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CENTRAL & EASTERN EUROPE ANNUAL SPECIAL ISSUE
NATPE BUDAPEST & KIEV MEDIA WEEK

CENTRAL & EASTERN EUROPE, FROM INSIDE

For the first time, our traditional Natpe Budapest issue has turned into our 'Central & Eastern Europe special annual edition', as we cover with the same issue, both Natpe Budapest, in June, and Kiev Media Show, the emerging content event in Ukraine, in September. It is a 2 x 1 offer, but above all, a deep trip into Central & Eastern Europe present.

We provide in the edition more than 20 interviews to top broadcasters of Central & Eastern Europe, and 5 high-end locally produced reports, based on own researches and alliances with Eurodata, MRM and CeeTV, among other CEE consultant specialists.

Which is the global message about the region? CEE is living a hard moment, due to the global crisis that affects especially the region, with recession and flat ad pies for years. But, CEE is one of the regions with more new programming outputs being launched. When the global crisis passes away, we will have a

huge content market to enjoy. It is key to bet today to have a better business tomorrow.


JUST TO REMEMBER...


For those reading PRENSARIO INTERNATIONAL for the first time... this publication is based on Latin America, but has more than 20 years covering the whole international market, and now it manages strong coverage and feedback from all regions, especially in Central & Eastern Europe, where we've been covering the Budapest shows for 15 years.

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 Smirnoff




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CONTENT FIRST

| EVENT | DATE & TIME | PLACE |
|---------------------------------------|--------------|------------------------------------|
| SCREENINGS MAJORS (ALL DAY) | JUN. 24-25 | ONLY WITH INVITATION |
| BREAKFAST SESSION (BROADBAND TV NEWS) | JUN. 25, 8AM | GERBEAUD CAFÉ |
| OPENING COCKTAIL RECEPTION | JUN. 25, 6PM | SOFITEL PARIS RESTAURANT & TERRACE |
| NETWORKING RECEPTION | JUN. 26, 6PM | SOFITEL PARISBUDAPEST RESTAURANT |



| EVENT | DATE & TIME | PLACE |
|---------------------------------------|---------------|--------------------|
| FORMAT SHOW | SEP. 10, 10AM | RADISSON BLU HOTEL |
| UKRAINIAN CONTENT MARKET | SEP. 11, 9AM | RADISSON BLU HOTEL |
| FILM BUSINESS | SEP. 11, 10AM | RADISSON BLU HOTEL |
| TELEVISION AS BUSINESS | SEP. 12, 10AM | RADISSON BLU HOTEL |
| FORUM DIGITAL BROADCASTING IN UKRAINE | SEP. 13, 10AM | RADISSON BLU HOTEL |

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THE HUNGARIAN TV SEASON: GOING DEEPER IN THE MULTIPLE-SCREEN ERA

Once more, PRENSARIO publishes a special report about the Hungarian TV market, generated through many interviews held with the leading broadcasters of the country: RTL Klub, TV2, MTVA (with the whole public bouquet of channels from M1 and M2 to DUNA and DUNA WORLD) and Viasat3. The key facts, the growing TV cable strategy, programming trends and the increasing digital business.

The Hungarian TV market is going through several and important changes this 2013. The first, and most important one, is the digital switchover that will be completed in two stages: first on July 31st and the second on October 31st. The **National Media and Infocommunications Authority** (NMHH) is in charge of leading the switchover in Hungary.

Digital terrestrial broadcasting will give Hungarians access to the three standard channels (m1, RTL Klub, TV2) and four additional channels (m2, Duna TV, Duna World, Euronews), as well as three public service radio stations without a subscription. If a subscription service is chosen, the subscriber will get access to up to 23 channels.

Those yet to make the transition to digital, are the directly affected group by the switchover. This group uses traditional rooftop and set-top aerials and received broadcasting without a subscription,



Constructed reality shows are a new hybrid genre that mixes amateur actors and scripted plots but they are told as real stories; they are working extremely well in RTL channels, as Budapest Day & Night in RTL Klub. The broadcaster also keeps its main bet on talent show X Factor, which will have its fourth season next autumn



TIBOR FŐRIZS, HEAD OF CONTENT ACQUISITIONS AND SCHEDULING, RTL KLUB

'WE ARE GETTING STRONG RESULTS WITH OUR QUITE-NEW CABLE TV CHANNELS, SO THOUGH THE FREE TV HAS LOST A BIT OF MARKET SHARE AGAINST THE REST OF THE MEDIA ENVIRONMENT, THE TOTAL MARKET SHARE OF RTL GROUP CHANNELS IN HUNGARY IS UP.'

with access to only M1, TV2 and/or RTL Klub channels. This represents 416,000 households in Hungary according to local surveys.

As many countries in Europe, the financial situation is still hard in Hungary. The advertisement pie is flat and the economical recovery is hoped for next year. The big media group's strategy keeps the same as the last years: launching new cable channels to keep the audience share and don't loose advertising share.

The good news is that digital advertising continues growing against the overall decline of the ad sector in the country. According to an article from CEETV, the *E-mail Marketing Conference*, revealed in June 3 that the digital growth in 2012 was 22%, reaching HUF 3 billion (USD 13.2 million), and the expectations are that an extra 10-20% will be added this year to reach about HUF 3.5 billion (USD 15.4 million).

At the same time, the Government plans to introduce a tax on the ad revenues of the local media companies. That's why the **Hungarian Electronic Media Service Providers Association** (MEME) issued an official statement saying that such a tax could cause 'incalculable damage' to Hungarian media, particularly at the TV



PETER KISS, PROGRAMMING DIRECTOR, TV2

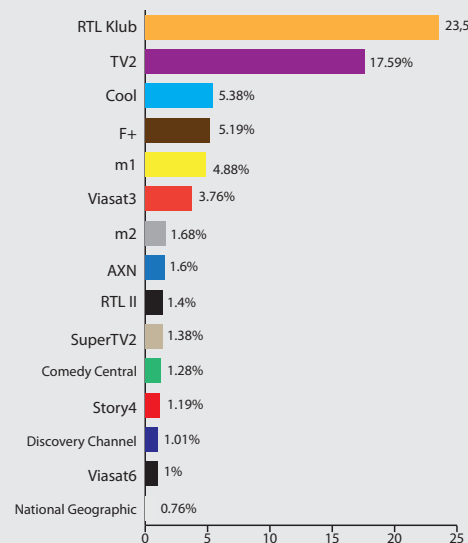
'DIGITAL SWITCHOVER IS AN ENORMOUS OPPORTUNITY ON THE WHOLE. NO AUDIENCE DECREASE IS EXPECTED, AS VIEWERS WITH ROOM AERIALS WILL SWITCH TO A DIFFERENT TYPE OF RECEPTION: IN TERMS OF COVERAGE, THE NUMBER OF SUBSCRIBERS WILL INCREASE, WHICH WILL POSITIVELY INFLUENCE THE VIEWER RATINGS OF THE CABLE CHANNELS.'

industry because this would mainly apply to TV broadcasters, and may be called a 'special TV tax'.

RTL: FRESH IDEAS, MORE GLOBAL MARKET SHARE

Tibor Főrizs, head of content acquisitions and scheduling at **RTL Klub**, the leading broadcaster

HUNGARY: AUDIENCE MARKET SHARE, BY CHANNELS (JAN. 1 – MAY 26, 2013)



Source: AGB Nielsen Media Research



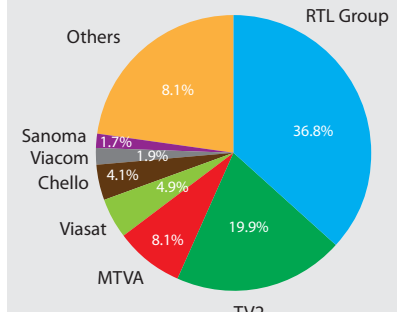
ZSUZSANNA KÁLOMISTA, DIRECTOR FOR ARCHIVES AND PROGRAM ACQUISITION, MTVA

'DESPITE THE GREAT ABUNDANCE OF THE TV CHANNELS (OVER 100 NETWORKS), THERE ARE ONLY 11 OF THEM THAT ARE SWITCHED ON BY MORE THAN 1 MILLION PEOPLE PER DAY AND THE FOUR THE PUBLIC TV STATIONS ARE AMONG THEM.'

in Hungary, and its cable channel portfolio, says: 'The big news for us are that we are getting strong results with our quite-new cable TV channels —we added them a year and a half ago— so, though the free TV has lost a bit of market share against the rest of the media environment, the total market share of **RTL Group** channels in Hungary is up'.

'Talking about programming trends, the big talent shows continue being the strongest issue at the prime time: we will produce the fourth season of *X Factor* for next autumn, with changes from the past —new mentors, new concepts and tips. Also, during the weekdays prime time, we

HUNGARY: AUDIENCE SHARE, PER TV GROUPS (JAN. – APR. 13)



Source: Nielsen, 18-49, prime time



MARIKA NEMETH, PROGRAM DIRECTOR, VIASAT3

'THE HUNGARIAN AUDIENCE IS SPOILT IN A WAY. US SERIES ARE ON AIR SOME MONTHS AFTER THEIR US PREMIER AND TV FORMATS ARRIVE SOMETIMES EARLIER THAN TO BIGGER MARKETS. OUR AUDIENCE GETS EVERYTHING THAT IS NEW AND TRENDY ON THE INTERNATIONAL TELEVISION MARKET.'

continue making focus on our traditional local soap *Among Friends* (already at its 15th season), U.S. TV series and movies'.

But an important change up from last year is the 'constructed reality' shows, a new hybrid genre that mixes amateur actors and scripted plots but they are told as real stories, with a reality-format storytelling. Explains **Főrizs**: 'We are producing a German format we call *Budapest Day & Night* from February, and it became a success story in access prime time, with nowadays 32% of market share'.

About Latin American telenovelas and Turkish series: 'We air Latin telenovelas in the afternoon before the 18:30 main news block on **RTL Klub**, and we are emitting the Turkish series *Magnificent Century* (**Global Agency**) every Wednesday in prime time, which constantly outperforms the CBS hit show *Elementary* running on **TV2** in the same time slot'.

In October 2012, the big launch of the group was **RTL II**, a premium pay cable TV channel that is free-TV alike due to its heavy dose of local productions. 'The channel is performing well, always according to our expectations. Yet, we have to maximize the coverage of the country, as it now reaches 50% of TV cable households, but we are carrying out fine the aim of providing exclusive premium TV content and moving some well-known brands from free TV to cable TV, to

make a difference in the audience'.

'Now around 40% of the programming of **RTL II** is own produced, we have good dancing shows, live shows, another constructed reality and a successful news program everyday. We are performing very well with women, and we want to develop more programs for them. There are also telenovelas on air at the channel from a string of major Latin American distributors. Other particularly successful cable channels are **Cool** (mix men and women, 18-49) and **Film+**, mainly male oriented, 18-49'.

These three cable channels are doing together almost 13% of audience share, in the important commercial target group 18-49. And the three are operating as "mirror breaks", which means that all commercials start at the same time, ends at the same time and audience see the same ads during the breaks of all of them. It's an outstanding commercial proposal for advertising partners to measure and profit better the whole market share of the group of channels, which have been seen in other pioneering markets, as Spain for example.

TV2: MORE LOCAL PRODUCTION AND ENCOURAGING NUMBERS

Peter Kiss, programming director at **TV2**, the second broadcaster of the market, describes: 'This year's digital switchover is an enormous opportunity for us on the whole. No decrease is



TV2 launched in 2013 the entertainment formats Big Duet, for its cable network SuperTV2, and Master Class Hungary —from Keshet TV, Israel—, which got it best mark on April with 35.1% share betting its biggest competitors in Hungary altogether.



The cooking documentary series *Angel Gastro* and the drama series *Hakion Reloaded* (second season) are two of the top shows from MTVA

expected in viewer ratings as viewers with room aerials will switch to a different type of reception, but in terms of the coverage the number of subscribers will increase, which will positively influence the viewer ratings of the cable channels.

'Nevertheless, the most important market shaping effect of the switch-off is that **TV2** can ask for a distribution fee afterwards, which can result in a significant rearrangement in the cable channel supply and this way in fragmentation as well,' he adds. On behalf of content trends, he says: 'Local fiction, scripted docu, reality and music shows both talent and entertainment, are the audience preferences.'

SuperTV2, the new premium cable channel of the group, was launched on November 1st 2012 and has doubled its market share in the first 6 months after the launch (November 2012: 0.92% - April 2013: 1.54%). 'The coverage of **SuperTV2** reached 61% of the total cable households by the end of April (*Nielsen Television Audience*



Measurement). The awareness of the channel has increased at the same time getting close to 80% in April (Source: TV/NRC brand awareness survey)', comments **Kiss**.

According to **Nielsen**, the share of viewing of **TV2Group** channels has increased by 4.5% year-on-year during the first quarter of 2013, while the share of viewing of cable channels has more than doubled, increasing by 125% year-on-year during the first quarter of 2013.

Prime time programs are the daily scripted docu *Family Affairs* (20.73% share), the daily docu soap *Sins & Love* (SuperTV2 17.09%) and *The Voice of Hungary* (28.02%). Other local productions of the company are *Megastar*, *Jóban Rosszban* and *It could happen to you* on **TV2**, and *Big Duet* and *Fish On The Cake* on **SuperTV2**.

'Launched in April, the local version of the original **Keshet** format *Master Class* (*Az Ének Iskolája*) had its best mark on April 27 with 35.1% share (18-49) and made **TV2** the market leader that day: the market share of the show was higher than our biggest competitors in Hungary altogether (**RTL Klub** + **m1** + **Cool** + **Viasat3** + **Film+**: 30.6%).'

Continues **Kiss**: 'This year the budget for own productions has been doubled and hit programs have been shown on the channels of **TV2Group**. In autumn large-scale entertainment programs are to be started on **TV2**; there will be daily and weekly entertainment programs, new formats and long-running, well-known brands in new forms.'

'For the summer, a brand new, genre-creating series has been in production. The

local productions have proved to be successful this year both on **TV2** and the cable channels. The position is very favorable as a selection can be made from the produced content according to the requirements of the market positioning of the channels, the viewer ratings and the demand for commercial time. On the short term the reinforcement of our present portfolio is in focus. At the same time the strength of the brands and the content production

capacities show that there is still significant potential therein', he completes.

THE NEW ERA OF PUBLIC TELEVISION

Started in 2011 with the *Media Law*, the integration of public service radio, TV, news and new media is now completed in Hungary, under the leadership of **MTVA**. **Zsuzsanna Kálomista**, director for archives and program acquisition at **MTVA**, who operates four TV stations **m1**, **m2**, **Duna TV** and **Duna World**, highlights: 'We introduced new branding for public television, radio and Internet portals on the opening day of the 2012 *Summer Olympic Games*. Also, *Formula 1* has a wide audience in **m1**. The new look, which is the outcome of an in-house development effort, was first presented on TV and gradually appeared on all platforms of PSM.'

In December 2012, **MTVA** transformed **m2** into a children channel, offering a non-violent, family-friendly and entertaining contents for kids. 'The new channel combines traditional and innovative programs creating alternatives for its audience. We are offering various programs to the age group of 3-12 years from 6am to 7pm and in the evening public service contents, educational and TV series, as well as musical shows and spots to the viewers.'

'Despite the great abundance of the television channels in our country (over 100 networks), there are only 11 of them that are switched on by more than 1 million people per day (the four public TV stations are among them). In 2012, **m1** was on the 3rd place with 3.5 million viewers per day; **m2** on the 5th place (1.9 million viewers), **Duna TV** on the 9th (1.6 million viewers) and **Duna World** on the 11th (1 million viewers). The accumulated daily reach of the 4 public service channels is nearly 4.3 million people: 46.6% of the Hungarian population uses these channels as source of information and entertainment.'

'Among the three terrestrial TV channels, only **m1** could increase its figures compared to the same period in the previous year. The figures of **RTL Klub** and **TV2** have decreased in both target groups investigated. Concerning the whole day, the joint audience share of the nationwide commercial channels (**RTL Klub**, **TV2**) has decreased from 39.8% to 34.3 %, i.e. by 5.5% among the adult population, compared to same period of the last year. Among the public service TV channels, both **m2** and **Duna TV** could improve their figures in prime time, and



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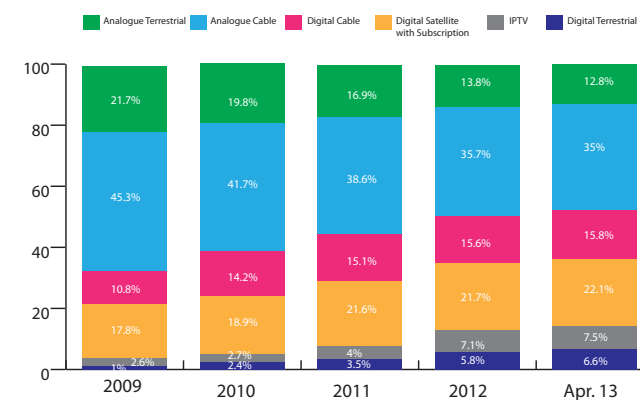
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HUNGARY: DISTRIBUTION OF HOUSEHOLDS BY PLATFORMS (2009-APRIL 13)



Source: Nielsen Establishment Surveys, in case of April 2013 data from the actual Nielsen Panel



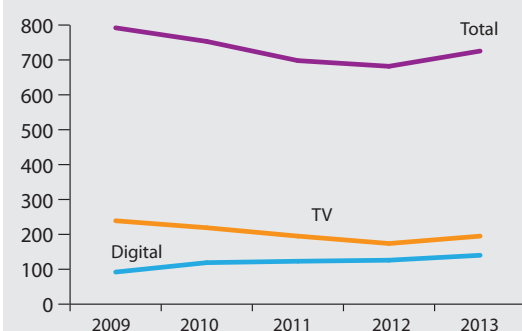
Cover Girl fit perfectly on Viasat3's brand by attracting mainly young female audiences, while *The Audience* is a traveling TV format broadcast on Sundays at the channel, with the aim to present people fail and deliver high emotions to audiences

those of the channel **Duna World** have become better, too', completes **Kálmista**.

The top six shows of **MTVA** are the brand-new drama series *Hacktion* (30x'52) that reveals the work of a secret unit called the Infrastructure Defense Division (IDD) and the new season *Hacktion Reloaded*; *Angel Gastro* is a cooking documentary series, while *On the Spot* is an award-winning documentary series that covers the hot spots of the planet. It has received the Golden Nymph in Monte Carlo TV Festival as "Best News Documentary".

At the end of 2011, **MTVA** began the theatrical distribution business in accordance with the market pressure to deal with theatrical distributors. 'The movie *Intouchables* was the first film release in the Hungarian cinemas in collaboration with an external distribution company. The independent theatrical release *Happiness never comes alone* was followed by a 3D movie *The Penguin King*. We want to represent family movies, comedy, art house and also festival success films to a larger audience in our country', finalizes **Kálmista**.

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



Source: AEGIS Media

VIASAT3, RECORD NUMBER OF PRIME TIME SHOWS LAUNCHED

Marika Nemeth, program director, of **Viasat3**, the fourth broadcaster of Hungary, remarks: 'Fragmentation, as a worldwide trend, is also present in Hungary: traditional channels are losing their audience year-on-year. We are proud that in this competitive market situation the **MTG Group's** female skewed channel **Viasat3** and the male targeted channel **Viasat6** has managed to keep and slightly increase the results in the main commercial target (18-49). Our total audience share increased from 5,6% in 2010, to 5,9% in 2011 and 6,1% in 2012'.

'The future of a TV station highly depends on the amount of good quality local productions and shows with high appeal to the local audience. Accordingly, in 2013 our main channel **Viasat3** has launched a record number of prime time shows. The search for the cover face of hot magazine, *Cover Girl* fits perfectly to our channel's brand by attracting mainly young female audiences'.

Continues **Nemeth**: *Eszbontok*, a funny game show with a fresh touch, was also very well received by our core audience. *The Audience*, a traveling television format was broadcast on Sundays with the aim to present people fail and deliver high emotions to audiences searching for more serious content. *Sztarkoktel*, our daily gossip magazine was positioned in the attention of our young female viewers'.

'The main trend shows a continuous increase in the ratio of programs produced locally vs. acquired. This trend is even accentuated with newcomers and the increase of the number of channels. Analogue switch-off will happen this year in Hungary, which most probably will slightly change the results of the channels, but surely will not change the television landscape', finalizes the executive.

VOD, AMONG THE WHOLE NEW MEDIA APPROACH

Completes RTL's **Forizs**: 'VOD services, both transactional or by subscription, are not mature in Hungary. In our catch-up services, people usually take the free of charge options, and they rarely want to pay to watch. In Central & Eastern Europe, there is also a problem with

the dubbing costs, the process is expensive as you have many small countries with different languages. So, international players prefer to develop services in other markets where the original versions with subtitles work. Therefore, **Netflix** or another service with the same stature, are not available yet in CEE'.

TV2's **Kiss** comments: 'In coming years, competition in the Hungarian VOD industry will intensify, with service providers trying to attract consumers with lower prices and better viewing choices both in terms of content and access. Our content is available through the VOD function of the top Hungarian cable providers and, due to the number of downloads, we can say it is popular. Naturally, more people would like to watch again a big event program, rather than a news program'.

TV2 Group has created four pages for channels and 16 pages for programs, with more than 400,000 fans altogether. 'Nowadays, our programs are being watched by certain (a growing number of) viewers with laptops, tablets or smart phones in their hands and, during the program, the viewed content is discussed on real time with friends and other viewers on **Facebook**'.

'For event shows as *Megastar*, *The Voice* or *The Big Duet*, the viewers are particularly eager to provide immediate feedback about the performance they have just seen. And about our infotainment programs (*Mokka* and *Aktiv*), **Facebook** is also used by **TV2** for a growing circle of viewers: insight is provided into the background of the events on the screen, with behind-the-scene posts, photos and short videos. The result of our activities can be measured from the traffic sources of the **Facebook Insights** and **TV2's** portal. The more personal and interesting behind-the-scene secrets and information is shared, the more people talk about it on the fan pages and in the social media in general'.

Lastly, Viasat3's **Nemeth** highlights: 'The Hungarian audience is spoilt in a way. High-quality US series are on air some months after their US premier and top television formats arrive in the country sometimes earlier than to bigger markets. Our audience gets everything that is new and trendy on the international television market. This could be the reason why VOD and other time shifted viewing forms hardly reach 1-2% of total viewing'.

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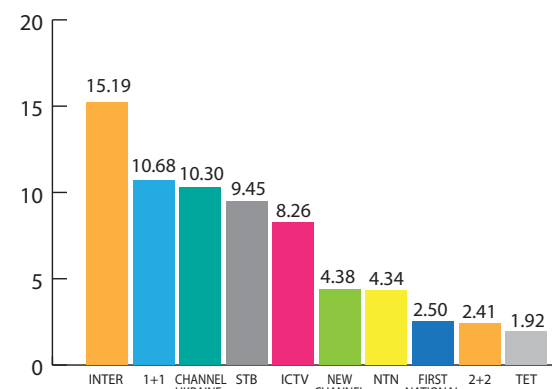
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UKRAINE: THE KEY TV MARKET IN CIS

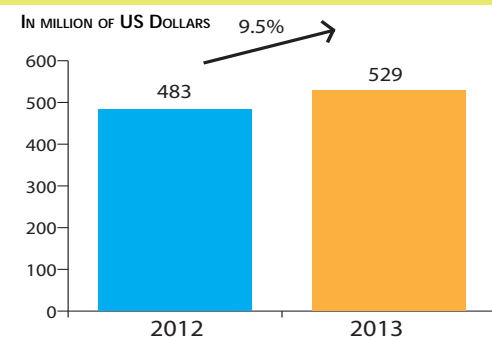
Ukraine is the second largest TV market in the CIS region after Russia. With a population of 45.6 million people, there are a total of 16.2 million television households and approximately 24 million television sets in use. Ukraine is a kind of unique country in Europe

UKRAINE: MARKET SHARE (%), PER CHANNELS - 18-54 (MAY 2013)



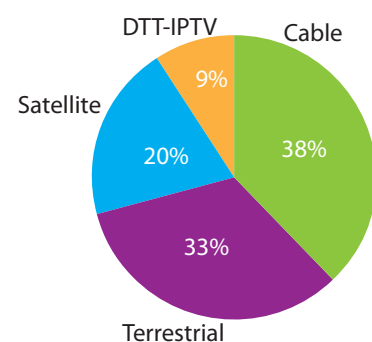
Source: Gfk Ukraine

UKRAINE: ADVERTISING EXPENDITURE FORECAST (2012 - 2013)



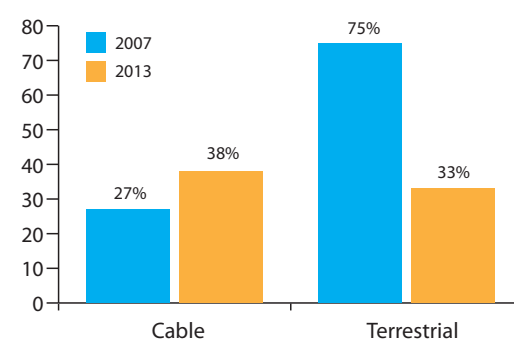
Source: All-Ukrainian Advertising Coalition

UKRAINE: TV HOUSEHOLDS, BY TECHNOLOGY (2013).



