own worlds; and *Lady's Farm* (58x'90), which mixes the adaptations of two novels of the Turkish author Orhan Kemal.

With 60% of average market share in the local market, *Fatmagul* (39x'90) is another key title on the distributors slate, as well as the historical drama series *Time goes By...* (40x'95) that has reached 74% of market share.



*Forbidden Love*

## ORF: DOCS & LIFESTYLE SHOWS

**ORF**, the public Austrian broadcaster, brings to Budapest entertainment shows, lifestyle programming and documentaries, like *Danube - Europe's Amazon* (2x'50) with scenes of breathtaking beauty along Europe's second-longest river.

On entertainment, it highlights *Champion* ('100 episodes), a mix of a knowledge quiz show and an action game show for the prime time program, and *Quiz Castle* (240x'5), a combination of 3D animation and film elements, in which the audience gets to guess along. It specifically caters to the needs of pre-school children.

*Shape Your Life* offers over 1,000 minutes of Yoga and Pilates for different sorts of media, TV to VOD and DVD, and *Homo Sapiens* (12x'25) is a comedy series that take the audience to the Neolithic period, during the first revolution in human history.



Marion Camus-Oberdorfer, head of content sales international



*Danube - Europe's Amazon*

## CARACOL: PABLO ESCOBAR ARRIVES TO BUDAPEST



Roberto Corrente, sales executive for Eastern Europe & Asia

**Caracol TV Internacional** (Colombia) launches in Natpe Budapest the most ambitious TV series of the last years in the Colombian television: *Pablo Escobar, the drug lord* (60x'60) that shows the path that turned a common man into the drug lord of the drug trafficking business, as well as into one of the richest and most cruel criminals of the whole world.

With 26.9 rating points (people) and 62.7% of average market share, this mega production premier was the most important launch in the history of Colombia, having

increased the TV share in 79% (some 11 million people). Additionally, the series was a success on Internet and social network: the official web registered 150,000 visits during the emission; **Twitter** account grew 35% during the first episode and got close to 17,000 followers, while **Facebook** page received 9,000 followers.

*Where the heck is Umaña?* (120x'60) is a new telenovela about a man that seems to be wealthy and he is a mega event organizer



*Made in Cartagena* is a police series shot in Cartagena de Indias, in the Northern Colombia

IFTA TABLE 5

## ECHO BRIDGE: MOVIES IN ALL GENRES

Echo Bridge Entertainment (USA) recommends to the CEE buyers the new season of *The L.A. Complex* (19x'60), a sexy new drama that follows the triumphs and trials of six twenty-something newly arrived in Los Angeles to pursue their dreams of stardom.

The distributor brings a slate of movies: the comedies *Goats* ('92) and *The Best and the Brightest* ('93), as well as the thriller *Messages Deleted* ('92) and the horror film *Fear Island* ('95).

Also, the Emmy-nominated series *Degrassi* (45x'60 new or 278x'30 total) in its 11<sup>th</sup> season, *Rich Bride, Poor Bride* (26x'30 + 65x'60), the sci-fi & fantasy series *Total Recall*: 2070 (22x'60); the lifestyle series *Lidia's Italy in America* (52x'30) and *At the End of My Leash* (65x'30); the music drama series *Instant Star* (52x'30) and kids programming *Lunar Jim* (46x'30) and *Henry's World* (26x'30).



*The L.A. Complex*

## ARMOZA: STILL STANDING, SEASON 2 IN TURKEY

**Armoza Formats** (Israel) announced that a second season of one of its flagship formats, *Still Standing* —adapted by NBC in the States— was commissioned by **Star TV** in Turkey. The channel is also producing a local version of the company drama series *The Naked Truth*, debuting this summer. *Still Standing Turkey*

*Still Standing*, which first season is currently on air twice a week in prime time, will continue without a break. An additional 26 episodes have been ordered, and will be transmitted weekly on Thursday night slot. Other deals closed are **Antena3** (Spain), **M1** (Hungary), **Jiangsu Satellite TV** (China), **Band** (Brazil) and the four seasons on **Channel 10** (Israel), while there are more negotiations following pilot productions in major European territories.



*Still Standing Turkey*

SUITE #113 A



*Pablo Escobar, the drug dealer* premier reached 62.7% of average market share and the official web receive 150,000 visits during its launch

that, after many business failures, decides to bring the world's music star of the moment to the country. But bad luck seems to chase him and he fails again.

