



Forbidden Love

Telenovela HD 120 x 1 Hr

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 Istanbul, Turkey

Worldwide Distribution by



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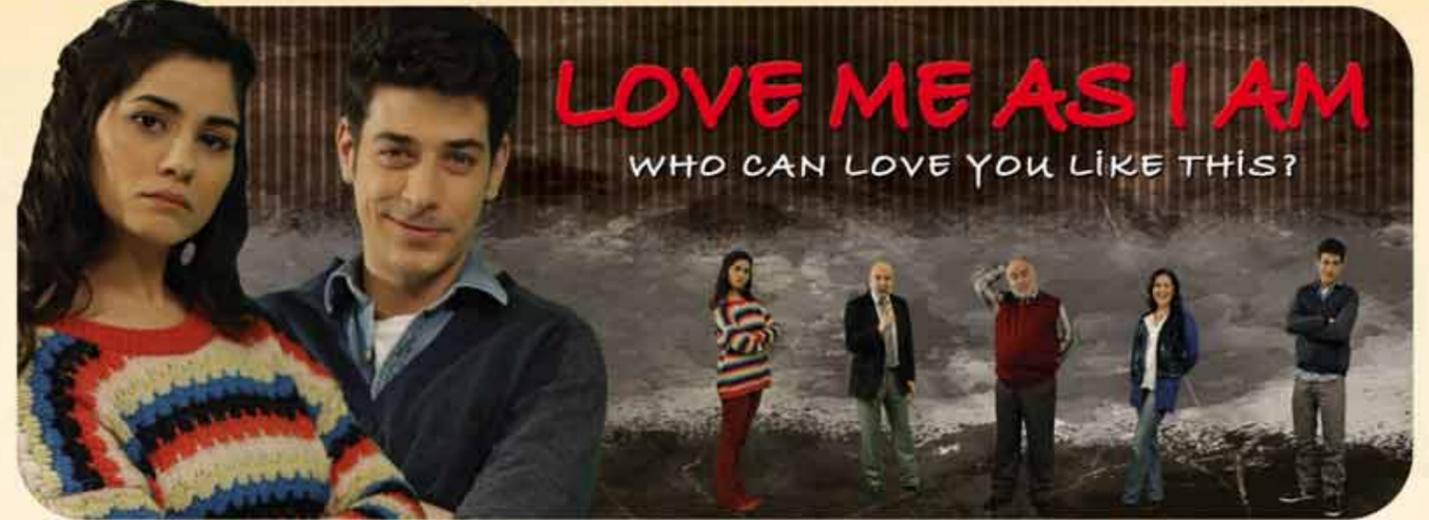
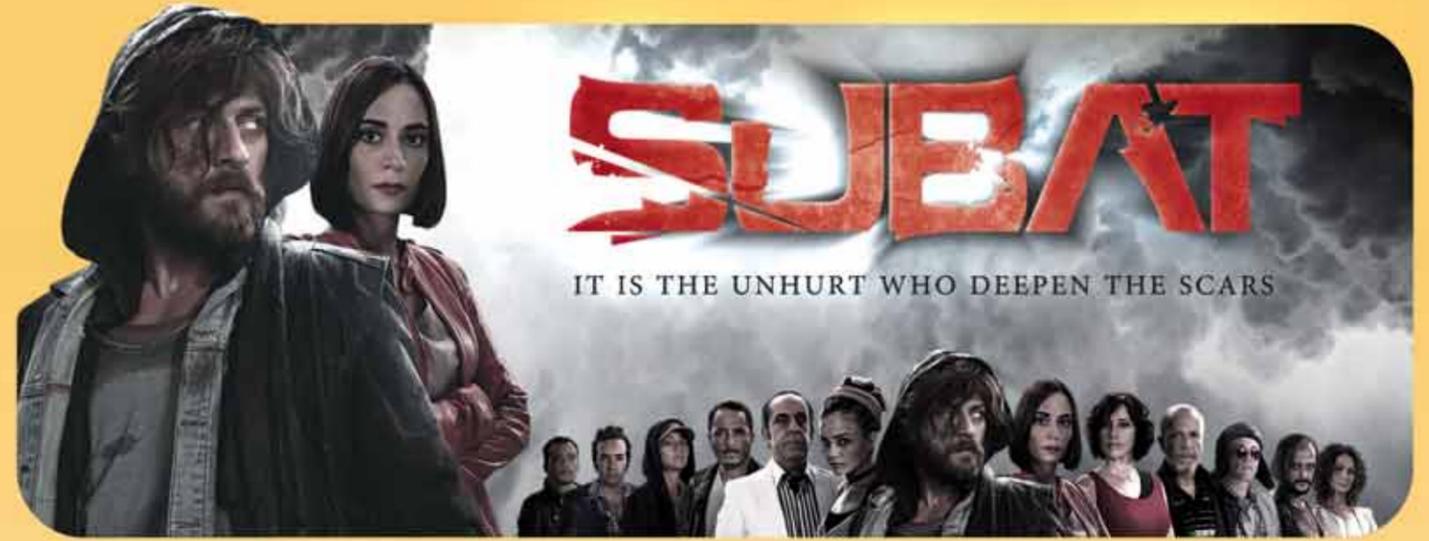
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DISCOP West Asia 2013 - Special Issue



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WELCOME TO ISTANBUL

One year ago, Patrick Jucaud, CEO at Basic Lead, the organizer of Discop West Asia, said: "Today, the worldwide content market is worth of about 228 billions of euros, where 80% of this amount is only handled by 17 countries, with USA and UK on top. But their economies are flat... on the other hand, Middle East, Africa and Western Asia only have 1.5% of that market, but they double their growth per year. And they have 40% of the global population... where the industry leaders have to make focus on?"



That's why Discop West Asia is the fastest growing market of the content industry, and promises to provide very good new opportunities this year. Through this special edition for the show, we are committed to show what's up in the content market, from global trends to local issues. It is really dynamic the content market, full of news and twists to pay attention. We are sure you will be surprised many times reading this edition.

THE BASICS

For those reading PRENSARIO INTERNATIONAL for the first time, this is a worldwide leading publication that has more than 20 years covering the whole



international market. We've been attending MIPTV and MIPCOM, Discop Budapest, ATF Asia, Natpe Miami, LA Screenings for a long time, and this is our debut in Discop West Asia, with a full local content special edition, as we always generate at every market we attend.

We make the big difference being focused on local buyers and producers: the main reports and interviews you read here, are devoted on the opinions, news and trends of Turkish, West Asia, Middle East, CIS and CEE programming and acquisition executives.

Also, we write in a very easy, friendly way, and we provide lots of graphics about TV channels market share, advertisement pies per country, etc., to catch fast business issues almost every page.

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.

Nicolas Smirnof

DISCOP WEST ASIA 2013: MAIN SCHEDULED EVENTS

Event	Date & time	Place
Producing Cross-Cultural Drama for TV (Part I)	March 5 - 10am	Conference Area
The power of Drama in Muslim countries (Part II)	March 5 - 10am	Conference Area
Arab Formats Have Talent	March 5 - 2pm	Conference Area
The New Co-Productions Deals	March 5 - 4pm	Conference Area
Welcome Cocktail Party (Sponsored by Kanal D)	March 5 - 6.30pm	Al Bushira Restaurant, Hilton Istanbul
ATV Party (Sponsored by ATV)	March 5 - 8.30pm	Nomads Resturan in Orkatöy
World TV Consumption Trends / TV dares to reinvent itself	March 6 - 10am	Conference Area
A close look at the Turkish merchandising marketplace	March 6 - 11.30am	Conference Area
Developing and co-producing TV content with Latin America	March 6 - 2.30pm	Conference Area
New Business models for Television	March 6 - 4.30pm	Conference Area
TRT Cocktail Party (By invitation only)	March 6 - 4.30pm	
Global Agency Hangover Party (Sponsored by Global Agency)	March 6 - 9.30pm	Conrad Istanbul, Ballroom



Prensario International

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WHEN LOVE BECOMES HATE



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TURKEY: THE NEW TV PICTURE IS TAKING SHAPE

Turkish TV market has evolved tremendously in the last five years: being traditionally a buying country, nowadays is one of the top content exporters in the world. To do this report, PRENSARIO has consulted the main players of the market about programming trends, digital development, international content distribution, etc.

The Turkish series have conquered Central and Eastern European countries, as well as Middle East, Africa and West Asia and are slowly coming to Asia. In Latin America, for instance, **Telemundo** has recently launched the adaptation of *Forbidden Love* (**Kanal D**, distributed by **Global Agency**) as *Pasión Prohibida*, which premiered extremely well on prime time by the end of January.

Because of this, the Turkish product has become the fastest TV content to expand worldwide. The industry is asking itself if this trend will continue or if it will stop... What has been happening is that Turkish distributors started to diversify their catalogues pushing not only the drama series, but also comedies, entertainment and formats, among other genres, which demonstrates that they started to understand the market evolution and dynamic.

In the domestic market, things are not so easy. The strong investments that broadcasters have done in the last years obligated some of

them to reduce budgets. The international trends can be explained through the Turkish example: the fact that in-house production has become the darling of the business is no longer under discussion; however, it is an expensive activity. Top business issue is now how to deal with growing production costs, which usually grow faster than incomes.

This happens due to the macroeconomic situation and the new *multimedia* competitive environment; in current times with international crises, it happens even more. In the short or long term, TV channels lead to a crossroads situation. Turkish broadcasters have invested so much in production and resources, and business models must be looked over.

Despite of the fact that Turkey has a domestic ad pie of 2 billion dollar (the third largest in CEE, after Russia and Poland) the two largest media groups in the country have experienced what was described above. **Kanal D** sold in 2011 its second channel **Star TV** to **Dogus Group**, and **ATV** (owned by **Çalık Holding**) went on a crisis and it is on sale since 2011.

AUDIENCE

The big piece news of the market is that, since the last quarter of 2012, **Kanal D** has lost its prime time leadership in both "Total individuals" and "AB", which coincided with the changes on audience measurement: along with **ATV**, it has cancelled its agreements with **AGB** and started with **TNS**.

The new figures showed during January that the leading channel on those strategic slots has been **Star TV**—it finished in the fifth position in 2011, and in the second position in the last quarter of 2012. It illustrated an outstanding 20.17% of market share on AB's prime time, while **Kanal D** reached 16.14%. About total individuals, the first one got 16.98% and the second one got 15.47%. Kanal D kept leading the "All day" segment in total individuals (12.04% against 9.98%) and AB (12.7% vs. 12.61%).



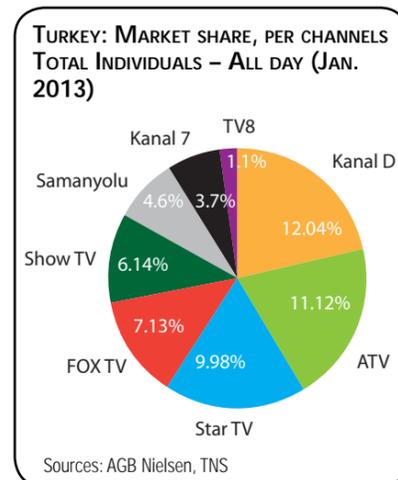
PELIN DISTAS YASAROGLU,
EDITOR IN CHIEF OF **KANAL D**

'OUR MAIN GOAL IS TO KEEP KANAL D'S LEADING ROLE, BY PROTECTING ITS BRAND VALUE AS BEING THE LOVE-MARK TV CHANNEL, AND SUSTAINING ITS PIONEER POSITION OF INTRODUCING NEW PROJECTS'.

The third channel has been **ATV** with 14.36%, followed by **Samanyolu** with 5.11%, **FOX** with 5.08%, **Show TV** with 4.9%, **Kanal 7** with 3.19%, **Kanal Turk** with 1.97% and **TV8** with 1.09% (total individuals – all day January 2013, source: TNS).

THE CHANNELS

Kanal D's position in the local market has



MUHAMMED ZIYAD VAROL,
CONTENT DEPUTY MANAGER, **ATV**

'EXCEPTED FOR VALLEY OF THE WOLVES (ATV) AND MAGNIFICENT CENTURY (STAR TV), THE NEW TREND IN TURKEY ARE PROGRAMS FOCUSED ON COUPLES, SUCH AS GAME SHOWS OR DRESSING COMPETITION PROGRAMS'.

remained as the leading channel not only on market share figures, but also as a pioneer in content development and win-win deals with key international companies.

Pelin Distas Yasaroglu, Editor in Chief, explains to PRENSARIO: 'During 2012 the two highlights were the game show *My Partner Knows*, which started distribution this Discop West Asia, and Turkish adaptation of **ABC/Disney's** *Revenge*. The game show became so successful that we positioned the show to air at weekend prime time during the season. Among both total and AB demographic group viewers, the show has responded with high rating scores getting an average of 20% audience share'.

Turkish version of *Revenge* has been the second co-production of Kanal D with Disney after *Desperate Housewives*. 'The series cast has brought together popular Turkish film with TV actors (Beren Saat, Mert Firat and Nejat Isler). Locally named *Intikam*, it achieved an impressive score when it was first aired on January 3rd with 21.61% audience share among total individuals, 28.81% audience



HASAN BOZASLAN,
DIRECTOR INTERNATIONAL AT **SAMANYOLU BROADCASTING GROUP**

'LOCAL SERIES ARE NOT PRODUCED FOR SALES. THE ACTUAL ADVERTISING MARKET IS TURKEY, WHICH MEANS THAT THE TV SERIES THAT ARE PRODUCED HAVE TO MEET THEIR EXPENSES WITH ADVERTISEMENT FIRST, AND THEN START TO EARN PROFIT'.

share among AB demographic group, and it rated as the most watched show of the day'.

'In the local market, our main goal is to keep its leading role in the sector, by protecting its brand value as being the *Lovemark* TV channel of Turkey, and sustaining its pioneer position of introducing new projects to the market. Apart from the series, Turkish audience mostly prefers game shows like *The Voice* and *Got Talent*. So it is distinctly entertainment'.

'We both work with local production companies and produce new drama series and game shows on our own. We also continue co-producing with international media companies such as **Disney** and **NBCUniversal**. Soon we will be launching the local version of *Monk*. We already have our HD channel. In the near future we will be investing on the digital side', completes **Distas**.

Muhammed Ziyad Varol, content sales deputy manager, **ATV**, remarks: 'The audience share has risen significantly. We are at the second position in the TV market, as we only have formats on the weekend. However in the



ZEYNEL KOC,
DEPUTY DIRECTOR GENERAL OF **TRT**

'THE RESTRUCTURING STRATEGY ALLOWED US TO LAUNCH NEW INTERNATIONAL CHANNELS (TRT AVAZ, TRT ARABIC, TRT TURK) AND CREATE THE NEW NATIONAL THEMATIC CHANNELS (TRT KIDS, TRT MUSIC AND TRT NEWS, WHICH HAVE ALL BEEN #1 IN THEIR GENRES'.



Peace Street from ATV gathered great ratings and beat two shows: Feriha (on Show TV for two seasons) and the sitcom Yalan Dunya (changed the time slot on Kanal D)

weekdays, and in term of series, we are at the first position; *The Valley of the Wolves* remains as the most watched series in Turkey; *Karadayi* has made a very good start in terms of ratings and its success keeps growing'.

'We also have *Peace Street* and *Don't Worry About Me*, both of them with very satisfying ratings. The first one has smashed *Feriha* (at



The game show *My Partner Knows* became so successful that Kanal D programmed it at weekend prime time during 2012. Now is available for sale in the international market



Show TV for two seasons). Another successful sitcom *Yalan Dünya* (on Kanal D) had to change its airing day due to *Peace Street's* ratings. *Don't Worry About Me* has been very successful against *Oyle bir Gecer Zaman Ki* (Kanal D), which had high ratings'.

'We have the daily own produced dating show *Match & Marry* and a program that helps to find missing people, *Straight Forward*. *Dizi TV* is dedicated to series. As for dramas, we have nine ongoing series, while we have *Trust* (Banijay), aired twice a week that is going really well, and *Who Wants to Be a Millionaire* (with us for several years), on entertainment side'.

The percentage of own production versus acquired content is 40%-60% (in terms of hours). Regarding genres, the channel is retransmitting some formats, US series such as *Flash Forward* or Hollywood movies at the late prime time slot. 'Except for *Valley of the Wolves* and *Magnificent Century*, the new trend is couple focused programs, such as game shows or dressing competition programs', says Varol.

Hasan Bozaslan, director of international sales at Samanyolu Broadcasting Group, says: 'Just like other channels, we have made new seasons of our continuing successful TV series more appealing to achieve success and reach out to our audience. *The Neverending Story* has been our most successful series in the genre of romance and drama in 2012'.

'This success has increased the ranking of Samanyolu TV to fourth place among channels (total individuals, prime time). We have shot movies and carried out new movie projects. The animation movie *God's Devoted*

Servant: Barla became the third most watched cinema movie of 2011. We have started carrying out activities to produce the sequel of this movie for 2013. *The Hill* is on second place, while *Patterns Of Diversity* is fourth; other top series is *The Team 1*. Sales of the three of them were done before the season was even finished'.

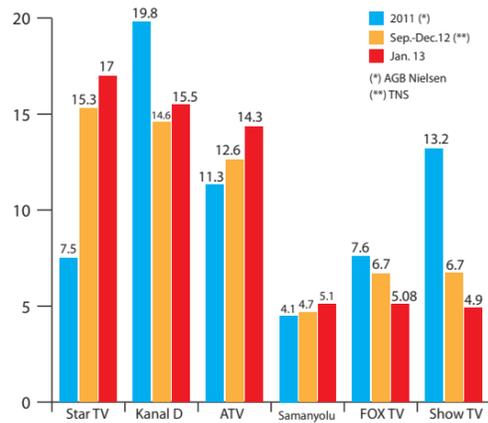
About trends, Bozaslan comments: 'TV series are generally broadcasted at prime time, but contest shows catch most attention of the audience at other hours. In 2013, we will have two theatrical movies, one 3D animation movie and our own life style shows or drama reality shows based on true stories are being planned for this year'.

'Turkish TV series are rich in terms of topic and visual quality, which have a long history and have proven themselves in time and reached the position they deserve. Shows are produced in high quality and address a general audience—people of all backgrounds and not a certain culture—; they have not faced any cultural or religious reaction when broadcasted on channels of other countries. Rating competition has arisen due to the high rating of these shows on the channels of other countries and the more Turkish TV series a channel broadcasts, the more its popularity and advertisement revenue increase', completes the executive.