Source: MRM

UKRAINE: MARKET SHARE EVOLUTION ON CABLE & TERRESTRIAL (2007-2013)



Source: MRM

from the point of view of the national-wide analogue terrestrial TV nets quantity: there are 16 channels of that kind in the country. The situation is about to change dramatically after the analogue terrestrial switch off that is planned for summer 2015. The number of digital terrestrial networks that will have national-wide coverage will increase to 32.

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

Government-owned TV channel **First National** is not so popular, as private broadcasters. Nevertheless it belongs to Top-10 most popular TV channels in Ukraine. There is no public broadcasting company in the country yet, although the process of its launch on the basis of state-owned **First National TV** channel is currently underway.

Totally there are 16 national-wide broadcasters, more than 200 local and regional TV stations (both private and government owned) and more than 100 satellite private broadcasters.

Cable is the most widespread television platform in Ukraine accounting for over 38% of all television households. The penetration of cable TV has risen more than 10% over the past several years (for instance its penetration in 2007 was 27%). The analogue terrestrial platform yet remains the second most widespread television platform in Ukraine and is used by 33% of television households.

However, the constant growth of the cable and satellite platforms has eroded the terrestrial platform's market share, which has decreased from 75% in 2007 to 63% in 2009 and to 33% in early 2013. All services on the terrestrial platform are currently free-to-air including DTT service from **Zeonbud**, private operator of 4 out of 5 DTT multiplexes in Ukraine. Satellite TV is the third popular TV platform in the country with more than 20% penetration (the majority of satellite households prefer to

receive FTA channels and not to pay DTH operators for the service). The rest 8-9% of the households use DTT or IPTV platforms (currently there is no update statistics of these two platforms users) to watch TV.

From the advertising point of view, Ukraine is the second largest market in the region after Russia. The total volume of its TV ad market amounted USD 483 million in 2012 and is forecasted to grow 9.5% in 2013 up to USD 529 million, according to **All-Ukrainian**

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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



Foyle's War

Having worked throughout the Second World War, investigating intrigue and murder during a very turbulent time, Foyle now finds himself up against a far more covert enemy, as he delves in to the Iron Curtain of Cold War Britain, negotiating the balance of power at MI5.

Completed



Midsomer Murders Series 16

The county of Midsomer may be green and leafy, but all is not what it seems behind the well-trimmed verges and net curtains... over 225 Midsomer inhabitants have now died before their time, keeping the world's favourite detective, Inspector Barnaby, as busy as ever. Over a decade on and *Midsomer Murders* is still the UK's most internationally exported drama.

Completed



Caligula

The scandalous reign of Roman Emperor Caligula, the once great and noble ruler who achieved infamy through his predilection for cruelty, excess and debauchery, is explored by historian Mary Beard as she investigates the truth behind the sensational stories that follow his name, while offering insight in to the daily life of the 25 year old ruler.

Completed



Gogglebox

Ground-breaking talk-about television where people talk about television. The highlights of the week's broadcasts are reviewed, intercut with footage of ordinary people watching at home, offering a microcosmic insight in to our viewing habits. It's life, in front of the television.

Format



Miss Fisher's Murder Mysteries Series 2

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

Completed

ALLNEWPROGRAMMES ALLNEWFORMATS ALLNEWCONCEPTS

CENTRAL & EASTERN EUROPE, AT THE MULTIPLE-SCREEN ERA



Central & Eastern Europe, nowadays, shows a good brief of what is happening with the whole content market, worldwide: on one side, it is suffering a global economical crisis, with the advertising pies mainly flat or down. But on the other side, there are a lot of new programming inputs appearing, including free TV, pay TV, IPTV, VOD and mobile services. In fact, CEE is one of the regions with more new TV channels being launched, even Free TV ones. What must be done to go up in the industry?

The global content market has two big issues today: the own production, which let broadcasters make the difference about ratings. And the multiple-screen era, where the broadcasters move themselves from one TV channel to a group of channels, to compete now not only against other free TV channels as in the past, but also pay TV, satellite TV, Internet, SVOD and VOD services.

The two issues have the same problem: the development process is getting more and more expensive with time. So if the advertisement pies are flat, the broadcasters (and the production companies related) need to produce more content and more channels with quite the same money. This is the big cross-roads today of the content industry, and that's why the alternate solutions appear: co-production projects between big players of different regions, production sharing models, second screen, branded content, licensing/merchandising, special Government production support plans, etc.

'Production sharing' is to share a same shooting location among two or more channels; 'second screen' means to coordinate a content release with two or more channels at the same time —Free TV + cable + Digital

platform + mobile— to be stronger and share costs, generating promotional synergy. And 'branded content' is to include a sponsor from the beginning of the production process, to share costs and to generate synergy, or to make alliances with big brands for many projects.

Central & Eastern Europe was a big buyer of content in the past, now is a big seller. We have the cases of Russia and Turkey that turned to top-selling titans, but most of the countries of the region have their growing own production and they need to sell abroad and to try the alternate options we mentioned above, to make business run. Poland, Romania, Hungary... so this is a great moment to push co-productions, second screen and branded content ventures in the region.

And the CEE region also has to manage its own particularities: a lot of TV channels in very small countries, strong digital development to compete with TV, particularly hard recession since the 2009 global crack... according to **Patrick Jacaud-Zuchowicki** of **Basic Lead** — the former manager of Discop Budapest and now in charge of Discop West Asia— business epicentre of the region is moving to East, to more emergent markets as the CIS nations and West Asia. They are as the CEE territories in the nineties, he says.

This is good point of view. But if the economical recovery lastly takes place in the CEE region—it is anxiously waited for, since 2010— we will have a formidable market to deal with: a lot of channels demanding fresh programming, across quite short distances, very close to the main European nations and with strong co-production and format opportunities... CEE can recover its traditional brightness for the international market.

And there is another tip in the mixture:

THE NEW MULTIPLE-SCREEN ERA, TODAY

2 PILLARS:

- OWN PRODUCTION
- NEW MEDIA BOOM: DTT, IPTV, VOD, MOBILE, ETC.

3 DRIVERS:

- A GREAT FUTURE
- CURRENT COST CROSS-ROADS
- EMERGENT MARKETS

6 SOLUTIONS:

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

Source: Prensario

the big online titans —**Microsoft**, **Amazon**, **GoogleYouTube**, **iTunes**, **Hulu**, etc.— are entering the content market worldwide, not only buying all kinds of programming, but also producing their own original content to get the audience, as **Netflix** is a pioneer on that.

Nowadays, everybody is producing: especially the pay TV channels, that are now the leaders about cutting-edge or niche programming, as it is the best way to compete. But also the new platforms do it... and there are production alliances between the different sectors. In the multiple-screen era, content keeps itself as the king.

Where is the market going? According to experts, with so many options in the multiple-screen era, the audience tend to fit their own programming schedule, choosing one per one the programs from TV, Internet, VOD... wherever.

Take in mind the **Aero** hit in New York these last months... **Barry Diller's** company is selling small antennas just to catch the free TV chains, per USD 5 each household. People can pay USD 5 for the free TV, just USD 8 for **Netflix** and might eventually replace the pay TV service, which is charged about USD 190 per month in the U.S. market. To think about it... this is why the pay TV titans are producing top original content, to keep their audiences.

TRENDY NEWS AND TESTIMONIES FROM CEE REGION

Alexandra Bezpalcova, head of acquisitions at **Nova** Czech Republic: 'We are launching three new TV channels: one about comedies, one male oriented, and one retro, with old

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

Source: Prensario

local productions'. **Gabor Fisher**, head of programming at **RTL Klub** Hungary: '**RTL II**, our first pay TV (free TV alike) channel, is evolving satisfactorily. There are 103 Hungarian speaking channels in our country, but with good content and schedule, you can make a difference'.

Amazon, the online titan, is attending the content markets with a rich acquisitions team, for its VOD online service. **Jason Roppel**, VP acquisitions: 'We are looking for all kinds of TV series, from all possible origins'. **Alan Sternfeld**, acquisitions manager of **Microsoft Xbox Video Service** for Central & Eastern Europe, is buying too all types of TV series and telenovelas, especially the ones produced in the CEE region.

Peter Chalupa, programming director at **Markiza**, Slovakia: 'We are buying more realities, to vary the big talent shows, that are the great thing'. **Gaye Arman Bickacioglu**, programming director at **Kanal Turk**, Turkey: 'We are making focus on producing different TV series, as the cooking show **Blind Taste**'. **Liutauras Elkimavicius**, CEO at **BTV** Lithuania: 'We are looking for all types of formats, as we have 20 hours per week to produce in house'.

Neudachnaya Inna, programming acquisitions at **9TV**, Russia: 'Turkish drama

series are very good for us'. **Assel Nukisheva**, **Channel 7** (Kazakhstan): 'We are looking for Dating/dancing shows to produce in house'. **Dana Petrovic**, acquisitions **Dexin Film**, Serbia: 'Though the ups & downs of the market, for us the Latin American telenovelas are the best, and we will continue bet on them'.

Peter Marschall, CEO **Paprika Latino**: 'In some territories, we are looking for joint and back to back productions and create hubs to share big setup costs. Productions from Western countries will come here to shoot entertainment and reality, as well as fiction. In Romania and Bulgaria, there are great facilities for big productions, while Hungary offers a fantastic tax support system for fiction that allows to get back 25% of all spendings'.

At last MIPTV, the number of companies participating from Russia grew 18% from last year, while the Ukrainian companies increased 30%. They both were at the top 5 territories worldwide at the category, surpassing countries as Brazil or China... Central & Eastern Europe, and especially the CIS markets, are an important engine of new content business.

In Cannes, both **Endemol** and **FremantleMedia** showed their new strategies, focused on digital platforms and branded content. Both CEOs of **Endemol**, **Tim Hincks**, and **FremantleMedia**, **Cecile Frot-Coutaz**, said that they are launching many new channels in **YouTube**. **Endemol** has already got one focused on **Fear Factor** and **FremantleMedia** plans one about lifestyle focused on pets.

FremantleMedia contents on **YouTube** scored 4.5 billions of viewers in 2012. The company plans to co-produce fresh online content with the digital titans, and announced that multiplatform comedy tittles from **Vuguru**, an online producer, are now part of its slate.

About branded content, **Endemol** has made a digital partnership with **Rolling Stones** to develop multiplatform and retail ventures. **FremantleMedia** has changed the way of producing formats in the Middle East, since it made an alliance with **MBC**, the big regional broadcaster, and **Dani Golan**.

TRENDS OF THE MULTIPLE SCREEN ERA, WHEN IT TURNS MORE MATURE

- THE DTT NICHE CHANNELS TURN TO MORE GENERALIST

- UNIFIED ADVERTISEMENT PLANS BETWEEN THE FREE TV AND THE DTT/ PAY TV CHANNELS

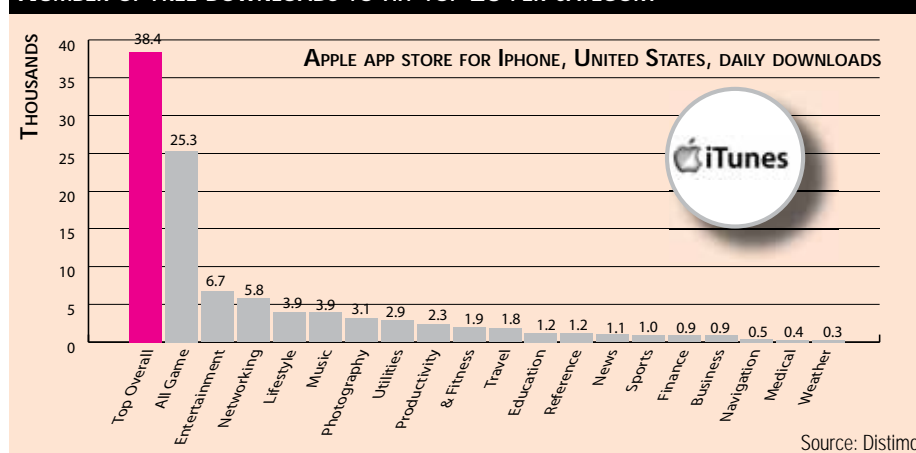
- THE TRADITIONAL PAY TV BRANDS GO TO DTT CHANNELS

- TO DEVELOP HYBRID FREE & PAY TV CHANNELS

- SYNERGY: 1 + 1 = MORE THAN 2

Source: Prensario

NUMBER OF FREE DOWNLOADS TO HIT TOP 25 PER CATEGORY



NATPE BUDAPEST 2013: IMPORTANT GROWTH EXPECTED



Rod Perth, CEO Natpe

'International expansion is very important to Natpe and we are committed to constantly increase the efficiency of regional market events such as **Natpe Budapest 2013**'. **Rod Perth**, CEO at **Natpe**, stresses to **PRENSARIO** that the organization aims at 'connecting content producers and buyers from the United States and countries around the world in the most effective and cost-efficient way'.

'The international TV programming business has been through difficult times in 2012 but the potential is there and we decided to listen to the customers, see the way in which we can make Natpe Budapest 2013 more efficient both to sellers and buyers; we invested in research and I am now pleased to announce that this year participants will be greeted with a series of features that we expect will help by turning the market experience into a more efficient and pleasant one'.

'One important news is that we have separated the Studios' screenings from the actual market days. This way, we think we have fixed the conflict; there will be less distraction for participants when they discuss deals with other distributors. We have also invested heavily in an ambitious "concierge service", a navigation system that connects buyers and sellers, reduces the number of meetings, converts

them in effective melting. We believe this will help people to conduct business more efficiently'.

According to reports received by **Prensario International** from East European buyers, moving the screenings to Monday June 24 has been a helpful move; many of them don't attend the L.A. Screenings and are happy about being able to review the new product in Budapest, closer to their home country. And, vendors are happy, too: in the past two years there have been complaints about buyers skipping appointments because they were still attending a screening at that time.

'In addition, we have established a partnership with **FRAPA**, the **Format Recognition and Protection Association**, though which they are able to assist people at the market with advice concerning format production and acquisition issues, as well as helping them navigate through this aspect of the business'.

'There is a daily online news service by **Broadband TV News** and a **Breakfast Program**

called *Extending the value of contents beyond and across platforms*, moderated by editor **Julian Clover**, in which participate **Antony Root**, EVP original programming & production at **HBO Europe**, **Nassima Boudi**, international sales manager, **Eurodata TV Worldwide**, **Patty Geneste**, Chairman at **FRAPA**, and a representative not yet confirmed from **Chello Media**', comments Perth.

'Participants have access to the *Online Market Guide* with all the data required and an App for smartphones and tablets, two additional tools we believe they will find helpful, too'.

'A big cocktail party has been scheduled for the opening day, June 25, at 6pm at Sofitel Hotel restaurant & terrace, and will also be celebrating Natpe's 50th Anniversary with another cocktail. All in all, we think we have been successful at fighting the realities of the international television programming business and are very optimistic about the outcome of Natpe Budapest 2013. We are committed and trying to be responsive'.

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CONTENT FIRST

450+
Content Buyers
more than 65% of whom never or seldom attend other major international markets

1000+
Participants representing 700 international companies

250+
Suppliers of movies, TV series, dramas, telenovelas, TV formats and packaged TV channels servicing Northern, Central and Eastern Europe

500+
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Book your participation now!

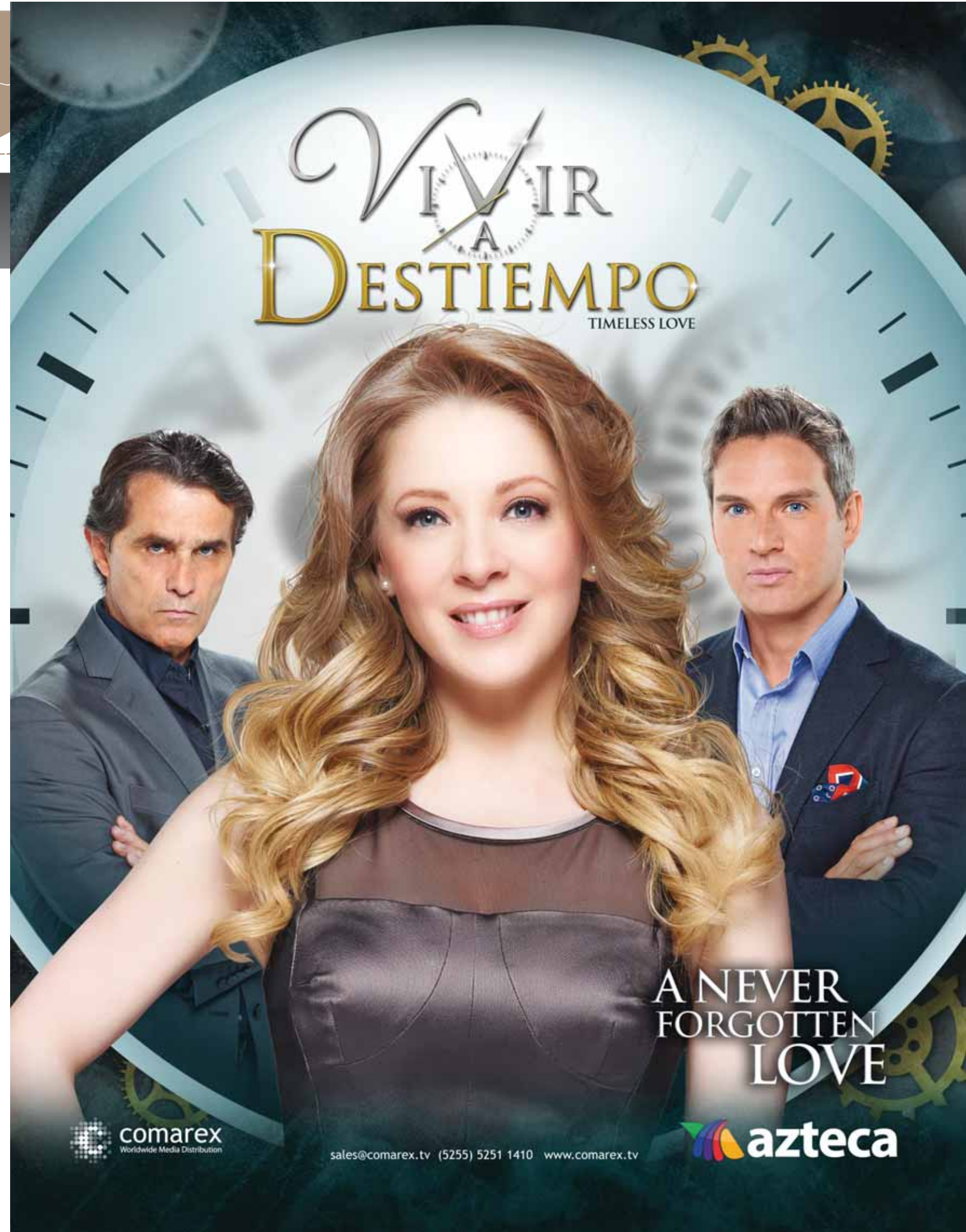
FINAL SCHEDULE
New format to maximize business opportunities, with both screening and market days

Studio Screening Days
Monday + Tuesday
Studios program screenings by invitation only

Market Days
Tuesday: noon - 6 PM
Wednesday + Thursday: 9 AM - 6 PM
Meetings throughout market floor + suites

Networking Events
Tuesday, 25 June
9 AM - 10 AM
Breakfast program produced in association with Broadband TV News
6 PM - 8 PM
Cocktail Party
Wednesday, 26 June
10 PM
NATPE Budapest Party

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KIEV MEDIA WEEK 2013: MORE INTERNATIONAL, EFFICIENT AND ACTIVE



Victoria Yarmoshchuk, director of MRM

Victoria Yarmoshchuk, director of **MRM**, the organizer of **Kiev Media Week**, held on September 10-13 on the capital city of Ukraine describes to **PRENSARIO**: 'The trade show will be more international, efficient and active, and I hope will bring more business success and inspiration to its participants. During 2012 edition, participants list represented more than 400 media companies, over thousand visitors and what is important and its geography has expanded significantly'.

'A number of leading international companies from CIS region, Europe, Asia, Africa and the Americas have joined the event making it really unique in the region. According to active registrations for KMW 2013 and preliminary negotiations with companies we expect major increase of participants, especially for the Ukrainian Content Market'.

This year we, the market will launch special event devoted to TV coproduction in course of Kiev Media Week. Continues **Yarmoshchuk**: 'We understand that coproduction is the future of TV business and we think that our trade show is right place to start looking for coproduction partners for your TV projects'.

'On the post-Soviet territories, KMW is lacking platform for networking, experience exchange and cooperation. Local media market is growing rapidly; our buyers (TV channels, distributors) are ready to acquire different content. For exhibitors its an important growing market with great opportunities and needs'.

'We want to create not only platform for business meeting and negotiations but also to inspire our guests. That is why this year we will introduce special keynote presentation from one of the biggest television professional of our age. More details will be disclosed soon, but for the moment I may say that this person has huge

experience in TV business and we are happy that he will share it with our audience'.

'We updated website and thanks to that a lot of new opportunities are available for KMW attendees. We launched new data accounting system. Thanks to these changes KMW participants get an access to information about attendees and their companies participating in all KMW events in the current year'.

ACTIVITIES

In the course of KMW, five important media events will take place: international conference and screening of new TV formats, *Format Show*; international audiovisual content market, *Ukrainian Content Market*; international B2B conferences, *Film Business* and *Television as Business*; and the international forum *Digital Broadcasting*.

Format Show will include screening program of the newest TV formats from core international distributors including **ITV**, **Armoza**, **Red Arrow**, **DRG**, **Eyeworks**, **Global Agency**, among many others. 'We will host a range of presentations from European indies, in-depth CIS TV formats market analysis charting 2013 and beyond and special session dedicated to global trends of the industry in partnership with Entertainment Master Class'.

Confirmed companies include **Venevision**, **Eyeworks**, **GloboTV**, **BBC**, **Red Arrow**, **Endemol**, **All3Media**, **Zodiak Rights**, **Televisa**, **Global Agency**, **DRG**, **Mondo TV**, **ITV**, **WeiT Media**, **Central Partnership**, **Star Media**, **FILM.UA**, and many others.

CIS TV MARKET

'TV business in the CIS countries is a rapidly developing industry both in terms of the quantity of TV channels and locally produced television content. For the past ten years CIS TV market drew dramatically, especially in such countries as Russia, Ukraine and Kazakhstan, which are the biggest regional TV markets. Nevertheless other have evolved rapidly: Uzbekistan, Kyrgyzstan, Azerbaijan, Tajikistan, Armenia, Moldova and Belorussia. The only one "closed for the others' eyes" market of the region is Turkmenistan, where there are only five TV channels, all of which are state-owned'.