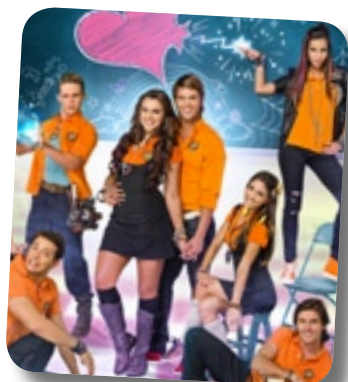
*Made in Cartagena* (60x'60) was shot in one of the most beautiful beaches in the north of Colombia, where a group of thieves try to rob the Santa Helena, an old treasure rescued from the bottom of the ocean and hidden in the guarded Colombo-Spanish Bank's vault.

In the telenovela *Five Widows on the loose* (120x'60) five women have to survive in life without their husbands. But they are not dead they are in jail. The distributor also highlights the entertainment format *Sounds like a Million*, in which the contestants may win juicy prizes according to their musical abilities: singing, dancing, identifying a tune or playing instruments.

VIEWING BOX M09



## TV AZTECA/COMAREX: FOUR TELENOVELAS AND MORE...



Grachi in its second season

**Adela Velasco**, Sales Europe and Africa, recommends four telenovelas from **TV Azteca**: *Quererte Asi* (120x'60), where a woman has inherited one of the most important hotel chains but the closest to her will secretly attempt to manipulate her; and *La Mujer de Judas* (120x'60), where a woman has become somehow of a legend, and the people that surround her say she dresses in a bride dress to kill her enemies.

**TV Azteca/Comarex** (Mexico) arrives to Natpe Budapest with a catalogue of more than 10,000 hours of programming plus the two international pay TV networks **Azteca Internacional** and **Azteca Novelas**, being promoted as well.

*Huerfanos* (120x'60) is the story of three sisters that lost it all when their parents died in a car accident. But now they have a new life without any luxuries, sports cars, mansions and even vacations. In *Cielo Rojo* (120x'60) a woman and a man were meant for each other, but it seems destiny is intent on keeping them apart.

The independent slate of **Comarex** highlights the second season of the young series *Grachi* (81x'60) produced by **Nickelodeon Latin America**, which was a success in both, the channel and the international markets.

Also, the action/suspense series *Intelligence* (12x'50), produced by **Taodue Film**, *Antimafia Squad* (12x'50) produced by **Mediaset Italy** and the new production from the same company *The Chosen* (12x'50), a paranormal



La mujer de Judas



Adela Velasco, sales Europe and Africa with Edina Balogh, senior acquisitions manager from Sanoma Media Hungary

investigation series where a young priest and theology professor at the university is concerned with exploring the boundaries between science and faith.

Lastly, *Religious Mysteries* (12x'50) with six big mystery documentaries that brings a vision to these stories of love and compassion; *Spot Central* (78x'25) a clip show with the most exciting and funny commercials of the world; and the animated series *Maya The Bee 3D* (78x'13).

## OnTV, A MULTIPLATFORM CONTENT HUB

Managed by two of the most important executives of the Latin American television industry, **Claudio Villaruel** and **Bernarda Llorente**, **OnTV** (Argentina) is a production and creative agency that attends Natpe Budapest for the first time, promoting not only its content catalogue, but also unique know how, experience and consultancy services in programming production, that CEE broadcasters and producers must take in mind.



Contra las cuerdas, both ratings and critics success

Both executives have been the head of artistic and programming department of the leading broadcaster in Argentina **Telefe** for ten years and now, from its own company, they have created top series for different TV channels and have launched early 2011 a DTT station called **360TV**, available through a set-top-boxes and web to more than 4.5 millions of homes. They also administrate the artistic department of **Radio del Plata**, in Argentina.

'We want to place **OnTV** as a creative hub for multiple platforms', remarks **Villaruel** and **Llorente**, who add: '2011 was a key year for us with *Television x la inclusion* (13x'60) that recently won a Martin Fierro Award (the main award of the local TV) and also for *Contra Las Cuerdas* (60x'60), nominated as "Best Telenovela International" in the Emmy Awards.'

The international distribution arm of **OnTV** is **Frecuencia Latina International** (USA). 'We strongly believe that the titles we have can be adapted to any market in the world, because they narrate universal stories. And the services we provide are based in the experience



Patricia Jasin, sales director of Frecuencia Latina International, with Bernarda Llorente and Claudio Villaruel. Behind, *Television x la inclusion*

we have gained after more than 20 years in a very changing and exigent market, like the Argentinean one.'