On the public TV side, with its 15 active channels TRT fulfils a big broadcasting service. The company is mainly concentrated on education-culture programs and documentaries, while it outsources drama productions'.

'We will continue to focus on in-house and outside productions and foreign program acquisitions, which are key for diversity', explains to Prensario Zeynel Koc, deputy director general of TRT, and adds: 'We've gone through a serious transition phase in the past 4-5 years. There has been a considerable loss in the market share with the introduction of private channels, but we have managed to

TURKEY: MARKET SHARE EVOLUTION ON TOP CHANNELS – TOTAL INDIVIDUALS/PRIME TIME (2011- JAN. 2013)



Source: TNS

turn these losses into gains in recent years'.

'This restructuring strategy allowed us to not only give life to international channels (TRT Avaz, TRT Arabic, TRT Turk) but also focused on modern broadcasting trades by creating national thematic new channels (TRT Kids, TRT Music and TRT News have all been #1 in their genres) that focus on viewers' enjoyment'.

'Turkish viewers look for entertainment just like the viewers in the rest of the world. The big success of drama series in the last few years has led producers into a quest for more. Besides this, sitcom and comedy are other popular genres. We are investing in technical infrastructure in the last years. We can say that we are ahead of many private channels with our sound infrastructure'.

About digital, Koc says: 'VOD content is gathered into a single web portal over the corporate structure. These sites are mostly informative and aim for publicity. At the same time they allow interactivity within the capabilities of the given website. Mobile applications serve common content and services that are formed by all corporate units or certain productions as VOD. On Smart TVs we offer VOD services by developing special applications for TV's sold commonly on the market'.

'In the last two years, the demand of the latest local content available on mobile and

DISCOP West Asia – Stand 34

Ancient Egypt: Life And Death In The Valley Of The Kings
Beyond the gold and the lapis lazuli, behind the Pharaohs and their tombs, stands the beating heart of Ancient Egypt – the people. Archaeologist, Dr. Jo Fletcher, would like you to meet Kha and Meryt. The two of them, have been dead for over 3500 years. Through this mummified couple, Dr. Fletcher tells the story of the everyday Egyptians and how they built their extraordinary civilization.
Completed

The Cube
Seven simple physical and mental challenges, performed in this extraordinary environment, can win you up to £250,000. The BODY, mysterious master of The Cube shows it can be done – but even the simplest task becomes fraught with difficulty and pressure.
Completed and Format

The Constructed Reality Slate
Proving that life is often far stranger than fiction, FilmPool's Constructed Reality formats are true-to-life and high in drama. Using real-life stories as situations, these formats create shows of raw emotion and youthful exuberance. From the urban fun of *Day & Night*, to the domestic trials of *Just Help Me!* they offer laughs, drama, and sometimes even great advice.
Format

The Secret Life Of Pompeii In Herculaneum
When Mount Vesuvius erupted, it did not only ravage the city of Pompeii, but also this smaller society. Now, scientists have dug in to the layer upon layer of ash, to discover an immaculately preserved world – ancient swimming pools still full of water, fishing boats with line and lure intact – revealing a civilisation of great social conscience and courage.
Completed

Face The Clock
The countdown has begun for this adrenaline fuelled quiz show that sees contestants race against the clock, quite literally, answering a series of general knowledge questions and banking cash prizes. But there is a wicked twist in the game that leads to devious tactics, quick-fire strategy and unexpected eliminations. The clock is ticking...
Completed and Format

Money From Strangers
How much money would it take for you to make a fool of yourself in public? How much to harass a stranger? *Money From Strangers* sees just how far the public will go for cash. As the money goes up, so do the laughs as the tasks get more outrageous, more daring and more embarrassing.
Completed and Format



The Neverending Story has been the most successful romance and drama series in 2012 at Samanyolu



TURKISH CONTENT EXPORTED CLOSE TO USD 100 MILLION IN 2012

The Producer Association in Turkey has confirmed that TV exports of Turkish content were close to USD 100 million last year, up from the 60 million posted in 2011. Prensario has made a research among Turkish distributors who agreed that the top companies were Global Agency, Kanal D, ATV, ITV and Calinos Entertainment.

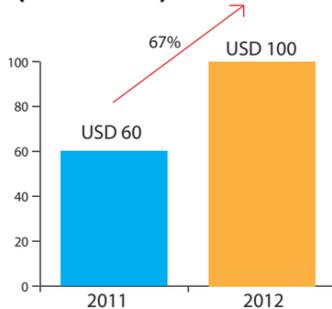
There were 10,500 fiction hours watched by nearly 150 million people in 76 countries. The TV series production sector in the country currently employs 50,000 people and started the new season with the aim to reach a turnover of USD 4 billion.

According to the association, production value is growing constantly and the price per one episode of TV series reaches up to USD 1.5 million. The highest actor's salaries reach USD 33,400 per episode.

Burhan Gun, lawyer of the Producer Association, said that the Turkish audiovisual industry (films, series, TV programs, DVD sales, internet revenues, copyrights, etc.) generates USD 20 billion in revenues. One episode of Turkish series abroad currently costs from USD 1,000 to USD 150,000.

Last month, Agency France Presse (AFP) reported that Turkey has become the second largest exporter of television content in the world after the USA. The news agency notes that on a typical night in Turkey, primetime viewers have a choice of more than 40 different TV series.

TURKISH CONTENT EXPORTS (2011-2012€).



Source: Producer Association of Turkey

Internet platform in Turkey has led private broadcasters offer all content as FVOD. Some private channels have their own platforms, he finalizes.

SERIES BOOMING

Another important aspect of Kanal D is being one of the leading Turkish distribution companies.

'We have already opened

the way of Turkish series abroad for a couple of years by our successful international sales. Apart from marketing the Turkish series, we have started to sell local content as formats as well', explains Distas.

Another top distributor is Global Agency. Prensario wanted to know the opinion of Izzet Pinto, CEO, who says: 'TV industry around the world was in search for something new and Turkish series entered the market at the right time creating a big trend. They have a different characteristic that makes them very different from Latin, American, European or Asian content. I have always hoped to achieve success with our series but never expected such a phenomenal approach.'

'Turkish series are family-oriented, which is quite conservative. Our main markets (Balkans and the Middle East) have a similar understanding and culture. Therefore, when the local viewers watch our series, they feel like they are watching local series. Since Turkish dramas are family-oriented, buyers are able to broadcast the series on their prime-time schedule.'



From TRT, Once upon a time is a big period drama series in Turkey

'The main characteristic of Turkish series is having a slow paste rhythm. It means, even if the viewer missed an episode, that they can connect to the series easily in the next episode. The script is quite simple; so it is easy to follow. Viewers do not prefer complicated scenarios. A successful series is usually over 100 commercial hour episodes. The budgets vary; for A grade series the cost is over USD 400,000, and for B Grade series, this is around USD 200,000. This budget is huge, so the quality is very high', he completes.

Varol from ATV remarks: 'The international division has about six years and was established as a response to the increasing demand on Turkish content from abroad. The general outcome has reached a really important amount and it is clearly the biggest revenue source.'

'TV series in Turkey are not produced for sales. We must certainly be clear about this. The actual advertising market is Turkey, which means that the TV series that are produced have to meet their expenses with advertisement first and then start to earn profit', describes Bozaslan.

And he exemplifies: 'The cost of an average TV series is USD 300,000 – USD 500,000 for a TV channel. Therefore, if TV series were produced for sales, the maximum amount of money they are sold at or the number of times they are sold would not meet their expenses. Their biggest revenue comes, of course, from advertisements. Unfortunately, not all the TV series that are produced achieve success. Some TV series continue until the end of the season despite losses.'

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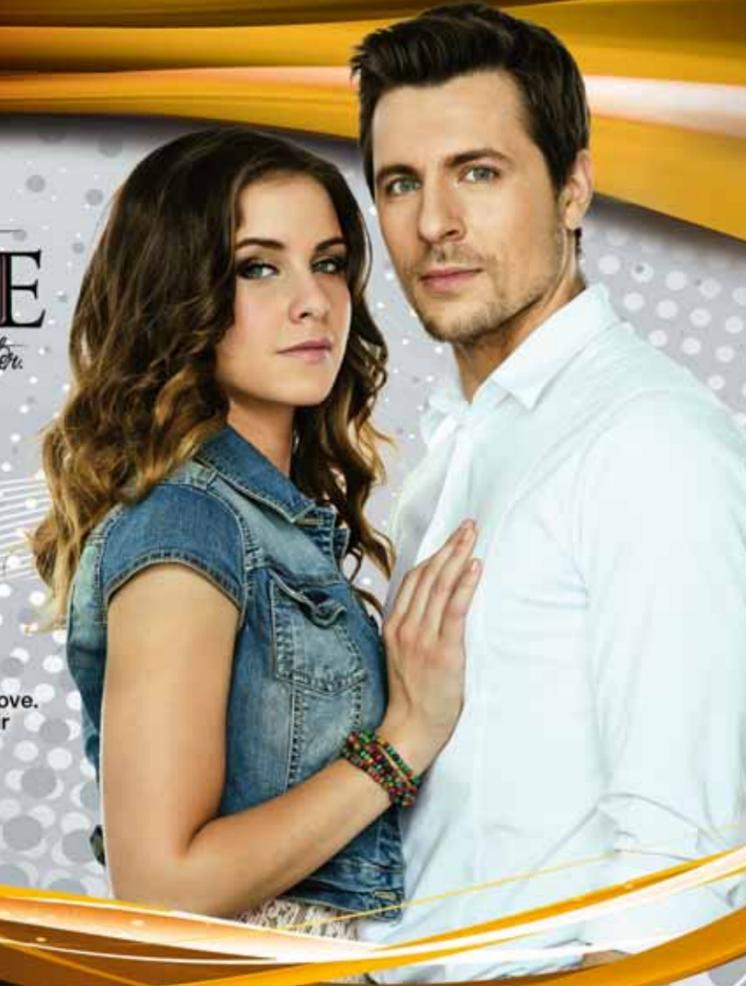
TASTE OF LOVE

Their story is like fine wine. It gets sweeter and richer, bolder and better.

PRIME-TIME SERIES
GENRE: DRAMA, ROMANCE
NUMBER OF EPISODES: 100 X 60'
LAUNCH DATE: JANUARY 1ST, 2013
LANGUAGE: SLOVAK

PREMIERE

Two competing wine-growing families, Rozner and Dolinsky hate each other. While Stefan Rozner built a successful winery, his former friend and colleague, Ivan Dolinsky faces financial problems and decides to sell his business. Ivan is convinced that Stanislav Rozner betrayed him and caused the death of his wife, Maria. Amidst the competition and hatred that reigns between the two families, Martin, Stanislav Rozner's son and Nina, Ivan Dolinsky's daughter fall in love. Their love story will have to stand against not only the disapproval of their families, but also to numerous intrigues and destiny's twists and turns.



RR

Restaurant Wants a Boss

IT'S TIME TO 'TASTE' THE CONTENT

PREMIERE

REALITY SHOW FORMAT (2013)
NUMBER OF EPISODES: 61
LENGTH: 50 DAILY SHOWS X 60'
11 LIVE SHOWS X 120'
SLOT: PRIME TIME

This brand new reality show features an innovative restaurant concept with a renowned chef in charge of twelve contestants. In the competition to becoming the restaurant's BOSS, the contestants break their backs cooking for ten weeks under the scrutinizing eyes of a renowned Chef in order to bring the new business to life. Witness an interactive reality show you have never seen before! Watch the drama revealed in the daily primetime TV show, follow their lives in the residence house and in the restaurant 24/7 on the internet, visit the restaurant and taste the food, enter for a chance to have one of the Chefs-to-be cook in the privacy of your home. But most of all - play a decisive role in choosing the WINNER. Through the show a brand new restaurant franchise with an original concept is created!

KIVANÇ TATLITUĐ

BELÇİM BİLGİN

MERT FIRAT

YILMAZ ERDOĐAN



THE
BUTTERFLY'S
DREAM

DISCOP WEST ASIA 2013: THE EMERGENT MARKETS TAKE THE SCENE

Discop West Asia is held in Istanbul, Turkey, on March 4–7, promising to enrich important issues about the business potential of West Asia and Middle East. Many international leaders especially highlight these regions for content industry, accompanied by a strong economy growth (based on their oil strength) and social changes after the Arab Spring. Is it worth to invest around here?

There is no doubt about these regions capabilities. As it was described in our first page at this edition, Middle East, West Asia and Africa take today only 1,5 percent of the worldwide content market incomes which represents about 228 billions of Euros, according to the data provided by organizer of Discop, **Basic Lead**. But these regions are growing 100 percent per year, while the central markets are flat or down. Strong growth and developments are coming to content industry of the Middle East and the

regions around.

Turkey is now a global titan in the production of fiction series, competing worldwide with the U.S. Hollywood Studios and the Latin American *Telenovela* distributors. And now the country also goes forward on entertainment formats.

The Turkish TV series have taken leadership in the Middle East, in CEE, in the CIS markets, very competitive countries as Bulgaria, Hungary, the former Yugoslavian territories. And today, in the world, important broadcasters are producing local adaptations of the Turkish top series, as **Kanal D's *Forbidden Love***, which is being produced by **Telemundo** for the U.S. Hispanic market and will be later distributed to Latin America.

In West Asia, the main business runs today through the Pan-regional channels, which cover many Arabic nations and with good business volume, they have recourses enough to proceed with high-profile production projects. They don't buy just canned programming, they also grow in the format and production businesses, both entertainment and fiction. The production ventures are evolving from being rare a couple of years ago, to important frequency now.

On the other hand, the new media takes off, as it is happening in other markets of the world: apart from free TV and pay TV, environment adds VOD, IPTV, mobile systems, and ancillary businesses as licensing, live shows, etc. As it is common in other regions, the emergent markets skip stages and include among the basic developments, high-end proposals, too. West Asia will be a strong digital

DISCOP WEST ASIA COVERAGE* VS. CENTRAL NATIONS**

CONTENT MARKET...		
1,5%	MARKET SHARE IN EUROS	80%
100%	GROWTH RATE	FLAT
40%	WORLD POPULATION	10%

* WEST ASIA, AFRICA, MIDDLE EAST ** USA, EUROPEAN COUNTRIES

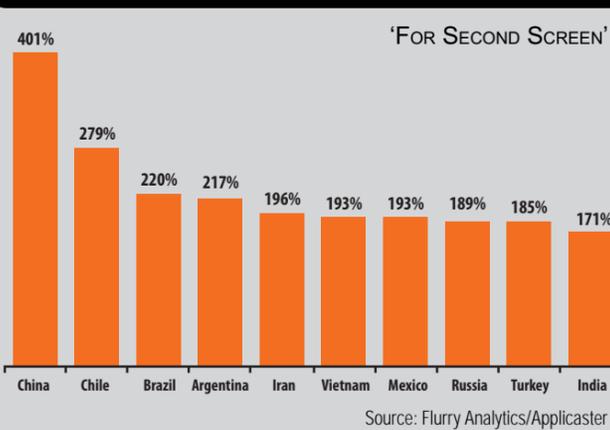
market from here to the upcoming years.

What is it recommended to be successful in the region? In the case of local players—broadcasters, Pan-regional channels, new media, regional production and distribution companies—the suggestions of the fastest growing actors are to search what is being done in other regions of the world (in Asia, for instance) and to develop it with local flavors. Globally, to go forward on the projects for sure, though the well-know religious, political, social or ethnic problems that from the past have stuck the Middle East. Today, almost every venture can be done, if it is thought well.

Some limitations of West Asia take place in Asia, too. For instance, South Eastern Asian countries have evolved fast and now are a leading region about international content production and distribution. Malaysia, for example, is one of the top production hubs in Asia from and towards the world, with important support of local Government entities.

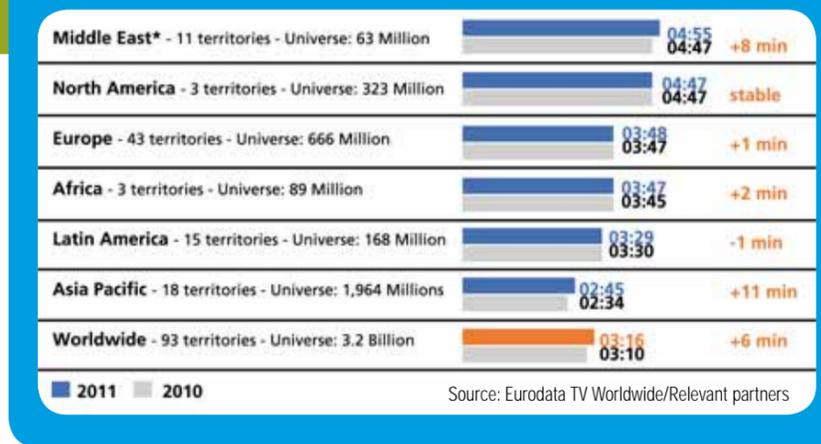
One of the most important recommendations

FASTEST GROWING IOS & ANDROID MARKETS BY ACTIVE DEVICES



AVERAGE DAILY VIEWING TIME – WORLDWIDE, 2011 (PER INDIVIDUAL – IN H:MM)

WEIGHTED AVERAGES BASED ON THE SIZE OF THE TOTAL INDIVIDUAL UNIVERSES.



from global distribution and production companies to select strategic local partners; one or many that can drive through the peculiarities, routines and customs of the very specific local markets. This doesn't mean to leave business in their hands—nobody can do the work better than oneself. A fluid interaction between the two sides will create the best-mixed push to grow better in the market.

THE NEW MULTIPLE-SCREEN ERA

As it is known, MIPCOM is the main worldwide market in the content industry. Held last October in Cannes, the show surprised many analysts that see how the global financial crisis doesn't let Europe recover from recession. The show had impressive business traffic, with innovative deals and ventures. We mean, the energy of the content market has been 'reloaded' in Cannes for the upcoming times.

How can be explained... the global crisis on one hand and such vitality on the other? The content market is going through an important phase of evolution, with changes to a new

WEST ASIA/MIDDLE EAST VS. OTHER EMERGENT REGIONS

ADVANTAGES

- SHORTER DISTANCES
- STRONG FINANCIAL SUPPORT IN KEY NATIONS
- ALMOST VIRGIN TERRITORIES TO DEVELOP FROM ZERO

reality: the new *Multiple-Screen Age*, where every market of the world evolves from some to many programming outputs. This leads to intense activity and investments, at any territory of the world, even the European countries more affected by the crisis, such as Spain, Hungary or Greece.