The most competitive TV markets of the region with the biggest number of national-wide

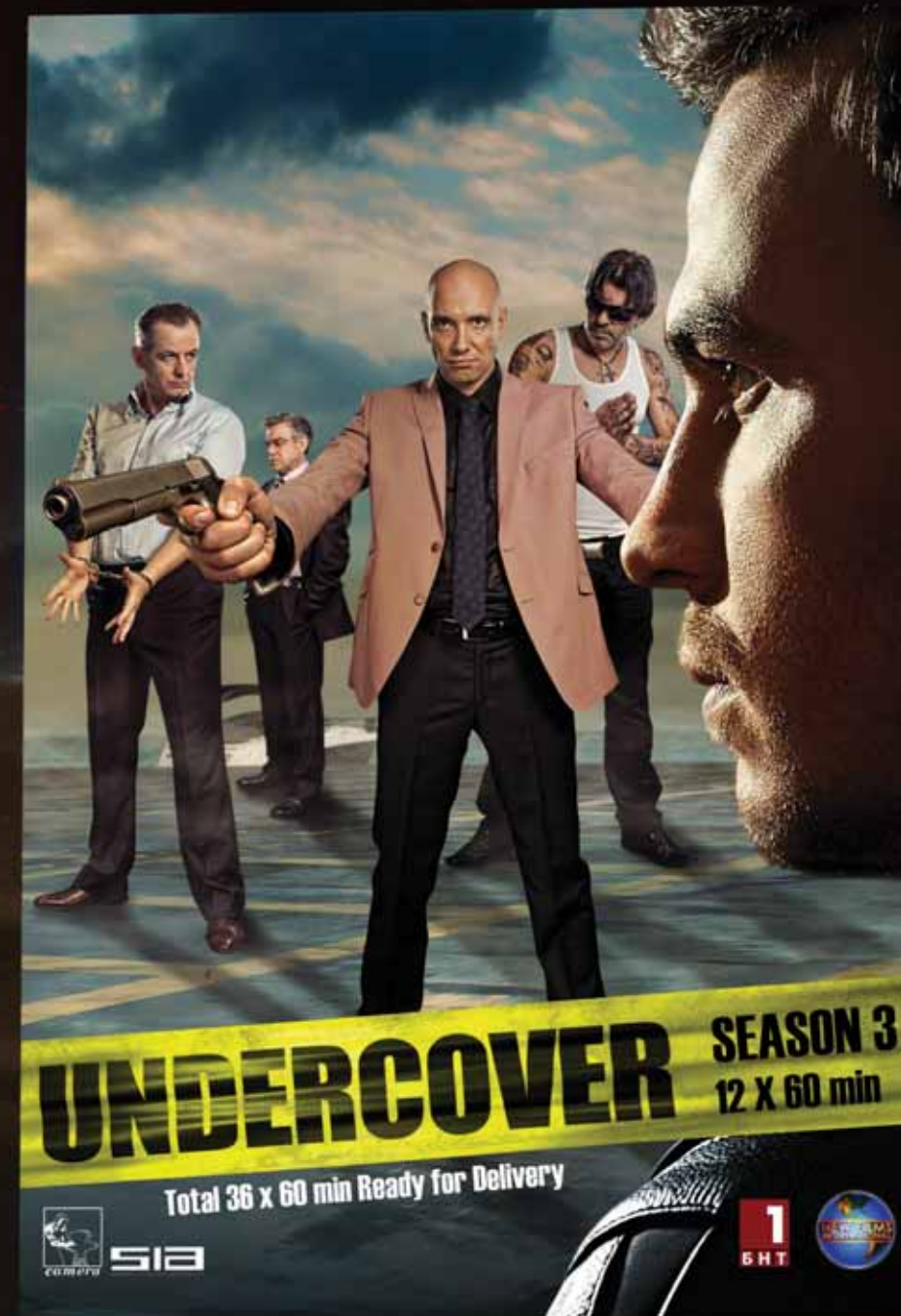
analogue TV nets are Russia (19 national-wide TV channels), Ukraine (14) and Kazakhstan (11). After analogue switch off (in the majority CIS countries deadline for digital terrestrial TV switchover is set for 2015) the number of national-wide terrestrial TV channels will double or even triple in the CIS countries.

'Entertainment content prevails almost in all CIS markets. However, in different countries of the region certain TV content restrictions exist. For example, in Moldova, TV channels are not allowed to broadcast foreign movies in Russian translation; in Ukraine panel games are prohibited on TV. But the most strange restriction (we are not talking about Turkmenistan, where almost all foreign and entertainment content is forbidden) was introduced this year in Azerbaijan where starting from this May foreign TV series are prohibited to broadcast by TV channels', says **Yarmoshchuk**.

Russia dominates in the region by the quantity of locally produced TV content. There are more than 150 production companies in the country that are supplying channels with TV dramas, comedies, detectives and TV shows. 'More than 60% of programming content of the largest TV nets in Russia is locally produced. At the same time Ukraine is a region leader by TV shows production (and adaptation of the international formats)', completes the executive.

KEY FACTS

- A THOUSAND OF MEDIA BUSINESS PROFESSIONALS FROM 400 COMPANIES ARE EXPECTED TO ATTEND KMW 2013
- THE GEOGRAPHY OF ATTENDANTS HAS EXPANDED SIGNIFICANTLY: A NUMBER OF LEADING INTERNATIONAL COMPANIES FROM CIS REGION, BUT ALSO FROM EUROPE, ASIA, AFRICA AND THE AMERICAS WILL JOIN THE EVENT
- THE MARKET CONSISTS OF FIVE MEDIA EVENTS: **FORMAT SHOW**, **UKRAINIAN CONTENT MARKET**, **FILM BUSINESS** AND **DIGITAL BROADCASTING**
- THERE WILL BE A SPECIAL FOCUS ON CO-PRODUCTION PROJECTS, CONSIDER BY ORGANIZERS AS 'THE FUTURE OF TV BUSINESS'
- ORGANIZER **MRM** HAS UPDATED THE MARKET WEBSITE AND LAUNCHED NEW DATA ACCOUNTING SYSTEM TO GET MORE INFORMATION ABOUT THE ATTENDEES AND THE COMPANIES



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TV NOVA: THE BOOM OF CHANNELS IN CZECH REPUBLIC

Alex Ruzek, director of television channels and programming of **TV Nova**, describes to PRENSARIO: 'During the last year there was a boom of channels in the Czech Republic. **Nova Group** was the most active in this manner, launching three new FTA channels **Fanda**, **SMÍCHOV** and **Telka** in the span of seven months'.

'In the free to air broadcasting, the most active are large media groups, with CME's **Nova Group** operating five channels, MTG's **Prima Group** operating four and public broadcaster **Ceska Televize** operating four, as the shutting down of independent channels has shown that stand-alone niche channels are not a viable business enterprise in our market'.

All in all, the number of FTA channels has increased from last May by seven: from 23 to 30 channels. Explains **Ruzek**: 'This widened dramatically the viewer's choice and therefore his or her viewing habits. In addition, there are more than 100 channels on paid TV platforms in the Czech Republic, where **Nova Group** operates two, **Nova Sport** and **MTV Czech**'.

'The biggest change in recent years has been digitalization, which has allowed us to give our viewers a portfolio of channels from which to choose. Our goal has been to maintain a strong mainstream channel in order to enable effective communication for our clients, augmented with niche channels for them to reach specific target audiences'.

'The highest rated programs are news and local drama series. Our main news this year regularly achieves a 46.7% share in our target group 15-54 and 1,871

million total viewers 4+. Our prime time dramas series, *Rose Garden Medical* 2, achieves a 41.5% share in 15-54 twice a week in prime time'.

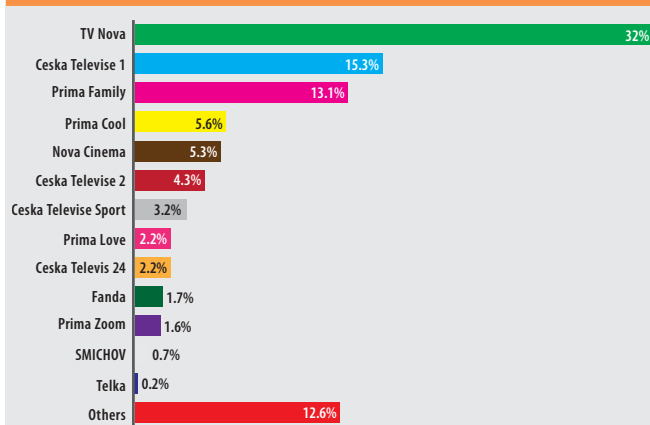
'Also successful is our long running daily soap, *The Street*, which has seen a resurgence in viewership during 2013 and is currently seeing regularly near a 36% share in 15-54, against two news programs on competing television stations. We are producing all of these shows ourselves, along with other drama and crime series (*The Collage*, *Doctors from Pocatky*, *Crime Unit Andel*, *Expozitura*), sitcoms (*Comeback*, *Helena*, *Sunday League*), reality shows (*Wife Swap*, *Masterchef*, *Farm*) and entertainment formats (*Idols*, *The Voice*, *Czech Music Awards*)'.

'Czech movies also do very well, and Nova is very active in pre-purchasing TV rights for films. Additionally, national hockey competitions achieve exceptional viewership, and so we are quite happy we were able to secure the free-TV rights for the ice hockey tournament of the Olympics in Sochi 2014', she says.

FUTURE PLANS

Market fragmentation has had a significant impact on viewer habits, says the executive, and adds: 'And specifically on the ratings generation potential of foreign content, as viewers now expect to find it on niche channels. We have moved a significant amount of our foreign product to our niche channels, and have bought new titles specifically for small channels, which we wouldn't have otherwise

CZECH REPUBLIC: MARKET SHARE, PER CHANNELS / PRIME TIME 15-54 TARGET GROUP (1Q 2013)



Source: ATO-Mediaresearch. (1) Fanda was launched on July 14, 2012 and started to be measured separately since October 2012. SMÍCHOV was launched on December 23rd, 2012 and started to be measured separately since February 2013. Telka was launched on February 22nd, 2013 and started to be measured separately since March 2013.



Prime time drama series *Rose Garden Medical 2* gathers a 41.5% share in 15-54 twice a week in prime time

considered for our main channel. Our viewers now require significantly more local content on our main channel than we have had in the past, so we are able to use our strong content engine to produce additional hours to saturate this viewer need'.

'We are expanding our local content, starting this summer with a new prime time drama series, *Doctors from Pocatky*, a spin-off of our highly successful *Rose Garden Medical* series. We will continue to develop new formats for television across all our channels. We will also continue to be sellers of this content, both as a finished product and as formats for adaptation'.

Completes **Ruzek**: 'We see a high opportunity for growth in the online space, where we are leading the way with our product **Voyo**, a SVOD service which provides unlimited access to a library of movies and series for a fixed monthly fee. We recently closed an SVOD deal with **Sony**, and hope to form other alliances for content on this platform in the very near future'.



TV Nova's main news program has regularly achieved this year a 46.7% share in channels's target group 15-54 and 1,871 million total viewers 4+

Alex Ruzek, director of television channels and programming of TV Nova

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RTL, CROATIA: 'WE CAN ALSO BE SUCCESSFUL WITH SMALLER BUDGETS'

'2013 has been a good year for **RTL Croatia** so far. We are the only main channel with growth in prime time, and together with **RTL2** we also have had the strongest growth as a group. This is thanks to a successful mix of acquired and locally produced shows and our continuously strong news offering'.

Kaspar Pflueger, programming director, **RTL Croatia**, explains to **PRENSARIO**, and adds: 'Nonetheless the continued sharp decline of the advertising market in 2012 has meant further budget cuts. But as we have shown over the last years, we can also be successful with smaller budgets. These are times when it really comes down to creativity and nimble actions'.

Scripted series dominate network's weekday prime time schedule. 'We were very successful with season two of our locally produced daily drama *Ruža Vjetrova* / *Windrose* (**FremantleMedia**) and the biggest talk about of the season, Turkish hit series *Suleyman The Magnificent*. Access prime time and the weekend belong to locally produced light entertainment'.

Pflueger continues: 'We were the first channel in the territory in years to introduce a daily game show in access-prime-time, a local version of *Pointless* (**Endemol**), which continues to do incredibly well, especially amongst young audiences. And the fourth season of *Farmer Wants A Wife* that did very well on weekends. News and informative programs continue to go from strength to strength,

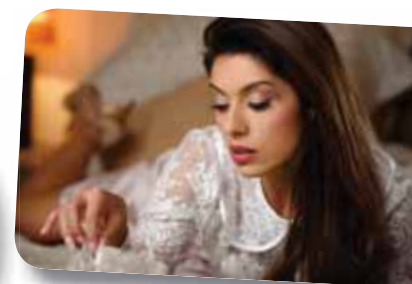
including our in-house produced event documentary *Antonija* about a missing girl, which was a huge success, so more such events will follow'.

Company's second-generation entertainment channel **RTL2** continues to do 'extremely well by simply focusing on the best US sitcoms of recent years', remarks the executive, who highlights the series *Two And A Half Men*, *Big Bang Theory*, *Modern Family*, etc.

About the market itself, **Pflueger** says: 'Croatia continues to be a stripped market. All major stations schedule horizontally on weekdays. This means there is a big demand for drama series and entertainment formats that offer a high volume of episodes. Turkish series and locally produced drama series are doing very well, as do daily reality series like *Big Brother*'.

'In general, our focus is on delivering events. For example we are mainly interested in Turkish series, when they offer something really new and different. We were the first channel who introduced Turkish series (*Binbir Gece*) to Croatia and have since been very successful with the stylish series *Ezel* and the historical hit soap *Suleyman*. So we are always looking for series and formats that have a real event character and are very broad, something that people will talk about'.

'Digital is now part of every programming decision. What can we do beyond the program, online, second screen application, mobile. However, our main focus is on drama, and this type of programming is not so suitable to



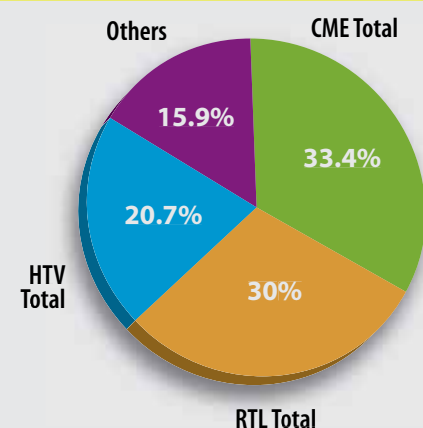
Ruža Vjetrova is the top locally developed daily series, and one of the most popular programs of the channel

interactive applications, as people usually watch really attentively and follow the story developing'.

'Hence our focus is more on social media activities before and after the show, and our free catch-up service, for people who have missed an episode. **RTL Sada** is the biggest catch-up service in the market, and getting the relevant rights is now a pre-requisite for program deals. For our other entertainment offerings, we are of course working on interactive offerings, for example for our new game shows', comments **Pflueger**.

And he finalizes: 'We have just started shooting for a new daily drama series, which will launch in fall and will be shorter than our previous series and more focused on one strong story. So, this time more telenovela and less soap. Also we are investing in local comedy and will start our first locally developed sitcom this fall, production has just commenced in Sarajevo, with some of the biggest names from the region starring. We will have a fresh season of *Magnificent Century*, too. I'm being asked every day when the series will return'.

CROATIA: MARKET SHARE, PER MEDIA GROUPS / PRIME TIME 18-49 TARGET GROUP (1Q 2013)



Source: AGN Nielsen Media Research



The Croatian adaptation of Endemol's format *Pointless*, a daily game show in access-prime-time

- USA SERIES PREMIER ON NBC IN JULY -



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MARKIZA, SLOVAKIA: 'ONE CONTENT, MULTIPLE DISTRIBUTION'

TV **Markiza** has been the market-leading channel in Slovakia since its launch in 1996. It is a general entertainment and family-oriented channel targeting individuals aged between 12 and 54 years old. In addition, the **Markiza** group operates three other channels in the territory: **DOMA**, a female oriented channel, **Dajto**, a male oriented channel and **Foor**, a comedy channel.

Silvia Porubská, Head of TV at the **Markiza** group, speaks with **PRENSARIO** about the position of the company in this market. She highlights: 'Our main channel offers a wide variety of content from high quality news programs, local fiction and reality and entertainment programs to foreign acquisitions'.

Currently, the most successful programs on **Markiza** are the main news at 7pm, a weekly feel good show *Modre z neba* which is in its 10th season, a local fiction series *Taste of Love* which launched in January of this year bringing immediate leadership in its slot

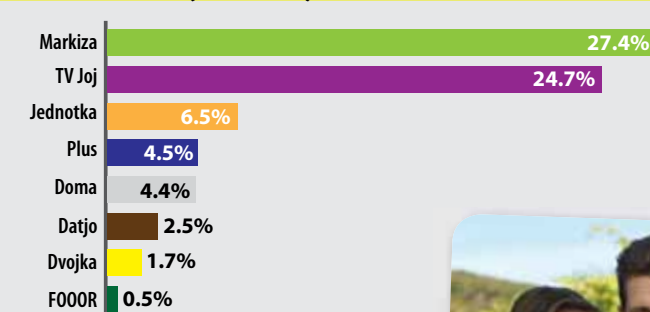
and established itself as the highest performing local fiction on the market, and other programs such as the 3rd season of *Czechoslovak Idol*.

'With the growing number of both local and foreign channels on the market the audience has been more selective in viewing preferences which brings higher pressure on us as a broadcaster to offer the highest quality productions and a wide variety of programs. The top performing programs are both fiction and reality and entertainment but mainly local content', comments **Porubská**.

'The foreign acquisitions have been on decline for the past few years due to the higher penetration of cable and other channels and also Internet piracy. The exclusive local content is what drives main audiences on our channels. From fiction we mainly concentrate on family romantic series and from reality and entertainment it's a mix of daily reality shows and big entertainment shows', she adds.

About programming trends in the Slovakian market, the executive expresses: 'We are concentrating on a very clear strategy of one content multiple distribution, which means that we not only operate our Free TV channels but also built other

SLOVAKIA: MARKET SHARE, PER CHANNELS – PRIME TIME / 12-54 (1Q 2013)



Source: PMT, TNS SK



Launched on January this year, *Taste of Love* has brought immediate leadership in its slot

distribution platforms which enable to utilize content targeting several means of viewership patterns. We launched a SVOD platform called **Voyo** that brings exclusive premiere products to the market both local and foreign before it can be seen on our Free TV channels'.

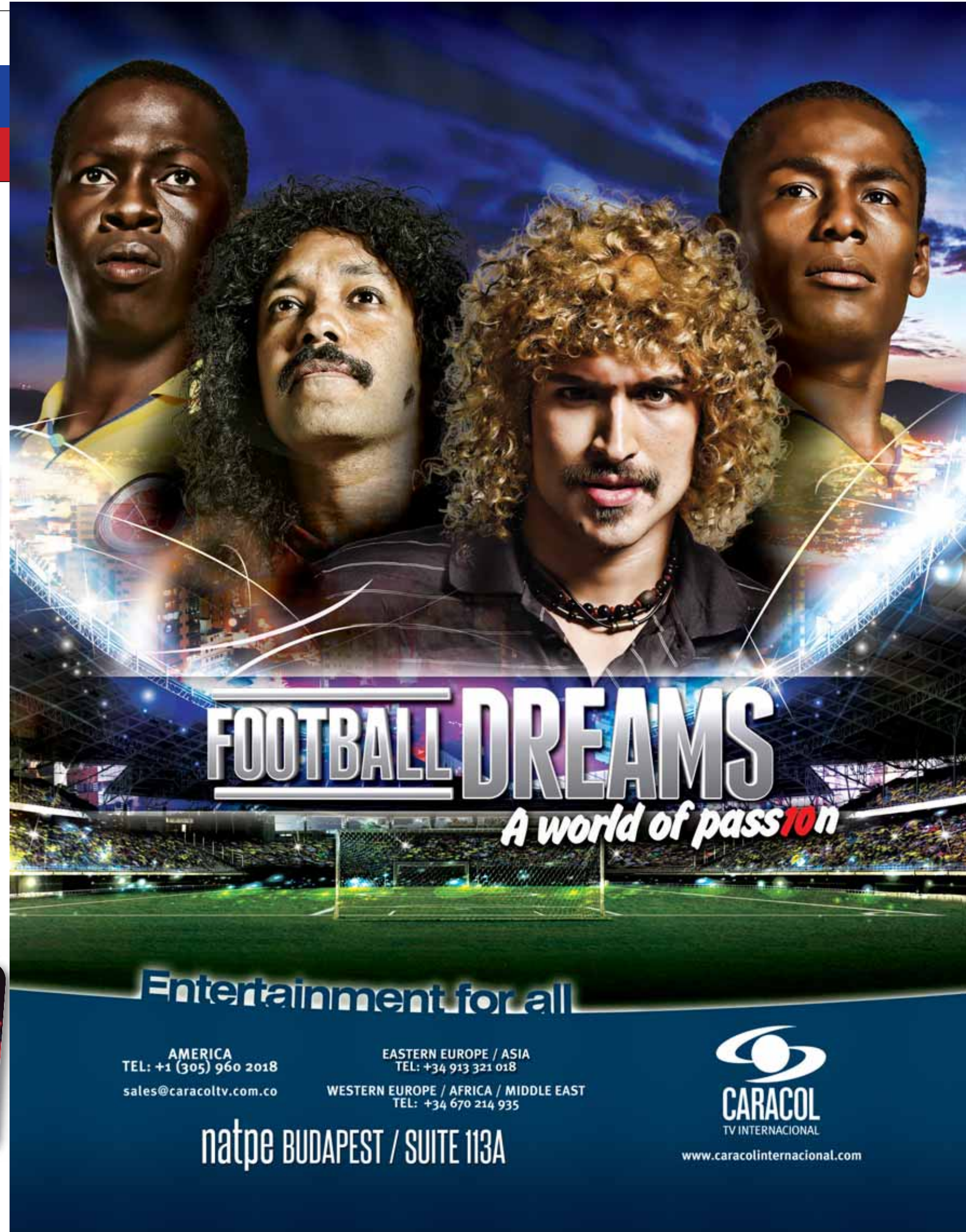
'Last February we launched our 4th channel, **Foor**, following our multi-channel strategy. Our main goal is to continue strengthening the performance of our group via high quality local content. This fall season we will launch a brand new fiction series from the creators of our currently successful *Taste of Love*', completes **Porubská**.



Modre z neba is a weekly feel good show that is in its 10th season



Czechoslovak Idol is one of the top entertainment shows in Slovakia in its 3rd season



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PINK: THE BIGGEST BROADCASTING PLATFORM IN SOUTHEAST EUROPE

The **Pink Media Group (PMG)** is the largest private broadcast media and entertainment group in Southeast Europe. Headquartered in Belgrade, **PMG** has operations in the Republic of Serbia and in the neighboring countries of the Republic of Montenegro and Bosnia and Herzegovina. Pink is currently expanding business into other markets in the region, including Slovenia.

PMG gathers seven individual, legally and financially independent companies that have diversified but complementary operations in: film studios, terrestrial television production and broadcast, satellite television production and broadcast, radio broadcast, motion graphics and animation production, music recording and audio production, CD/DVD replication, business aviation (jet) services, everything under the leadership of Mr. **Željko Mitrović**, president & CEO.

PMG's television, radio and satellite broadcast operations offer a full range of foreign and domestically produced programming.

Pink's terrestrial television channels have the highest audience share in all three markets: **RTV Pink** Serbia with 25.1% of market share, **PinkBH** with 13.1% and **Pink M** with 20% (data of the first three months of 2013).

In 2006, **PMG** launched its most recent venture, **Pink Films International (PFI)** - a division of **Pink International Company**, with the start of construction of a new movie studio. The complex is located over 17 hectares on Belgrade's periphery, will house nine large sound stages and multiple production offices and facilities. To support this infrastructure, PFI will offer a complete package of services to attract international film production.

A REFERENT

Pink evolution is a reference of what has been happening to Central and Eastern Europe in the last years: medium-companies have become large groups of media reaching each segment of business inside the TV industry and operating in many regional markets. More related-business, more territories covered. Expansion is the answer to crisis.

The company has become a referent in the main three segments of the content business: development, production and emission, adding recently an international division to distribute its more than 30 pay TV channels worldwide. At MIPTV, it had a booth in the floor promoting its brands.