After the LA Screenings, the series about discrimination, xenophobia, social inequity and exclusion, *Television x la inclusion* has had a great reception in Mexico, France, Spain, Ecuador, Uruguay and Colombia, as well as the US market, who acquired the rights to adapt the format. 'In Argentina it has also received several recognitions from Public governmental entities, the national Senate, and from the local government of the city of Buenos Aires', completes **Villaruel** and **Llorente**. 'We definitely want to work in Central & Eastern Europe'.

# Donde las estrellas se alinean

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## BE INNOVATIVE WITH RCN



Lina Maria Waked, sales executive

**RCN Television** (Colombia) brings to Natpe Budapest a varied and innovative portfolio of telenovelas and series, highlighting the comedy *From riches to rags* (120x'60) about two families that learn that money is not the most important thing in life.

The product has had a great premier in Colombia, being produced by **Guillermo Restrepo**, president of the local office of the Argentinean company **Resonant TV** from **Gonzalo Cilley**, CEO. 'Being part of this market is very important for us, based on the interest that the CEE market has shown for years on our

productions,' says **Lina Maria Waked**, executive of the International Sales Department of **RCN**, who adds: 'We are sure that our catalogue will be very attractive because we have universal stories that can be adapted to any culture.'

*Classified Ad Stories* (60x'60) reveals the diverse drama that happen to common people who have been obligated to place an ad on the newspaper to solve their problems; *House "Man"* (120x'60) shows a man who, after working for many years at a bank, expects a promotion, but due to life's circumstances he ends up facing the chores at home.

Then, the super production *Wait for me!* (120x'60) tells the story of a woman who supports her husband in achieving the American Dream; and the police story *Armored Hearts* (80x'60) combines

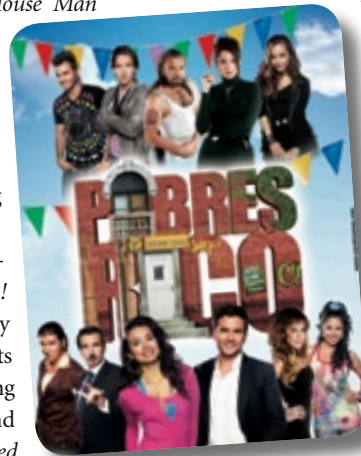


SUITE #112

House of Queens

action and drama. *Dr. Mata* (60x'60) is an incredible story adapted to the 1950s, which tells the story of the humble maid of the sexagenarian Alfredo Ferro Villegas, neighbor of the Perseverancia neighborhood, who dares to accuse the famous doctor Matallana for the disappearance of her boss. And *House of Queens* (80x'60), a spin off of the successful telenovela *Chepe Fortuna* and with the same ingredients of the Caribbean coast.

'Our interest is to have direct contact with the main free TV channels, paid and regional television channels as well as alternative media in Central and Eastern Europe,' completes **Waked**.



From riches to rags

## A+E: HISTORY IN ALL SENSES

A+E Networks (USA) highlights the history series *Mankind the Story of all of us* (12x'60), an epic tale of the global rise of civilization, complete with danger, action, heroism and adrenaline.

The hit series *Pawn Stars* (145x'30) takes viewers inside the doors of the only family-run pawnshop in Las Vegas, where three generations of men from the Harrison family buy and sell historically significant items, while *Dance Moms* (25x'60 + '60) follows children's early steps on the road to stardom and their mothers who are there

for every rehearsal, performance and bow. Both are available for formats, as well.

Other titles are *The Eleventh Day - The Survivors of Munich* ('60), *Chris Bohjalian's Secrets of Eden* ('120) and the format *Monster in-laws* (10x'30), which shines a light on married couples who are at the boiling point with their overbearing in-laws.



Mankind the Story of all of us

SUITE #214

## CBSSI: SCREENINGS FOR CEE BUYERS



Armando Nuñez, president

As it has happened last year, some U.S. studios are organizing screenings during the week of Natpe Budapest. **CBS Studios Interna-**

**tional** (CBSSI) is doing it on Wednesday 27<sup>th</sup> at 2.30pm, where it exhibits the titles launched during the last LA Screenings in Los Angeles.