The two basic pillars of content business, today and for the future, are the own production and the new media *boom*. Around them, today, all the big deals of the content industry take place. The own production is already accepted by everyone as the key of the TV channels, especially to have a successful prime time. And the new media *boom* provides, apart from a lot of new channels—SVOD, Web, mobile, etc.—for both current and new TV players, a new ecosystem of rules, recourses, competence... and opportunities.

The main engines of activity and investments nowadays are three: first, the generalized sensation that, when global crisis ends, there will be a stunning market to take advantage of, with much more channels or programming outputs than before: Free TV, Pay TV, mobile, etc. All of these need preparation, evolution, generation of new concepts... there is a lot to learn and to do.

WEST ASIA/MIDDLE EAST ATTRACTIONS

- TURKISH PRODUCTION POWER
- THE PAN-REGIONAL PAY TV CHANNELS
- NOT ONLY CANNED PROGRAMMING, BUT ALSO FORMATS
- ENTERTAINMENT + FICTION
- NEW MEDIA BIG POTENTIAL: VOD, IPTV, DTT, MOBILE

Second, present also obliges. Both pillars own production and new channels have the costs issue as a crossroads. Production is increasingly expensive but ad pies do not increase, and there are new channels but with the same money from the past to support them. So, co-production projects, production-sharing ventures, Second Screen, Branded Content, ancillary business as licensing, live shows, etc., take the big content agreements and ventures nowadays.

And third, in emerging markets, excellent content businesses keep being made. Global crisis affects—there was deceleration in 2012 from China to Brazil—but it does not prohibit, as it does often happen in the central markets. For that reason there is so much focus from the world in Asia—the last ATF show in December was very successful—Latin America—Natpe Miami last month had an unique *boom* of activity—and the Middle East, Western Asia and North Africa.

The good trends mentioned before, apply

SUCCESS IN WEST ASIA/MIDDLE EAST?

LOCAL PLAYERS

- TO COVER MANY COUNTRIES AT THE SAME TIME, TO HAVE BUSINESS VOLUME
- OWN PRODUCTION: TO BRING INTERNATIONAL HITS ADDING LOCAL FLAVORS
- TO CHECK WHAT IS WORKING IN A-LIKE MARKETS AS SOUTH EASTERN ASIA
- NOT TO BE ASHAMED... ALMOST EVERY VENTURE CAN BE DONE IF IT IS THOUGHT WELL

INTERNATIONAL PLAYERS

- TO TAKE GOOD LOCAL PARTNERS
- TO DEVELOP FORMATS AND CO-PRODUCTIONS
- TO GENERATE A MIXED PUSH WITH THE PARTNER
- THINK GLOBAL, ACT LOCAL... IN THE DIFFERENT MIDDLE EAST NATIONS

THE NEW MULTIPLE-SCREEN AGE, TODAY

2 PILLARS:

- OWN PRODUCTION
- NEW MEDIA GROWTH: TDT, IPTV, VOD, MOBILE, ETC.

3 PUSHERS:

- AN ENCHANTING FUTURE
- CURRENT COST CROSS-ROADS
- EMERGENT MARKETS

5 RECOURSES:

- CO-PRODUCTION PROJECTS
- PRODUCTION-SHARING
- SECOND SCREEN
- BRANDED CONTENT
- ANCILLARY BUSINESSES

Fuente: Prensario

Keith LeGoy, president, international distribution, Sony Pictures Television, with actors Kevin Spacey and Robin Wright, and Beau Willimon, executive producer/show runner, all from the Netflix series House of Cards



THE NEW MEDIA PLAYERS ARE PRODUCING THEIR OWN TV SERIES, AND THERE ARE MORE THEATRICAL CELEBRITIES IN INDEPENDENT TV PROJECTS

twice in the emerging markets, due to the virgin segments to develop, and because adoption rates many times are higher than in USA or European markets, as we've said above.

Middle East, against Asia and Latin America, provides important advantages: shorter distances between the main countries of the region and with the central markets. There are markets, especially the oil nations, with very strong financial resources, thinking of network infrastructure investments. And at the same time, there are many territories still virgin, with everything to develop on the right direction.

If the 'famous' stops of the region — the violence, the social divisions, etc.— can be minimized, we can be sure that the Middle East will be one of the strongest poles of content business development from now.

EVERYBODY AGREES...

According to Mipcom organizer, **Reed Midem**, the three main trends of the convention in 2012 were: more original content with increased presence of celebrities than in previous shows; more digital fever with digital buyers growing from 310 in MIPCOM 2011, to 520 in MIPCOM 2012; and the fact that the emergent regions were on the top about growth in presence: Latin America had 36% more attendees than a year before. Then, China with 30%, South Korea with 12%, and Canada with 11%.

The increasingly active participation of governments to promote audiovisual production

is another key element to consider, especially in the emerging markets evolution. At MIPCOM, there were 41 pavilions with countries supported by their governments, doubling the number of few years before. The Middle East must evolve much better in this area, as Asia and Latin America are doing.



Larry Tanz, CEO of Vuguru, a new digital company FremantleMedia partnered, with Rob Clark, director global entertainment development, David Ellender, CEO FremantleMedia Enterprises, Cécile Frot-Coutaz, CEO of FremantleMedia, and Sander Schwartz, president of kids and family entertainment, FremantleMedia Enterprises

THE FORMAT TITANS ARE LAUNCHING THEMATIC TV CHANNELS IN YOUTUBE, AS THE LATEST TREND: ABOUT CRIME, URBAN LIFE, ETC.

THE NEWEST THING, IN NEW MEDIA

- **FORMAT TITANS: THEMATIC CHANNELS IN YOUTUBE**
- **HOLLYWOOD STUDIOS: VOD THEMATIC SERVICES**
- **HOLLYWOOD STUDIOS: LIVE BROADCAST SERVICES TO SMART PHONES AND TABLETS**
- **INDEPENDENTS: NEW OPTIONS OF SECOND SCREEN**
- **NEW MEDIA AND LICENSING PLAYERS: TO PRODUCE OWN CONTENTS**
- **THEATRICAL AND TV INDUSTRIES, CLOSER**
- **FRANCHISE PRODUCT MANAGEMENT**

Fuente: Prensario

A LOOK TO THE FUTURE

What is the newest thing in worldwide new media? Format titans as **Endemol**, **FremantleMedia** and **Zodiak** are releasing new thematic TV channels in **YouTube** about crime, urban life, etc. Hollywood studios as **Disney** are releasing VOD services by genre, instead of the general former experiences. **ABC on Demand** has been launched recently for its series, and now the market faces **Disney Movies on Demand** for its movies. And with Pay TV operators or telcos, the studio is developing broadcast live special services -- **Disney Watch** -- for smart phones and

tablets, of its TV channels.

TVE (Spain) has created an original version of **SecondScreen**. While viewers watch the super production **Isabel**, they can link to different services: documentaries about the real story behind the characters, previous episodes, etc.

On the other hand, traditionally complementary business players, are increasingly steering their own TV contents: toy manufacturers, videogames developers, advertisement agencies, etc. They produce TV series based on their brands and power 360° developments.

At Mipcom 2012, almost as curiosity, **Reed Midem** highlighted that now the film and TV industries are closer: film producers make TV pieces and TV producers make movies, making new synergies possible.

Keeping with this, it's worth to the end a sentence-vision of **Pierluigi Gazzolo**, COO **Viacom Worldwide**: 'Today, our focus is on product-franchise management. Depending on each property, we design different strategies for multiple windows, to exploit brands in as many ways as possible. In the multiple-screen age, franchise products are more important than TV channels.'



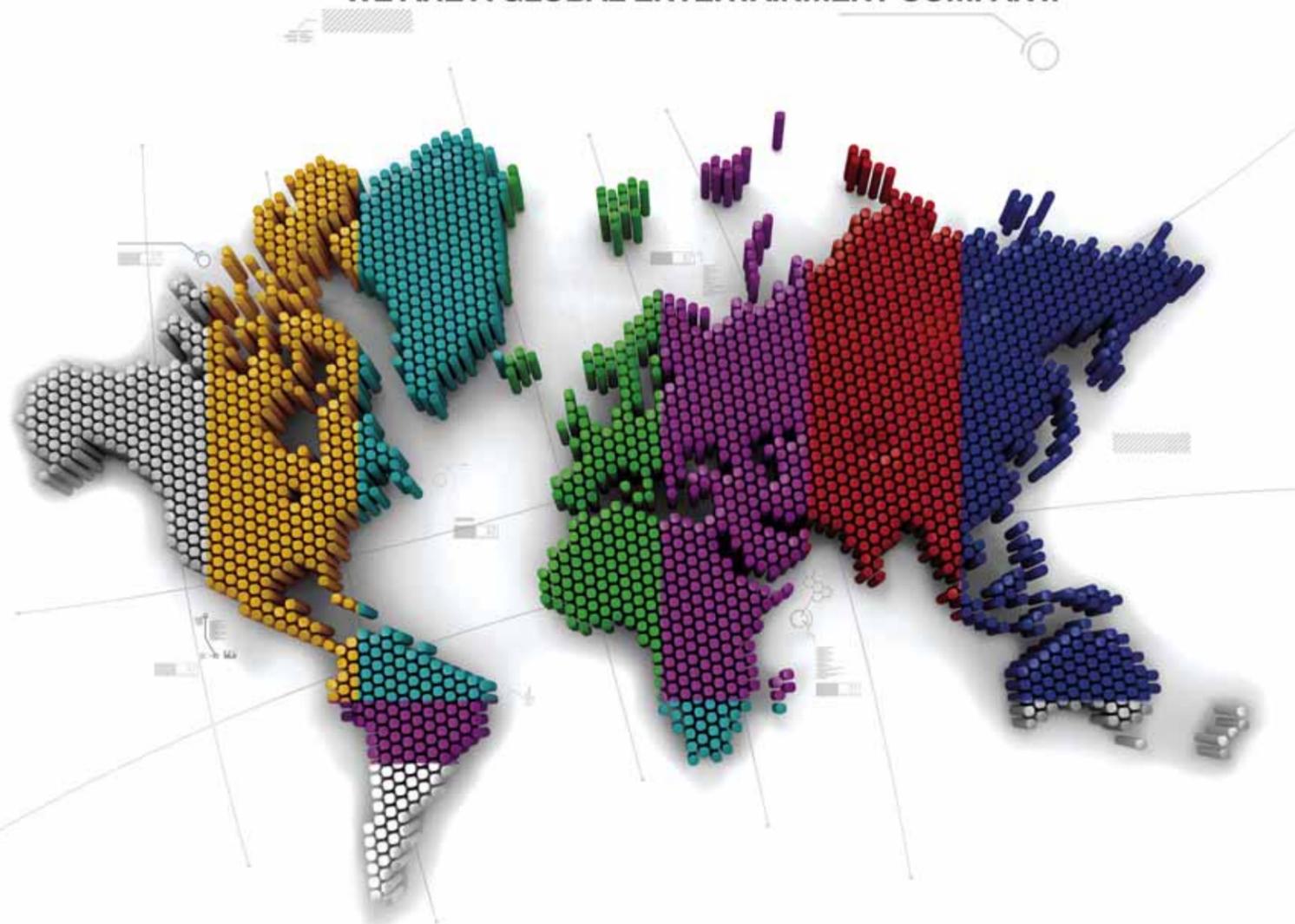
Disney Media Distribution: Ben Pyne, president; Katherine Powell, general manager sales EMEA; Giovanni Mastrangelo, general manager sales emerging markets; Amit Maihotra, general manager sales Southeast Asia; Fernando Barbosa, SVP production & distribution, Latin America, US Hispanic and Iberia; Haydn Arndt, general manager Australia

WORLDWIDE, DISNEY IS MAKING FOCUS ON LAUNCHING THEMATIC VOD SERVICES, EVEN BROADCAST LIVE OPTIONS FOR SMART PHONES AND TABLETS



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KAZAKHSTAN NATIONAL TV: 'VIEWERS EXPECTATIONS AND PREFERENCES ARE GROWING'

CEETV's MARIA RUBAN dialogues with KAIRAT MUSAKALOV, Chief Executive of informational programs at KAZAKHSTAN NATIONAL TV COMPANY, who explains the main trends in the local TV market, as well as the hard competition with private networks.

KM: Yes, it is a big issue. Private channels live off advertising and in rating terms they are ahead of us. But we try even within the bounds of state orders to create interesting, up to the date reality content uniting the channel's policy and the interests of the viewers.



Contest and singing shows on Kazakhstan National TV are very popular



CEETV: WHAT CONTENT IS THE MOST POPULAR IN KAZAKHSTAN AT THE MOMENT?

KM: As everywhere in CIS, criminal genres. But it depends on the audience, which can be politicized or aging. Youth likes music. Viewers are different and tastes are different as well. There were plans to launch a public television on the basis of our channel but still this issue is postponed. And of course there's a need for such channel.

CEETV: ARE YOU INDEPENDENT FROM THE STATE IN CHOOSING AND CREATING THE CONTENT?

KM: 50/50. We partly work with State orders and partly create socially significant contemporary content. We have enough budgets for that along with facilities, as Kazakhstan channel has one of the biggest nets all over the country. Our head office is in the capital, the channel reaches 98% of the Kazakh population along with citizens of border regions in China, Mongolia and Russia. On the basis of our channel we also established Culture (Medeniet) and Kids (Balapan) channels, so far available via cable nets. Also in each of the 14 regions we have regional offices with own TV channels, which broadcast simultaneously with the main station.

CEETV: WHAT HAS CHANGED IN THE KAZAKH TV ENVIRONMENT LATELY? HOW DID VIEWER'S TASTES CHANGE?

Kairat Musakalov: The viewer' expectations and preferences are as usually growing. Regarding the content, as our company belongs 100% to the Government, we are broadcasting in its interest. So, in order to 'dilute' highly political content we have social, entertaining, kids programs, etc. to reach various strata of society. Still, political and informational programs prevail.

CEETV: HOW DO YOU SOLVE THE COMPETITION ISSUE IN THIS CASE? IT MUST BE HARD TO COMPETE WITH COMMERCIAL STATIONS.

CEETV: DO YOU PLAN INTERNATIONAL VERSION OF KAZAKHSTAN CHANNEL TO BE DISTRIBUTED WORLDWIDE?

KM: As far as I know actively we don't work on this question. We run a site on the Internet where it is possible to access the materials that were never



Maria Ruban, correspondent and representative CIS of CEETV



Many of the Kazakhstan National TV programs are available in its website

aired and, of course, to watch our programs. Its audience is stably growing. We actively started to develop the site only a year and a half ago paying much attention to the content: it is bilingual in Russian and Kazakh languages.

CEETV: HOW DO YOU EVALUATE THE MEETING IN MID-2012 IN MOSCOW BETWEEN THE HEADS OF CIS STATE AND PUBLIC BROADCASTING COMPANIES TO DISCUSS ESTABLISHMENT OF EURASIAN TV AND RADIO BROADCASTING UNION?

KM: The Informational Pool of CIS countries is very needed, as we don't have offices in all CIS countries to collect information there. So the Pool reimburses the informational vacuum for us. And today we started talking about the establishment of the Eurasian Broadcasting Union, which is a very good idea. Even though USSR collapsed we still remain close countries with lots of blood relations between nations.



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KTRK, KIRGIZSTAN: 'POLITICAL AND SOCIAL PROGRAMS ARE THE MOST TRUSTED BY AUDIENCE'



Kubat Otorbaev, general manager of KTRK



CEETV's MARIA RUBAN interviews **KUBAT OTORBAEV, general manager of KIRGHIZ NATIONAL TV AND RADIO CORPORATION (KTRK), who describes what's going on in the local TV market as well as the main content trends**

CEETV: PLEASE TELL US ABOUT THE KIRGHIZ TV MARKET?

Kubat Otorbaev: If I'm not mistaken, there are 25 channels that are available in the Republic. If we take Chyujskaya region, where the capital Bishkek is, there are 15 frequencies, eight or nine of those are occupied with international content, Russian, Kazakh and Chinese. Russian channels like Perviy, Rossiya 1, Rossiya 24, TNT, CTC and even Zvezda are transmitted or retransmitted in the country, along with Kazakh Khabar and

Chinese CCTV.

Two years ago after April events of 2010, by the decision of the Provisional Government, on the basis of National TV and Radio Corporation, a new Public Television was launched. This year the law on OTRK (public TV and Radio) was implemented with Supervisory Board as its supreme body. The Board was formed recently (in April this year). Five people were proposed by the President, five from Parliament and five from the public. The General Manager was elected in 2010 for a five-year term. The editor policy of our channel is based on the international journalistic standards as impartiality and independence.

So, we may say that we have freedom of speech, which I see as one of the achievements of the new authorities.

CEETV: HOW DO YOU EVALUATE THE MEETING HELD IN MID-JUNE 2012 IN MOSCOW BETWEEN THE HEADS OF CIS STATE AND PUBLIC BROADCASTING COMPANIES TO DISCUSS ESTABLISHMENT OF EURASIAN TV AND RADIO BROADCASTING UNION?

KO: The idea is good but there are of course certain questions that need to be solved.

CEETV: WHAT CONTENT IS THE MOST POPULAR IN KIRGIZIA?

KO: In February this year Gallup made a situational analysis in the country, one of the questions was the trust in the institutions. The most trusted is mass media, followed by Parliament and authorities. The least trusted are law-enforcement bodies, militia and judges. To the question, what channel do you watch the most; I can proudly say that the majority referred to our channel. Our political and social



Maria Ruban, correspondent and representative CIS of CEETV

programs are also the most trusted by the respondents, which shows that we are going in the right direction.

CEETV: YOU HAVE ONLY LOCAL CONTENT IN THE PROGRAMMING GRID?

KO: We used to have the practice of acquiring content but currently we consider it as too expensive for us. The budget of our organization is 300.000 USD per year. But recently we made an agreement with Kirghiz BBC service and started to receive footage and information videos from them. Sure this is not enough and we are currently looking for such content.

CEETV: WHAT ARE YOU INTERESTED IN?