Dragan Jelčić, acquisition manager, explains to **PRENSARIO**: 'The group runs movie studio

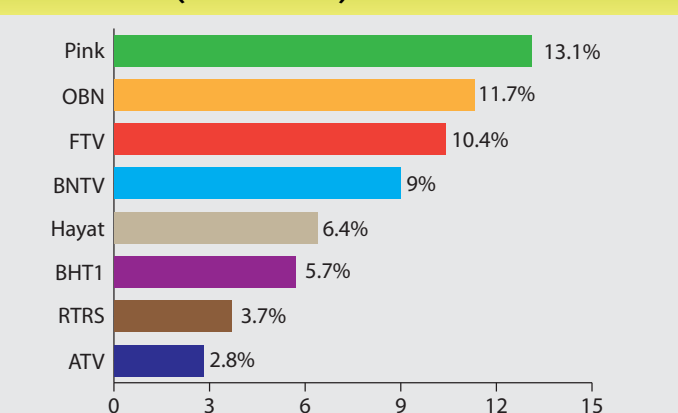


One of the top shows in Pink Serbia is Grand Parade, coproduced with Grand: in its 14th season, it includes quiz shows, comedy and children programming



On soaps, Zvezdara is very popular in Serbia with 14 episodes in its first season

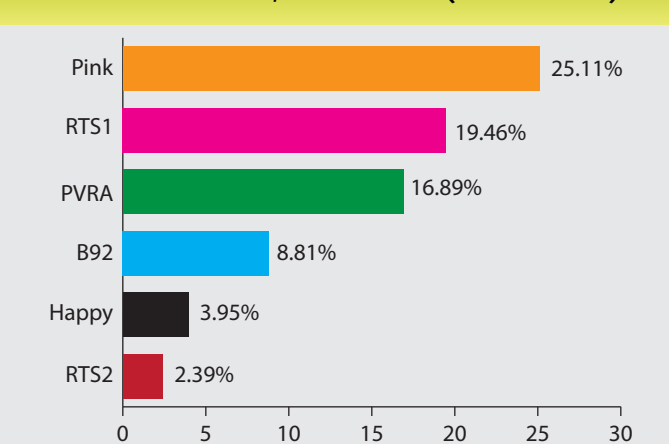
BOSNIA & HERZEGOVINA: MARKET SHARE, PER CHANNELS (MARCH 2013)



Source: AGB Nielsen

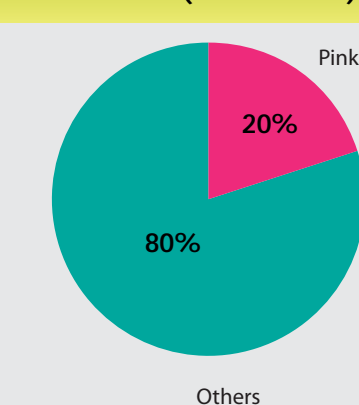


SERBIA: MARKET SHARE, PER CHANNELS (MARCH 2013)



Source: AGB Nielsen

MONTENEGRO: MARKET SHARE, PER CHANNELS (MARCH 2013)



Source: AGB Nielsen

with 9 sound stages and 3 leading TV stations (with one being launched in Slovenia). We are not only leaders in free TV business, but also in cable and satellite and film production, and now all these are available internationally.'

Company's catalogue includes more than 60 local films, as well as thousands of hours of entertainment formats, magazines, drama and comedy series, among others. One of the top ones is *Grand Parade*, coproduced with



Indian soaps are a big trend in Pink Serbia: Balika, with more than 1000 episodes, is still on air and it is highly successful



Turkish product includes Kuzey Guney, from Kanal D



Latin telenovelas are broadcast in Serbia: Pablo Escobar, The Drug Lord is one of the most recent, from Caracol TV

PINK LAUNCHED A PACKAGE OF 30 TV CHANNELS IN MAY



Pink International Company, Serbia, last MIPTV: Dragan Jelčić, head of film department, acquisitions and programming; Ivan Vlatković, VP; Barbara Sandić Stetić, head of administration & communications; and Željko Mitrović, president, during last MIPTV

Last May, leading basic cable operators in Serbia, Bosnia and Montenegro were among the first to offer their customers the so-called *Pink Package*, consisting of 30 television channels. **Pink** had announced that there would be 60 channels by September and eventually 100 channels in total available to subscribers by the end of the year.

Grand, and in its 14th season, including quiz shows, comedy and children programming. 'In Serbia we have very popular music shows and reality show, as well as sitcoms and soaps like *Zvezdara* with 14 episodes in its first season', adds **Jelčić**.

Apart from the local production and Turkish series, which are 'always strong', **Jelčić** mentions a very interesting trend in the region: the Hindu series. 'They are very popular among our audience: *Balika*, for example, is a soap of more than 1000 episodes, still on air'.

PRENSARIO INTERNATIONAL 25



Dragan Jelčić, acquisitions manager, Pink

TV7, BULGARIA: 'OUR MAIN GOAL IS TO BE A NATIONAL LEADER'



Nikolai Barekov, CEO TV7 channels

ceetv: TV7 recently changed its ownership and now it is owned by the UK based financial and consultancy agency Alegro Capital. This is the first deal for the company in Eastern Europe. Would you disclose a few of the details behind this deal? Was this the only company that had an interest in the acquisition of TV7 and what was the reason for the sale of the TV group?

Nikolai Barekov: I think the big business around the world is always interested when there is a good media company or a good media group for investments. During the last months, the group of channels around TV7 and TV7 itself really became a good basis for investment in Bulgaria. I cannot comment on any details of the contract with Alegro Capital. They are a very famous and popular fund around the world. I think that it is normal for other big investment networks to have an interest in investing in a similar group that is developing so dynamically. I would like to remind that only for the last few months since I've been in the operational management of these channels, TV7 has tripled its results in primetime and at the

moment it's one of the most attractive TV stations both for watching and airing of commercials.

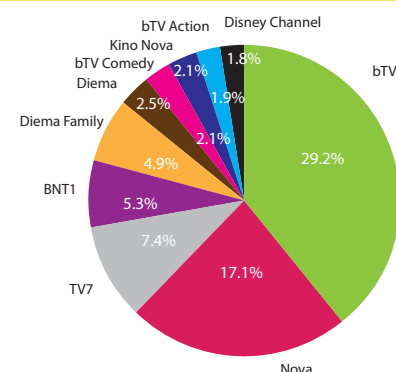
ceetv: Which are the best competitive programs in TV7 and what is the present place of the station in the ratings? What are your ambitions in this regard and is the aim to turn TV7 into a national leader?

NB: Our main goal is to be a national leader. I think that in 2014 TV7 would take the first position in the ratings. My belief in this comes from two things: first, the digitalization will equalize the abilities of the main groups of channels like TV7, bTV, Nova and BNT; second, our program at the most is more qualitative than the one of our colleagues. Unlike them, who invested in cheap foreign products, we invest in Bulgarian productions, in Bulgarian series, in Bulgarian reality formats, and we are working with many of the proclaimed Bulgarian producers. At the moment we are fighting for the second place with Nova TV. Many of our programs are on first place in the ratings but in the average shares the battle is with Nova TV for the second place. The morning block, of course, is firmly on second place fighting for the first place with bTV. There is a very high increase for the News, *The Mole*, the reality format, which at the moment is the only reality show which holds the ratings for about four hours in the primetime. It showed results that were even better than the ones of established shows like bTV's *Slavi's Show*.

Our Saturday-Sunday program is an absolute flagman in the air of the Bulgarian televisions. The most established publicists are with us – Karbowsky, Kohlukov, Diana Naydenova, Lyuben Dilov. And of course, something where we are a complete leader with a great market share, over 40% share, this is the Bulgarian Football Championship. Now, the way it is made and is being aired on TV7 and NEWS7 has nothing in common with the amateur attempts that have been made till now. We made a global investment in this product, we will develop it in a marketing kind of way for an year ahead. We invested a lot in the program *Bulgarian Football Championship*, we became the main sponsor of the championship through NEWS7. We are definitely the leader there in primetime when we are having our games. Our

By YAKO MOLHOV, CEETV

BULGARIA: AVERAGE MARKET SHARE, PER CHANNELS / 18-49, ALL DAY (1Q 2013)



Source: GARB

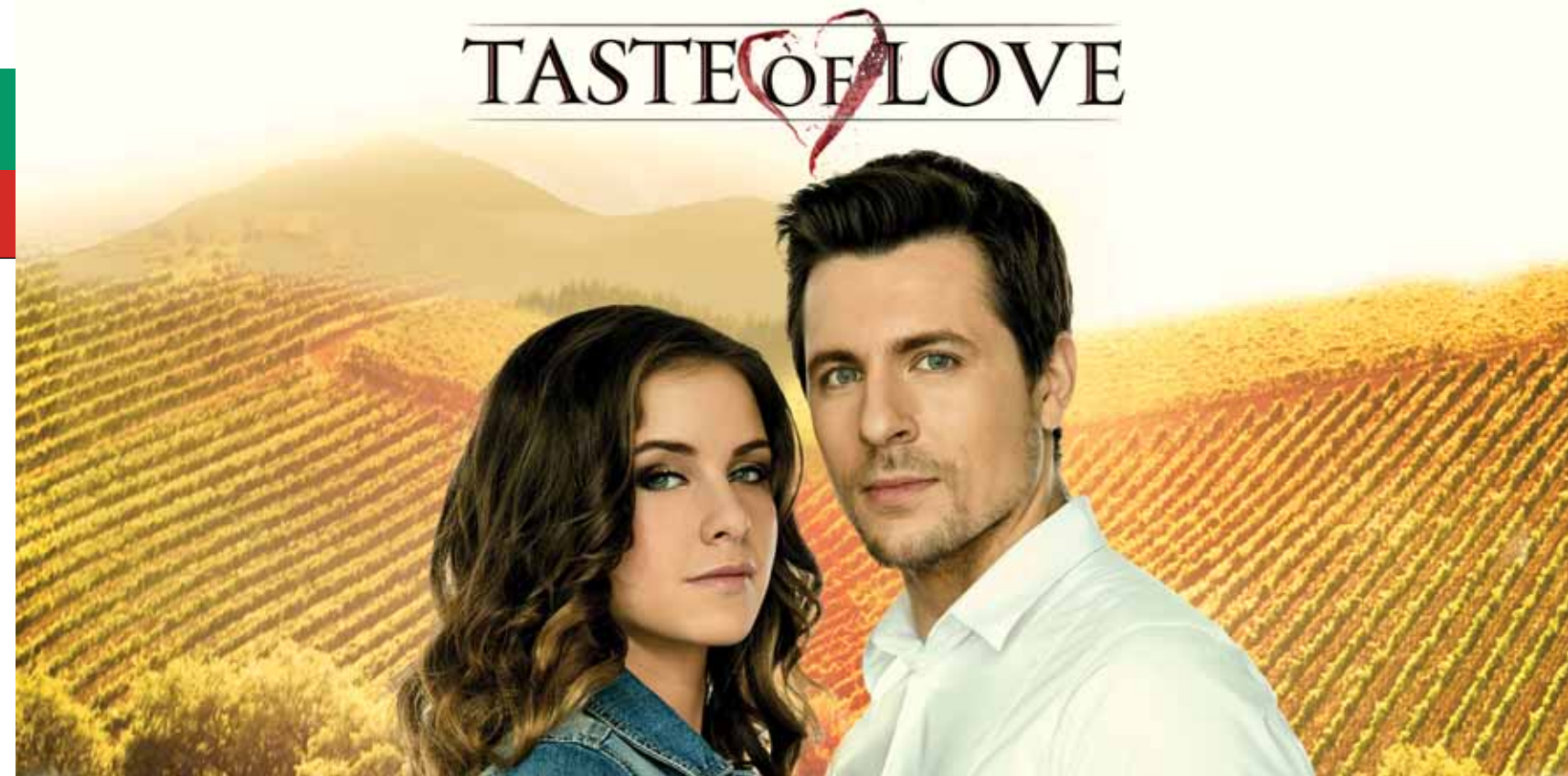
colleagues from bTV, Nova and BNT are losing 2/3 of their market share, thus, there we are leading with shares of 30-40%.

ceetv: This spring some of the most expensive projects started in the air of TV7 – the periodic drama *The Tree of Life*, the reality show *The Mole*, you also attracted some of the biggest producers from other TV stations and their shows. Is this strategy successful and what are your expectations from the spring season in regard to the ratings?

NB: We tripled the ratings in the average watching time, while in primetime we made them five times greater, and of course, this is a very good and very strong managerial move that has been made. This was my strategy. Actually, by taking the operational management of the channels' group, my personal goal was the seizing of some very serious market shares through the production of quality products. The best Bulgarian producers are working with us because we are upright in our engagement with them, and we are fulfilling our contracts. We've got well-bred relations. I believe that just now we are developing the market niche with the family saga *The Tree of Life*, which is accepted very well by the audience, and *The Mole*, which is a reality format originally intended to conquer considerable market results and that's

SPECIAL NOTE: because a matter of space in this issue, the second part of this interview will be published in our MIPCOM edition of October

TASTE OF LOVE



OUR STORIES LOVE OUR VIEWERS

MEDIA PRO

DISTRIBUTION



Restaurant

Wants a Boss

The periodic drama series *The Tree of Life* was one of the most expensive and successful productions of 2013

KANAL 2, ESTONIA: 'WE HAVE TO FIGHT FOR EVERY EURO'



Olle Mirmo, programming director (credit: www.ekspress.ee)

ceetv: What was 2012 like for Kanal 2 and are you satisfied with the spring season?
Olle Mirmo: In 2012 we were the most watched commercial TV channel in Estonia and only narrowly missed the pole position among all channels. It is a rather remarkable result as 2012 was a big sporting year with football championship and Olympic Games that gave the public broadcaster a slight edge. Our spring season is up and running with promising ratings and positive feedback to our shows. We are already focusing on our fall season, which should be extremely special. As the oldest commercial TV channel in Estonia we will be celebrating our 20th birthday in the fall: this means lots of highlights for Estonian TV viewers.

ceetv: We have seen a slight drop in ad revenues for TV in Estonia. At the same time the 3 main broadcasters continue to invest more into local

productions, providing for a very competitive, albeit small market. How do you explain this?
OM: It comes down to two things. First, not only have ad revenues decreased, the total revenue among all TV channels is relatively small which means that you have to fight for every Euro available. Second, Estonian audience has a strong fondness of local shows. Although some of the acquired content brings great ratings it cannot compete with local series and shows. When we put these aspects together we see that we need to focus on local content to bring home great ratings and therefore higher revenue even if they are a lot costlier than acquired content.

ceetv: We have seen a boom of creativity, and quite interesting fiction and non-fiction original formats in Estonia. What new projects can we expect from Kanal 2? Will drama and comedy continue to be the main genre in 2013?
OM: The year has started with several new local shows for us. One of the most high-profiled is *Tohter Olaf* (local version of *The Dr. Oz Show*). After the success of *Jeopardy!* last fall we launched another quiz show: *Mis? Kus? Millal?* based on the long running and legendary Russian format *What? Where? When?* We also launched two weekly sitcoms: a female oriented *romcom Best Before* and *The Guys from Dead End Street*, which is much edgier and quirkier. In addition, after two successful pilot episodes last fall we are producing a full season of entertainment show *It's a Boy/Girl Thing* (**Global Screen**); the new factual series *You are Not Alone* that showcases on different local human interest stories and has an overall positive feel. We launched a limited run documentary series *The Departed* about the people who leave Estonia to live abroad with no intention of returning. All in all, these shows span all genres of TV so we aim to offer a large range of variety to our loyal viewers. Of course we have also continued with our established hits such as the weekly drama *Under the Clouds*.

ceetv: What is the production cost of one episode of primetime drama in Estonia? How about entertainment and reality projects?
OM: The production costs are significantly lower than in Western countries and you could probably produce a full season of a weekly drama with the budget you will receive for one episode in the UK or Germany. Still, as the ad market is also tiny, the budgets cannot be higher because it would be impossible to make even.



By MARIA RUBAN, CEETV



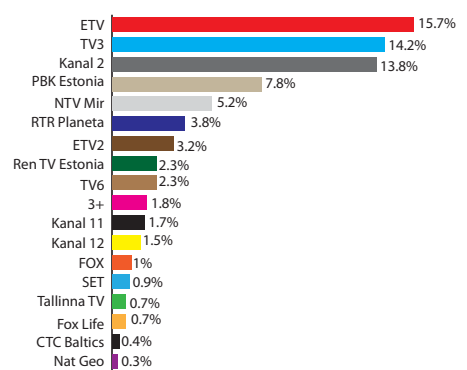
The quiz show *Mis? Kus? Millal?* is based on a famous Russian format

I am regularly astonished to see how many high value local TV content is produced in Estonia. There are some format based shows that look as great on our channels as they do in countries that are many times bigger and have much bigger budgets.

ceetv: While local productions have been flourishing you are also not giving up on adapting formats. How do you pick up the formats and to what extent are you ready to experiment in this regard?
OM: We are very willing to experiment in this field and we are probably the most daring channel in Estonia when it comes to conquering new areas. In 2011 we were the first channel in Estonia to acquire a scripted format (*The Sketch Show*), now others have followed suit. And way back in 2006 we were the ones to first try a huge mega format in Estonia, which turned out to be the success story; that is *Dancing with the Stars*. As to how we pick up formats, it really comes down to the format as it really is different in every case. There are formats that we screen and now immediately that we should produce them. Then there have been cases where we actively search for a format in a specific genre.

ceetv: How do you balance between the different types of acquired content? Which are the main distributors you work with and what type of content are you looking for?
OM: Our main providers remain **Warner** and **Sony**. We acquire most of our movies as well as series from them. As the local productions bring the highest ratings our focus is there when it comes to the prime time. We air, however, acquired series in daytime where Latin telenovelas and German romances rule. We still buy quite a lot of content from other independent companies as we also have two basic cable channels: female-oriented Kanal 11 and male-skewing Kanal 12. These two channels focus on acquired content, i.e. films, series, documentaries, factual content etc. We have acquired content from most of the leading

ESTONIA: AVERAGE MARKET SHARE, 4+ (APRIL 2013)



Source: TNS Emor

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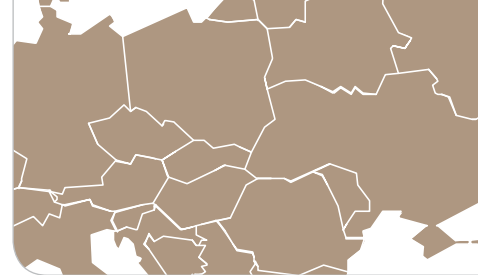


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CME: 'CEE IS THE REGION WHERE LOCAL DIGITAL PLAYERS STILL HAVE THE CHANCE TO GROW'



Robert Berza, Head of Internet

PRENSARIO interviews **Robert Berza**, Head of Internet, **CME**, who highlights the company's digital business all across the region: 'Besides Slovenia where we have been present since 2000 with the current market leader, **24ur.com**, **CME** started building a digital strategy and product portfolio in 2006. Since then we launched and now operate over 50 portals across 6 territories, dozens of mobile sites and apps and the regional icebreaker in SVOD, **Voyo**', describes **Berza**.

'As it eventually crystallized in the past two years, our strategy is, on one hand, to grow the audience of our free websites (news portals, niche websites) and increase revenues from the very competitive advertising market and, on the other hand, to increase the number of **Voyo** subscribers and, naturally, the revenues from this stream', he adds.

'Our initial plans involved a TV website, primarily serving as a marketing tool for broadcasting, but later developed into a complex portfolio. We have one of the best news portals across **CME** and we launched sports as well as tabloid websites and niche portals. We own and

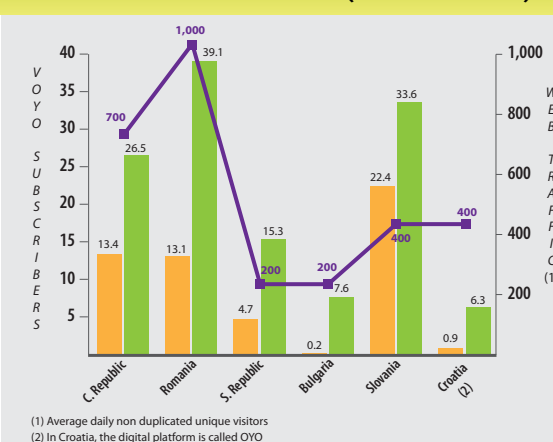
operate prominent blog platforms in Croatia and the Czech Republic, game portals and e-commerce pilots, focusing on different demographics and target groups. This allowed us to attract more revenues than just from the Internet ad markets and create vertical strategies on content, marketing and sales together with our broadcasters and the content production engine of **CME**.

'Being the leaders in Romania, #2 in Slovenia, #4 in the Czech Republic and among top 7 in the other territories I can say we do a pretty good job on the free portals side of our strategy. Our most pivotal project over the past two years is most undoubtedly **Voyo**, a SVOD platform that distributes both our own linear and exclusively online channels, along with movies, series, shows, sports against a monthly fee ranging from USD 4.5 to USD 9 (VAT included), depending on the territories'.

'It's practically a new market emerging in the region, under heavy competition from illegal video portals and internet torrents and with customers not at all willing to pay for content, let alone on the "free Internet". Still, at the end of Q1 2013, we proudly reported over 128,000 paying customers across the region and are enjoying this nice trend also in Q2'.

'**CME** produces content for all distribution windows and our digital strategy was mainly to offer to our visitors or customers the key prime-time productions (fiction, reality and entertainment) or daily news and sports plus programs licensed by **CME** (mainly foreign fiction). We believe that for **Voyo** we first need to have the most extensive library possible coming from these sources, increase the numbers of our subscribers considerably and only then strive to look for exclusive video-on-demand formats. For example, we created a spinoff exclusively for **Voyo** of *Lara's Choice*, the most successful locally produced fiction series in Croatia ever. In Romania, we experiment rather in the sports segment where we first distribute selected events live on **Voyo** and only later on TV, whereas in most of our operations we premiere episodes of

Voyo/OYO SUBSCRIBERS & WEB TRAFFIC EVOLUTION IN CME MARKETS (Q1 12 vs. Q1 13)



Source: CME Quarter Report

fiction series on **Voyo** and days later we air them on the main TV channel'.

'In the six countries where we operate we run a local version of **Voyo** and a local string of websites, ranging from a few (in Slovakia) to over 20 (in Romania). Regarding new launches, our focus is to grow the product we already have, **Voyo** or the ones with high audience potential, and not necessarily launch new portals'.

'CEE is one of the areas where the big global players just started to show their muscles. You already need to be very competitive in order to be profitable with a digital operation merely from the advertising market. Despite the fact that we see growth and potentially more companies transferring their marketing budgets from other media to the Internet, more and more of this money will go to the likes of **Google** or **Facebook**. As a result, the "locals" will get less and less and the markets will eventually consolidate with maximum three local Internet players generating enough revenues to survive and grow'.

'CEE is now the region where local digital players still have the chance to grow and establish themselves as leaders in some segments on the non-advertising online world: e-commerce & paid services. It's still a matter of several years till companies like **Amazon**, **Netflix** or **Apple** start focusing on the region, but one can already notice active **Naspers** buying e-commerce leaders across the region.', completes **Berza**.



Lara's Choice, the most successful locally produced fiction series in Croatia, had a exclusive spinoff for Voyo

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Produced by: Northern Pictures and Beach House Pictures (Australia)
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Around the Next Bend

A personal journey through the heart of India.
Produced by: Minds Eye Entertainment for Travel + Escape (Canada)
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LOADED

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Produced in association with: The Weather Channel (US)
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CTC MEDIA: DIGITAL STRATEGIES BOOST COMPANY'S LEADERSHIP



Yulia Mitrovich, CTC Media's Chief Strategy and Digital Media Officer

CTC Media is Russia's largest independent media company operating three free-to-air channels in Russia: **CTC**, **Domashny** and **Peretz**, as well as two stations in the CIS countries, **Channel 31** in Kazakhstan and **CTC Mega** in Moldova, with a total potential audience of 150 million.

The company is also actively developing its content production and digital media capabilities, this last division is led by **Yulia Mitrovich**, Chief Strategy and Digital Media Officer, who describes to PRENSARIO: 'Distinguished quality content is one of the most valuable **CTC Media** assets. We do our best to

make it available via various platforms: on air, online, via mobile and Smart TV applications. Today, the total monthly audience of our digital resources exceeds 8.2 million people.'

'**CTC** channel application has recently joined Top 5. Smart TV applications, outrunning all other TV channels and major video resources. We have launched a motion activated mobile cooking application *Domashniy. Recipes*, which gives access to thousands of expert recommendations, timer and other useful services without touching the screen. In 2012 our digital media revenues nearly tripled compared to 2011'.