On the other hand, the company and **Avex Broadcasting & Communications** (Japan) announced a new multi-year, non-exclusive agreement for CBS series for the SVOD service **Market Video Store**, accessible to **DOCOMO** mobile subscribers. The del includes early seasons of *NCIS*, *NCIS: Los Angeles* and *90210*, and full seasons of *Star Trek*, *Star Trek: Enter-*

*prise*, *Numb3rs*, *Medium* and *The 4400*.

**Armando Nuñez**, president, says: 'The continued growth of mobile devices in Japan has opened new opportunities to monetize our content in a way that complements our existing licensing deals in the market'. **Hidemi Arasaki**, director and Business Strategy of the Japanese company, adds: 'We had a successful growth in our subscriber numbers. Now, our challenge is to maintain our growth rate, and to maintain a satisfying service for our existing subscribers.'

ACADEMY ROOM MA4

## ARTEAR: ALTERNATIVE PRODUCT FOR LATE PRIME TIME



Julieta Gonzalez, sales executive

**Artear International** (Argentina) launched in Budapest its brand-new series for the late prime time, *Naked Family* (13x'60), which was premiered in Argentina with very good results. **Julieta Gonzalez**, sales executive, is in charge of this market.

Broadcast at 11pm in **El Trece**, is about the Cocker family, a very peculiar one. During the 80's, they ventured into the skin flicks industry: the father *Dicky*, was the director, and Lorna,

the mother, was the porn star. The company was a huge success and became leaders, but now they had their fair share of fiascos, frustrations and decadence.

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

Other options are the series *Left on the Shelf* (36x'60), which is an award-winning drama series (it also received the Golden Martin Fierro in 2011) and *Be Kind to Me* (36x'60), and the telenovela



Naked Family, for late prime time

*Gypsy Blood* (250x'60).

Lastly, the documentary line up is headed by *Fantastic Biographies* (8x'30), with the bio of a fiction character, someone who never existed; *Methods* (13x'30) approaches different branches of art and culture, the creative process behind a work of art; and *Tasting Notes* (57x'30), dedicated to the spectacular world of wine.



The Social Leader, an award-winning series

## RAI: BIBLICAL AND DETECTIVE SERIES



Margherita Zocaro, sales

**RAI Trade** (Italy) highlights its TV movie catalogue, headed by *Borsellino, the last 57 days* ('98), a drama that begins with an assassination and it was co-produced between **Rai Fiction** and **Compagnia Leone Cinematografica**, as well as the its biblical and detective series slate.

*Mary of Nazareth* (2x'100) is the story of two women joined by the same name and by one man: Jesus; *The day of the Siege - September 11, 1683* (2x'100 or '120), when

thousands of Islamic warriors hailing from every corner of the Empire are laying siege to Vienna.

After having wandered aimlessly all night long, a woman is found by the police in downtown Rome in *The lady who returns* (4x'100), produced by **Endemol Italia** and **Rai Fiction**. Lastly, the detective story *The young Montalbano* (6x'100), a series set at the beginning of the '90 that describes how everything has begun.



Mary of Nazareth

SUITE #124

## EDEBE: MORE ANIMATED SERIES



Margherita Zocaro, sales

**Edebe Audiovisual Licensing** (Spain) launches at Natpe Budapest its new non-dialogue animation series *Jonas* (26x'5), produced in flash 2D and targeted to kids from 4 to 10 years old.

'It's a production of **Machango Studio**, a small studio located in Canary Islands, and **Televisión de Canarias** (TVC), and we are working as worldwide distributors and licensing

agents,' explains to **PRENSARIO Ivan Agenjo**, Sales director, who is enthusiastic about the reception at the market.

The story is about an only child in a humble family from a humble neighbourhood. He doesn't have many toys and the ones he has are not very good. However, what he lacks in material things, he makes up for with his imagination. The production finished in March, just before the market. 'Machango is planning to make a second season of the series (26 episodes more) starting by end of this year,' says the executive.

Other titles of the distributor are *Never Ending Tales* (26x'10), a collection of independent short stories produced in

stop-motion technique, and the lovely stop-motion series *Snails* (39x'6) targeted to preschoolers about the adventures of a group of small animals living in a garden.

'Both are a coproduction between the studio **OQO Filmes** and **Televisión de Galicia**. Produced between 2010 and 2011, are based on the bestselling books by the same name published by OQO publishing. We have just added them to our catalogue and hold the TV and licensing rights worldwide,' completes **Agénjo**.