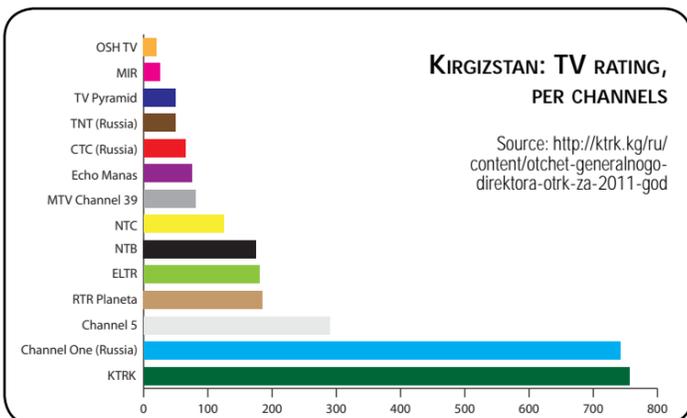
KO: Reliable, non-politically committed and impartial information from all over the world. Just this, we are not ready so far to but any documentaries or other content.



News and journalistic programs about politics and society are very popular on KTRK



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Source: <http://ktrk.kg/ru/content/otchet-generalnogo-direktora-otrk-za-2011-god>



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INDUS TV AND THE VIBRANT TV INDUSTRY IN PAKISTAN

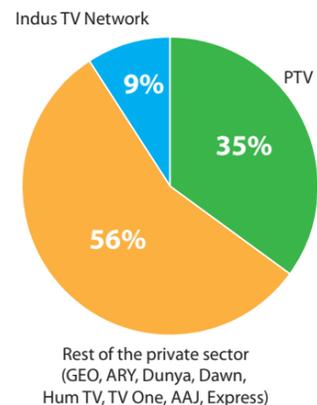


Mohammad Hanif Ravda, controller global syndication and acquisition Indus TV Network

The history of electronic media in Pakistan is as old as the country itself as Radio Pakistan began operating the day independence was achieved after the Pakistan Broadcasting Corporation (PBC) was formed. TV was relatively slow to grow, as it wasn't until 1964 that **Pakistan Television Corporation (PTV)** appears.

PTV's state monopoly ended in 2003 when the market was liberalized, bringing new private TV channels that emit soaps, news, drama and talk shows. They have been issued licenses for cable or satellite only, which means that PTV is the only channel that provides terrestrial services to the population operating eight channels: **PTV Home, PTV News, PTV Bolan, PTV National, PTV Global, AJK TV, PTV Sports, PTV World.**

PAKISTAN: AUDIENCE MARKET SHARE, BY CHANNELS



Source: Industry sources

'After the deregulation, TV sector remains vibrant. There are more than 86 channels out of which 15 are major news channel and the remaining caters for entertainment, music and religion,' describes to Prensario **Mohammad Hanif Ravda**, controller global syndication and acquisition **Indus TV Network**, a pioneer company launched in 2000.

It operates the general entertainment Channel **Indus Vision**, news channel **Indus News** and music channels **Indus Music** and **GKABOOM**. All of them were the first private stations in the genres. **Indus Music** was transformed as **MTV Pakistan** in 2006, but it was not renewed the deal with MTV due to territorial jurisdiction.

Over the course of last 12 years, the company has blossomed into a diversified multimedia entertainment enterprise with over 350 employees and a huge revenue base. 'We stand out from its peers due to our superior brand positioning amongst women and youth (main TV viewers), putting it at an ideal place to take advantage of Pakistan's growing economy and its rapidly expanding media sector', explains the executive.

'Content capability has established it as the largest production house with the largest programming library and gives it an advantage in terms of expansion in its bouquet as well as managing costs. Our brands and content make it best positioned to benefit from the growth in expatriate Pakistanis and overseas viewers as well as direct cross over into the huge international market', he adds.

PROGRAMMING

'We can claim to have single handedly redefined the pop music scene to the extent that Pakistani Pop music outsells music of many other countries but is also magnetizing the captivating the world youth community. Indus has also revolutionized morning viewing through interactive live women programming (*Indus Plus*) and offers the only indigenous children programming (*Indus Kidz*), says **Hanif Ravda**.

'We are mostly concentrating on in-house production and also procure software from local and foreign producers mostly in the drama and soaps and reality shows. However, there is a huge potential of procurement of programs as there is a robust growth in viewership. Recently, Turkish



In conversation with Hajra (3rd season): Indus brands have a superior position amongst women and youth

serials dubbed in local language have obtained highest viewership ratings (TRP) even surpassing local productions'.

For 2013, Indus main objectives will be betting on music competition formats, find financial investment and resources, as well as strategic partnerships with selected international channels & music houses, and work closely with Gallup for a People's Meter ratings system. 'We'll also be looking for foreign contents according to the market demand, specially focused on cartoon and animation series. And we'll keep building our brands doing specific marketing activities', completes the executive.

THE MARKET

During 2011, total advertising on TV was to the tune of 2.311 million minutes and the top 25 channels received 65% the total advertising (USD 225 million). An increase of 16% over last year was seen on news, while entertainment showed an increase of only 3% and music shrank by 13%. Telecom sector was leading in advertisement spent followed by the multinational companies producing consumer goods.

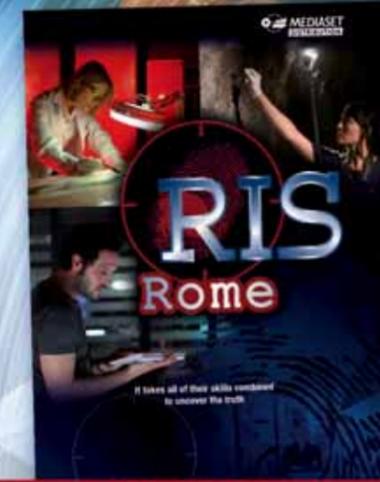
PTV gathers 35% of the total audience market share, and the rest is divided on **GEO, ARY, Dunya, Dawn, Hum TV, TV One, AAJ and Express** (56%), and **Indus**, with 9%. 'There has been a cumulative investment of approximately USD 2.5 billion in the electronic media industry by March 2012 as revealed by the *Pakistan Economic Survey 2012*. The investment will likely to grow with expansion of infrastructure by TV Channels particularly for coverage of General Election that will be held in the first half of 2013', explains **Hanif Ravda**.

'The rapid expansion in private media channels over the past few years has helped to attract viewership back to Pakistani channels rather than foreign offers. However, while the expansion has allowed the masses to be aware of the political world (national and international), media has exploited its position by playing on emotions of the people several times showing audio/visuals for the sake of sensationalism', he finalizes.

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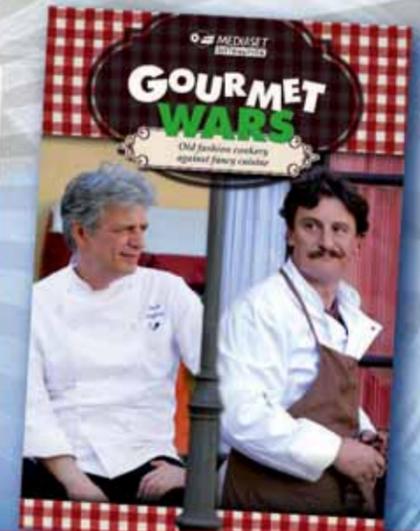


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TAJIKISTAN, UZBEKISTAN, KAZAKHSTAN: C.I.S. TV MARKETS ARE EVOLVING FAST

BY ARTEM VAKALYUK, MEDIA RESOURCES MANAGEMENT, UKRAINE

Television markets in such Central Asia countries as Tajikistan, Uzbekistan, and Kazakhstan differ a lot from the points of view of their volume, number of broadcasters, TV-content production facilities and trends of development. TV markets in Tajikistan and Uzbekistan, for instance, are just starting to evolve and integrate into global TV tendencies. From the other hand Kazakh TV industry is rather powerful and already meets all the requirements of modern TV world and represents all the main trends of global TV market. In this article we'll give a short analysis of these three CIS territories from the point of view of current situation on their television markets.

TAJIKISTAN

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

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

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

TV advertising market in Tajikistan is rather small – less than USD 10 million (the population of the country nears 7.4 million people, there are approximately 2 million households). Out of 2 million television households, 1.5 million households rely on the terrestrial



Victoria Yarmoshchuk, director of MRM

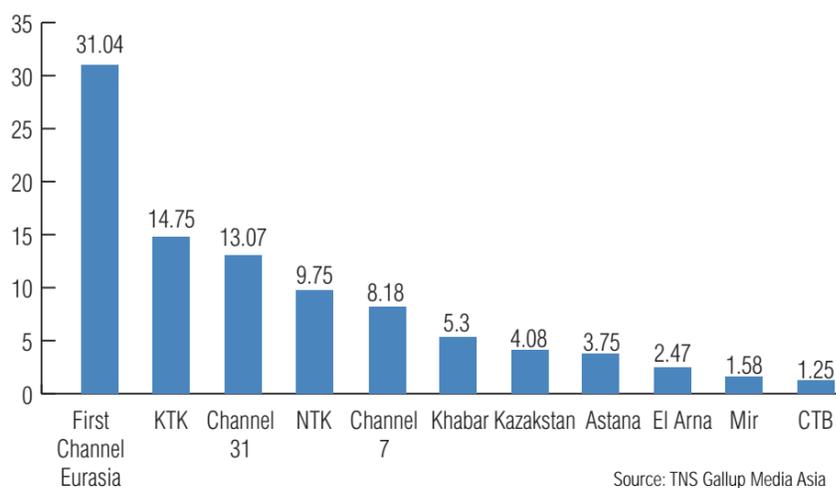
platform for their primary television reception while 500,000 households rely on satellite. Dominance of the state-owned channels on the market prevents the substantial growth of advertising industry in the country. This is also one of the main reasons of poor TV content production – there are neither local series nor local adaptations of the international TV formats on the Tajik TV.

Situation may change after analogue terrestrial signal switch off – it is planned for mid 2015. DTT-signal transmission first started in May 2010 in Dushanbe in DVB-T, MPEG-4 standard. In 2011-2012 DTT became available in three more regions of the country. Nowadays Tajikistan is implementing DVB-T2 standard. Currently four abovementioned nationwide TV channels are available in the first DTT-multiplex. Overall two terrestrial multiplexes, which will include 20 channels, are planned.

UZBEKISTAN

For the number of TV households, TV market of Uzbekistan is more than twice bigger than one of Tajikistan – there are about 4.7 million households and 7.4 million television sets in use in the country. The terrestrial platform is used by 81% (near 3.8 million) of all television households. Cable and satellite television delivery platforms are becoming increasingly popular with viewers and account for 10-15% and 4-5% of all television households, respectively.

KAZAKHSTAN: TV MARKET SHARE, PER TV CHANNELS - DECEMBER 2012 (ALL 6+)



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

They are: **Ozbekiston, Yoshlar, Sport TV, and Tashkent**. The biggest and the most popular private TV channels in Uzbekistan are: **Markaz TV, NTT, Forum TV and SofTC**. TV advertising evolves rapidly in Uzbekistan. Its volume last year reached USD 50-55 million, and its annual growth is forecasted for further few years at the 12-15% level. TV content production is just starting to develop in the country. The main producers of TV series and TV movies are state-owned **Uzbektelefilm** and **Uzbekkino** companies. In the last two years some private productions and TV stations started shooting local series and TV shows (no international TV formats are yet officially adapted in Uzbekistan).

In June 2008, the first DTT pilot project in central Asia was launched in the capital city of Tashkent. Viewers could access 8 standard-definition television services using MPEG-4

AVC compression technology. In September 2008, the further multiplex was launched offering viewers in Tashkent and Bukhara access to four government-owned television services. Regular DTT broadcasting started in September 2009 offering 12 DTT channels (the services are a mixture of 4 government-owned and 8 commercial pay-DTT channels). Currently DTT-multiplexes cover near 42% population of the country.

KAZAKHSTAN

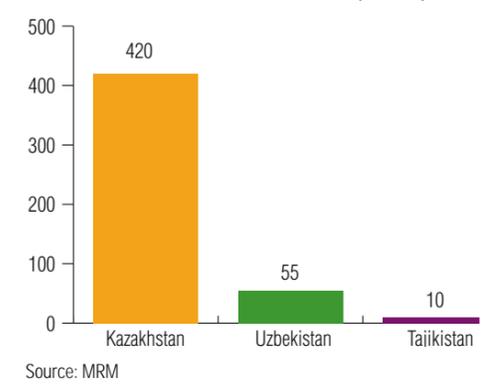
Kazakhstan is ranked as the ninth largest country in the world, but its population is only 15.9 million people. The total number of TV households is estimated to be 4.2 million while the total number of television sets in use is approximately 4.6 million. The analogue terrestrial television platform is the primary television delivery platform for 86% of television households.

Approximately 600 villages do not have access to analogue terrestrial television signals. Cable is used by 12% of the population, satellite TV penetration reaches for now up to 5% of the market, while first IPTV service was launched in the capital city Astana in February 2009 by the broadcast network operator **Kazakhtelecom** (IPTV penetration in the country now is less than 1%).

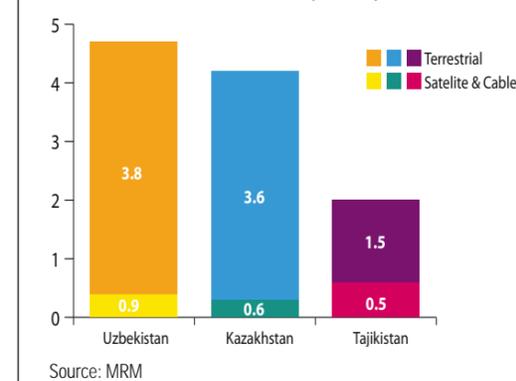
Kazakhstan has significant potential for further growth in the television advertising market and is the third largest among the countries in the region after Russia and Ukraine. TV advertising in Kazakhstan reached more than USD 420 million in 2012.

Television viewership is remarkably high among young audiences, with viewers younger than 35 years old comprising nearly half of the total television audience in the country. Kazakhstan-1 is the most popular state-

ADVERTISING EXPENDITURE, BY COUNTRIES IN MILLIONS OF US DOLLARS (2012)



TV HOUSEHOLDS, BY COUNTRIES IN MILLIONS (2012)



owned television channel of Kazakhstan. Other popular national-wide state-owned television stations are **Khabar** and **Yel Arna**. According to government statistics there are 116 private channels, and the most popular among them are **Perviy Kanal Evraziya, KTK, and Russian CTC Media** owned **Kanal 31**.

In Kazakhstan feature movies production is rather developed mostly due to the government-owned **Kazakhfilm** company. In terms of TV content production this country is also evolving rapidly. For instance, in 2011-2012 there were more than 10 local TV series and more than 20 local TV shows produced. Kazakh TV stations already adapted such international TV formats as *The X Factor, Pop Idol, Operación Triunfo, The Money Drop, Strictly Come Dancing, I Love My Country*, etc.

Digital Terrestrial Television implementation in DVB-T2 standard started in Kazakhstan in summer 2012. Currently more than 370 towns and villages of the country (3.5 million of people) are covered by DTT signal. The state planes to deploy 7 digital multiplexes and complete the analogue switch-off process till mid 2015.

NOTE: DATA ON TV RATINGS AND SHARE OF THE TV CHANNELS IN UZBEKISTAN AND TAJIKISTAN ARE NOT AVAILABLE BECAUSE OF THE ABSENCE OF NATIONAL-WIDE TV RESEARCHES IN THESE COUNTRIES.

JAHONNAMO TV: MORE OPTIONS IN THE TAJIK TV MARKET



Abdulmajid Usmonov, director of Government Organization TV Channel Jahonnamo

CEETV's MARIA RUBAN speaks with ABDULMAJID USMONOV, director of Government Organization TV Channel Jahonnamo, who explained the moment of the stations in the local TV market, which has been suffering several changes after the country's independence in 1991.

CEETV: CAN YOU DESCRIBE IN A FEW WORDS HOW DOES THE TV MARKET LOOK LIKE IN TAJIKISTAN?

ABDULMAJID USMONOV: There are just 57 television and radio channels, half of which belong to the State. Speaking about television, we have four state channels, one of which is Jahonnamo. Most of the channels air in Tajik, Russian or English languages. First National Channel (Shabakaj



Yakum) reaches 99.8% of the population, the others - around 90%, because they were established later.

The second is TV Safina (TVS) established in 2005, and the third, for kids and youth TV Bahoriston (TVB) and just three years ago informational channel Jahonnamo was launched.

It broadcasts 24/7 in Russian, English and Tajik and is available for more than 80% of national population and 55% worldwide.

CEETV: WHAT CONTENT DO YOU HAVE ON AIR?

AU: Mainly information, analytical programs, interviews, weather forecasts, sports events, documentaries. News we produce ourselves, having offices all over the country, in Moscow and Qatar. We operate closely with Al Jazeera in video and footage exchange. Also, we have good contacts with Afghan channels, with Iranian Press TV. Of course, we cooperate with Russian sources, one of them is



The match between Juventus (Italy) and Celtic (Scotland): sports programs are very popular in Tajik TV market



Maria Ruban, correspondent and representative CIS of CEETV

MIP (International Informational Pool), established by the CIS National and Public Broadcasters and MIR, international TV and Radio company.

CEETV: WHAT GENRES ARE THE MOST POPULAR IN THE COUNTRY?

AU: Russian and Indian series are popular, lately the Turkish series arrived in the country. Our audience is Russian - Tajik, so many people in the country watch Russian channels and series, because for many years we used to live in one country. Also, there are lots of Russian plants and companies in the country due to fast economic development. Speaking about genres, criminal and detective stories and 'soap operas' are followed with interest.

CEETV: HOW DOES THE DIGITALIZATION PROCESS GO IN THE COUNTRY?

AU: There is a state program, consisting of six stages to be ended by 2015. Two already are implemented. We have chosen the European system just like Russia (DVB-T 2 standard).

UZBEKISTAN: TWO NEW TELEVISION CHANNELS ON AIR



Islam Karimov, president of Uzbekistan

Two new television channels **Madaniyat va ma'rifat** (culture and enlightenment) and **Dunyo bo'ylab** (around the world) started to broadcast their programmes on 31 December 2012.

New Uzbek TV channels began to broadcast their first programs from 19:00 Tashkent time. Both channels are working in digital format and they will work 24 hours.

Both were created in line with the resolution of the President of Uzbekistan, **Islam Karimov**, who explained: 'The main objective is to expand the number of digital television channels of national television and radio company of Uzbekistan, filling them with quality content and maintenance'.