'The convergence of traditional and digital media is getting stronger. In 2012, **CTC Media** was the first on the Russian market to develop and implement a large transmedia project on the overlap of TV and Internet. The *Real Love* project reach amounted to 53 million people: 30 million CTC channel viewers and 23 million Internet users, that accounts for 1/3 of Russian population. That is an unprecedented case for an advertising market. TV and Internet reach were balanced for the first time.

About the strategies to make your content available on digital, **Mitrovich** explains: 'We use streaming technologies to make our content available on demand. All videos are ad supported. We think it is the most efficient model for the Russian market. Digital platforms can offer much more content than it is present on air. For example, there are backstage materials, contests, protagonists' personal life details interesting to the general public'

'We try to provide the audience with interactivity, hold online Q&A with actors from the TV shows. The online quest *Boarding School* has been recently rewarded as the best Russian off-air



The Real Love project reach amounted to 53 million people: 30 million CTC channel viewers and 23 million Internet users (1/3 of Russian population)

special event in 2012. Nearly 500 thousand social media users joined the project', she comments.

'The audience fragmentation is extremely strong due to high levels of piracy. There is no clear leader that is capable of gathering the majority of TV content on one destination. Numerous TV market players promote their content by themselves.'

'The number of Internet users in Russian is one of the highest in the world – 68 million people in 2012 (48% Internet penetration). The time spent online is expected to grow by over 40% by 2015 compared to 2009. Internet consumption is growing fast but not at the expense of TV usage, which is going up as well. Therefore, in Russia, like in many other countries we see the growth in the overall media consumption fueled by proliferation on broadband, mobile devices, etc.'

Completes the executive: 'Today's audience enjoys cross platform approach, people possess numerous gadgets and are positive about complex stories that are told with the help of multiple resources. Digital media is a segment where there is always a place for experiment. Our experiments are based both on the video content and technology development.'

MAIN FIGURES

- THE NUMBER OF INTERNET USERS IN RUSSIA IS ONE OF THE HIGHEST IN THE WORLD: 68 MILLION PEOPLE IN 2012
- THE INTERNET PENETRATION IN RUSSIA IS OF 48%
- THE TIME SPENT ONLINE IS EXPECTED TO GROW BY OVER 40% BY 2015 COMPARED TO 2009



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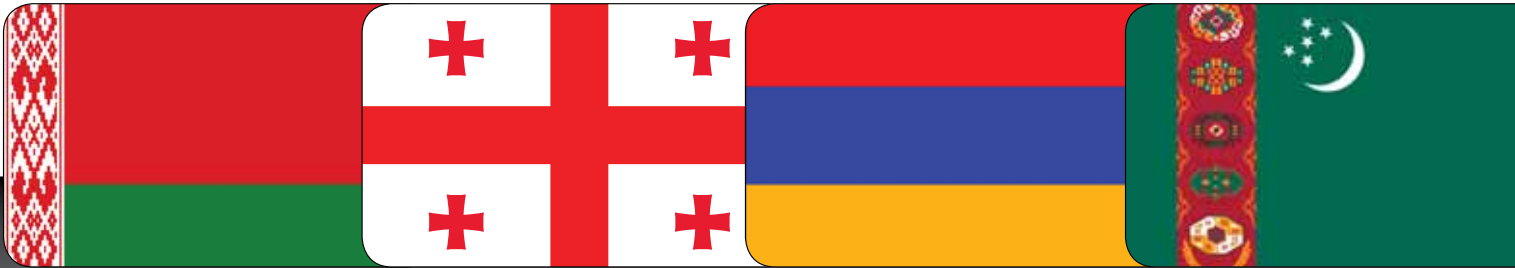
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TV MARKETS: GEORGIA, ARMENIA, TURKMENISTAN AND BELARUS

By ARTEM VAKALUYCK, MEDIA RESOURCES MANAGEMENT



PRENSARIO continues the cycle of articles dedicated to the current situation on TV markets of the post-Soviet countries, through the exclusive information provided by **Media Resources Management** (MRM), organizers of *Kiev Media Week* (September 10-13, Kiev, Ukraine). The region is developing rapidly both in terms of its TV market volume and the number of players on it led by such states as Russia, Ukraine and Kazakhstan. This time, its provided a short analysis of Georgia, Armenia and Turkmenistan.

GEORGIA

Among the three countries of Caucasia, Georgia is the second largest territory: larger than Armenia and smaller than Azerbaijan. It has an area of 69.7 km² and a population of 4.6 million people. The total number of television households is slightly more than 1.5 million and it is estimated that there are approximately 2.5 million television sets in the country.

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

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

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

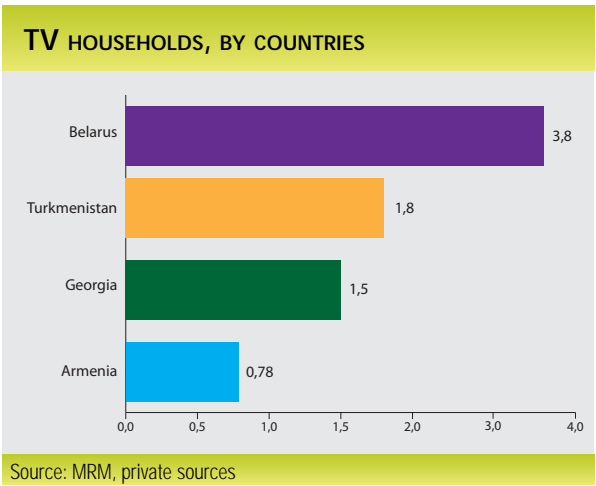
Unfortunately, data on TV ratings and share of the TV channels in Georgia is not available because of the absence of national-wide TV researches in this country. Nevertheless TV advertising is a rapidly evolving industry – the total TV ad spend exceeded \$100 million in 2012.

TURKMENISTAN

Turkmenistan is situated in central Asia with an area of 491,200 km² and a population of 5.2 million people. There are a total of 1.8 million television households and an estimated 2.1 million television sets in use. Approximately 83% of the television households (1.5 million) rely on the analogue terrestrial platform for their primary television reception.

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

The Ministry of Communication is the



legislative and regulatory body responsible for broadcasting in Turkmenistan. It is responsible for proposing and implementing legislation in the area of electronic communications. Currently 3 national broadcasters are available on the analogue terrestrial platform. They are: **Turkmenistan, Altyn Asyr: Turkmenistan**, and **Yaslyk TMT-3**.

Unlike the other countries of the former USSR, which have made some progress towards the implementation of their DTT platforms, Turkmenistan has not yet begun DTT trials. This can be attributed to the state's information policy that may effectively conflict with the introduction of digital technologies. Data on TV ratings and share of the TV channels in Turkmenistan is not available because of the absence of national-wide TV researches in this country.

ARMENIA

Armenia is the smallest country in the region, and is lodged between the two other adjacent Caucasian countries of Azerbaijan and Georgia. It has an area of 29,800 km² and a population of 3.2 million people. The total number of television households equals 785,000 and the overall number of television sets is approximately 880,000, of which 300-400 television sets have a built-in DVB-T tuner.

The analogue terrestrial television platform is the most important television platform in Armenia. It should be noted, however, that some television households rely on more than one television platform. Analogue terrestrial TV covers more than 785,000 households, or

DATABASE (2013)

GEORGIA
POPULATION: 4.6 MILLION
AREA: 69,700 KM²
PAY TV SUBSCRIBERS: 200,000

ARMENIA
POPULATION: 2.97 MILLION
AREA: 29,800 KM²
PAY TV SUBSCRIBERS: 350,000

TURKMENISTAN
POPULATION: 5.2 MILLION
AREA: 491,200 KM²
PAY TV SUBSCRIBERS: —

BELARUS
POPULATION: 9.5 MILLION
AREA: 207,195 KM²
PAY TV PENETRATION: 50%

Source: MRM, private sources

almost 100% of the population. Analogue cable penetration totals 3,000 households (0.38%); digital cable (DVB-C) covers 12,700 households (1.62%) and digital satellite (DVB-S) platform covers almost 7,850 households (1%) in the country.

Five nation-wide terrestrial television broadcasters are present in the country. Of these, the **Public TV of Armenia** is a public service broadcaster while the **Armenian 2nd channel**, **Armenia TV**, **ALM Holding**, and

Shant are privately-held broadcasters. In addition, 53 regional and/or local commercial broadcasters are on the terrestrial platform.

The analogue broadcast network for the public service broadcaster is maintained and operated by the government-owned transmission company TV and Radio Broadcast Network (TVRBN). It has a terrestrial network of 203 transmission sites.

In addition, there are two private broadcast network operators which operate the analogue terrestrial networks for Armenia TV and ALM Holding. The terrestrial networks of Armenia TV and ALM Holding are 16 and 13 transmission sites respectively.

The draft Concept of DTT Switchover in Armenia has been developed by the Ministry of Economy and is currently in the process of approval. According to the draft plan, a budget of approximately 100 million is to be made available to provide DTT coverage across the whole territory of Armenia. While the draft plan does not allocate a budget to help households acquire DTT receivers, it is understood that the government is planning to provide funding for low-income households.

BELARUS

Belarus is a former USSR Republic with a population of 9.5 million people. It is estimated that there are 3.7 million television households and approximately 4.5 million television sets in use. As the end of 2012, 227 television and radio broadcasters were officially registered with the Byelorussian Ministry of Information, of which 158 radio broadcasters (137 governmental and 21 commercial) and 69 TV broadcasters (28

governmental and 41 commercial).

Currently six nationwide broadcast services are available on the analogue terrestrial television platform: Belarus 1 (coverage is 99.72% of the population), ONT (97.99%), Lad (91.78%), CTV (81.06%), RTR-Belarus (63.94%) and NTV-Belarus (64.2%). DTT platform officially launched on July 1st, 2005, at that time using MPEG-2 in the capital city of Minsk. Adoption of MPEG-4 AVC standard has been approved by the Parliament. As of February 2013, DTT coverage reaches 95.65% of the population. Analogue switch off is planned for completion by 2015. Currently eight broadcast services (Belarus 1, ONT, Belarus 2, CTV, RTR-Belarus, NTV-Belarus, Mir and Belarus 3) are available on the DTT platform; they all are accommodated in a single DTT multiplex.

Although the vast DTT deployment the analogue terrestrial television platform is still the most widespread television delivery platform in the country and is available to 99.64% of the population. Cable TV is available to 50% of the population. An IPTV service was launched in February 2009 and the number of subscribers has been growing. Satellite TV penetration is less than

From the advertising point of view local TV market is rather small for such population as it is in Belarus today. TV advertising spending reached last year a bit more than USD 55 million. It is forecasted that the market size will grow at least 10% this year. More precise data on TV advertising market in the country and on TV channels ratings is not available for now because of the absence of national-wide

ARMENIA: BROADCASTERS ON THE ANALOGUE TERRESTRIAL PLATFORM

| BROADCASTER | TERRITORIAL COVERAGE | POPULATION COVERAGE |
|----------------------|----------------------|---------------------|
| PUBLIC TV OF ARMENIA | 100% | 100% |
| ARMENIAN 2ND CHANNEL | 74.8% | 93.8% |
| ARMENIA TV | 43.2% | 76.7% |
| ALM HOLDING | 43.5% | 69.5% |
| SHANT | 32.4% | 59.1% |

Source: TVRBN, Armenia



BY JULIA ESPÉRANCE, BY EURODATA TV WORLDWIDE



WHAT'S UP IN POLAND?

The Polish TV market is dominated by the public group **TVP** and the private groups **TVN** and **Polsat**. Both public and private channels have seen their market shares decrease further over the past year. The biggest loss was registered by **TVP1** with 2 points decrease compared with 2011, followed by **TVN** with 1.1 point down. In 2012, **TVN** lost its position of second most watched channel, allowing **Polsat** to take the lead.

TV Puls, however, is growing rapidly with a 0.4 point increase in one year. In 2012 its income grew 50% compared to 2011. The channel has also started investing in their own programming.

One of the biggest changes over the past year was the analogue switch off which started in November 2012 and is set to be terminated by the end of July. 22 channels are for now available for free and it has become a real alternative to satellite and cable which have been growing very fast over the past few years. Getting a place on one of three multiplexes was an important stake for TV stations, allowing them to reach a wider audience.

The proliferation of new players, offering a wider offer of content, boosted the TV consumption, which remains above the worldwide and European averages. The figures increased by 1 minute for all individuals and 4 minutes for young adults 16-24, reaching respectively 4 hours and 3 minutes and 1 hour and 58 minutes.

Sport and particularly football, which is usually a huge generator of ratings for the Polish

channels, also impacted the daily viewing time. The past year was an important one, seeing that Poland was the host country for the Euro 2012, a major football competition. As an example, the Poland versus Russia game attracted more than 13 million viewers for a 75.3% share on **TVP1**. It was the best performance since the 2006 Football World Cup. Moreover, **TVP** covered part of the *London Olympic Games*, which brought to the channel good performances last summer.

Fiction, especially local creations, is a key genre in Poland. Long-running series are a safe bet with *L For Love* and *Ranch* being, once again, the most watched programs in 2012, peaking respectively at 7.9 and 7.2 million viewers for the best episode. In terms of successful new series, while **Polsat** launched last September a hit with the series *Przyjaciółki*, **TVN**'s new medical drama *Lekarze* was well-received with a market share of almost 30% up compared to the channel slot average.

Finished series, especially from the United States, also filled the schedules but without meeting the same success as the local fiction. The historical miniseries *Spartacus: Gods of the Arena*, was, however, an exception in posting a premiere market share three times higher than its slot average.

The United States is not the only provider of finished series as showed by the Russian success *Anna German*, the *Mystery of the White Angel*. This biopic of Anna German, a famous Polish singer, ignited ratings on **TVP1**. The series recorded a huge 38.8% share for its premiere (more than 20 points up on the slot) and managed to increase its audience over the episodes with a final reaching a 39.9% share.

On the entertainment side, Polish channels mainly bet on local adaptations of strong brands. This season, **TVN** broke a record with the local version

POLAND: AUDIENCE SHARES OF MAIN CHANNELS – TOTAL DAY



Source: Eurodata TV Worldwide / Relevant partners



L For Love was one of the most watched programs in 2012, peaking at 7.9 million viewers for the best episode on TVP

of *Masterchef*, which gathered for its premiere almost 3 million viewers for a 18.6% share. The ratings increased as the episodes went along, with 4.7 million viewers and 27.2% market share for the final. On **TVP2**, musical talent quest formats are a winning formula with the adaptations of *Clash of the Choirs* and *The Voice of Poland*, which returned respectively for a third and second season.

The development of online content is bound to be one of the new perspectives for the Polish market, as Internet seems to become an increasingly important element of the main networks' strategy. **TVP** has recently launched a portal named vod.tvp.pl that offers viewers clips from series, feature films, documentaries, and archive material on an on-demand basis. Meanwhile, **TVN Group** has been expanding its multi-platform strategy over the years, including its online **TVN Player**, which has experienced a huge success since its launch.

Want to know more about ratings and programming trends in more than 100 territories worldwide.

Order Eurodata TV's "One TV Year in the World" and "International TV Trends" reports: www.eurodatatv.com

Source: Eurodata TV Worldwide / Relevant partners

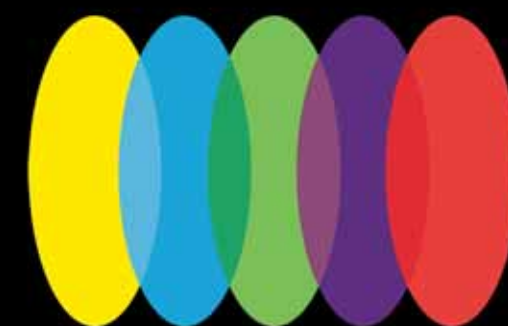


TVN's *Masterchef* gathered in its premiere almost 3 million viewers and 18.6% share

POLAND: AVERAGE DAILY VIEWING TIME - PER INDIVIDUALS



Source: Eurodata TV Worldwide / Relevant partners



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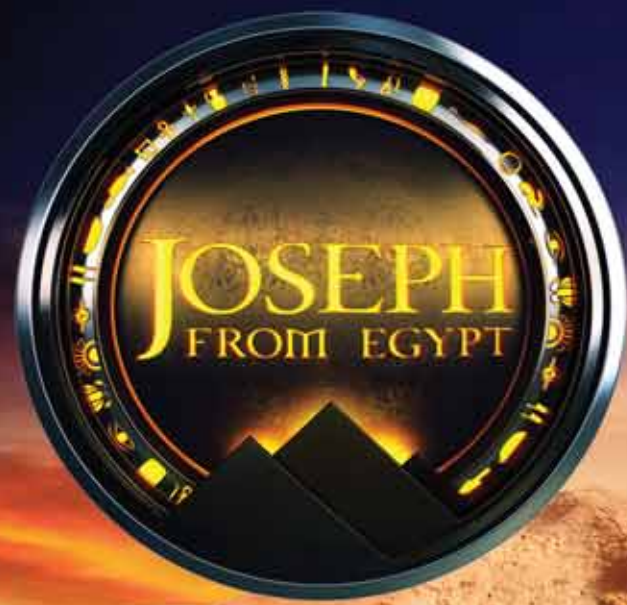
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How Top TV Shows in CEE Perform on Social Media

SocialBakers, leading social media analytics company, released an analysis of selected top rated television shows (selected based on the CME rating from 2012) throughout Poland, Croatia, and the Czech Republic and measured their performance on Facebook. The time range was 20-28 May 2013.

The Polish series *M jak miłość* earned the top spot out of the three countries, with the largest fan base on Facebook. This storyline focuses on three generations of one family, from grandparents to grandchildren, their experiences and antics, and most importantly, love.

The official Facebook page for boasts a whopping 219,474 fans and took fourth place in average post engagement rate with 0.27%. When ranking the top posts by number of interactions, they also took the number one spot, posting a photo from one of the episodes, telling people not to miss their favorite program.

Na dobre i na złe, the Polish medical series, earned second place, both by fan count (125,223) and average post engagement (0.32%).

Croatian series, *MasterChef Hrvatska*, took third place in number of

Facebook fans, totaling 84,369. However, none of their Facebook posts made it to the rankings, neither by interactions nor average engagement.

Ordinace v růžové zahradě 2, the Czech medical series, has the fourth largest fan count on Facebook, with 74,103 fans. Their post settled at third place, at a 0.30% engagement rate, but earned second in number of interactions. The show's most popular photo-post, which received 842 interactions, depicts a mysterious image of one of the surgeons and viewers were encouraged to guess who was behind the mask.

Larin izbor, the Croatian drama, ranked at fifth place with 71,384 fans. They consistently took fifth in the rankings, both throughout average post engagement and post interactions, 0.11% and 194 respectively. Although *Ranczo TVP*, another Polish series, did not make it to the top 5 ranking by number of Facebook fans, but had the most engaging post, at 0.50%.

Ordinace v růžové zahradě 2, the Czech medical series, has the fourth largest fan count on Facebook, with 74,103



The Czech medical series *Ordinace v růžové zahradě 2* has the fourth largest fan count on Facebook with 74,103 fans

TOP 5 TV SHOWS BY NUMBER OF FACEBOOK FANS IN CZECH REPUBLIC, POLAND AND CROATIA

| TV Show, Main Markets | Total Number of Fans | Country |
|-----------------------------|----------------------|---------|
| M jak miłość | 219474 | Poland |
| Na dobre i na złe | 125223 | Poland |
| MasterChef Hrvatska | 84369 | Croatia |
| Ordinace v růžové zahradě 2 | 74103 | Czech |
| Larin izbor | 71384 | Croatia |

Source: SocialBakers

TOP 5 TV SHOWS BY AVERAGE POST ENGAGEMENT RATE IN CZECH REPUBLIC, POLAND AND CROATIA

| TV Show, Main Markets | Total Number of Fans | Average Post Engagement Rate | Country |
|-----------------------------|----------------------|------------------------------|---------|
| Ranczo TVP | 19920 | 0.50% | Poland |
| Na dobre i na złe | 125223 | 0.32% | Poland |
| Ordinace v růžové zahradě 2 | 74103 | 0.30% | Czech |
| M jak miłość | 219474 | 0.27% | Poland |
| Larin izbor | 71384 | 0.11% | Croatia |

Source: SocialBakers

fans. Their post settled at third place, at a 0.30% engagement rate, but earned second in number of interactions. The show's most popular photo-post, which received 842 interactions, depicts a mysterious image of one of the surgeons and viewers were encouraged to guess who was behind the mask.



The Polish medical series *Na dobre i na złe* earned second place, both by fan count (125,223) and average post engagement (0.32%)

TOP 5 POSTS BY NUMBER OF INTERACTIONS IN CZECH REPUBLIC, POLAND AND CROATIA

| TV Show, Main Markets | Total Number of Fans | Top Post's Number of Interactions | Top Post's Engagement Rate | Top Post's Number of Likes | Top Post's Number of Comments | Top Post's Number of Shares | Country |
|-----------------------------|----------------------|-----------------------------------|----------------------------|----------------------------|-------------------------------|-----------------------------|---------|
| M jak miłość | 219474 | 1345 | 0.62% | 1304 | 41 | 0 | Poland |
| Ordinace v růžové zahradě 2 | 74103 | 842 | 1.14% | 484 | 354 | 4 | Czech |
| Na dobre i na złe | 125223 | 796 | 0.64% | 745 | 51 | 0 | Poland |
| Ranczo TVP | 19920 | 270 | 1.39% | 242 | 25 | 3 | Poland |
| Larin izbor | 71384 | 194 | 0.27% | 170 | 23 | 1 | Croatia |

Source: SocialBakers

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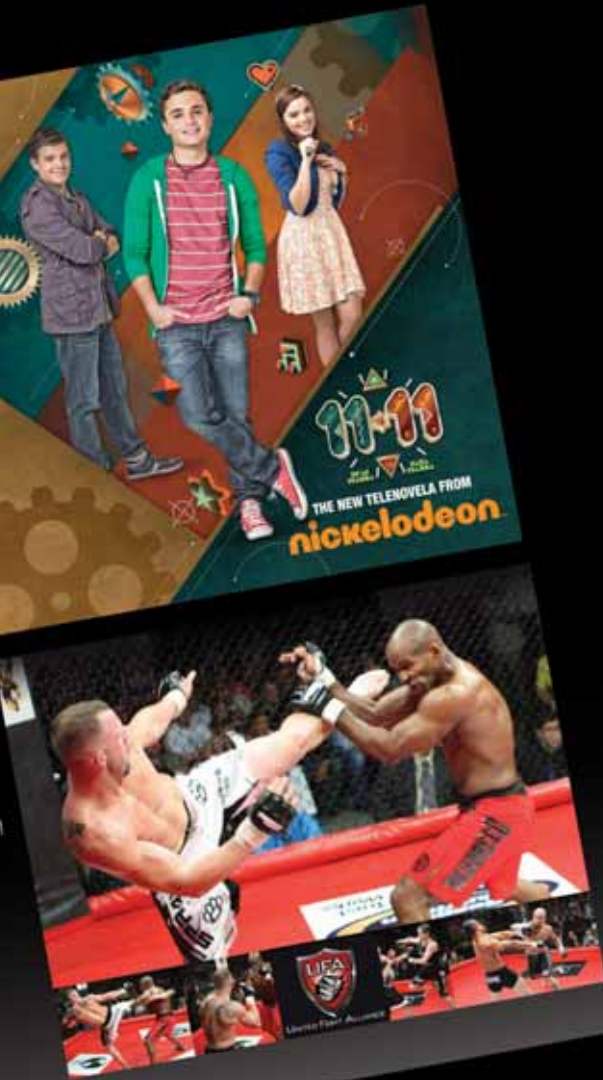
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TELENOVELAS
11.11 EN MI CUADRA NADA CUADRA
75x45'

Kike tiene catorce años y le encantan las herramientas y la tecnología de última generación, pasión que lo ha convertido en un verdadero experto a la hora de inventar, mejorar y reparar gadgets y aparatos mecánicos. Esta afición adquiere particular importancia cuando él y su familia se mudan al departamento 11-B del edificio 11.11, una misteriosa construcción de un arquitecto/inventor/filósofo llamado Don Leonardo. Gracias a las cualidades únicas del edificio, cuando Kike duerme tiene la habilidad de traer a la vida a Enrique, una versión de él mismo con 20 años, que interactúa con el mundo real como cualquier otra persona. Con la ayuda de Enrique, Kike se embarca en una doble misión: encontrar a su madre perdida (una brillante antropóloga que desapareció en el Amazonas) y ganarse el corazón de la bella Sandra, una joven e aspirante actriz y cantante que vive en el mismo edificio. Sandra está interesada en Esteban, el malicioso vecino de quince años que vive en el penthouse del edificio. A primera vista, Esteban es innegablemente adorable. Sin embargo, por detrás de eso, engaña a todos utilizando algunos "recursos secretos" para parecer irresistible.