Never Ending Tales



Jonas



## RECORD TV, AN EPIC MINISERIES REFERENT

In the last years, **RecordTVNetwork** (Brazil) has become a referent in religious, epic and history miniseries, with high budget and time reconstructions that are proper of the Hollywood Studios. After the success of *Samson and Delilah* and *Esther, the Queen*, the distributor brings to Natpe Budapest *David, the King* (29 episodes), which has become the leading series in Brazil in its slot, having reached 19 rating points and 40% of market share, betting the main competitor.

"The international market is always interested in products that show the Brazilian culture. However, they also have interest in universal stories, like the historical miniseries, like *David, the King*, which was launch in the international markets at the beginning of the year with great reception among our main

clients," explains **Delmar Andrade**, director of international sales.

Following this genre, *Samson and Delilah* (18x'50) is another classic story where strength and beauty come together in a game of greed, seduction and power; *Esther, the Queen* (10x'50) tells the story of a beautiful young lady, and Jewish at a time when her people were persecuted and she must avoid that they're all extinct.

*Jackpot!* ('45), which won the "Best Telenovela" award in Banff 2012 Rockies Program Competition, shows a group of friends had been playing lottery since two years ago, but when they win the New Year's Eve prize and become millionaires they are also involved in a terrible nightmare. *River of Intrigues* (250x'45) is a contemporary and captivating telenovela.

*Another Power* (237x'45), shot in Palermo and Tonnara di Scopello, Italy, is an action/suspense soap opera about the local mafia. In *The Law and the Crime* (21x'60) a high-society woman decides to study and become a police commissioner after her father being murdered in a robbery.

The exciting story of *Flames of Life* (253x'45) shows a love growing interest started in two childhood friends who haven't seen each other for many years and are bring back together in a tragic moment. Lastly, *Opposite Lives* (240x'45)



Delmar Andrade, International Sales Director



David, the King, a highlighted epic miniseries from the distributor

about a young rich man of a traditional family, and a student and tourist guide who lives in a slum, *The Slave Isaura* (167x'45).

"With the investment we have done in contents, I highly recommend the buyers to pass by our suite to look at them and check the high quality levels. I'm sure they will finally find them very attractive for their audiences," completes **Andrade**.



Jackpot! won the 2012 BANFF Award as "Best Telenovela"

BOOTH # 05.02

## NBCUNIVERSAL: SUCCESSFUL DRAMAS



Belinda Menendez, president Int'l Distribution, with the actors Monica Raymund (*Chicago Fire*) and Laz Alonso (*Infamous*)

After a successful LA Screenings in May in Los Angeles, **NBCUniversal** (USA) organizes in Budapest a new screening on Tuesday, June 26<sup>th</sup> at 12pm for the CEE buyers.

The distributor exhibits two dramas that were the most commented among the Latin & Iberian buyers consulted by PRENSARIO: the suspense series *Infamous* (13x'60) and *Chicago Fire* (13x'60), about firefighters, rescue squad and paramedics of Chicago Firehouse 51. Also, *Do no Harm* (13x'60).

About comedies, it was highlighted the *Go On* (13x'60) with **Matthew Perry** (*Friends*) and *Animal Practice* (13x'30) that tells the story of a veterinarian surrounded by intelligent animals. Lastly, *Next Caller* (6x'30) and *Guys with kids* (13x'60) for **NBC**, as well as *The Mindy Project* (13x'60) for **FOX**.

## DORI MEDIA: TWEEN AND CRIME SERIES

**Dori Media Distribution** (Switzerland) highlights at Natpe Budapest its *tween* own produced series *Galis* (30x'60) and *Split 3 - The Real Story* (45x'30), as well as the drama series *Single Again*, the Chilean version of *Date Blind*, one of the titles that head the catalogue and *Shall we Kiss*.

The distributor also brings the crime series *New York* (70x'30), Elena Antonini, VP of Sales the documentary *Checked in New York* and the entertainment formats *The Money Pump* ('45), *Wrong Numbers* and the new game show *Smart Face*, where the participants has to look for someone in the street that answers its questions to win the prize.



SUITE #120

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SUITE  
#215SATURDAY NIGHT  
TAKEAWAY (ITV, UK)

ONE OF THE TOP VARIETY ENTERTAINMENT SHOWS ON AIR IN THE CENTRAL TERRITORIES. IT OFFERS A CHAIN OF INSIDE FORMATS AND SHOWS, ONE MORE SUCCESSFUL THAN THE OTHER, VERY EASY TO ADAPT EVERYWHERE

SUITE  
#217GRADUATES  
(TELEFE, ARGENTINA)

THE LATEST BOOM OF THE ARGENTINEAN TV: A ROMANTIC COMEDY (120' X 60) ABOUT A GROUP OF HIGH SCHOOL FRIENDS THAT JOIN AGAIN MANY YEARS AFTER, CROSSING THEIR STORIES.