The main goal of **Madaniyat va ma'rifat** is to create highly artistic cognitive, scientific-popular and cultural enlightenment

TV programs, directed at raising cultural and educational level of population, form interest among young generation to science and education, etc.

Dunyo bo'ylab will focus on expanding interest and knowledge of population on history, geography and modern development of the countries of the world, national traditions and cultures of various nations, unique nature, flora and fauna, etc.



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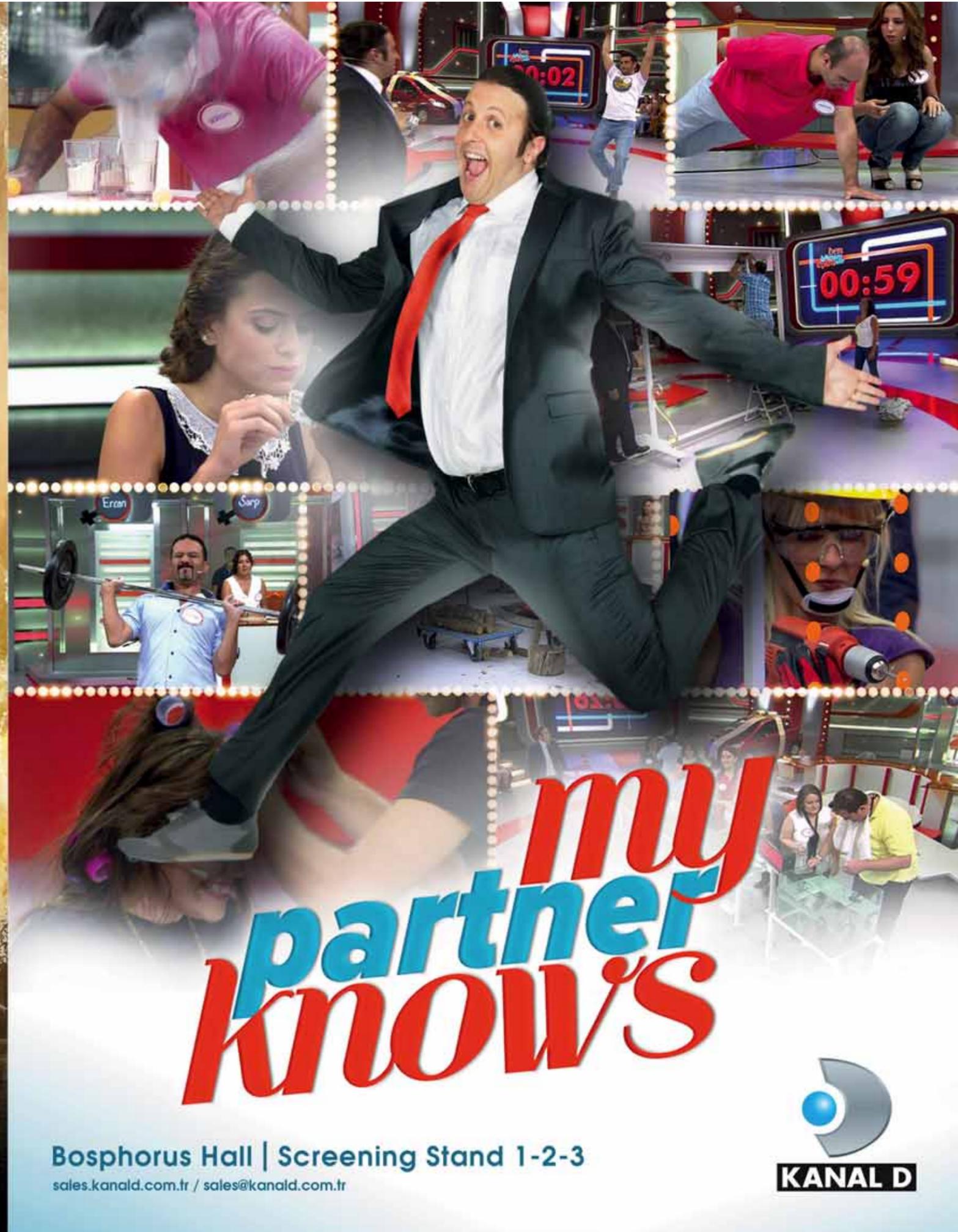
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JCC, TOWARDS THE INTERNATIONAL MARKET



Saad Al-Hudaifi, Acting Channels' Director

Al Jazeera Children's Channel (JCC) is the first choice for Arab families and children aged 7-12 in Middle East, while **Baraem TV** is a preschooler channel and a referent for parents, mothers and educationalists, who have expressed that the channel does offer what they and their kids aged 2-6 look for.

Saad Al-Hudaifi, Acting Channels' director, explains to Prensario:



Uncle Moseleh's Tales and Shams and Rami are two original shows on JCC



'According to a study we conducted recently, 80% of Arab mothers of preschoolers believe TV helps children learn, and 83% like children's channels that teach children the classical Arabic. We aim to offer a comprehensive 360° media proposition that is always loved by children and trusted by parents, embracing and reaching out to our Arab audiences on various platforms whenever and wherever they are.'

The channel celebrated its 7th anniversary last year. 'Our content has reached beyond our geographical coverage and has acclaimed recognizable appeal. Our recent successful productions are the muted show of real life comic encounters *Shams and Rami* and *Uncle Moseleh's Tales* that revives the widely loved art of puppetry embark on the production of new seasons next year', he says.

'Our content is well varied to include animations, special, and we have so far tied with many international names provide top quality animations like: **V&S Entertainment** (UK), co-producers of our widely loved *Everything's Rosie*, **DQ Entertainment**, and **BBCW**, among others.'

Explains **Al-Hudaifi**: 'We always look to partner content providers and explore ways to work with prestigious companies. Our new vision and strategy are the guidance for shaping our external ties: we welcome new ideas whether on co-production or acquisition level. We have extensive coverage in the MENA region and parts of Europe. We are making progress in expanding its transmission to reach every Arab home worldwide: **JCC** and **Baraem TV** reach over 350 million Arab households.'

Baraem TV have launched on November 1st **Baraem Europe** with special grid blocks designed to meet the special needs and preferences of audiences in of Europe, and JCC will soon follow. Completes **Al-Hudaifi**: 'With this new feed, we will continue to inspire our audiences now at times best suited for them in North Africa and Europe as we do for our

BARAEM TV: 4TH ANNIVERSARY



Haya bint Khalifa Al Nassr, acting executive general manager

January 16th, 2013, marked an important day in the history of Arab children entertainment: the fourth anniversary of **Baraem TV**. Since its beginnings, the channel has kept its promise of providing its viewers with valuable and qualitative entertainment for preschoolers.

Haya bint Khalifa Al Nassr, acting executive general manager said: 'The recognition and trust of our viewers is a significant milestone for our vision and strategy. This encouragement keeps us motivated to continue engaging our audience through our programming with an assurance to parents that we will always provide responsible content.'

Al Hudaifi completed: 'The anniversary is just the start of our journey; we have many more surprises planned for our audiences including a new line-up of shows that will feature in-house and international productions.' Some of the new shows are scheduled on January 2013 grid include *Handy Manny*, *Little Einsteins*, *Jojo's Circus*, and many more.'



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WHAT'S UP IN THE MIDDLE EAST TV MARKET?

By SARAH LABIDURIE



The Voice, a co-production with Sony Picture Television Arabia and MBC, was a success in the Pan Arab market

The Middle East TV market is very disparate, as all the countries do not have the same culture, the same history, or even the same audience measurement system. A wide range of channels exists in the region, and its number has incredibly increased over the past years. According to the Amman-based Arab Advisors Group (AAG), the number of free-to-air (FTA) channels in the Arab world grew by 19.3% between April 2011 and March 2012.

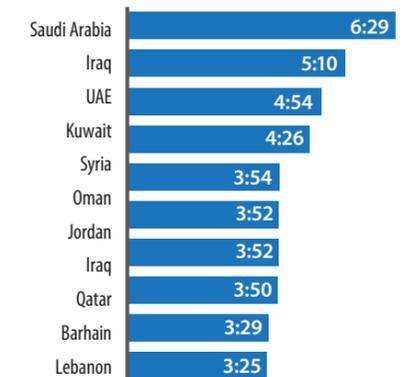
This increase of FTA is almost exclusively composed of privately funded channels, because of the more liberal environment that has been developed over the past years. The Middle East is dominated by the satellite delivery and mostly free-to-air TV. Pay-TV penetration is quite low. The number of FTA satellite channels grew by a massive 542% between January 2004 and March 2012.

Audience measurement systems in the Middle East vary from a country to another.

While people meter has been used in Armenia, Azerbaijan, Cyprus, Georgia, Israel, Lebanon and Turkey for years and the United Arab Emirates more recently (December 2011), other countries (Bahrain, Oman, Qatar, Syria, Kuwait, Jordan) are using face-to-face or the CATI technology. The analogue terrestrial switch-off has been done for Cyprus, and Israel. It is planned for Georgia (2014), Turkey (2014) and Armenia (2015).

In 2011, with an 8 minutes increase, Middle

AVERAGE DAILY VIEWING TIME – MIDDLE EAST, (PER INDIVIDUAL – IN H:MM)



- Weighted averages based on the size of the total individual universes. In Middle East, only Lebanon and Israel are measured on a people meter basis.

- The results of the other markets are based on monthly waves (see details in the country by country region)

Source: Eurodata TV Worldwide/Relevant partners

East countries reached, for one more year, the most important daily viewing time per individual compared to other areas, ranking ahead of North America and outperforming the worldwide DVT. In 2011, the highest DVT per individual is Saudi Arabia's with 06:29 minutes in 2011 versus 06:01 minutes in 2010. Iraq, UAE, Kuwait, Oman, Israel, Qatar, Bahrain and Lebanon saw their DVT increase this year too, whereas only Jordan and Syria saw theirs decrease.

The recent "Arab Spring" in the Middle East has completely changed the Middle Eastern TV Landscape, the way that people want and could consume TV and more generally the Media, bringing new opportunities to the market actors. In addition, because of the Arab revolutions, but also the financial crisis, budget allowance sector to the media particularly television was reduced, which makes the market more fragile and the quality of productions harder to balance.

After the events, they were looking for something more entertaining and distracting on their TV than the political talk shows or the news that they were used to watch. Hence, viewership is in demand for comedies, game shows, talent quests or sitcoms. Comedy shows was not traditionally well represented in the Middle East, but is now springing up, which marks the beginning of a new era.

Major media actors took these needs and envies from the audience into account and that is how in 2011 some of the most entertaining international formats were adapted in the region. For example, the pan-regional group MBC produced Arabs' *Got Talent* in January 2011, then *Arab Idol* in December 2011 and *The Voice* in 2012.

Besides, two international hit adaptations ranked first in the 2011 top ten: *Got Talent* ranked first in Georgia, alike *Masterchef* in Israel. This marked the beginning of a real love story between the Middle Eastern public and the talent shows. As mentioned above, MBC is at the origin of one of the most successful format in the Middle East of these last years.

The Voice (a co-production with Sony Picture Television Arabia) was a real challenge because it was adapted for the Middle East region, which counts many countries and many cultures and dialects, whereas in the rest of the world, one format is adapted per country. The success was immediate, and a three-season deal was signed. It opened the door to other talent quests, showing broadcasters that it is possible to make one show for different countries.

One of the keys for gathering audience in the whole region is to use social media and digital extension. The producers of *The Voice* have understood this and can be partially credited with a part of the show's success, thanks to the transmedia strategy they deployed.

Even if there are some cultural issues that limit the possibilities for adaptations, most of the big international format are or are going to be locally produced. Besides the talent quests, game show formats appeared too with, for example, the nowadays classic *Who wants to be a millionaire* that was revived by Sony Picture Television.

Another format, distributed by DRG is in adaptation for the Lebanon channel Future TV. This is a music competition format that originally aired on NBC in the USA. Local customs were added to the original format in order to fit the expectations of the broadcasters.

Pyramedia, another Middle East production company that teamed up with twofour in Abu Dhabi, has chalked up five seasons of its show *Million's poet on Abu Dhabi TV*. Even if the success of *The Voice* showed that adapting one show for different countries is possible, it is still rare because one of the issues to adapt international format or simply to produce local format in the whole Middle East region is the different dialects that coexist. Recently, a program was produced in three Arabic dialects. Indeed, *Trust*, a Banijay game show has been picked up by Lebanon, Saudi Arabia and Egypt, with different hosts and questions.

However, some programming genres especially dating shows still do not fit with the region's cultural history. But who knows, with the extremely fast developing movement of the last months, this could be the next step.

This period marked not only the beginning of a new entertainment area, but also the development of local sitcom productions. A deal was secured by SPT for the local adaptation of the internationally famous sitcom *Everybody Loves Raymond*, picked up by MBC, but also by Egyptian channel Dream TV and Lebanon channel Murr TV.

Regarding dramas in general, Turkey's were historically the most popular in the Middle East, but producers and broadcasters are now finding

their voice to produce their own authentic drama. This is not only due to the rising costs of Turkish drama imports, but also to a new generation of people who want to make creative and quality local shows.

MBC, owner of many channels airing in the whole pan-Arab region, is at the origin of one of the most successful and largest TV series in the Middle East. Indeed, *Omar Ibn Al Khattab*, which reached a share of 1.3% for its premiere (versus 0.1% for the channel), tells the story of the eponymous Islamic leader as he built an empire across the region. The series was sold to many countries such as Lebanon, Tunisia, Indonesia or Algeria.

Regarding the huge success of local series, MBC is now developing another historical drama described as Magnificent century meets Downtown Abbey. Planned to be aired in 2013 during the month of Ramadan, the channel hopes that this new drama will know the same destiny as its predecessor.

MCB is also preparing two other local dramas. The first, *Girls' Taled*, tells the story of a group of Egyptian girls who first met at school, with



From MBC, drama series *Omar Ibn Al Khattab* reached a share of 1.3% for its premiere (versus 0.1% for the channel), and it was sold to Lebanon, Tunisia, Indonesia, Algeria, among others

BEST PERFORMING PROGRAMS

	Rank	Channel	Day	Date	Time	Program	Genre	Origin	Dur(min)	Rat%	000	Shr%
Arzerbajjan	1	ANS	Tue	01/02/11	18:20	Toy olsun davami	Variety Show	Azerbaijan	40	31.3	1,187	70.6
Cyprus	1	ANT1	Tue	05/04/11	22:22	Elenh H Pornh	Series	Cyprus	35	25.5	172	59.4
Egypt	1	AL HAYAH	Tue	08/09/11	19:50	Ramez Qalab All Asad	Variety Show	Egypt	34	31.1	8,146	60.8
Georgia	1	RUSTAVI2	Mon	04/04/11	22:15	Got talent	Reality Show	Georgia	91	36.7	585	77.9
Israel	1	CHANNEL2	Sat	24/09/11	21:35	Master chef 2	Reality Show	Israel	120	25.8	1,473	59.5
Lebanon	1	LBO	Fri	25/11/11	20:30	Celebrity duets	Reality Show	Lebanon	120	16.6	650	49.8
Turkey	1	KANAL D	Tue	25/01/11	20:47	Oyke bir gecer z aman ki	Series	Turkey	106	27.3	14,079	56.5

SOURCE: Eurodata TV Worldwide/Relevant partners

each episode reflecting a year of their lives. The second series, *The Family's Daughters* (31x'45), is a Syrian drama about the lives of a group of daughters within the same family. This shows in some measure how local network count on their skills and talent to make high quality local productions, especially regarding dramas.

But much remains to be done, especially due to the primitive audience measurement systems in some countries that remain an obstacle to express the impact that might have the new programming among the viewership. Indeed, it is hard for the Media actors to build a strategy and to face the stakes of the advertising market. An opening to the world has been observed not only regarding the programs, but also regarding the channels. Some major take-over happened over the last months, both from the Middle East to other countries and conversely.

Recently, Al Jazeera, entered in the U.S cable market by acquiring Current TV. The group plans to replace it with its own network to be called Al Jazeera America. The Qatari group has made a deal for its channel Al Jazeera Children with BBC Worldwide to broadcast more than 180 hours of BBC programming, with all the series to be dubbed in Arabic.

On the other hand, other Occidental countries also try to implant on the Middle East market. Discovery purchased Dubai-based company Takhayal Entertainment (the premier company for cuisine and culinary programming) and its affiliates, including the flagship network Fatafeat which reaches approximately 55 million TV households in the Middle East and North Africa. This acquisition gives Discovery a major entryway to the Middle East market.

In Turkey, Sundance Channel became available

for the first time following a deal between AMC/Sundance Channel Global and Turkey's largest pay TV platform Digiturk. This opening also ultimately results from three new deals signed by Sony Pictures Television with the broadcasters in Egypt, Qatar and Dubai. The deals license broadcast rights to feature films from the Sony Pictures library across a wide variety of genres and decades.

It allows to Al Rayyan in Qatar and the Egyptian-based television network Rotana to have access to thousands of feature films and television series. Meanwhile, in Dubai, SPT has confirmed a new distribution deal with national broadcaster Dubai Media Inc. that will air their selection on Dubai One. Movements and take-overs are not reserved to the USA.

In December 2012, French-Tunisian producer and financier Tarak Ben Ammar announced that he will buy the ONTV Egyptian television network, which he plans to manage through his Italian company Prima TV.

This alliance between the North African market and the Egyptian market will create a real new Pan-Arab group, able to reach millions of people. With this recent openness to foreign programs combined to the local formats that still remain popular in the Middle East, and with the increase of the volume and quality of local productions, the Middle East market might strengthen its position in the whole world in the next years.

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MIDDLE EAST BOOM AFTER THE ARAB SPRING

The worldwide industry has turned the spotlight on the surge in Arab television channels, program production and television advertising, that has taken place since the 2010 Arab Spring.

Leading executives from a host of Arab broadcasters, including Al Jazeera's English and Arabic TV channels, twofour54, Abu Dhabi TV, Dubai TV, MBC Group, Al Dafra TV, Al Jadeed TV, MTV and Roya TV are increasing their presence in the international markets, like the MIPs in Cannes. Those tradeshows bring together delegations from over 100 countries, and introduces dedicated conferences designed to take a close look at the booming Arab TV market and the continued strength of Turkish drama in these conferences.