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Victoria Yarmoshchuck, director of MRM (Ukraine) with Intra Communications (Russia); Lusine Aslamazyan, executive director, Viktor Umnov, producer, Igor Fedorov, director of sales and acquisitions, and Antonina Udolova, senior acquisitions executive



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



MTV Russia: Anastassia Korchagina, head of acquisitions, and Maxim Krivitskiy, program director



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



Michael Sender, COO Zodiak Vostok, Russia; Asia Batayeva, format manager, 1+1 Ukraine; Shakira Hoffmann, sales Red Arrow, Germany; Daria Bolshakova, head of Lega, Zodiak Vostok, Russia



General Producer Center, distribution company for Belarus and Russia: Anastasia Ripinskaya, assistant director, Alexander Mishaov, general producer, and Kristina Pershko, producer



Russian distribution company LYCO: Tatiana Kalimulina and Alexey Rasmagin



MK Distribution, which buys for six free Ukrainian satellite channels: Vladimir Osaulenko, head of digital media development, Katerina Dmitrieva, international sales & acquisitions manager, and Denis Mikheev, general director



Kino TV, Ukraine: Oleksandr Ishchuk, acquisitions, with Ivan Prymakov, head of acquisitions



Malyakto TV, kids channel from Ukraine: Volodymyr Kmetk, managing director with his wife Nina Kmetk, and Khrystyna Kmetk, deputy director



Polcast Television, Poland: Piotr Borys, programming director, and Piotr Lenarczyk, head of programming and acquisitions (borders) and Maria Eugenia Costa, Telefe International



Dorota Stec, from TV Puls



Poland: Alicja Gancarz, acquisitions Film and Ale Kino+, and Joanna Rathe, acquisitions specialist, DOMO + Kuchnia+, at the new media player nc+.



Marta Piotrowska, deputy head of content & scheduling, and Jacek Swoboda, programming executive from Telewizja Silesia (Poland) with Adela Velazco, sales of TV Azteca/Comarex Mexico



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



Adam Urbanowski, acquisition executive from TVN (Poland)



Pawel Jordan, managing director, TVN Turbo, Poland



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



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



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



Dexim Film, Serbia: Ljupka Trifunovic and Dana Petrovic



Jovan Milenkovic, head of Prava I Prevodi, Serbia



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



Andrea Zaras, head of acquisitions at MTVA (Hungary), and Lubomir Nemec, head of controlling and finance of Prorom Media-Trade, a distribution company based in Germany that buys for the Romanian TV market



Sorina Big, head of acquisitions, and Oana Barbulscu, acquisitions coordinator from Pro TV Rumania (borders), and Tibor Forizs, head of program acquisitions and scheduling RTL Klub (Hungary)



Romania: Cristina Raicu, business and administration manager, and Alina Arsene, acquisitions manager of Television Inc. (borders), with Ines Turturica, acquisitions manager of Acasa/ProTV



National TV, Romania: Diana Stanciu, acquisition analyst; Larisa Mohut, acquisition coordinator; Anamaria Diaconu, acquisition manager



Ruxandra Ion, general manager of Mediapro Pictures (Romania) with two actors of its productions, last MIPTV in Cannes: Criss and Vlad



Lorand Polch, programming director, and Bianca Balazs, head of program commissioning, both at MTVA



RTL Klub, Hungary: Gabor Fischer, head of programming; Bernadett Ofalvi, junior acquisitions manager; Anita Kiss, programming coordinator; Szilvia Albert, programming manager



Edina Balogh, acquisitions manager, and Borsany-Gyenes Andras, chief operating officer, both at Sanoma Media, Story 4 & 5, Hungary



Hungary: Ralf Bartoleit, COO, Peter Kiss, programming director, and Gergely Okros, chief creative officer, all from TV2, with Peter Marschall, CEO of Paprika Latino



Hungary: Péter Gonda, managing director from the production company ART Entertainment, and Pukner Brigitta, OP creative producer from Viasar3, the third channel of the market



Cecile Huberts, managing director of distributor Free Way (Hungary) and Zsófia Bodnar, acquisitions executive from SPI International



Cristina Cepi, head of acquisitions of CME Internet Division in Czech Republic, with Ivan Grodetsky, business development manager of Yota, a subscription services in Russia



Chris Philip, CEO at Sierra Engine, with Antoanella Ungureanu, content manager VOYO (new media) Czech Republic, from the CME Group



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



Arthur Yezekyan, president of Shant TV, Armenia



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



Markiza, Slovakia: Ivana Suliková, head of TV Doma, and Silvia Porubská, head of TV



Beatriz Rodríguez, business manager Eastern Europe, and Claudia Šahab, director of Televisa International Europe (third from the left), with Elza Štrapkova, acquisitions manager, and Peter Chalupa, head of acquisitions, both at Markiza, Slovakia



Czech Republic: Lucie Urbánková, acquisitions manager, and Karel Kabat, CEO of the distributor Filmexport Home Video, with Jitka Bodlakova, import executive from Ceska Televize (middle)



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



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



Giorgi Lominadze, head of acquisitions at Rustavi 2, and Giorgi Gachechiladze, producer general of Georgian Public Broadcaster (GPB), both from Georgia (extremes) and Fabrizio Ferrara, Prensario International



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



Eesti Rhuvsringhaaling, acquisitions executive, EER (Estonia)

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



Show TV, Turkey: Bilgen Akgungor, chief editor of interactive services, Feray Turkan Ozkan, head of acquisitions & sales (Turkish content) and Serra Karahan, sales director



Turkey: Can Okan, president of the distributor ITV, with Ahmet Oncan, vice president of the producer Medyavizyon.



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



KTK from Kazakhstan: Talgat Dairbenko, advisor to the GM, Kocheva Yekaterina, marketing director, and Natalya Freiman, head of acquisitions



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



Junita Budvytiene, head of acquisitions, LRT



BTV, Lithuania: Daiva Andrade Gonzalez, director program & acquisitions, Liutauras Elkimavicius, CEO



Alexander Von Moers, International Content Sales at RedBull Media House Austria (center) with Seda Korkut, acquisitions and planning executive, and Gaye Arman Bickacioglu, director of programming and acquisitions at Kanal Turk, Turkey



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



Emanuela Bosco, format sales manager, and Mellisa Pillow, sales director for Europe, Telemundo Internacional (extremes), with Zrinka Jankov, programming schedule & film editor, Nina Mikola, head of acquisitions, George Makris, general advisor to the board, all from Nova Croatia



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



HRT, Croatia: Djelo Hadziselimovic, Head of Foreign Programming, and Ranka Horvat, Editor, Drama & Series



Andreja Sertic, managing director of Media Acquisitions (Croatia) with Tomaz Krzicnik, head of acquisitions ProPlus (Slovenia)



Vassela Dimitrova, Senior Acquisitions manager from bTV Media Group, Bulgaria



Antoni Mangov, deputy programming director Nova (Bulgaria), and Svetlana Vassileva, CEO, Start Up (Bulgaria)



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



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



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



Belma Bajrami-Kastrati, executive director of Smart World TV Kosovo



Leonid Cuali, acquisitions manager of CTC Moldova: Anna Gabrielyan, head of sales of DT Production Russia; Olga Bordeianu, program director, and Serghei Abalin, editor-in-chief of CTC



Jurnal TV, Moldova: Dorina Cojocar, producer, and Nata Albot, general producer



Star, Greece: Eleni Paschalidou, foreign programme manager, Gina Dimitriadis, international acquisitions manager



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



Chello Central Europe: Sarolta Muranty, acquisitions assistant, Eniko Harsanyi, head of business administrations, and Marta Kertesz, TV channel manager



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



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SPECIAL INTERVIEWS | BROADCASTERS & PRODUCERS



KESHET, ISRAEL: 'WE ARE NOT A TYPICAL COMPANY'



Ran Telem, Keshet's VP Programming



Founded in 1993, **Keshet Media Group** is a leading Israeli media player whose core business is free TV with **Channel 2**, the country's major commercial network, who has consistently dominated ratings and market share with a daily TV reach of 62% of household (38% upscale); on prime time share averages at 35% with top programs achieving 45%.

The company is quickly expanding as a leading source of digital content with the web portal **Mako** (third amongst Israeli leading websites), **Mako**

Mobile (largest creator of mobile apps in Israel) and **Screenz** (joint venture with international content and advertising company **The Box**). It also operates **Keshet International** (content distribution & production), **Keshet UK** and, the recently created, **Keshet Australia**.

Keshet Broadcasting is a referent of the "new wave" of Israeli formats that are expanding all across the globe. **Ran Telem**, VP Programming, explains: 'We are not a typical kind of company, as we are active on all fronts of the content business: development, production, emission and international distribution. We have more formats in development than on air: over 20 scripted or non-scripted projects in different stages'.

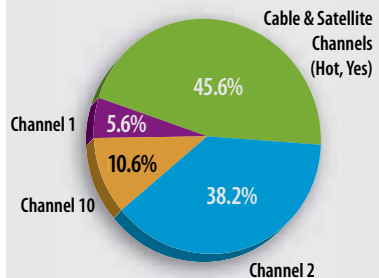
Keshet is famous for having licensed one of the latest successes of the US television: the series *Prisoners of War*, adapted as *Homeland* by **FOX** and sold in several territories. 'The drama *Mice* was premiered in April in Israel and sold for adaptations in USA and Russia, and *The A Word*, a story about a family's painful, was recognized as "Best Drama Of the Year" in Israel', completes **Telem**.

On comedy, *Traffic Light* is in its 4th season and its the highest rated scripted show in Israel, having won the International Emmy. Its in its fourth season on Russia's **CTC**, who adapted locally. In the US, **CBS** has done a pilot of *Mother's Day*, too. Keshet has developed in house entertainment formats like the talent show *Master Class*, the factual entertainment *Fair & Square*, the hidden camera game show, *Deal with it* (local version will be launched in July in **TBC**, USA), *Sure or insure* and the docureality *Remember me*.



Keshet's series *Prisoners of War* was adapted as Showtime's *Homeland* by **FOX** in the US and then sold in several territories

ISRAEL: AUDIENCE MARKET SHARE (2013)



Source: private sources

MEDIAPRO PICTURES: CHANGE, THE ENGINE FOR EVOLUTION

'Like every producer, we pass through various changes but this is the engine for further evolution. In a nutshell, we are adapting on a constant basis to the market and its expectations; keeping up the standards that we've proliferated for some time now regardless of the economic conditions while providing high-quality content to the broadcaster and the audience itself'.

Carmin Ion, Head of Local Entertainment, **MediaPro Pictures**

Romania, comments to **PRENSARIO**: 'We have produced a few TV shows that did their best on their time slots: *Romania's Got Talent* won the leadership during the last season, *Masterchef Romania* has captivated the local audience and we aired the second season of *The Voice*, which again was successful'.

Speaking of the audience preferences, **Ion** remarks: 'Romanians are enchanted by intrigues and stories with strong stakes that appeal to their emotions or to their sense of humor. As for television shows, these indeed work the best locally due to the high- standard production, to the idea of contest and competition and to the novelty brought by each edition'.

Romanian TV market is 'constantly rearranging', says the executive, and adds: 'Now the most visible trend is towards TV shows. In our market, the producers, including us, opt for adapting international franchise that have proved already in reaching generous market share, like *The Voice*, *Got Talent*, *Dancing for a Dream*, etc. We have continued developing and producing fiction programs like the teenagers TV series *A bet with life*, in its 4th season and the most successful comedy in Romania, and *Las Fierbinti*, in its the 3rd season'.



The Voice Romania in its second season

Lastly, **Ion** completes: 'Our strategy is to keep a close look on the expectations and needs of the market. Basically, we run periodically researches that can help us maintain the right track of the production field having at the same time the synergy with the broadcaster. As for the production itself, we have an important slate of projects in development covering both drama and comedy. We learnt to get more and more rigorous with ourselves and with all the projects we're involved in. This surely comes along with keeping up to being the major producer in the country'.



Carmin Ion, Head of Local Entertainment, MediaPro Pictures Romania

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85 episodes // HD



80 episodes // HD

MUJERES DE LUJO



70 episodes // SD

VIVIR CON 10 PASA HASTA EN LAS MEJORES FAMILIAS

105 episodes // SD

SIN ANESTESIA EL AMOR NO TIENE RECETA



100 episodes // SD



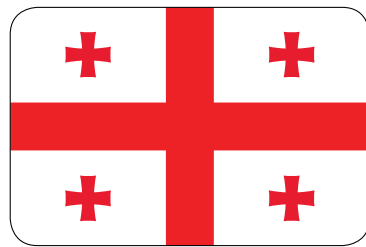
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TeVe de Verdad



SAMANYOLU: A PIONEER IN THE TURKISH MARKET



Hasan Bozaslan, international director

Hasan Bozaslan, international director, **Samanyolu**, describes to PRENSARIO the moment of the channel: 'Drama series is our main pillar of programming with *Torn between two worlds*, *The Team* and *The Hill* as the main three productions on air. Our news channel **Samanyolu Haber** is also number 1 in audience'. According to TNS, **Samanyolu Broadcasting Group** has reached in April 4.55% of market share on prime time, being the 7th broadcaster in Turkey.

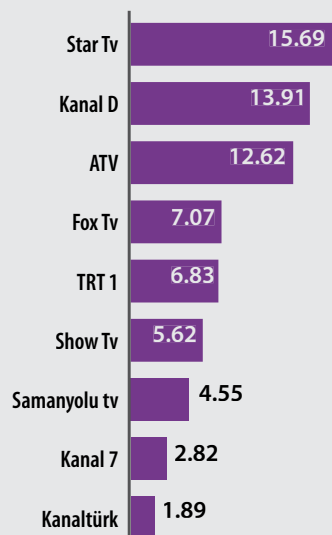
Premiered on April 11th, *The Ottomans* was the brand new series for prime time, sold to **MBC** in Middle East just before the premier, as well as **Nex1** in Iran. 'Market to market we bring more production to license. The production level and number of hours are growing because our relationship with production companies like **Hersyfilm** (*The Ottomans*) or the producer **Birol Güven** (*Marriage School*)', adds.

There are more mystery and police series in the Turkish market. '*The Hill*, in its second season, goes up year to year. Its about the South Easter Turkey suburbs and a tragedy of a village lady, and it worked really good because it represents the reality of those people'.



The Ottomans was launched in April and positioned Samanyolu among the top broadcasters on Turkish prime time

TURKEY: MARKET SHARE, PER CHANNELS – PRIME TIME (APRIL 2013)



Source: TNS

RUSTAVI2, GEORGIA: NEW LOCAL SITCOMS

Founded in 1994, **Rustavi2** is the most popular broadcasting company in Georgia currently reaching 85% of country's population and 30% of market share. **Giorgi Lominadze** manages the programming department and acquisitions of licensing product for **New Channel**, which is the TV station affiliated to **Rustavi2**.

He explains to PRENSARIO: 'We are a pioneer broadcaster in the country. Top shows on air are the news program *Courier*, the musical program *Star of Georgia*, the non-political talk shows *Profile* and *Nanuka's Show*. Also the analytical shows *Position*, *P.S.* and *Business Courier*, the entertainment shows *Georgia's Got Talent*, *Wheel Of Fortune*, the comedy shows *Vano's Show* and *Comedy Show*, as well as the *UEFA Champion's League*, the game show *What? Where? When?* and the series *My Wife's Friends*.

Continues **Lominadze**: 'The percentage of local product is 70% vs. ready made consisting of 30% of the grid. Since the new season **Rustavi2** is going to suggest our audience local sitcoms, one international entertainment show and two local comedy shows, too'.

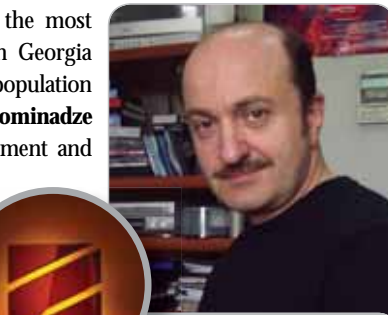
'We are looking for international entertainment and game shows, as well as formats, series, animation, factual programs, sport events and awards, etc. Generally, international distributors have some new programs and shows. We have a successful collaboration with companies such as **Paramount**, **Disney**, **Warner**, **Fox** and **Sony**, as well as **Lionsgate**, **BBC**, **Endemol**, **FremantleMedia**, **RAI**, **Televisa**, **Telemundo**, **Telefe** and **Venevision**

Endemol, among many others.

'Georgian TV market main trend is local production — series, sitcoms, entertainment programs talk-shows, factual programs, animation, sport programs. Mentioned above are the most demanded contents from our audience.

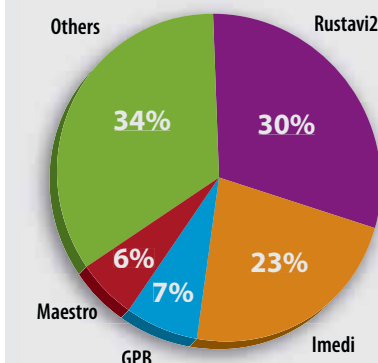


The musical show *Star of Georgia* is one of the most acclaimed programs on Rustavi2



Giorgi Lominadze, head of acquisitions

GEORGIA: MARKET SHARE, PER MARKETS - ALL DAY (JUNE 2013)



Source: TV MR GE-Nielsen

completes **Lominadze**.



Left on the Shelf

THREE SISTERS, HAUNTED BY MEMORIES OF THEIR DEAD MOTHER, WILL TRY TO BREAK THE SPELL OF BAD LOVE AFFAIRS THAT SEEMS TO BE ON THEM.

Dramatic Comedy



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Comedy

COMPULSIVES TIMES

AN ECLECTIC GROUP OF PATIENTS SHARE A DAILY THERAPY SESSION, IN WHICH THEY EXPRESS ALL THEIR SUFFERING. HOWEVER, THE ATTENDING PHYSICIANS ALSO SUFFER AND STRUGGLE AGAINST THEIR "OWN GHOSTS".

Drama



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Pol-ka
PRODUCTIONS

THE KEY TALENTS OF ENDEMOL CEE



Marina Williams, CEO of Central and Eastern Europe, Endemol

'Despite the recent economic down turn in CEE, we strongly believe in the future growth of the emerging territories. The advertising market has been posting growth in Russia in 2012 vs. 2011, which is a great vote of confidence in the region as advertising revenue in some major western European markets have declined', summarizes to PRENSARIO **Marina Williams**, CEO of Central and Eastern Europe, **Endemol**.

'We have set up wholly owned production companies in Poland and Turkey. In Russia/CIS we have a joint company with **Weit Media**

working with local entrepreneur and producer **Timur Weinstein** (**Endemol** owns 51% of the company), where we decided to partner with an experienced local producer and our business is 50-50% between non scripted and scripted. While in other markets we are still predominantly a scripted producer'.

'Our strong partner in Balkans has been the producer **Emotion**, who has been producing *Big Brother* now for many seasons. We produce high budget shows such as *Big Brother* and we produce smaller life style shows like *SnogMarryAvoid*. Our key talent is to show initiative in our propositions and local developments: in Russia, 50% of our content is locally developed scripted product. We also match quality with the best price'.

'*Your Face Sounds Familiar* (**Endemol Spain**) is taking the world audiences by storm: it has been a huge hit from small markets like Estonia to large markets like Russia. It has become absolute #1 in all audiences. In Russia, **Channel 1** doubled its average audience share achieving above 30%. *Big Brother* continues to be very strong in the Balkans where it has been very successful on such channels as **Nova (Viasat)** in Bulgaria and **B92** Serbia'.

'*The Money Drop* has been very successful on **Rossiy 1**, Russia; **TV7** Kazakhstan; **TVP** Poland; **Show TV** Turkey and many others. Recently we have added Slovenia, Macedonia and Georgia. We have produced over 250 episodes of *The Money Drop* in our region. *My Kitchen Rules*, a success in Lithuania, is a reality show that has potential

to roll into new territories and we are also pleased with game show *Pointless*, on **RTL** in Croatia. This format was created in the UK and is a long running hit series for **BBC One**'.

Lastly, **Williams** complete: 'We are looking into expanding further into scripted production in Turkey and build synergies with other markets of CEE and Middle East where Turkish series has been very popular. In relation to new production companies, we are always very opportunistic and once we feel that there is enough volume of business to justify a local operational company- we will be there'.



The Money Drop has been very successful on Rossiya 1 Russia. Over 250 episodes were produced in the CEE region

PAPRIKA LATINO: SMART SOLUTIONS

Founded in 2004, **Paprika Latino** was acquired in June 2012 by **MTG Studios, Modern Time Group** content division, who took 53% of its shares. **Peter Marschall**, CEO, explains: 'We entered the Czech market with our first commission for **Prima TV**. We are opening up our Baltic operations, bringing fiction to Hungary and we expect more aggressive growth in our Latin American local operation in the near future'.



Peter Marschall, CEO

'In Hungary, *The Voice* highest share peaked at 38.1%, which is more than double the channel average of **TV2 (Pro7Sat1)**. During first days of June, *Fish on the Cake* broke its record with a stunning 6% share on **Super TV2**, which has a channel average of about 1.4%. This mean having quadrupling the channel average, showing an exceptional power of the brand and the production'.

'In Romania, *The Wife Swap* is one of the best rated TV shows on **Prima TV**. Over the years, we made it a #1 show and now is reaching in spring 2013 its 17th season, broadcast on Sunday at 8.30pm. *Fish on the Cake* is in its 10th season and its still on the top of local shows. Every episode is at least doubling the average share, but most of the episodes exceed channel's average even with 300%'.

'The show launch was a similar success on **Nova** in Bulgaria in 2011, broadcast at 8pm reached an average rating of 28% compared to the channel average of 18% and on **Viasat3** Slovenia in 2011, its debut season reached a 9.2%'.

The most successful show produced in Serbia was *Farmer Wants a Wife* with three seasons in prime time on **TV PRVA**. 'The show outperformed the channel average by 14 to 35%, finishing among the Top 3 rated shows of the week. It reached an amazing 19.6% average compared to the channel average of 6.6%. On **Planet TV** in 2012, *Paradise Hotel* doubled the channel average with 8.4% share, while *Dragon's Den* was a similar success with 3.2% share compared to 2.2% channel average'.

'When budget are cut, we need to come up with smart solutions to keep the good results with lower costs. We can offer one of the lowest costs



Fish on the Cake is a success all across CEE markets



with good quality in the Baltic region, very near to Scandinavia. And with our footprint in Czech Republic, we have access to offer services for the fiction market from one of the most developed service location

Europe', completes **Marschall**.

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NICOLÁS SMIRNOFF AND FABRICIO FERRARA, FROM LOS ANGELES, USA

LA SCREENINGS 2013: GET SUPER OR DYSFUNCTIONAL

LA
screenings.org

The LA Screenings, the event where during ten days the Hollywood Studios introduce their new seasons of TV series and films to worldwide broadcasters, took place last month in Los Angeles, USA. About 1100 international buyers attended the show, quite the same volume or a bit less people from last year. Though, content business is up.

The Hollywood Studios screened at the market much more scripted product than in 2012. Nowadays, not only the free TV, but also the pay TV and the digital platforms, are producing original fictional content, to make the difference with their customers. Due to that, most of the studios had record figures of TV series showed, and there were more dramas than comedies, comparing to last year.

The genre trends got very clear, along the screenings: there were a lot of super natural or SciFi plots on dramas, and dysfunctional families on comedies, more than what it is usual for a top trendy option. Also, there was a good amount of police/procedural stories, but in most of the cases with a twist: a blind cop, in a wheel chair, etc. There were quite less

medical dramas than in the past.

As the U.S. market is better from global crisis, the studios produced more risky product, not so conventional. This has provided advantages and disadvantages, as some studios have offered 'freak' screenings, some buyers said. They asked for more series about common people with usual problems. Also, the *serialized* TV series are back —when the inside stories last two-three episodes— against the TV series where the stories start and end per every chapter.