BB4

TIME GOES BY...  
(KANAL D, TURKEY)

THE TURKISH PRODUCT IS ON THE TOP OF THE WAVE, AND THIS SERIES GOT 70% OF MARKET SHARE IN TURKEY. IN THE '60s, A CAPTAIN SAILOR RETURNS HOME WITH A SECRET TO REVEAL TO HIS FAMILY.

SUITE  
#324THAT'S TALENT  
(MEDIASET, ITALY)

IT IS THE MOST-WATCHED TALENT SHOW OF THE ITALIAN TV, WHICH INCLUDES A REAL SCHOOL OF PERFORMING ARTS FOR YOUNG PEOPLE. IT WAS ADAPTED IN USA AND OPTIONED IN UK.

SUITE  
#318CQ  
(TELEvisa, MEXICO)

A TEEN COMEDY (80x30') WHICH IS THE FIRST TIME THAT CARTOON NETWORK PRODUCES LIVE ACTION IN LATIN AMERICA, IN A CO-PRODUCTION WITH THE MEXICAN TITAN.

SUITE  
#129GODANCE! (STARMEDIA,  
RUSSIA/UKRAINE)

UNIQUE MUSIC SHOW THAT INCLUDES HUNDREDS OF PEOPLE PERFORMING AT THE SAME TIME, DEVELOPED FOR THE UKRAINIAN MARKET AND TO BE ADAPTED BOTH IN FRANCE AND USA. FOR CHANNELS LOOKING FOR SOMETHING UNUSUAL...

SUITE  
#119BOLLYWOOD STAR  
AUSTRALIA  
(ALL3MEDIA, UK)

SPECIAL REALITY SHOW (4x'60) WHERE BOLLYWOOD, THE WORLD'S MOST PROLIFIC FILM INDUSTRY, IS ON THE HUNT FOR A NEW STAR. THE SEARCH GOES GLOBAL.

VIEWING  
BOX B13LOVE IN DIFFICULT TIMES  
(TVE, SPAIN)

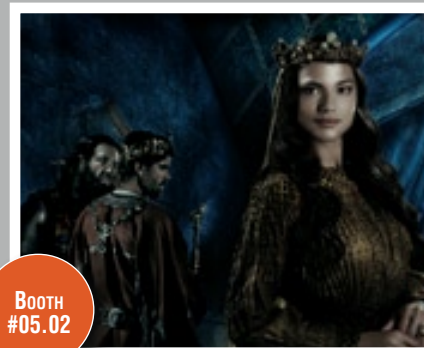
THE MOST WATCHED LONG RUNNING SERIES IN THE SPANISH TV AT La1, THE LEADING TV CHANNEL: IT IS A LOVE STORY THAT HAPPENS DURING THE YEARS OF THE SPANISH CIVIL WAR.

SUITE  
#113AWHERE THE HECK IS  
UMAÑA? (CARACOL,  
COLOMBIA)

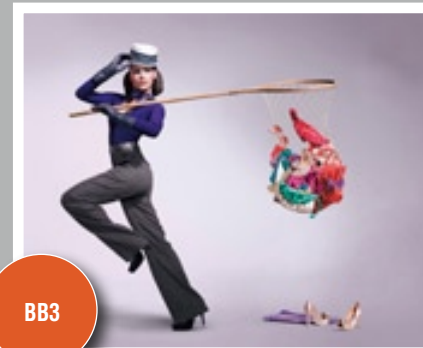
IT IS AN ORIGINAL COMBINATION OF COMEDY AND TELENUELA (120x'60) ABOUT A MAN WHO BAD LUCK SEEMS TO SEARCH HIM AT EVERY TIME. THE LOCAL CUSTOMS OF THE INTERIOR OF COLOMBIA ARE FUNNY TO SEE IN EUROPE, ALSO.

SUITE  
#117BIKINI DESTINATIONS  
(VENEVISION, USA)

FRESH TV SERIES THAT PROVIDES A BALANCE OF PHYSICAL AND NATURAL BEAUTY WITH WOMEN IN BIKINIS, FUN AND ADVENTURES IN WONDERFUL LOCATIONS OF THE WORLD (50x'30).