'In the past 18 months we have seen the launch of some 150 new Arabic satellite television channels across Egypt, Libya, Iraq, Yemen, Sudan, Jordan and Lebanon and Gulf Cooperation Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia)' explains Nabil Kazan, president and chief executive of K & Partners TV Services.

'80 million Arab households are now accessing terrestrial and satellite broadcasting and we now have over 650 Arab TV channels available', remarks the executive.



THE MARKET

Since 2010, production of Arabic television series has increased dramatically, with 160 series produced in 2011 compared to just 81 in 2010. Advertising is also up significantly to \$14.3 billion in 2011 — a 35% rise on 2010. Television represents 67% of the ad market.

According to a global report from AEGIS Media, TV continues on the 'strong growth path' of the last couple of years, although the pace of growth slowed in 2011 compared to the +26.8% seen in 2010.

'Growth was +11.6% in 2011, this is expected to continue this year and next. The share of TV ad spends is on an upward trajectory, partly due to the decline in Print spends', remarks the study. In 2012, TV advertising expenditure in Middle East and North Africa reached USD 5,3 billion, and its expected to reach USD 6,1 billion this year, according to the same source.

Egypt is the biggest TV advertising market with USD 852 million (2012) and projected USD 1,02 billion (2013), followed by Israel with



Distributed by Global Agency, The Magnificent Century was one of the top Turkish titles in Middle East

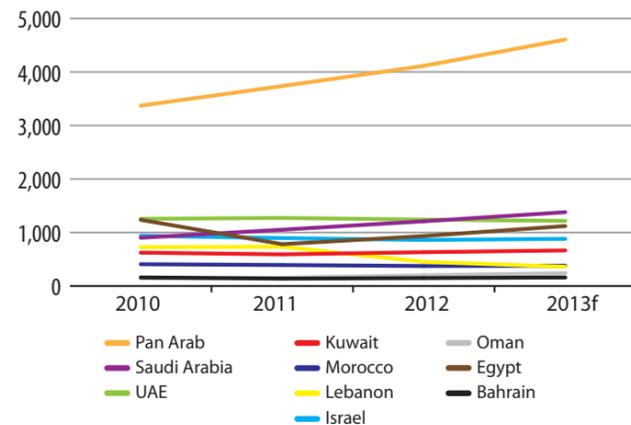


USD 368 million (2012) and projected USD 380 million (2013), Lebanon with USD 234 million (2012) and projected USD 272 (2013), Kuwait with USD 150 million (2012) and projected USD 197 million, and Saudi Arabia with USD 51 million (2012) and projected USD 78 (2013).

In line with audience tastes around the world, Arab viewers' favorite shows are drama series, movies and soap operas, with over 200 channels broadcasting daily Arabic or Turkish drama series such as popular hits *Harem al Sultan* (*The Magnificent Century*).

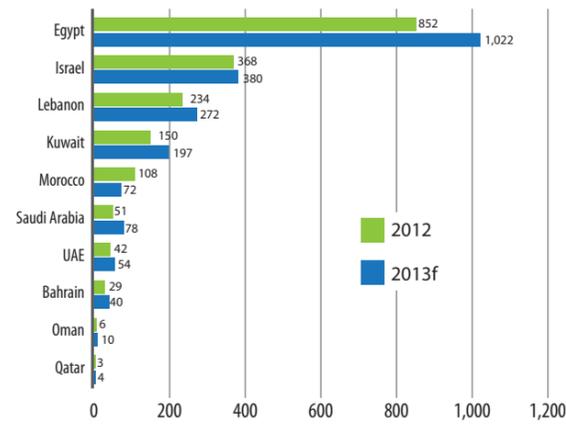
'Turkish drama series that are dubbed for the Arab market perform very well', comments Laurine Garaude, director of the Television Division at Reed MIDEM, who adds: 'The Arab market is diverse, but there are strong pan-Arab consumer trends which the international community need to understand'.

MIDDLE EAST: ADVERTISING EXPENDITURE EVOLUTION, PER COUNTRY (2008-2013f) - IN MILLIONS OF US DOLLARS

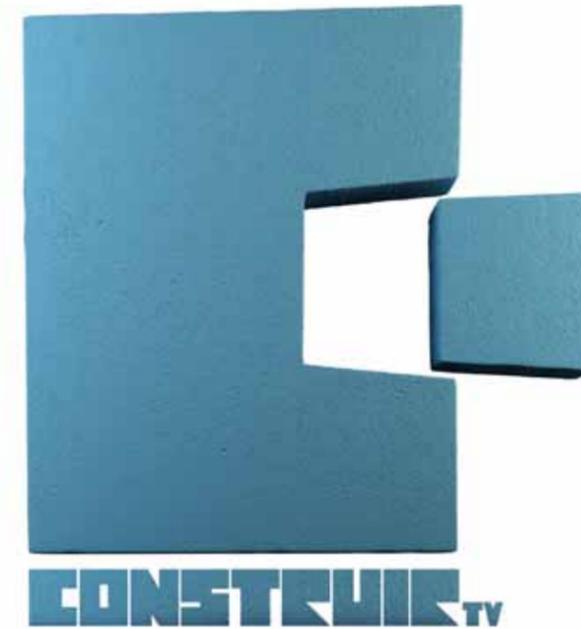


Source: AEGIS Media

MIDDLE EAST AND NORTH AFRICA TV ADVERTISING EXPENDITURE (2012-2013f) - IN MILLIONS OF US DOLLARS



Source: AEGIS Media



A channel devoted to the world of work



THE GIRL NAMED FERIHA
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TURKISH TV SERIES



VISIT US
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boardroom



WHAT'S GOING ON IN WEST ASIA?

By FRANÇOISE LAZARD, DISBOOK EDITOR

ARMENIA

The audiovisual market in Armenia is surprisingly replete for such a small country: there are currently 3 public television stations, 71 private local broadcasters and four operating on the basis of international agreements. The Public Television and Radio Company of Armenia (ATV) continues to lead the ratings and dominate the local advertising market. Television Ratings and Monitoring System, available since 2006, provides important information to the media market and empowered development in the sector.

Population: 2.97M
Urban Population: 64%
Capital City: Yerevan-population 1.125M
GDP Per Capita: \$5 400
Mobile Cellular Penetration: 100%
Internet Users: 1.8M
Facebook Users: 335 000
TV Households Penetration: 96%
Pay TV Subscribers: 325 000

Most Popular Programs
#1: News With Commentary
#2: Films

#3: Music
#4: TV Series

Main broadcasters: Shant TV, Armenia TV, ALM TV, A1+, A-TV
Pay TV Operators: Arminco, Ucom
Main Advertising Agencies: Kaym, McCann Erickson, Focus Media, Media Group, Dg Contact, Cornerstone, Sharm Holdings, Alpha Plus Consulting
Main TV Advertisers: Vivacell, Armentel (Beeline), Orange Armenia, Ameriabank, Vtb Bank, Armeconombank, Pepsi Cola



AZERBAIJAN

According to World Bank's "Doing Business" report Azerbaijan is one of the fastest developing economies in C.I.S. region with an impressive GDP growth in the last five years. Under the admission to European Council, Azerbaijan started the harmonization processes of media policy to align with European standards. Television is controlled by the National Radio and Television Council (NRTC), which facilitates the realization of government's policies and makes decisions concerning broadcasting licenses. State-owned AZTV and the public TV station ICTIMAI remain major broadcasters; a dozen privately owned television stations are available across the country as well as Turkish TRT and

some Iranian and Russian channels. The complete switch to digital was scheduled for the end of 2012.

Population: 9.5M
Urban Population: 25%
Capital City: BAKU-population 2.12M
GDP Per Capita: \$10 200
Mobile Cellular Penetration: 100%
Internet Users Penetration: 70% (2012, Minister of Communication and Information Technologies)
Facebook Users: 897 000
Number TV Households: 2M
Pay TV Subscribers: 100 000
Source: Minister of Communication and Infor-

mation Technologies

Main broadcasters: AZTV (state-run), Ictimai (public), Ans TV (private, national), ATV (private, national), Khazar (private, national), Lider TV (private, national), Space TV (private, national)
Pay TV service operators: Uninet, Ultel, Katv, B&B TV, Delta Telecom
Main advertising agencies: McCann Erickson, Maxmedia, Krea Advertising Agency, Aam Advertising
Main TV advertisers: Procter & Gamble, Azercell, Colgate-Palmolive, Reckitt Benkiser, Henkel, Azerfon, Maer, Bakcell, Danone, Coca-Cola



TAJIKISTAN

State-run television broadcaster transmits nationally on 4 stations and regionally on 4 stations; 11 independent TV stations broadcast locally and regionally, most of them entertainment-based; some households are able to receive Russian and other foreign stations via cable and satellite. The mobile market is booming, with coverage extending to all major cities and towns

Population: 7.63M
Urban Population: 50%
Capital City: Dushanbe-Population 679 000
GDP per capita: \$2100
Mobile Cellular Penetration: 74%
Internet Users: 794 000
Facebook Users: 34 600
TV Households: 3.5M

Pay-TV Subscribers: 56 000

Main broadcasters: Tajik TV, Channel One Tadjikistan, Safina, Jahonnamo, Bahoriston, Soghd TV, Khatlon TV, SMT (Independent Television Of Tadjikistan)



TURKMENISTAN

The Turkmenistan media remains under the control of the government. The state-owned **National Television and Radio Company** (NTRC) is running the transmission of television programs in Turkmenistan, in Turkmen language. Pay-TV services exist in rudimentary form. Turkmen TV audiences prefer to watch Russian television. As all Russian channels were recently banned, except ORT (from 4 pm to 6 pm), satellite aeriels appeared and now 99% of Turkmen residents use them and have access not only to Russian but to foreign channels as well. In 2011, a new TV Tower in Ashgabat was offi-

cially inaugurated. It is a new massive television complex that combines broadcasting, production, acquisition, post-production, a variety of links facilities needed for transmitting a range of HD programs. and a new multi-facility broadcast center. Coinciding with the tower, a new TV channel was launched: Ashgabat TV. The first online TV channel Turkmen TV was recently launched.

Population: 4.99M
Urban Population: 50%
Capital City: Ashgabat-Population 909 000

GDP per capita: \$7 800
Mobile Cellular Penetration: 31%
Internet Users: 253 000 (RSF, Dec. 2011)
Facebook Users: 5 860 (social networks are censored)
TV Households : 900 000
Pay-TV Subscribers: 50 000
Source: Reporters sans Frontières

Main Broadcasters: Turkmen National TV, TMT 1, TMT 2, TMT TV 4, Channel 6



CYPRUS

The political division on the island is reflected in its media landscape: Greek and Turkish constitute national official languages, both zones operate their own press, and both Greek and Turkish television stations are available across the island. Public television services in Greek Cyprus were established with the country's 1960 independence and are operated by the Cyprus Broadcasting Corporation (CYBC). Since the early 90s when private radio and television broadcasting was allowed, the state-owned television channels have been forced to share

the advertising market with dozens of private operators.

Population: 1.13m
Urban population: 70%
Capital city: Nicosia-population 217 000
GDP per capita: \$ 27 500
Mobile cellular penetration: 135%
Internet users: 584 000
Facebook users: 514 000
Share of households with television: 99,3%
Pay TV subscribers: 150 000

Main broadcasters: Cybc (Rik1, Rik2, Rik Sat), Sigma Radio and TV, Mega TV, Plus TV, ANTI-Antenna Group, Alfa TV, LVT (lumiere tv)
Pay TV operators: Nova Cyprus, Cablenet, Cyta, Primetel
Main advertising agencies: McCann Erickson, Pandora / Ogilvy, Telia & Pavla Advertising, Gnomi Consultants, Marketway, Pissis Signs
Main TV advertisers: Bank Of Cyprus, Golden Telemedia, Hellenic Bank, Laiki Bank, Orfanides, Procter & Gamble, Carrefour, Nestlé, Coca-Cola



KYRGYZSTAN

Most of the urban centers have television coverage. In the rural areas TV coverage is spotty, in large part due to the mountainous terrain, for much of Kyrgyzstan lies in the northern ranges of the Himalayas. The two state-owned Kyrgyz National TV and Radio Broadcasting Corporation dominate the audiovisual sector. In addition, there are several commercial broadcasters operating in Bishkek, and more than a dozen private stations. Russian networks are available terrestrially and have a significant audience.

Kyrgyzstan has 12 TV channels, three of which are central but fail to reach the entire country. There are five TV channels in the capital city of Bishkek. Adspend on television (45%) is expected to continue grow, reaching close to \$120m by 2013

Population: 5.5M
Urban Population: 35%
Capital City: Bishkek-population 854,000
GDP per capita: \$860

Mobile Cellular Penetration: 85%
Internet Users: 2.2M
Facebook Users: 50,000
TV Households: 600 000
Pay TV Subscribers: 50 000

Main broadcasters: Stan TV, KTRK, NTS (New Television Network), Osh-TV, Star Movies



TELEVISA: NEW TEEN AND TRADITIONAL TELENOVELAS



Mario Castro, director of Sales, Asia & Africa

Grupo Televisa is the world's largest media company and a major player in the global entertainment industry, by producing 70,000 hours a year of original content in all types of entertainment.

At Discop West Asia, **Televisa Internacional** (Mexico) highlights the traditional telenovelas *The Lady from Vendaval* (150x'60) where a woman will do whatever it takes, even finding a provisional husband, in order to save the property her mother left her, and *True Love* (150x'60) with two bodyguards that fall in love with the woman they have to protect.



The Lady from Vendaval: a traditional telenovela released at Discop

Televisa sold to **SBT Brazil** the format of the kids telenovela *Carrossel*, which was adapted by the second broadcaster and become one of the highest rated program of the channel and the Brazilian market. Televisa has the rights for international distribution of the Portuguese version.

Following with the traditional telenovelas, appears *Crown of Tears* (150x'60): a woman will have to bear harassment and humiliations in order to get her kids ahead. After this telenovela ended on 4pm slot at **Canal de las Estrellas**, last month



From Brazil, Televisa highlights the kids telenovela *Carrossel*

Televisa launched *Wild at Heart* (150x'60).

It's a great story from the producer of *Don't mess with an Angel* and *Curse by the Sea*, **Natalie Lartilleux** about a woman who never met her father and falls in love with a man that changed her life. The distributor is pushing this title specially at this market.

Mario Castro, director of Sales, Asia & Africa, and in charge of this market, explains: 'At Discop, we are mainly focused on the Middle East and Turkish market, as well as Greece and CIS countries, where we are really successful with our canned productions'.

On behalf of formats, he completes: 'We have an alliance with Sony Pictures Television since 2012 to produce local version of our formats in those territories. It's a joint venture with the Hollywood studio and is managed directly from our Mexican offices'.

COMERCIAL TV: SERIES AND DOCUMENTARIES

Comercial TV (Spain) highlights at Discop West Asia a catalogue of series, soap operas, programs and documentaries. Heading the slate is *Bandolera* (535x'45), the successful series broadcast on **Antena 3**, Spain. In the series, a young English woman returns to the place where she was

raised by his uncle, in the mines of Rio Tinto, Andalucia. She graduates in Spanish literature and wants to reach a dream: be a writer and travel around Spain searching for new adventures.



Bandolera

MORE ENTERTAINMENT WITH ALL3MEDIA

With huge expectations about Middle East and West Asia regions, **All3Media International** (UK) highlights at Discop West Asia three entertainment titles, and two factual shows. Executives attending are **Nick Smith**, VP of international Format Sales, and **Kelly Shek**, Sales Executive.

First, the entertainment show *Face the Clock* available as ready made (30x'30) or format, a Russian roulette quiz of fast-paced general knowledge rounds, where the clock is always ticking; and *The Constructed Reality Slate*, a catalogue full of factual entertainment formats including the youthful exuberance *Day & Night*, the domestic trials of *Just Help Me* and *Families*

at the Crossroads.

The groundbreaking *The Cube* with seven physical and mental challenges is also available as ready made (53x'60) or format, while the two factual titles are *Ancient Egypt: Life and Death in the Valley of the Kings* (2x'60), about the Egyptians and their extraordinary world, and *East to West* (7x'60) with the true story of the birth and flourishing of civilisation in the Middle East and its huge impact on the West.

As part of an exclusive format representation deal brokered by **All3Media**, **Strix Television** (subsidiary of **MTG Studios**) announced recently that is representing leading independent television production company,



Face the Clock

Studio Lambert's format catalogue in all of Scandinavia. Through **All3Media**, Strix represents past and future formats developed, owned and controlled by **Studio Lambert** (*Undercover Boss*, etc.).



Ancient Egypt: Life and Death in the Valley of the Kings

BOOTH #27 - 28

VIEWING BOX #18

SCREENING STAND #34

NATPE Triumphs!

natpe 5
1963 - 2013
CONTENT FIRST



- “Can't wait for next year...great from a TV perspective, and it was the center of the YouTube content universe.”
- Mark Cuban, Chairman, AXS TV
- “As the linear and digital businesses start to blend, NATPE becomes more and more valuable.”
- Larry Tanz, CEO, Vuguru
- “Best NATPE conference in years!”
- Thomas Vitale, Executive Vice President of Programming & Original Movies for Syfy and Chiller
- “The market delivered exactly what we expected in terms of exposure and business opportunities.”
- Antonio Barreto, CEO, DLA
- “The NATPE Legacy Award was a wonderful experience which I will remember for the rest of my days!”
- Herbert G. Kloiber, Chairman, Tele München Gruppe

Thank you to all who participated and contributed. Join us:

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June 24-27, 2013
Sofitel Chain Bridge Hotel, Hungary
www.natpebudapest.com

natpe.
January 27-29, 2014
Fontainebleau Resort, Miami Beach
www.natpemarket.com

TELEMUNDO: CHANGING BUSINESS MODELS



Melissa Pillow, director of Sales

'Our business in West Asia is booming. After years of selling practically all of our programming to Farsi language channels such as **Farsi 1**, we have just closed *Maid In Manhattan* in this language with a new company in the Middle East'.

Melissa Pillow, director of Sales of **Telemundo Internacional** (USA), describes to Prensario the moment of the company in the region and continues: 'Our product is in high demand in Pakistan, where we have just positioned our titles *Beautiful but Unlucky*,

Fearless heart and *Where is Elisa?* We continue to do a great deal of business in Afghanistan as well as Lebanon, where a local version of one of our most popular telenovelas is undergoing production in the Arabic language'.