Another important tip is that very popular Theatrical stars —actors, directors and producers— are moving to TV series: **Robin Williams, John Malkovich, Christian Slater, Steven Spielberg, J.J. Abrams**, etc. This is very good for TV business.

One of the top screened series, according to the buyers consulted by PRENSARIO, was *Under the Dome*, from CBS, with a high-impact plot and visual effects. But **Disney** was the studio that most hit the market, with the new brands added to its catalogue: **Marvel, Lucas Film** —with *Star Wars* promising a huge theatrical release every year from 2015— and the live-action division of **Dreamworks**. Also, both **ABC Family** and **ABC Studios** are very prolific in valued production series.

The Blacklist and *Michael J. Fox Show* in Sony, *Crisis* and *The Americans* in Fox, *Ironside* and *About a Boy* in NBCUniversal, *Hostages* (the new 24 alike series) in Warner, *Resurrection* and *Marvel's Agents of SHIELD* in Disney, *Saint George* in Lionsgate, are other preferred



Thomas Lasarzik, VP Acquisitions, and Ruediger Boess, SVP Acquisitions, ProSiebenSat Media AG (Germany); Daniela Bishara, sales for German-Speaking territories, Disney Media Distribution; Claude Schmit, CEO of RTL Germany; and Roman Rinner, acquisitions of ATV, Austria



Craig Morris, head of scheduling, and Katie Keenan, head of acquisitions, at Channel Five (UK), with Jeff Ford, content director, Damian O'Hara, head of acquisitions, and Aolfe Francis, head of scheduling, the three from TV3 Ireland

series by the buyers. About services, **Fox** has innovated with **FoxFast app**, an exclusive web service for its broadcaster customers, to get online information and marketing materials about the licensed products.

Latin America, as it usual happens, was one of the regions with more buyers attending, as it also had an independent market with selling suites the days before the *major* screenings, at the Hyatt Recency hotel in Century City. The region brought about 300 buyers. From the rest of the world, especially Europe, the traditional broadcasters reduced their attendance, but they were complemented by the rise of new media players. Hollywood Studios' executives told PRENSARIO they expect to generate better and broader deals from last year, all in all.

New media *boom* at LA Screenings? It was not so active as in other content events at Natpe Miami or Mipcom, where the online titans —**Microsoft**,



Emilia Ab Rahim, brand manager ntv7 & 8TV; Cheng Imm, general manager TV3, Ahmad Izham Omar, CEO of Media Prima, and Airin Zainul, general manager ntv7 & 8TV, all of them from Malaysia; with Macie Imperial, head of program, and Leng Raymundo, VP Acquisitions, distribution & DTT channels, both from ABS-CBN The Philippines; and Roxanne Barcelona, VP GMA, The Philippines



NBCUniversal brought a real 'bubbleship' from Tom Cruise's SciFi film *Oblivion*, to its screening: Enrique Juárez, SVP Latin America, with Mexican Televisa buyers: Jaime Aguilar-Alvarez, Claudia Silva, José Luis Romero (formats) Elsa Vizcarra and Adrián Echegoyen; also, Karina and Ana Lydia Montoya, from Televisa Networks (pay TV channels of the group)



TV Joj, Slovakia: Erika Tothova, head of acquisitions, Eva Dzuorocinova, acquisitions



UAE: Rupert Morling, senior channel manager, MBC Action; Kamal Nassif, director new media, e-vision; Khulud Abu-Homos, SVP programming & creative service, OSN; Lina Matta, channel manager, MBC2, MBC4 y MBC Max; Tareq Falah Al Ibrahim, channel manager MBC Drama & coordinator manager, MBC 1; and Fadi Ismail, group general manager, MBC



CBC Radio-Canada: André Biraud, head of drama and feature films, Marie Sylvie Lafeyvre, head of acquisitions, and Louise Lantagne, general director, television

Amazon, Google/YouTube, etc. — had entered the market, among many other new services. But during the screenings days, the managing of the VOD and digital windows, was a hot topic.

CENTRAL & EASTERN EUROPE

Do you want a Central & Eastern Europe view of LA Screenings? **Tibor Forizs**, head of content acquisitions and scheduling at **RTL Klub**, the leading free TV broadcaster in Hungary, comments: 'We've seen a superior quality of shows from last year, both in dramas and sitcoms. Most of the studios had at least one or two shows good for us, in both genres. We are looking for options both for free TV and cable, but especially for free TV in prime time'.

'The bad side? Last year we faced the problem that the shows were too devoted to the American domestic market, and not so much for the European territories. This time the situation is better although we couldn't find good procedural shows that work very well in our country. Also serialized shows are returning, while we prefer series with self-contained episodes; ongoing shows like *CSI*, *Criminal Minds*, *The Mentalist*, *Bones*, *Castle*, are still performing very well in Hungary'.

'The Screenings I liked the most was at **Warner Bros.**, especially *Hostages*. Personally I also liked the **Disney** slate, with series such as *Intelligence*, *Resurrection*, or *Betrayal*, the latter looks similar to a more sophisticated telenovela. *The Blacklist* at **Sony**, *Under the Dome* at



Dorothée Horps, acquisitions director, Orange (France) and Alix Goldschmidt, VP Acquisitions of Films & TV Programs, Orange (UK); Didier Ghez, VP International New Media TV Distribution, NBCUniversal, with Guillaume Jouhet and Peggy Charley, from the boutique films and series channels Orange Cinema Series (France)



Nordic buyers: Goran Danasten, head of fiction, and Stephen Mowbray, head of acquisitions at SVT Sweden (borders) with Gudrun Helga Jonasdóttir, head of acquisitions at RUV (national TV of Iceland)

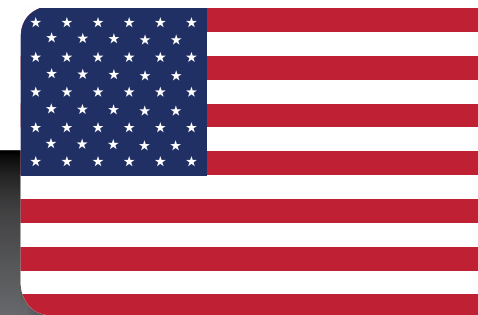


Programming & acquisitions from 3+ TV Switzerland: Dominique Aiseo, Christina Goell, Ree Jamm, Karin Schraoer and Alexander Koenig



Fox: Patricia Daujotas, VP Programming, Fox International Channels Latin America; Orlando Jones of *Sleepy Hollow*, and wife Jacqueline Staph; Gabriela Gil, acquisitions Fox International Channels Latin America; Elie Wahba, SVP of Latin America & Caribbean, Twentieth Century Fox Television Distribution; and writer and executive producer of *Sleepy Hollow*, Roberto Orci

CBS were also quite interesting projects and **Fox** had a much better screening compared to last year... In general though, there was nothing that you could say: 'Well, this is the groundbreaking hit of the year'. Hollywood continues to produce quality shows, but it has to try new genres or plot formulas'.



Spain: Julian Rodríguez Montero and Felipe Pontón, acquisitions of Telefonica Digital, with Ignacio Corrales, president, and Ignacio Giménez, acquisitions manager of Radiotelevisión Española (RTVE)



Portugal: Helena Torres, responsible for Drama and Cinema, and Hugo Andrade, programming director at RTP (extremes), with Bruno de Lima Santos, programming director, and Margarida Pereira, head of acquisitions, both at TVI



Star TV, India: Dharmesh Gandhi, content strategist, Nicole Sinclair, sales for Asia at CBS; Akhil Mehra, commercial; Kevin Vaz, English cluster; and Rasika Tyagi, content for English channels



More Asian buyers: Dave Lee; Gae Yong, Fox Channels Korea; Shin Bong Kang, Disney Korea; Sun Moon, Fox Asia; and Josh Ha, from Disney Korea

TELEVISA: STRONG BET ON LIGHT ENTERTAINMENT FORMATS



Ricardo Ehram, general director of Televisa International Europe, Africa & Asia

appointed **Ricardo Ehram**, general director for Europe, Asia and Africa as the key inside of the international division to command the company's expansion on the light entertainment format business.

Televisa International (Mexico) is strongly betting on formats, after some successful alliances, such as the joint venture with the Spanish company **La Competencia**, announced at the beginning of this year. The company has recently

'The good results of *Everybody and their brother* after MIPTV, where it was optioned to **RAI Italy** and to more than 20 countries, is the beginning of the reinforcement of the format area. Televisa will generate and exploit more owned formats together with other strategic partners throughout the world, explains **Ehram** to PENSARIO.

Other top formats are *Angry Words* and *The Dating Office*, which had a good reception at MIPTV and LA Screenings last month. 'The former one was optioned in France and a pilot will be produced in the near future. The plan is to create/distribute between 4 to 8 formats annually,' adds the executive.

About Natpe Budapest, he continues: 'We are doing extremely well in Central and Eastern Europe on both, ready made and formats. There



Everybody and their brother had a tremendous MIPTV, being optioned in many countries throughout the world

are new clients buying our content, even in a crisis context. The channels are not producing fiction, so those slots go to entertainment - and we cover that business as well.'

On behalf of telenovelas, a big release for the show is *The Tempest*, which begun in Mexico in May and its considered 'perfect for the region'. Another big news is that **Televisa** will most probably partner with a local company to develop the first fiction series ever produced here. 'We knew this moment would come and did it in a great moment of the company in the CEE region,' completes **Ehram**.

ARMOZA: CONNECTED, ASIA & EUROPE

ZEETV, India's the second-largest media and entertainment company has commissioned 65 episodes of factual format *Connected* from **Armoza Formats** (Israel), while in Estonia, a first season has been commissioned by **Kanal 2**, the biggest commercial channel in the country, for a 30 episode run which has now started production. The format is a self-filmed journey of five women/men who don't know each other, but whose lives become connected thematically.

In Israel, a fifth season is now in production and will launch this summer. The series, produced by **KODA** has set records of viewership

for **HOTTV**, and has twice earned the Best Docu-Reality prize at Israel's TV Academy Awards. A second season has just ended airing in Finland on **MTV's SUB** channel and, previously, was aired in Denmark (**DR2**), where it won the best observational documentary series for 2012, in Norway (**TV Norge - FEM**), Netherlands (**NED3**) and Ukraine (**1+1**), among others.

VIEWING BOX M09



Connected

SMILEHOOD: TEEN SERIES, 360 DEVELOPMENT



Silvana D'Angelo

Smilehood (Argentina) is a young company working on sales and license of top franchises from Latin America to the world. Through **Silvana D'Angelo**, sales director, the company is commercializing own licenses of both, animation and teen fiction.

'We are an open-minded company with positive and very active executives. After the production of our star product, *Plim Plim*, we created a wholly new are denominated Smilehood Media dedicated to distribute and produce contents for all platforms. *Plim Plim* live show debuted this month in Argentina and,

since 2014, it will begin the Latin American tour', says **D'Angelo**.

'On the other hand, we are working with the family comedy *Segun Roxi*, heavily required in both, its web version —through the big success in social media in Argentina— and its format for TV. Its a highly innovative idea, fresh and universal in the most demanded genre nowadays', continues the executive.

Another project is *Wake Up*, a 26-episodes series produced by **OnceLoops** (Argentina), financed by **Coca Cola** and that will be premiered on **E! Entertainment Television** in Latin America in November. 'We are looking for this non-traditional alliances with key players from inside (broadcasters, producers), and outside of our industry (brands)', adds

D'Angelo.

'We want to be different and bring to the market original ideas with this kind of supports. Apart from the Media division, we have our licensing area, which is also very successful. Both are generating a company that can provide contents on a 360° way with ancillary business included.'

Completes **D'Angelo**: 'We try to transmit positive values: there is a "way of business" we respect and has to do with human values, to the people, environment, etc. We want our



Segun Roxi, family comedy

wake up!
with no make up

A collage of photos of people, including a woman labeled 'Abril', a man labeled 'Marco', and a woman labeled 'Leticia'.

Segun Roxi

Roxi es una madre que trabaja, y por lo tanto una amiga sin tiempo, una esposa sin anillo y una mujer desbordada. Cargada de bolsos, culpas y planes, está siempre en busca de su eje frente a las voces enloquecedoras de la gran ciudad a las que divide entre aliados: su empleada doméstica, y enemigos: las mamis del jardín, la maestra, los pediatras, familiares, comerciantes y opinólogos compulsivos que llenan su vacío con técnicas y recetas. **SEGUN ROXY** es una comedia sobre una madre políticamente incorrecta en una misión por salir ilesa de la devastadora experiencia de la maternidad. **Segun Roxi** Sitcom 26 x 1 tv hour. Productora: La Maldita.

plim plim

WAKE UP! es una ambiciosa serie musical que aborda el universo de los jóvenes proponiendo una temática diferente a lo que se ofreció hasta hoy. Una generación que hoy busca encontrar su identidad, atravesando la etapa mas desafiante se su vida: el paso de niño a adulto. Una etapa en la cual se plantea la búsqueda de sentido de la vida y el camino a seguir hacia la felicidad y los sueños. Wake Up es un despertar a la aceptación de que lo único que verdaderamente tenemos, es lo que "somos", la importancia de tener un sueño por delante e ir hacia este con pasión venciendo todos los obstáculos. Nunca es tarde para empezar. Suban el volumen, y vamos a donde quieren llegar!!! **Wake Up!** Serie juvenil musical. Primer temporada 13 x 1 h tv. Productora: Once-loops, Coca Cola TV y Warner Channel.

Plim Plim, un Héroe del corazón es una serie animada protagonizada por un niño de 5 años amigable, valiente y entusiasta, que combina los personajes de payaso, héroe y mago, mientras acompaña a sus amigos y enseña con el ejemplo. La serie destaca en sus capítulos temáticas como la honestidad, la generosidad, la solidaridad, la amistad y la responsabilidad. En la actualidad, se puede ver a través de la señal Disney Junior y Discovery Familia en USA. **Plim Plim Animation**. Primer temporada 20 eps x 7 minutos. Segunda temporada 20x7 eps. Tercer temporada 20x7 eps. Productora: Smilehood.

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ALL3MEDIA: CONSTRUCTED REALITY ON TOP

All3Media International (UK) is one of the UK's leading independent television programming distributors, offering quality programming to broadcasters and media



Day & Night, constructed reality are strong in CEE

platforms around the world. Its catalogue of approximately 5,500 active hours covers all major genres, with a focus on drama, factual and entertainment programming and formats.

At Natpe Budapest, **Stephen Driscoll**, SVP International Sales and **Sabrina Duget**, VP Format Sales, highlights the constructed reality slate from **Filmpool** (Germany) with *Day & Night*, *Just Help Me!* *Cases of Doubt*, among others, some of which have been extremely successful in CEE. Actually, the company organizes a breakfast on Wednesday 26th at 8.30am at ParisBudapest Bistro at the Sofitel, where **RTL Klub** exposes a case of study of this format in Hungary.

On the other hand, *Foyle's War* (3x'120 + 22x120) is a drama series that happens in the post-war era, where a man must gather



Stephen Driscoll, SVP International Sales

intelligence to protect the nation. *Gogglebox* is an audacious factual entertainment format that captures first-hand reactions to the week's television broadcasts.

The Inside Job (4x'60) is another factual entertainment format where job applicants undergo the ultimate performance assessment; unaware that amongst them is a company mole, planted to spy on their every move. And *Caligula with Mary Beard* ('60) is a factual program where a woman investigates the scandalous reign of Roman Emperor Caligula, who achieved infamy through his predilection for cruelty, excess and debauchery.

MEDIABIZ: FORMAT AND LATIN TALENT

MediaBiz (Argentina) is becoming an important player as a provider of fiction formats, mainly from the Argentinean production company **Pol-ka**, but also from the authors-writers-creators pool the company manages for the international market.

The last big news is the adaptation of the fiction format *Killer Women* in the US, which will be premiered on fall this year. It was an alliance between the talent agency **Latin WE** (**Luis Balager** and **Sofia Bergara**)

and **Electus** (**Ben Silverman**) that produced the series for ABC, whose pilot cost USD 6 million. Balaguer, Vergara and Silverman are executive producers of the project.

Alex Lagomarsino, CEO, explains: 'We continue to propose specific projects for international broadcasters with renewed authors and director from Latin America: **Ricardo Rodriguez**, **Ramiro San Honorio**, **Marcelo Cabrera**, **Leonardo Bechini**, **Oscar Tabernisse**, **Patricia Maldonado** and **Jorge Nisco**. Our objective is to offer this talent to the worldwide TV channels and producers'.

SOMOS, MAKING FOCUS ON CEE



Francisco Villanueva, head of sales

Somos Distribution (USA) it is an important independent distributor that is growing fast in the international market, offering a good variety of products: action TV series, sports, teen series, factual, telenovela scripts, etc. It is attending Natpe

Budapest with a suite for the first time, and wants to develop strong business in Central & Eastern Europe.

Francisco Villanueva, head of international sales: 'We are attending with booths or suites the most important events of the content calendar, as MIPTV and Mipcom, Natpe Miami, LA Screenings, now Natpe Budapest and ATF Asia, among others. In the United States we are an important group of production and

distribution of content, not only at the free TV business but also Theatrical, pay TV, Internet and digital platforms, Music, live shows... we develop business 360°'.

'We have important international product to distribute in the U.S. Hispanic and Latin America, as Turkish TV Series from **ATV**, formats from **Sparx**, **Mega TV USA**, etc. To distribute in the worldwide market and in CEE in particular, we have for instance *11 11* (75x45') a teen telenovela that is an original co-production between **Nickelodeon** and **Somos Productions**. It is a great product for all kinds of broadcasters'.

'Also, we have a wide offer of scripts and finished products of popular and internationally successful telenovelas, including acclaimed writers ready for remakes; *Mercedes Salazar*, a popular jeweler that teaches the history, beauty and power of gems (30x45'); and *Family Rights* (30x45') about a 60 years old woman who has to work back as a therapist, while takes care of her two teen sons'.

VIEWING BOX M02



11 11, co-produced between Somos Productions and Nickelodeon

and *Family Rights* (30x45') about a 60 years old woman who has to work back as a therapist, while takes care of her two teen sons'.

The sports offer includes: *MMA*, the most popular full contact sport that combines all martial arts in the cage; *Mexican Box*, the timeless sport in furious fights; and *Lucha Libre*, the widely popular wrestling matches with its colorful characters.

'Another very good option is *G.A.U.L.A.* (45x30) about a Colombian elite police unit focused on kidnapping stories, with real footage, research and emotions. We are open also to discuss new content opportunities (production, distribution, special alliances) with Central & Eastern Europe players'.

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DIRECTOR
Jorge Nisco



SCRIPTWRITER
Ricardo Rodriguez



SCRIPTWRITER
Ramiro San Honorio



Talent is the key



Marcelo Cabrera
SCRIPTWRITER



Oscar Tabernisse
SCRIPTWRITER



Leo Bechini
SCRIPTWRITER

TELEMUNDO STRENGTHENS ITS POSITION IN CEE



Melissa Pillow, sales director, Central and Eastern Europe

Telemundo Internacional (USA) arrives to Natpe Budapest with great news about titles being sold in the region. **Melissa Pillow**, sales director, Central and Eastern Europe, explains: 'Currently, *Maid in Manhattan*—co-produced with **Sony**—is on air in Albania, Montenegro and Serbia, and *Fearless Heart* is also on air in Albania, Hungary, Georgia and on pan regional satellite covering the entire CIS'.

'Our classic titles *Precious Rose* is on air in Armenia, *Acasa* Romania and in Estonia, where the telenovela is first in its time slot among adults 18 to 49; it will launch very soon in Slovenia. *Hidden Passion* is airing in Bulgaria, Slovakia and Hungary; *Marina* in Hungary the Czech Republic; *Aurora* in Macedonia and Bulgaria;

and *Paula for Love or Money* in Bosnia, Serbia, Slovenia and Montenegro. Two of our newest titles, *Forbidden Love* and *Bittersweet*, have just launched in Georgia.'

At Natpe Budapest, **Pillow** highlights: '*The Return* (120x'60) is to-date our most successful telenovela at 9pm, and has competed with English speaking networks in US, while *The Lord of the Skies* (65x'60) —co-produced with **Caracol TV**—is about the most important Mexican lord of drugs, based on a true story; and *Forbidden Love* (120x'60), the Latin American version of the Turkish series of the same name.'

From **TVN** (Chile), it brings the comedy *Better off Single* (100x'60) that shows a group of men that are fed up with their lives, break away and come together to live the single life in one house. And *Dama y Obrero* —to air shortly in US—, two strangers who are bound by their feelings for each other.

'Buyers are normally not



The Lord of the Skies, co-produced with Caracol TV

Better off Single, from TVN Chile

interested in comedy. Even though some may do very well, they are considered risky if they are not local comedy series. But drama is still in high demand, especially in series, as there is little production of that genre, locally in the CEE. There is a lot of curiosity when it comes to our entertainment formats *12 Hearts* and *My Teen Dream*. Scripted realities are in high demand as well however they are typically locally produced'. 'Telenovelas in these markets are facing ever increasing competition by locally produced series as well as soaps and series from a range of countries such as India, Germany, Korea, Turkey, Croatia and far east Asia. However, as cable and satellite channels launch continuously and digital terrestrial television is now well established in many CEE territories, Spanish-language telenovelas are still popular and are finding their way onto new female-targeted niche channels', completes **Pillow**.



The Brazil Challenges, about Brazil

Albuquerque, president, and **Beto Ribeiro**, director: 'With **NatGeo** we have produced *Police Operation*, which has been a great audience success with 35% of market share, showing the real police in Sao Paulo'.

'For **A+E** we've done really well with *Criminal Investigation*. We have co-produced two comedies for **TBS/Turner**: *The Bitter* and *I hate my boss*. *Los Hermanos Lost in Brazil* is a reality about and Uruguayan, a Paraguayan and an Argentinean that must go through the Brazilian territory in 30 days in a VW van of the '70'.

'We do business in almost all Latin America, as well as South Korea, UAE, Portugal, Spain, Ukraine, Finland, among others. We assist regularly to MIPTV, MIPCOM, and we have participated in Discop West Asia, Natpe Budapest and ATF, increasing our international footprint', add **Albuquerque** and **Ribeiro**.

The company has over 100 employees and it has a rich portfolio of more than 15 new productions for prime time for the international market. Other highlighted products are the suspense series *Way Beyond Fear* (8x'45); the action miniseries *Elite Police Force* (4x'45); the sitcom *The C&D's*, about the reality shows; *Rescue Brazil*, about firefighters, co-produced with **Turner**.

The reality *Homicide Division: A practical guide to plastic surgery* and *Medical Specials*, for **Home & Health** de **Discovery Channel**; the cooking show *Chef's Favorite choice* and *The Brazil Challenges*, to know the unknown places in Brazil, done with **Turner**. Lastly, the variety shows *Off The Records* and *Casting*.

SUITE #121

SUITE #114

CINEFLIX: GREAT EXPECTATIONS ON CEE

Cineflix Rights (Canada) attends Natpe Budapest with great expectations as it is launching a brand-news slate with a variety of genres. **Lucy Rawson** is the sales executive in charge of this show.

Filmed on location in Dallas and Washington D.C., *The Day Kennedy Died* ('60) is an exclusive one-hour special commemorating the 50th anniversary of JFK's assassination. Those who were there share their first-hand account of



The one hour special *The Day Kennedy Died*

the final hours immediately leading up to his untimely death.

Other top program on company's catalogue is *Outback Rangers* (4x'60 or 10x'30) that follows the armed rangers who protect Kakadu. Travelling by airboats, quad bikes, and choppers, this fearless group of individuals tackles everything from emergency rescues and wildlife poachers, to feral animals. It's a high-risk job that involves a balancing act of preservation and control across an unforgiving land.

Border Security Canada consists in two seasons (39x'30): every day, twenty thousand passengers request entry into Canada. While most experience the usual uneasiness that comes with crossing through immigration and customs, others have more legitimate reasons to feel nervous. The show offers a revealing look at life on the front lines

of national security following Canadian border officers as they intercept suspicious characters and contraband from around the world in an effort to keep their borders secure.

Around The Next Bend (12x'30) follows two young adventurers as they travel halfway around the world to embark on a 2,500 km rafting expedition down the mystic Ganges River in India. Lastly, featuring stories of life and death, *Trauma Investigators* (4x'60) shows an elite team of doctors as they diagnose and treat patients at one of the UK's leading trauma centers. Every case is a new mystery waiting to be solved and cutting-edge 3D graphics give viewers a rare insider's perspective of what's at stake.