BOOTH  
#05.02ESTHER  
(RECORD TV, BRAZIL)

AN EPIC MINISERIES (10x60') PRODUCED IN BRAZIL IN HD AND HIGH BUDGET, BY THE SECOND LARGEST BROADCASTER. IN THE ANCIENT AGE, A QUEEN MUST SAVE HER PEOPLE FROM BEING EXTINGUISHED.



BB3

SHOPPING MONSTERS  
(GLOBAL  
AGENCY, TURKEY)

EACH WEEK, FIVE WOMEN ARE CHOSEN TO COMPETE ABOUT DOING THE BEST SHOPPING. THEY HAVE LIMITED TIME, MONEY AND SURPRISING TWISTS TO FOLLOW.

VIEWING BOX  
B24THE VISITOR OF PRISONS  
(FILMAX, SPAIN)

TV MOVIE BASED ON THE REAL STORY OF A WOMAN THAT IN THE XIX CENTURY, WAS THE FIRST ONE TO WORK WITH JAIL PRISONERS AND IMPOSED CONCEPTS AS 'REINTEGRATION' AND TOOLS TO GIVE THEM OPPORTUNITIES FOR A BETTER LIFE.

SUITE  
#112BKDABRA 2  
(FOXTELECOLOMBIA,  
COLOMBIA)

ORIGINAL AND VERY SUCCESSFUL ACTION-SUSPENSE MINISERIES PREMIERED ON FOX USA, ALREADY AT ITS THIRD SEASON OF 10 ONE-HOUR EPISODES.

SUITE  
#112CLASSIFIED AD STORIES  
(RCN, COLOMBIA)

A FRESH TV SERIES (60x60') THAT REVEALS THE DIVERSE DRAMA OF COMMON PEOPLE WHO HAVE BEEN OBLIGATED TO PLACE AN AD ON THE NEWSPAPER TO SOLVE THEIR PROBLEMS

SUITE  
#323FANTASTIC BIOGRAPHIES  
(ARTEAR ARGENTINA)

SPECIAL DOCUMENTARY SERIES (8x'30) THAT PROVIDES BIOGRAPHIES OF FICTION CHARACTERS, PEOPLE WHO NEVER EXISTED

SUITE  
#121WHERE IS ELISA?  
(TELEMUNDO/TVN  
CHILE)

A SUSPENSE TV SERIES THAT WAS AN UNIQUE SUCCESS IN CHILE AND MANY COUNTRIES OF THE INTERNATIONAL MARKET, HAVING MANY ADAPTATIONS BECAUSE IT IS VERY SUITABLE FOR ANY TERRITORY.

MEETING  
TABLE 11BMY ETERNAL (ABS-  
CBN, THE PHILIPPINES)

THE ASIAN DRAMAS ARE GAINING INTERNATIONAL MARKETS, AND THIS PRODUCT IS A VERY GOOD EXAMPLE OF WHAT THEY CAN PROVIDE: A STORY FULL OF PASSION, TWISTS AND VENGEANCE (80x'45).

SUITE  
#1917A BET WITH LIFE  
(MEDIAPRO, ROMANIA)

THE FIRST ROMANIAN TV SERIES WITH POP-ROCK MUSICAL MOMENTS, AND ALSO A TEEN COMEDY-DRAMA CENTERED UPON THE LOVE STORY BETWEEN TWO TEENAGERS, WHOSE DESTINIES ARE SWITCHED AT BIRTH (52x'60).

SUITE  
#225LA MUJER DE JUDAS  
(TV AZTECA, MEXICO)

IT IS A VERY SUCCESSFUL TELENUELA (120x'60) WHERE A WOMAN HAS BECOME SOMEHOW OF A LEGEND, AND THE PEOPLE THAT SURROUND HER SAY SHE DRESSES IN A BRIDE DRESS TO KILL HER ENEMIES.



By JONATHAN DORAN



## OTT TV HAS REACHED THE MAINSTREAM

Internet TV has finally become a mainstream consumer service category, with a rapidly growing proportion of households becoming equipped with the right devices, enabled with adequate Internet bandwidth and exposed to a widening range of compelling, web-delivered video services. Much of OVUM's recent consumer research has tracked these developments and highlights how and why consumption of long-form video and TV services via the Internet can no longer only be seen as an early adopter activity.