At Discop, the distributor brings the brand new telenovela *The Return* (120x'60) about the life of a woman in a gold mine, and the Latin adaptation of *Forbidden Love* (120x'60) and *Bittersweet* (130x'60), co-produced by **Cadenatres** (Mexico) and **Televen** (Venezuela).

Also, the format *Letris* from **Reset TV**, which presents the popular game as a game show for TV and the brand new telenovela *Precious Rose* (130x'60), produced by **Argos Television** (Mexico) for



Forbidden Love: the Latin version arrives to its origins



The Switch from TVN Chile

Telemundo in the US Hispanic market.

'We are visiting with our partners from Kazakhstan, where currently our family entertainment format *My Teen Dream* (locally called *Mamma Mia*) is a hit; as well as from Israel, Armenia and of course Georgia, a country where our newest titles *Forbidden Love* and *The Return* were closed', adds **Pillow**.

And she completes: 'These two latter titles, our new scripted formats *The Switch* and *Separados* (from **TVN Chile**, who has renewed the deal with **Telemundo** for five more years), along with our catalogue of entertainment formats from **Reset TV** of Spain, are our main focus for all of our clients in Eastern Europe and the Middle East who will visit the market'.

DCB AT DISCOP WEST ASIA

DCB Consulting is new Singapore based distribution company launched last December by **Nathalie Nennig**, former sales chief of **Novovision** (France) and will attend Discop West Asia for the first time.

Focused on formats and entertainment, **DCB** presents some ready made and formats covering all genres, including clip shows, children's programming and some documentaries, from the most talented European independent content providers.

Nennig has already partnered with French companies French TV: **ADLTV**, **Ah!Production**, **Pernel Media**, **Image-In** and **Quadra Film Coalition**. It also represents the leading Belgian entertainment company **The New Flemish Primitives** with sport reality show *Eternal Glory*, *Tour Deluxe*, *Take Two*, *Know Your Own Kind*, etc.



Nathalie Nennig

FUNDING AVAILABLE TO PRODUCE IN ALBERTA



Jeff Brinton, commissioner

highly skilled and experienced crew including producers, directors, location managers, grips, costume designers, etc.

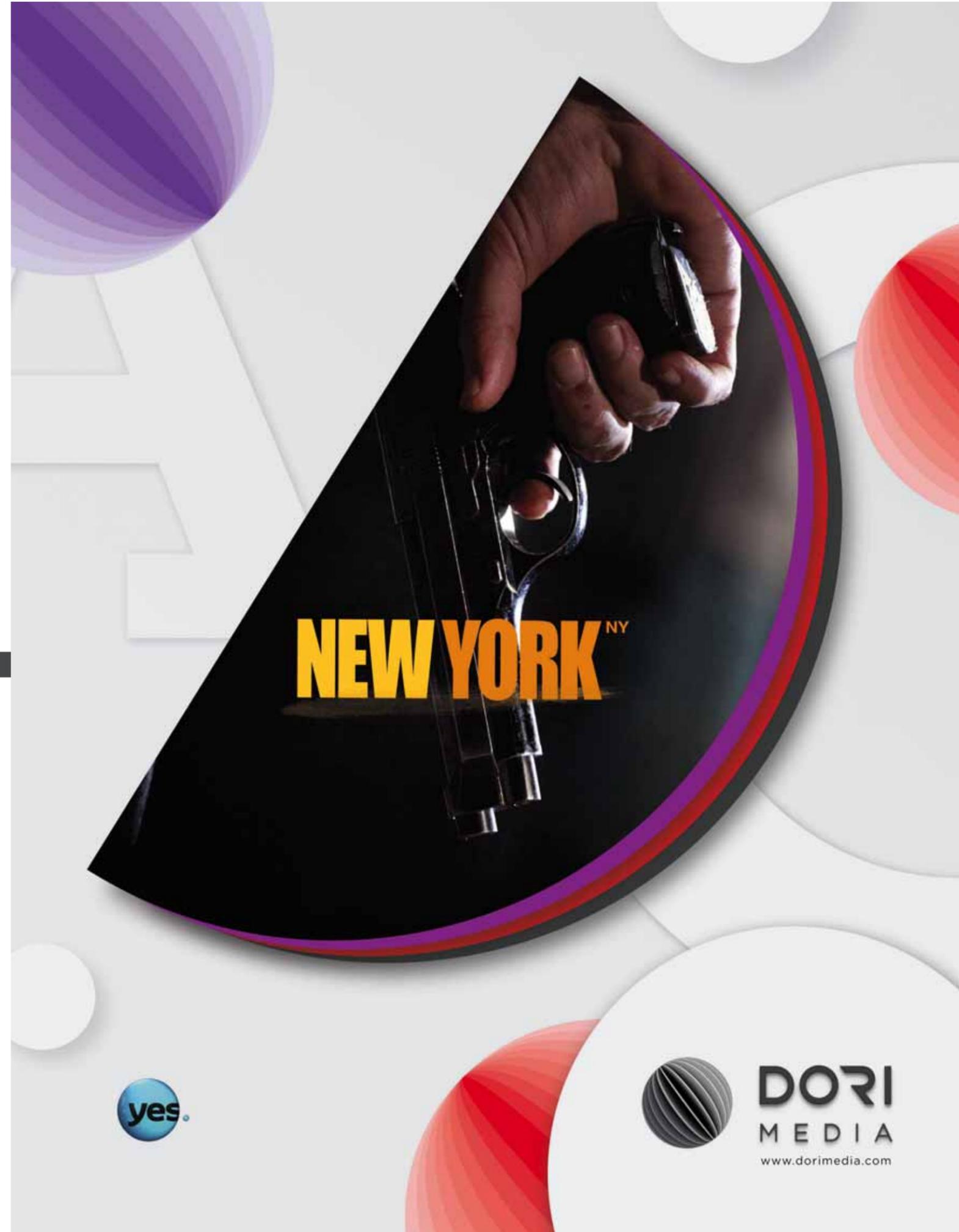
Alberta Film is a full-service commission from the Canadian state Alberta that assists international companies with all production needs: from information about unions and guilds to contacts for

The commission is increasing its participation in the international arena. **Jeff Brinton**, commissioner, explains: 'We will also create a customized location package for your project detailing the specific locations that will meet your production needs. Scouting services are also provided. We offer a unique mix of expertise (studios, production companies, post production) and locations'.

'Our funding for screen-based production is delivered through the **Alberta Multimedia Development Fund**, a competitive and flexible incentive in the form of a grant against all

eligible production expenses incurred here. It will contribute up to 30% of all eligible Alberta expenses up to \$5 million per project', says **Brinton**.

Major projects including *Inception*, *The Bourne Legacy*, *Hell on Wheels*, among others, have used Alberta as a location of choice. 'We'll continue working with all forms and types of production and maintain our reputation of being a production centre. We anticipate having a very busy 2013/14, including the third season of the **AMC** series *Hell on Wheels*, as well as a variety of indigenous productions and other productions not confirmed yet'.



KANAL D: THE NAME OF THE TURKISH SERIES



Ezgi Ural, international sales executive, and Amac Us, sales and acquisitions specialist

As one of the leading Turkish distributors of 2012, **Kanal D** keeps surprising to West Asia, Middle East and North African buyers with more drama series and, since this market, entertainment formats.

Heading the catalogue is *Kuzey- Güney* (+50x'90) with the story of two brothers' struggle to survive in their own worlds. *Kuzey* is very lively, rebellious, hot tempered, while *Güney* is a calm, patient, logical. They have different ambitions and paths, but something in common: the girl they are both in love with.

Two of top ranked Turkish series of the last years are from **Kanal D**: the period drama that happens in the 1967 *Time Goes By...* (+100x'95), which gathered 74% market share when it was on air, and *Fatmagül* (80x'90), a story of stolen lives that reached 60% or market share.

Forbidden Love (79x'90) is a love story adapted from Turkish author Halit Ziya U aklıgil. After losing his wife eleven years ago and excluding himself from his social environment, a man gave all his attention to his daughter and son. The story captivated **Telemundo** in the USA, who produced a Latin version as *Pasion Prohibida* and premiered it in January with great success.

The distributor launched at Discop West Asia its brand new series *Lost City* (+20x'90), which occurs in a slummy district of



Kuzey- Güney

Istanbul, where the inhabitants of a 6 story apartment building are trying to cling to life... These are people who have had to give up their hopes and dreams just to stay alive in the metropolis.

Other brand new title is the entertainment format *My Partner Knows*, a game show that was one of the top shows on air during 2012 with an average of 20% audience share (prime time, weekend) among both total and AB demographic



Lost City

ARTE: ADVENTURE, GASTRONOMY AND ARTS

ARTE France is a leading documentary producer in Europe, and it brings to Discop West Asia its huge catalogue, highlighting the travel adventure production *Castles and palaces of Europe* (5x'52), which offers breath-taking aerial views of the Loire Valley in France, to southern Germany, the southeast of England, the Piedmont in Italy and along Portugal's coast.

In the belly of the city (5x'52) is about gastronomy: five markets, five

complex systems that play a crucial role in their city: Barcelona, Budapest, Vienna, Lyon and Turin. They all have a big belly: the city food market that nourishes a great part of their population. *Budding Stars* (7x'26) is a brand new title about the most famous dance school in the world, where the greatest "étoiles" or principal dancers are trained.



Castles and palaces of Europe

VIEWING BOX #28

MEDIAPRO: TU SERIES + REALITY FORMATS



Allina Oneata, sales manager, and Claudia Stravrositu, head of international operations

MediaPro Distribution (Romania) is taking the content distribution business seriously, after attending several tradeshows of the industry and presenting new titles each time. For Discop West Asia it bring two highlighted titles.

Starting with the prime time drama and romance series *Taste of Love* (109x'60)

launched on January 1st in Slovakia. Its about two competing wine-growing families that hate each other. While one of them has built a successful winery, his former friend and colleague faces financial problems and decides to sell his business.

The other proposal of the distributor is the reality show format *Restaurant wants a boss* (61 episodes), available in two formats: 50 daily shows of one hour or 11 live shows of two hours. This brand new title features an innovative restaurant concept with a renowned chef in charge of twelve contestants.

Company's catalogue includes new seasons of two series: *A bet with life* (90x'60) is a

teenseries centered upon the love story between two teenagers, whose destinies are switched at birth. **MediaPro Pictures** produced it for the leading Romanian broadcaster **Pro TV** and **Ruxandra Ion** was the general producer.

Originally produced by **MediaPro Audio Visual Zagreb** and broadcast on Croatian TV Nova, *Lara's Choice* (182x'60) is a timeless classic love story based on a loyal woman for the prime time, based on the theme of the loyal woman who has to wait for her love to return from unpredictable adventures on the sea.



Restaurant wants a boss, new reality show

VIEWING BOX #15



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TV AZTECA/COMAREX: BRAND NEW TELENOVELAS



Martha Contreras, sales Asia, and Adela Velasco, sales Europe

One of the world's largest producers of Spanish-language television programming, **TV Azteca** brings to Discop West Asia through **Comarex** (Mexico) its brand new telenovela *La Otra Cara del Alma* (120x'60) with top actress **Gabriela Spanic**.

Top titles of the distributor are the telenovelas *The Kings* (120x'60), which shows a very powerful and complex kingdom, as close to the storm as it is far away from calmness; and

Prisoner of Love (120x'60), where three families are united by a terrible secret.

Loving You (120x'60) is the story of a woman that becomes the sole proprietor of the country's most profitable hotel chain when she marries with a man that only wants... her money. *Legendary Love* (120x'60) shows a woman dresses in a wedding dress to kill her enemies. Other telenovelas are *Trading Lives* (120x'60) and *Under A Red Sky* (120x'60).

From **Comarex**' independent catalogue its highlighted *Ultimo Año* (70x'60), the thriller telenovela produced by **MTV Networks**, with the love story between a young girl and two boys that will fight for her love.

On the other hand, the distributor is exhibiting all **HBO Latin America** productions that is distributing exclusively for this territories. The first in the slate is *Alice* (13x'60),



La Otra Cara del Alma

Fugitives, from HBO Latin America

produced by **Gullane Films** in Brazil: it tells the story of a woman who must travels through Brazil because of her father's unexpected death. Other titles produced in Brazil are *Sons of the Carnival* (13x'60) and *Mandrake* (13x'60).

Shot in Mexico by **Argos**, *Capadocia* (39x'60) is the name of an innovative women's prison facility in Mexico City that was created as a result of political interest and power struggles, while *Epitafios* (26x'60) was produced in Buenos Aires by **Pol-ka**, and tells the story of a serial killer.

Lastly, the most recent production of HBO in Latin America: *Fugitives* (13x'60), shot in Chile. Is the story of a failed drug trafficking operation that sparks a full-out pursuit of four men who find themselves forced to find refuge throughout Chilean territory, as they flee from both the mafia and the law.

BRAZIL AVENUE ARRIVES TO ISTANBUL

Globo TV International (Brazil) highlights in Istanbul its most recent local success: the telenovela *Brazil Avenue* (150x'45) that has paralyzed the Brazilian audience.

Is a dynamic, lifelike, and modern telenovela that reveals how blind ambition and inflicted cruelty can change the course of a life; a dramatic story a girl, who struggles to recover the life her dreadful stepmother took from her when she was a child.

A&E NETWORKS: NEW SERIES

A+E Networks (USA) highlights at Discop West Asia its brand new series produced for History Channel: *The Men Who Built America* (8x'60) that shows the persons whose names became synonymous with the American Dream, and *Mankind The Story of All of Us* (12x'60), a visceral, surprising and dangerous series that draw on the style of action movies, dramatizing key turning points in the story of mankind.

CONSTRUIR TV: CENTRAL ASIA, MIDDLE EAST AND NORTHERN AFRICA



Annabelle Aramburu, Sales Director

Construir TV (Argentina) represented by sales director **Annabelle Aramburu**, attends Discop West Asia for the first time driven by the promising content business opportunities that the Central Asia, Middle East or Northern

Africa markets offer.

The channel is currently negotiating sale of its contents to a Turkish TV channel, as well as closing a distribution agreement with one of the most important film & TV distributors of said country.

'Our expectations are to focus in distributing and obtaining a strong presence on these major markets in a near future. We are heading to Discop with our new documentary series, currently in production and set to be released on primetime next April', said **Aramburu** to **PRENSARIO**.

Worth mentioning are *The Work and I* that

shows people so passionate for what they do, that their jobs identify them; *Constructions, before and after* that deals with the impact of buildings in society, showing the architectural aspects but also the people using these.

Finally, *Building a country*, portraying the urgent need of more infrastructures, resources or energy in countries with a growing economy; and *Family in overalls*, that relates the life of everyday families whose members share vocations or occupations.



Building a country

VIEWING BOX #15

GLOBAL AGENCY: 'WE CREATED THE PHENOMENON OF TURKISH DRAMAS'



Izzet Pinto, CEO

'**Global Agency** pioneered in exporting Turkish series to CEE, CIS and Balkan countries. We were not only able to enter in these countries, but created a phenomenon for Turkish dramas. Turkish actors and actresses became even more popular than Hollywood stars.'

Izzet Pinto, CEO of the leading Turkish distributor **Global Agency** describes its feelings to **PRENSARIO** facing a new edition of Discop West Asia. And continues: 'We are also the first Turkish format distributor which created its own export market. Lately, the company became international by representing projects from fifteen countries.'

'Our latest hit is the miniseries *The Butterfly's Dream*. It is the most expensive mini series ever

produced in Turkey. It is a story of two poets who fall in love with the same girl. We will also be launching two successful formats titled *Rivals-in-Law* and *Attention Please!*

The first one is a fun-cooking format, which brings the bride and mother in law against each other, while the second is a quiz show that is based on contestant's attention. 'For all of our new projects, we are hoping to enter over 50 countries. Our goal for future includes opening channels in Middle East and CEE countries,' adds the executive.

'Currently still our best selling project is *Magnificent Century*, in its third season on **Star TV**. So far including the MENA region, we reached 45 territories. We are in talks with a Latin American distributor to enter Mexico. This will be an interesting market for us and I am sure Mexican viewers would be impressed with the Turkish series.'

'*1001 nights* continues to enter more territories as well. In fact, the export business started with



The Butterfly's Dream, the most expensive miniseries ever produced in Turkey



Shopping Monster, top format

it in CEE and became the most watched Turkish series of all times. On the formats side, the day time show that combines competition and gossip *Shopping Monsters* and the daily cooking show *Blind taste* are doing well. The first one is a huge hit especially in Germany, while the second is going on air in Russia and Ukraine,' finalizes **Pinto**.

ABS-CBN: THREE HIGHLIGHTS

VIEWING BOX #02

ABS-CBN International Distribution (The Philippines) brings to Discop three top series, starting with *Her Mother's Daughter* (75x'45) and *Be Careful With My Heart* (80x'45). The first one is prime time's newest sensation, a family drama on high gear, while the second one is network's daytime frontrunner, a light drama bordering on the romantic.

At the end of its run in October 2012, *My Eternal* (75x'45) posted a staggering 45.4% rating and an audience share of 66%. The secret behind 2012's highest-rating series is its absolutely engaging story that portrays the triumph of the human spirit against all odds.



Her Mother's Daughter

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TRT: HISTORY + PRESENT



Meltem Tumturk, director of sales

The sales division of **Turkish Radio and Television Corporation (TRT)**, led by **Meltem Tumturk Akyol**, director of sales, highlights at Discop West Asia a varied catalogue including period dramas, superheroes series, comedies and soap operas.

Heading the slate is the period drama series *Once Upon A Time Ottoman Empire "Mutiny"* (20x'95) is the story of the 18th Century Ottoman period under the reign of Sultan Ahmet III trying to pursue a rather peaceful relationship with Europe, instead of campaigning. Aired in 2012 in **TRT 1**, the series already has a second season and it was picked up last year by **Dubai TV** for Middle East and North Africa (MENA).

Subat (13x'90) is a brand new title considered as a 'timeless and placeless story' where the protagonist of this story grew up in an orphanage where his face partially burned in a fire from which he was saved by a collector guy. During his orphanage days, he was subject to some experiments, as a result of which he gained super powers.

The Poor Boy And The Rich Girl (13x'90) is another proposal from the distributor: the story is based on the relationship between a father, an extremely wealthy person, who goes wild when his youngest daughter introduces him a very ordinary and silly looking man as the man she's going to marry.

Lastly, it brings to Istanbul *To Better Days - Every Marriage Deserves One More Chance* (13x'90), a soap opera about family and the increasing number of divorces, especially in Turkey. The series aim to mention all of the aspects of family, and to save marriages preventing divorces. Each episode brings you a new family on the brink of divorce.



Subat

CALINOS: NEW PRODUCTIONS, CHANNELS AND OTT SYSTEMS

Firat Gulgen, CEO of **Calinos Entertainment**, explains: 'We are working with **Böcek Yapım** on the production of *Mohammed Al Fatih Conqueror of Istanbul*, a feature film that will be first released internationally on theaters and then as series, as well as a new epic drama series.'

'The finest screenwriters in Turkey are working with us in projects like *Geniş Aile*, *Ihlamurlar Altında*, *Elveda Rumeli*, *Karadağlar* and *Asi*', he remarks and adds that at Discop its highlighting two drama & romance series: *The Girl Named Feriha* (+60x'60) and *The Cost Of Living* (94x'60), as well as *The Karadag Family* (80x'60).



Firat Gulgen, CEO



Asi, TV series

Also, the action-drama feature films *Five Minarets In Newyork* ('119) where two Turkish anti-terrorist agents are sent to New York City on a mission and *I Saw The Sun* ('120). 'It is an exciting time for us as we started working in new territories like Pakistan, Afghanistan, Northern Iraq, Malaysia and Brunei, and also in talks with Latin American countries for format rights. We are also considering the possibilities of Far East. Korean productions are popular in the region and we are working on a new distribution and marketing strategy for the region.'

'We launched in 2012 our own movie channel **FilmTIVI** and we are planning to expand that side of our business by launching other networks. Digital progression will be at the center of our strategy: we are launching our own OTT platform under the brand **VODVOD** by the end of this quarter, including local and international movies, series, documentaries, kids and lifestyle programming. Advertising industry is also becoming digital, so we will invest in a company that has one of the best technologies in the world for digital product placement.'

Also, the action-drama feature films *Five Minarets In Newyork* ('119) where two Turkish anti-terrorist agents are sent to New York City on a mission and *I Saw The Sun* ('120). 'It is an exciting time for us as we started working in new territories like Pakistan, Afghanistan, Northern Iraq, Malaysia and Brunei, and also in talks with Latin American countries for format rights. We are also considering the possibilities of Far East. Korean productions are popular in the region and we are working on a new distribution and marketing strategy for the region.'

VVI: ACTION & SUSPENSE SERIES



Manuel Perez and Cristobal Ponte

Venevision International (USA) showcases at Discop brand new telenovelas, series, realities and documentaries. The executives attending are **Manuel Perez**, VP & CFO, and **Cristobal Ponte**, Exclusive

Independent Representative for Europe, Africa & Middle East.

Company's catalogue is headlined by the new dramatic series full of action and suspense titled *Lucia's Secrets* (80x'45) produced by **Venevision** in Caracas and will first premier on **Univision** (USA). 'We expect to continue a successful 2013 in Istanbul, especially since we are introducing four telenovelas that we have not presented at

VIEWING BOX #15

this market before', says **Perez**.

In addition, it highlights fresh new series like *My Life in Sayulita* (20x'30), a seductive reality, and the action series *A Legend of Shaolin Kungfu* (42x'60). Other telenovelas are *Rosario* (120x'45), *The Talisman* (101x'45), *My Ex Wants Me* (101x'45) and *The Love Curse* (144x'45).



Lucia's secrets



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RECORD TV: EPIC MINISERIES ON TOP



Delmar Andrade y Edson Mendes en el último Natpe Miami

Record TV Network (Brazil) highlights at Discop West Asia its epic miniseries *King David* (30x'60) that shows mankind that all men are capable of committing sin and injustice, but that they'll only find the path when they obey God's laws.

Following is *Samson and Delilah* (18x'60) that mixes strength and beauty in a game of greed, seduction and power, and *Esther, the Queen* (10x'60), which 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.

Tricky Business is a funny story about a woman that got married and pregnant with a young man that has a gambling habit and is drowning in debt. Reason for which they have to sell the apartment that they live in, dissolve the architecture firm and cancel the trip they have planned.

Jackpot! (234x'45) is another gambling history: a group of friends had been playing lottery since two years ago. In the New Year's Eve, when the prize has an extraordinary value, they picked the correct numbers of the lottery and they all become millionaires.

In *Masks* (125x'45) a wife of a rich landowner from Mato Grosso do Sul is kidnapped along with her son while returning from a therapeutic cruise to cure her postpartum depression. And *River of Intrigues* (250x'45) is a contemporary



Esther, the Queen & Samson and Delilah, epic mini series

soap opera with different scenarios.

On series, Record TV Network highlights two mafia series: *Another Power* (237x'45) shot in Italy and involving themes, mysteries, revenge and drug dealing; and *The Law and the Crime* (21x'60), which shows the impact of the violence between different social classes.

Lastly, the telenovela *Flames of Life* (253x'45) that 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.

SHOW TV: WHAT SHOULD I WEAR TODAY?

ACADEMY SUITE #1



Serra Karahan and Nazlı Çankaya, sales

Show TV (Turkey) is highlighting three titles at Discop West Asia, starting with the drama teen series *New Guys At School* (+59x'90) about a public school of a poor neighborhoods that was destroyed because of a fire.

In the entertainment show *What*

Should I Wear Today? (316x'120) candidates picked from among thousands are invited to auditions in several cities all around the country. Lastly, the drama series *From Lips To Heart* (75x'90), a passionate love story that will captivate the international audience.



What Should I Wear Today?

POLICE SERIES + FORMATS = DORI MEDIA

A mix of police series and entertainment formats is offering **Dori Media** (Switzerland) to the market. Heading the slate is *New York* where the son of the head of a notorious crime family arrives in New York, escaping his past and seeking a new future.



Got A Minute?, entertainment format

In a one of a kind new project, the police department and the ministry of education decide to find the first ever kid's police station, inside Cedar high public school: *SYPD*.

Can you face it? is a lighthearted factual entertainment format in which one person gets a chance to hear for the first time what people really think of him, and to fix those habits that annoy his loved ones, while *Got A Minute?* is based on a trivia game, where the participant will have only one minute to answer as many questions as possible.

Cross Country is a prime time reality show, which pairs complete strangers into couples, about to embark on a unique journey. The couples are formed of individuals from entirely



New York, police series

different and opposing, backgrounds and beliefs.

Lastly, the teen series *Galis*, where a mysterious donation sends three lucky foster home kids to join an elite summer camp in a faraway forest. As they try to fit in with the snobbish kids and weather stormy loves, they discover it wasn't luck that brought them there but a sophisticated scheme that leads to a larger than life adventure.

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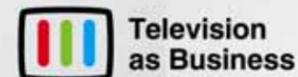


CONFERENCE AND SCREENING OF TV FORMATS
FORMAT SHOW
10 September 2013



Organizer:
Independent Association of TV
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INTERNATIONAL FORUM
DIGITAL BROADCASTING
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CARACOL: FROM COLOMBIA TO WEST ASIA



Berta Orozco, sales representative

the complex route of cocaine trafficking, co-produced with **Cadenatres** (Mexico)', she adds.

Following with the biggest drug dealer of all times, the distributor highlights the documentary *Pablo Escobar: Stories Of An Era* (2x'60), as well as the series *To the rhythm of love*, *Rafael Orozco* (80x'60) and the comedies *Where the heck is Umaña?* (140x'60) and *Made in Cartagena* (60x'60). Also, *Blessed Child* (60x'60), an unitary series about people's faith.

On the format side, the game show *Sounds Like a Million* (80x'60) in which contestants may win juicy prizes according to their musical abilities, and the revolutionary dance talent competition format originally developed by **Caracol**: *The Dance Floor*, a mega production with more than 200 people working on the stage.

'For us, Middle East and the North of Africa are fundamental territories, where in the last years we've opened several markets. We are committed to bring contents that adapt to their culture and tradition. Some of our top productions where acquired (as format and ready made) by clients like **FOX Middle East** and **MBC Group**', completes **Orozco**.



The White Line, co-produced with Cadenatres in Mexico

ARTEAR: SERIES WITH TWISTS

Artear International (Argentina) highlights for Discop West Asia two series with a twist for late prime time, as well as a complete catalogue of telenovelas and documentaries.

In *Compulsive Times* (14x'60) an experienced doctor is responsible for treating a group of outpatients with diverse severe ailments, while *Naked family* (13x'60) shows a very particular family composed by a father and a mother that belonged to the porn industry (an actress and a director) and now face the reality of their miserable marriage.

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 Argentinean TV.

Other options are the series *Left on the Shelf* (35x'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 *Gypsy Blood* (250x'60).

Lastly, the documentary line up is headed by *Fantastic Biographies* (8x'30), with the bio of fiction characters; *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.



Compulsive Times suitable for late prime time



Fantastic Biographies

MEDIASET: THE BEST ITALIAN DRAMAS



Manuela Caputi, international sales manager

Through **Manuela Caputi**, international sales manager, **Mediaset Distribution** (Italy) brings to Istanbul a catalogue of more than 500 titles: the company invests yearly over 200 million in new drama productions, and has had an increase in sales of its scripted format unit.

In addition, the company offers the international network **Mediaset Italia** with the

best of Mediaset's programming targeted to the 60M Italians living around the world, and its also involved in the business development of international co-productions.

As finished programs, the distributor highlights the sentimental drama series *Tuscan Passion* (12x'90 or 24x'45) about two young people whose love is shattered in the wake of a dramatic murder. All set in the rich Tuscan vineyard countryside, which is only perfect on the surface.

Food can bring us together as well as tear us apart. This is what happens in the family entertainment series *Gourmet Wars* (16x'50), about North against South, united in a succession of relentlessly fun, fast-paced and ultimately hu-

man events. It has been optioned in the CIS countries and its also available as format.

Available as both, ready made or format, Mediaset highlights the family series *Kissed By Love* (12x'50) is full of sentiment, joy and funny twists but love, in all of the forms it can present itself, is always victorious; the investigation series *RIS Rome* (20x'50) and the lifestyle show *Italian Cooking Presto* (175x'10 or 395x'90).



Tuscan Passion

SCREENING STAND #5

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REPLACING *CROWN OF TEARS* ON CANAL DE LAS ESTRELLAS'S 4PM SLOT, *WILD AT HEART* (150x'60) IS THE NEW TELENOVELA FROM TELEVISA ABOUT A HUMBLE WOMAN WHOSE LIFE CHANGE WHEN SHE MEETS THE LOVE OF HER LIFE. DISTRIBUTOR: TELEVISA INTERNATIONAL, MEXICO

THE DANCE FLOOR IS REVOLUTIONARY DANCE TALENT COMPETITION FORMAT ORIGINALLY DEVELOPED BY CARACOL TV, WHERE 16 EXPERIENCED COLOMBIAN SINGERS LED 16 DANCE GROUPS. IS A MEGA PRODUCTION WITH MORE THAN 200 PEOPLE WORKING ON THE STAGE. DISTRIBUTOR: CARACOL TV INTERNATIONAL, COLOMBIA



AVAILABLE AS BOTH, READY MADE OR FORMAT, THE GROUND-BREAKING *THE CUBE* (53x'60) SHOWS SEVEN PHYSICAL AND MENTAL CHALLENGES. DISTRIBUTOR: ALL3MEDIA INTERNATIONAL, UK

CONSTRUIR TV IS ATTENDING DISCOP FOR THE FIRST TIME WITH REALLY INNOVATIVE PROGRAMS LIKE *THE WORK AND I* THAT SHOWS PEOPLE SO PASSIONATE FOR WHAT THEY DO, THAT THEIR JOBS IDENTIFY THEM. DISTRIBUTOR: CONSTRUIR TV, ARGENTINA



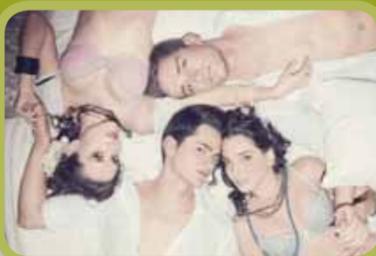
KANAL D WAS ONE OF THE TOP TURKISH EXPORTERS IN 2012 WITH TITLES LIKE THE DRAMA SERIES THAT OCCURS IN THE 1967 *TIME GOES BY...* (+100x'95), WHICH GATHERED MORE THAN 74% OF MARKET SHARE WHEN IT WAS ON AIR. DISTRIBUTOR: KANAL D, TURKEY

THE GIRL NAMED FERIHA (+60x'60) IS A BRAND NEW DRAMA & ROMANCE SERIES FROM ONE OF THE PIONEERS COMPANIES IN THE TURKISH CONTENT DISTRIBUTORS: IT TELLS THE DREAMS AND DESIRES OF A YOUNG GIRL WHO GOT STUCK BETWEEN TWO WORLDS. DISTRIBUTOR: CALINOS ENTERTAINMENT, TURKEY



THE TEEN SERIES *GALIS* (60x'30) SHOWS HOW MYSTERIOUS DONATION SENDS THREE LUCKY FOSTER HOME KIDS TO JOIN AN ELITE SUMMER CAMP IN A FARAWAY FOREST. DISTRIBUTOR: DORI MEDIA DISTRIBUTION, SWITZERLAND

KING DAVID (30x'60) IS ONE OF THE MOST SUCCESSFUL EPIC MINISERIES PRODUCED IN BRAZIL IN HD AND WITH A HIGH BUDGET. DAVID'S LEGACY IS TO SHOW MANKIND THAT ALL MEN ARE CAPABLE OF COMMITTING SIN AND INJUSTICE. DISTRIBUTOR: RECORD, BRAZIL



ULTIMO AÑO (70x'60) IS A THRILLER TELENOVELA PRODUCED BY MTV NETWORKS LATIN AMERICA THAT NARRATES THE LOVE STORY BETWEEN A YOUNG GIRL AND TWO BOYS THAT WILL FIGHT FOR HER LOVE. DISTRIBUTOR: COMAREX, MEXICO

NAKED FAMILY (13x'60) SHOWS A VERY PARTICULAR FAMILY COMPOSED BY A FATHER AND A MOTHER THAT BELONGED TO THE PORN INDUSTRY (AN ACTRESS AND A DIRECTOR) AND NOW FACE THE REALITY OF THEIR MISERABLE MARRIAGE. DISTRIBUTOR: ARTEAR INTERNATIONAL, ARGENTINA



FOOD CAN BRING US TOGETHER AS WELL AS TEAR US APART. THIS IS WHAT HAPPENS IN THE FAMILY ENTERTAINMENT SERIES *GOURMET WARS* (16x'50). IT HAS BEEN OPTIONED IN THE CIS COUNTRIES AND ITS ALSO AVAILABLE AS FORMAT. DISTRIBUTOR: MEDIASET DISTRIBUTION, ITALY

IN THE BELLY OF THE CITY (5x'52) IS ABOUT GASTRONOMY: FIVE MARKETS, FIVE COMPLEX SYSTEMS THAT PLAY A CRUCIAL ROLE IN THEIR CITY: BARCELONA, BUDAPEST, VIENNA, LYON AND TURIN. DISTRIBUTOR: ARTE FRANCE



THE PERIOD DRAMA SERIES *MAGNIFICENT CENTURY* ITS ON ITS THIRD SEASON IN START TV, TURKEY, AND ITS THE BEST SELLING PROJECT OF GLOBAL AGENCY: ONLY IN THE MENA REGION, IT REACHED 45 TERRITORIES. DISTRIBUTOR: GLOBAL AGENCY, TURKEY

WITH THE STORY OF A WOMAN THAT WORKS IN A GOLD MINE, *THE RETURN* (120x'60) IT'S A BRAND NEW TELENOVELA THAT DEBUTS ON WEST ASIA & MIDDLE EAST TERRITORIES. IN US, TELEMUNDO PREMIERED IN AT THE BEGINNING OF THE YEAR WITH 1,6 MILLION OF VIEWERS. DISTRIBUTOR: TELEMUNDO INTERNATIONAL, USA



THE DRAMA SERIES *FROM LIPS TO HEART* (75x'90) IS A PASSIONATE LOVE STORY THAT WILL CAPTIVATE THE INTERNATIONAL AUDIENCE, WITH INTERESTING TWISTS. DISTRIBUTOR: SHOW TV, TURKEY

ROSARIO (120x'45) IS A TOP PROPOSAL FROM VENEVISION INTERNATIONAL: A YOUNG AND BRILLIANT LAW STUDENT AND A PROMINENT VETERAN ATTORNEY FALL DEEPLY IN LOVE AND START PLANNING A FUTURE TOGETHER. DISTRIBUTOR: VENEVISION INTERNATIONAL, USA



TO BETTER DAYS - EVERY MARRIAGE DESERVES ONE MORE CHANCE (13x'90) IS A SOAP OPERA ABOUT FAMILY AND THE INCREASING NUMBER OF DIVORCES IN TURKEY. EACH EPISODE BRINGS YOU A NEW FAMILY ON THE BRINK OF DIVORCE. DISTRIBUTOR: TRT, TURKEY

THE PRIME TIME DRAMA AND ROMANCE SERIES *TASTE OF LOVE* (109x'60) WAS LAUNCHED ON JANUARY 1ST IN SLOVAKIA: ITS ABOUT TWO COMPETING WINE-GROWING FAMILIES THAT HATE EACH OTHER. DISTRIBUTOR: MEDIAPRO DISTRIBUTION, ROMANIA



THE ASIAN DRAMAS ARE GAINING INTERNATIONAL MARKETS, AND *MY ETERNAL* (80x'45) IS A VERY GOOD EXAMPLE OF WHAT THEY CAN PROVIDE: A STORY FULL OF PASSION, TWISTS AND VENGEANCE. DISTRIBUTOR: ABS-CBN, THE PHILIPPINES

MANKIND THE STORY OF ALL OF US (12x'60) IS A VIS-CERAL, SURPRISING AND DANGEROUS SERIES THAT DRAW ON THE STYLE OF ACTION MOVIES, DRAMATIZING KEY TURNING POINTS IN THE STORY OF MANKIND. DISTRIBUTOR: A&E NETWORKS, USA





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



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



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

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



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



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



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

Sara Rahbari, Gem TV, Iran

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



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



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



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

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

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

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



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

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

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



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



Dixin Films, Serbia: Dana Petrovic with Ljupka Triunovic

Elsa Strapkova, Acquisitions Manager, Markiza TV (Slovakia)

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

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

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



TRICKY BUSINESS

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