### ADOPTION AND USAGE OF VIDEO-CENTRIC CONNECTED DEVICES IS RAMPING UP

In addition to the adoption of free-to-air and pay-TV services across 'traditional' delivery platforms, a quarter of TV homes worldwide were accessing Internet TV by the end of 2011, according to Ovum's Global Multi-channel TV forecasts. While most

of this activity is currently via home computers, the expanding range and availability of video-capable connected devices is becoming the central driver in the proliferation of OTT TV distribution and consumption.

Consumers now face a growing choice of connectable devices equipped for online viewing and with form factors that make portable, second-screen and multi-room consumption of long-form video a much more compelling experience. At least a third of respondents to

Ovum's Consumer Insights (CI) survey panel said that they connected their television sets to the Internet either directly

or via a peripheral device.

### CONTENT SERVICES GO HAND-IN-HAND WITH DEVICES

Consumers' usage of connected devices is also shaped by the availability, range and ease-of-use of applications and services across those devices. Our CI survey indicates that, on average, movies and TV shows

are being watched online by 45% and 50% of consumers respectively across the full range of video-capable connected devices.

Accounting for much of this consumption are premium video-on-demand (VoD) services like Netflix, iTunes, Amazon Instant Video, Lovefilm, Zune, and Sony's Video Unlimited

as well as archive and catch-up offerings such as BBC iPlayer, Hulu, and SVT, and web-based extensions to pay-TV in the form of 'TV Everywhere-type' products. The proliferation of high-quality web-based video offerings, along with the explosion in connected device uptake and vastly improved, near-ubiquitous broadband access, marks the coming together of all the parts necessary for making Internet TV a mass market proposition.

### THE TV ESTABLISHMENT HAS EMBRACED OTT TV

As premium customer segments become saturated, the financial impact of falling pay-TV ARPU in several markets will be offset by wider uptake of lower-value subscriptions. Our report entitled: *How do Pay-TV Opera-*

tors Keep Consumers Paying for TV stressed the need for partnership and co-operation between the old guard and the rising tide of OTT upstarts in order for traditional operators to survive by keeping their offerings relevant and competitive.

This is already happening to some extent, with several operators having launched web-based multi-screen initiatives as a value-add to their own core TV offerings. Most of these implementations rely on the use of application stores and associated popular mobile and portable device platforms that are controlled by adjacent players such as Apple (iOS) and Google (Android).

Beyond the formation of business relationships such as these, some operators have gone a step further by actually partnering with Internet TV players. In the UK for example, Virgin Media enjoys a successful relationship with the BBC, whereby it delivers a version of BBC iPlayer as a dedicated cable VOD channel. Meanwhile Xbox LIVE is providing a new distribution channel for growing list of pay-TV operators across multiple markets.

### DEMOGRAPHIC SPREAD OF AVERAGE INTERNET TV CONSUMER.

- 37 Average age of adult Internet TV viewer
- 50:50 Virtually 50% split between males and females
- 53% Percentage of married people that watch Internet TV
- 57% Percentage of parents that watch Internet TV
- 61% Percentage of people in full-time work that watch Internet TV

Based on a survey of over 8,000 consumers aged over 16 years of age

Source: Ovum Consumer Insights survey, 2011

OVUM

NETFLIX



amazon instant video

LOVEFILM

zune

Video Unlimited

hulu

BBC iPlayer

# CONTENTS WITHOUT FRONTIERS

<p><b>ROMANTIC COMEDY</b></p> <p><b>GRADUATES</b></p> <p>120 X 1 TV HOUR TELEFE/UNDERGROUND/ENDEMOL</p>	<p><b>TELENOVELA</b></p> <p><b>CANDY Love</b></p> <p>150 X 1 TV HOUR TELEFE/LCA PRODUCCIONES</p>
<p><b>SERIES</b></p> <p><b>THE CHAIRWOMAN</b></p> <p>26 X 1 TV HOUR TELEFE/ ENDEMOL ARGENTINA</p>	<p><b>COMEDY</b></p> <p><b>the MAN of your dreams 2</b></p> <p>1st Season 13 X 1 TV HOUR 2nd Season 11 X 1 TV HOUR TELEFE/ 100 BARES</p>
<p><b>CHILDREN</b></p> <p><b>Z TV</b></p> <p>50 X 1/2 TV HOUR TELEFE/ CIENPIES CONTENIDOS</p>	<p><b>DRAMATIC SERIES</b></p> <p><b>"MISTREATED"</b></p> <p>13 X 1 TV HOUR TYC</p>

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