Lucy Rawson, Sales Executive

FREMANTLEMEDIA: TATTOO NIGHTMARES

Tattoo Nightmares, a **495 Production** for **Spike TV** (series 1: 8x'30, series 2: 26x'30) is a show about real people with really bad tattoos, ranging from hilarious to downright disturbing. Viewers will watch as they seek the help of three of the best cover-up artists in the business

to fix them: Tommy Helm, Big Gus and Jasmine Rodriguez. The stakes are high as the regretful clients go under the tattoo gun a second time to see if the artists at *Tattoo Nightmares* can work a miracle and turn their disasterpieces into masterpieces.



MEDIALAND: BIG INDEPENDENT PRODUCTION, FROM BRAZIL



Beto Ribeiro and Carla Albuquerque

Medialand is one of the biggest independent production companies from Brazil having worked with broadcasters **Record**, **Globo**, **Canal Futura**, the Pay TV networks such as **Turner**, **HBO**, **BBC**, **National Geographic**, **Discovery**, **Viacom**, **A+E**, as well as VOD and Internet players like Netflix or YouTube.

Its productions have had local and international repercussions and most of the times, **Medialand** takes the 100% of the investment. **Carla**

KANAL D: 'CEE WILL ALWAYS BE OUR MAIN TERRITORY'

As one of the leading Turkish players, **Kanal D International Distribution** attends once more Natpe Budapest through **Emrah Turna**, sales executive, who is highlighting the company's drama series.

He explains to PRENSARIO: 'We have added new clients and new territories to our successful stories in the first half of 2013. In every local market, our dramas generated high ratings in prime time slots and this resulted with an increasing demand for our dramas and increased the average license fees.'

Georgia and Pakistan are the main buyers



Mercy

of 2013, remarks Turna and adds: 'We sold more than ten titles in Pakistan and five titles in Georgia in just 6 months'. The distributor is highlighting its brand-new drama *Mercy*, as well as *Kuzey- Güney* (+50x'90) with the story of two brothers' struggle to survive in their own worlds.

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.

Continues **Turna**: 'Africa & Latin America are the territories that we are focused on since 2012. We recently closed couple of format deals in the second one. However, CEE is our core market along with MENA. Almost all the primetime slots of CEE countries are full of Turkish Dramas'.

'As **Dogan Group** we are not only a content distributor but also a local player in some countries such as Romania and Bosnia & Herzegovina. CEE will always be our main territory. Every single buyer from every single territory has a unique taste. As a result it is impossible to speak

generally.

However there are some points in common. Optimizing the budget/viewership is the main focus of all the broadcasters'.

And he completes: 'Turkish productions are telling the stories from both east and west. Our stories are like a glue between different cultures. There is no need to adapt. We are telling their stories because we are not limited in our borders; we are east and west'.



Emrah Turna, sales executive



Kuzey- Güney

TVN CHILE, STRONG IN ENTERTAINMENT FORMATS



lexis Piwonka and Ernesto Lombardi

Apart from the successful telenovelas, distributed as ready made or format worldwide by **Telemundo Internacional**, **Television Nacional** (Chile) is pushing internationally its catalogue of entertainment formats, which are not only very successful in the local market, but also in some territories of South America.

Since Natpe Miami 2013 the company is attending the show with specific suites to push its productions in key territories.

Ernesto Lombardi, manager of international business, and **Alexis Piwonka**, sales and marketing, explains to PRENSARIO: 'We have long experience in realities, talent and game shows, which have generated top products of the Chilean industry'.

'Telenovelas have always had good results, as they are a distinctive product from Latin America. But the Chilean reality shows have a lot to surprise international audiences... they are fresh, originals, with rhythm and can work really well in the most demanding TV markets', remark **Lombardi** and **Piwonka**.

Is the case of *Apuesto por ti*, for example, which has been optioned in Spain and Argentina. Is a format about people with extraordinary activities that surprise visually: they stretch the skin, eat cloves and walk over the fire. Judges are as exotics as the participants.

Calle 7 is another big blockbuster from



Apuesto por ti

TVN with five years on air, which has a tremendous success in **TC** (Ecuador) with 18.3% market share at 5pm with an impressive 360° development through social media.

'*Rojo - Fama Contrafama* was broadcast in the past and returned with incredible numbers: is a tournament of 12 dancers and 12 singers that are being eliminated week-to-week up to the great *finale*. And *Peloton*, where common people received a hard military training and only the

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ELECTUS DISEMBARKS AT NATPE BUDAPEST

Electus International (US), chaired by visionary executive producer **Ben Silverman** (*The Office*, etc.) and led by CEO, **Chris Grant**, attends Natpe Budapest for the first time. The company was launched over a year ago with **John Pollak** as President, and **Diego Piasek**, director international distribution and production, came aboard to oversee all businesses across CEEMEA, Southern Europe and Israel.

Piasek is in charge of this market, and explains: 'We have secured hundreds of hours of programming by partnering with big players in the US. In less than one year, we went from having 11 titles in our catalogue to over 172 hours of **Electus** produced content currently airing on

broadcasters and cable networks in the US. In addition, we have picked up and added 44 brand new shows with over a thousand hours of content'.

'Our biggest

expectation here is to build new relationships and expand our footprint across CEE. We have closed over 20 format deals: we offer a wide diversity of contents, which allows to service a wide range of channel profiles and needs: public broadcaster looking for a family "shiny-floor" format (*Fashion Star*, *Bet on Your Baby*), to a male or a female oriented channel looking for great tape to target their core audiences (*The Hero*, *72 Hours*)'.

'We represent brand-integrated contents (*Fashion Star*, **NBC**); game shows (*Bet On Your Baby*, **ABC**); cooking (*Food Fighters*, **NBC**); the summer show *The Hero* with Dwayne "The Rock" Johnson (**TNT**); the action-adrenaline-packed *72 hours* (**TNT**); the #1 show in **H2**: *America Unearthed*; #1 show on **CMT**, *Dog and Bet On The Hunt*; the smash hit, just renewed for another season: *King Of The Nerds* (**TBS**)'.

'The highly anticipated network survival show, *Get Out Alive with Bear Grylls* (**NBC**); nature's number one specialist *Lonestar Legend* (**Animal**

Planet); one of the highest event formats on **CTC Canada**, *C a n a d a ' s Smartest Person*; and one of the biggest franchise on cable, *Mob Wives*, with its *Mob Wives Chicago* and *Big Ang* (**VH1**) spin-offs, all in **VH1**.

'We have partnered with the most prominent pan regional channels in the region (**Discovery** covered over 100 countries with *Savage Family Diggers*, *Fashion Star*, *Flip Men* and *Mob Wives: Chicago*), and we have closed deals with some of the biggest broadcasters in the local markets (**1+1** Ukraine to produce *Bet On Your Baby*) as well as with top-production companies. Our commercial objective is simple: continue to grow our distribution & production business with original formats, and to exponentially roll out **Electus**' content across an exciting and fast-growing region', completes **Piasek**.



Diego Piasek, director international distribution and production



Bet On Your Baby will be premiered on 1+1 Ukraine

ABS-CBN: THREE HIGHLIGHTS

ABS-CBN International Distribution (Philippines) brings to Natpe Budapest 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.

VIEWING BOX M20



Laura Rhodarmer, SVP Licensing

GET SURPRISED WITH TALPA



The winner is... is the brand new game show from the distributor

Talpa International (Holland) brings to Natpe Budapest a diversified slate of entertainment format including scripted and non-scripted titles such as talent, game shows, variety and music formats. **Laura Rhodarmer**, SVP Licensing, is in charge of this market.

Heading the slate is *Divorce* (13x'45), a scripted dramedy about three guys with

nothing in common, except for the fact that they are all in the middle of an unexpected and messy relationship break-up. *Beat the Best* (10x'75) is the brand-new variety talent competition where only the best performers, from all over the world: compete to take the show's hot seat and remain there to win a huge cash prize.

Big expectations has the distributor on the new game show *The Winner Is...* (9x'75), specially promoted in this market: 'It's a must-see singing game show that delivers an unbeatable combination of intense qualifying auditions, great vocal duels, instant cash, dramatic decisions... and a big cash prize', explains **Rhodarmer**.

Talpa keeps pushing its well-known format *The Voice Kids* (9x'75): it's time for kids to show off their vocal talent. *Challenge Me* (13x'75) is a

record-breaking show in which ordinary people set unique records by doing something unique, bizarre, funny or downright spectacular.

Showbizzquiz (13x'75) is a fun game show featuring two competitive hosts and their teams. Both have just one aim on each episode: to defeat each other. *What do I know?!* (13x'75) is another dynamic and fast-paced quiz show with three national celebrities battle each other in a wide range of general knowledge questions to win a cash prize for a deserving individual. And *Body Talk* (13x'45) is Talpa's new up-close and personal health quiz is full of valuable information, fun facts and surprising fables.



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VVI: HD ACTION SERIES & TELENOVELAS



Daniel Rodriguez, sales director, and Cristobal Ponte, Exclusive Independent Representative for Europe, Africa & Middle East

Venevision International (Venezuela/USA), presents at Natpe Budapest its diverse programming proposal headlined by the HD telenovela *Rosario* (120x'45) starred by a young and brilliant law student and a prominent veteran attorney, who fall deeply

in love and start planning a future together, and *Inside Football* (17x'30) is a dynamic and entertaining news magazine presenting in-depth coverage of the largest spectator sport on the planet.

Also, the action series *Lucia's Secret* (75x'45), shot in HD by **Venevision** at multiple locations throughout Caracas (Venezuela) and Miami (USA) with the collaboration of **Univision Studios** and Colombian company **Be-TV**. Along with **Univision**, **Venevision Production** announced by the end of may the co-production of the new telenovela *Cosita Linda*.

Cristobal Ponte, Exclusive Independent Representative for Europe, Africa & Middle East, attended last March Discop West Asia, so he assist to Natpe Budapest with a very positive feedback from these regions.

Other titles from the distributors are the reality series *My Life In Sayulita* (13x'45), *Latin Angel Special* 26x'30, the series *Extreme Sports* (+ 100 hours) and the martial arts action series *A Legend of Shaolin Kungfu* (42x'60); and the telenovelas *The Talisman* (101x'45); *My Ex Wants Me* (159x'45); and *The Love Curse* (144x'45).



Inside Football

THE ISRAELI "NEW WAVE" COMES WITH KESHET



Kelly Wright, senior sales manager

For the first time at Natpe Budapest, **Kelly Wright**, senior sales manager **Keshet International** (Israel) promotes the hit talent show *Master Class* that features incredible performance episodes with powerful emotional highs: it scored over 50% share in Israel and is the #1 premiering show of the year on **TV2 Hungary**.

'We are offering our catalogue of over 50 scripted and non-scripted formats that have been successfully adapted in the US and around the world. They are developed at reduced costs, without sacrificing the quality of our storytelling and our production values. Can be easily translate to the CEE, which shares similar budgets to Israel', says **Wright**, who highlights *Prisoners of War*, adapted as *Homeland* (FOX, US) and already sold in Russia and Turkey, among other territories.

'We have from cost-effective game shows like *Sure or Insure* to shopping budget format *Checkout* or pressure-cooker *Clockwise* with a great potential. We were always active in CEE, which has become one of our top priorities: these territories are buying more formats than ever before.'

'We recently established **Keshet UK**, an independent production company based in London, have just launched **Keshet Australia** —a joint venture with **Northern Pictures**— and now expanding into North America. There are more than 10 deals in development and production in Russia, and we are seeing great opportunities to build on the success of *Master Class* in **TV2**, and our original drama series *Prisoners of War*', completes the executive.



Master Class, a TV success in Hungary

TV AZTECA: MORE TELENOVELAS AND ACTION SERIES



Marcel Vinay Jr., CEO, and Adela Velasco, Sales Europe and Africa, Comarex

Through **Comarex** (Mexico), **TV Azteca** brings to Natpe Budapest its brand new telenovelas *Destiny* (120x'60), *Timeless Love* (120x'60) and *The Other Side of the Soul* (120x'60), the former starred by the top actress **Gabriela Spanic**. The series *Confessions from the Beyond* (13x'60) and *The Lieutenant* (24x'60), produced by **Benjamin Salinas** about an operation involving the rescue of kidnapped immigrants is another highlight for this market.

Top titles of the distributor are the telenovelas *The Kings* (120x'60), which shows a very powerful and complex kingdom; 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; and *Legendary Love* (120x'60) shows a woman dresses in a wedding dress to kill her enemies.

STAND LL3

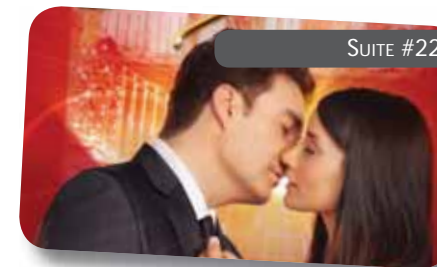
GLOBAL AGENCY: TO THE WORLD

One of the major representatives of the Turkish boom is undoubtedly **Global Agency** that has become a referent of the Turkish product, but also adding to its catalogue content from other parts of the world.

Izzet Pinto, CEO: 'We are a global distributor after acquiring **Worldwide Entertainment** (Australia) one year ago, and we have programming from different origins. We have launched in the year over 10 new projects and we've grown a lot in entertainment formats, close to 60%. All in all, in the last year, we growth 120%'.



Izzet Pinto, CEO



Destiny, new telenovela

From **MTV Networks**, the teen telenovelas *Popland!* (70x'60) and three seasons of *Grachi* (75x'60), from **Nickelodeon**. Then, the series *XY* (31x'60), *Real Estate* (26x'60), *State of Grace* (13x'60) and all **HBO Latin America** productions that is distributing worldwide: *Alice* (13x'60), *Sons of the Carnival* (13x'60), *Mandrake* (13x'60), *Capadocia* (39x'60), *Epitafios* (26x'60) and *Fugitives* (13x'60).

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CARACOL: TELENOVELAS, SERIES & FORMATS



Roberto Corrente,
sales executive

Caracol International (Colombia) assists to Natpe Budapest to push in CEE territories its latest portfolio, which includes high-end drama series, telenovelas and entertainment formats. **Roberto Corrente**, sales executive, is in charge of the market.

'For this year's edition we have unique and entertaining productions headlining our portfolio, including the brand-new series *Football Dreams* (60x'60), about four of the top players of the Colombian National Football team's; and the series *The Voice of Freedom* (60x'60) about Helena Vargas, a woman eager to become emancipated during an extremely

"machista" time (the fifties):

After its successful premiere in US, **Caracol** brings *The Lord of the Skies*, a co-production with **Telemundo** about a man who become the leading, and only, drug dealer in Mexico in the '90s, taking Pablo Escobar's place in the region.

The distributor is also pushing its new entertainment format, *The Dance Floor*, an original **Caracol TV** show that is a revolutionary dance talent competition where 16 dance groups led by 16 experienced Colombian singers will make the audience dance to well known choreographies belonging to those



The Voice of Freedom



Football Dreams

favorite songs kept in everyone's memories. Lastly, the co-production with **Sony Pictures Television** The hypochondriac (120x'60) about an hypochondriac woman who strongly believes that she will die soon. And the co-production with **Cadenatres** (Mexico) *The White Line* (80x'60) with four incredible stories about men and women that intervene in each phase of the complex route of cocaine trafficking.

GLOBO: SPECIALS & DOCS

Globo TV International (Brazil) released at Natpe Budapest *Brazil Avenue* (160x'45), a modern telenovela that reveals how blind ambition and inflicted cruelty can change the course of a life. Also, the romantic comedy *Sparkling Girls* (120x'45) centered around three young hard-working housekeepers, who reach stardom instantly when an online video clip of them singing, surprisingly becomes a hit.

Other top titles from the distributor are *Gabriela* (55x'45), *The Life*

We Lead (70x'45), *Dinosaurs & Robots* (125x'45), recently sold to **SIC** Portugal, *The Brazilian - The Women* (14x'25), *Crazy About Them* (14x'30), *Slaps & Kisses* (season 1: 37x'30 and season 2: 35x'30), the special *Ivete Gil Caetano* ('70) and the documentaries *Animal Kingdom*, *the diaries of Lawrence Wahba* (10x'23), among others.



Brazil Avenue

COMERCIAL TV: HISTORICAL SERIES AND TELENOVELAS



Paloma García Cuesta

Comercial TV (Spain) is an off and online distribution company founded by its president **Santiago Gimeno** in 2007. It started the international unit about one year and half ago: at Natpe Budapest **Paloma García Cuesta**, sales manager, is in charge of the market.

She explains to **PRENSARIO**: 'We distribute Spanish and Latin American television content comprised by different genres all of them adaptable in terms of scheduling and slot duration such as telenovelas, fiction series, entertainment programs, Spanish feature films and animation.'

'With our headquarters in Spain we have

a key strategic position to connect Spanish-speaking content to the world. For Natpe Budapest, we highlight the top series from Spanish broadcaster **ATRESMEDIA** *Bandolera*, a historical soap opera with a great success in the country, which has gathered already great expectation in these territories; we are under conversations with some of them.'

Furthermore, the distributor offers the telenovelas from **RCTV** (Venezuela): 'We are confident on the quality and success of this type of product. We want to follow our strategy to bet for fiction of all type of targets and genres, as they are being received with great interest in CEE region.'

'Our main objective is to be known by more and more broadcasters, not only from the big markets, but as well for medium and small ones. This is our third time attending the show and

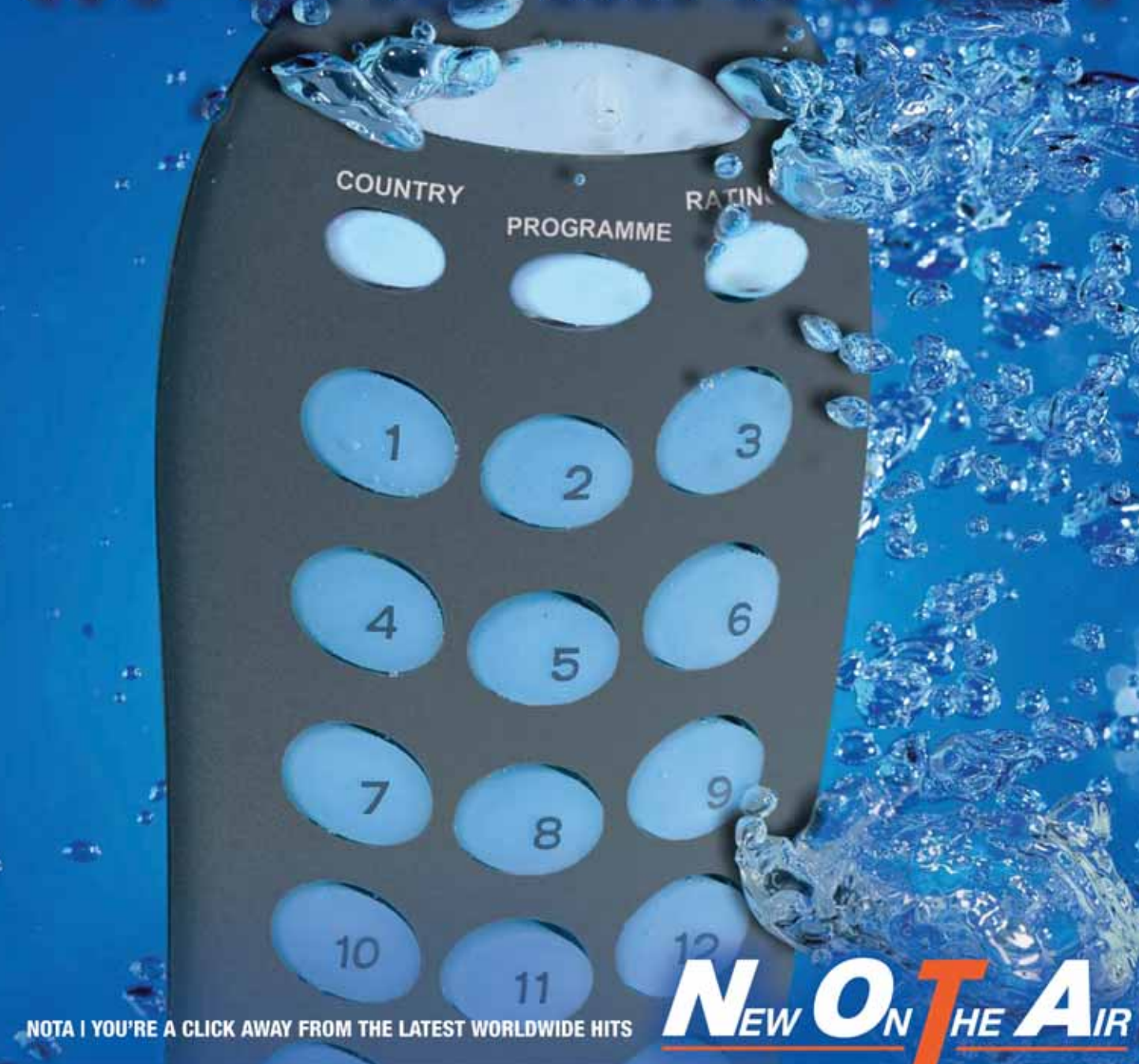


Bandolera

we have been doing contacts from the previous year: many TV channels —free, pay, national or regionals— are requesting programming to cover their grid.'

'Natpe Budapest is a perfect place to meet them more specifically and to have more time to know their needs: the market is a great platform to increase our potential contacts from other parts of the world such as North of Africa and Middle East', completes García.

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THE BIBLICAL SERIES, GREAT RESULTS FOR RECORD



Edson Mendes and Delmar Andrade, during last LA Screenings

Record TV Network (Brazil) has found a real niche of business with biblical series, having developed titles like *Esther, the queen*, *King David*, *Samson and Delilah* and the most recent one, *Joseph of Egypt*, that will have probably 30 episodes in total of one hour.

Joseph of Egypt is a high-end series shot in Egypt and the Atacama Desert in Chile that cost USD 36 million and its still on air in Brazil with 11/12 rating points. It has a tremendous reception at MIPTV and LA Screenings and

now the company is pushing it for Central and Eastern Europe.

Moreover, the company got recently great news with his series *King David*. **Delmar Andrade**, director of international sales, explains: 'It was premiered on **MundoFox** in the US Hispanic and it was a tremendous success: the slot where it was broadcast (8pm) grew 300% in audience with our production. We are really happy and it opens doors for other titles in the future'.

Continues the executive: 'We premiered on May 21 a new telenovela for the channel (still don't have the official English name for the international market), but it will be about a very intelligent woman that do great businesses in a street market. It will have over 120 episodes'.

Other titles from the catalogue are the telenovela *Tricky Business*, 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; *Jackpot!* (234x'45), another gambling history; and *Masks* (125x'45), where



Joseph of Egypt is the brand-new biblical series

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.

River of Intrigues (250x'45) is a contemporary soap opera with different scenario. 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).

ORF: COPS & DOCS

ORF Enterprise (Austria) attends Natpe Budapest once more with new titles to offer to CEE buyers, including *CopStories* (10x'45) where parents who refuse to believe that their child and *Mr. Punch* (30x'25), whose core is an imaginative adventure story, presented in a traditional puppet-show style.

In 2014, Europe will remember the outbreak of the First World War with the documentary *Sarajevo – The Assassination* ('60), who reflect the murder of the Austrian successor to the throne, Franz Ferdinand, and his wife Sophie in 1914 in Sarajevo. Another big documentaries are *Gonsalvus*, *The True Story of Beauty and the Beast* ('50) and *The*

SUITE #327A



Marion Camus-Oberdorfer, Head of Content Sales International

ICEX: A BETTER RECOGNITION OF SPANISH PRODUCT

Sonsoles Huidobro, head of the Audiovisual Department of **España Exportación e Inversiones** (ICEX), explains: 'After several years promoting worldwide the Spanish content, we see a better recognition from the market of **Audiovisual From Spain** brand, umbrella of all the Spanish producers and distributors'.

The sales went up, too. 'The demand has grown during all 2012. The main characteristic of the Spanish content buyer is that it looks for quality instead of quantity. We grow in Latin

America, especially Brazil, as well as Russia, France and Western Europe in general'.

'We will continue to support the industry's players. In a highly competitive market, is important to plan very well our visibility strategies with the support in the international markets, commercial missions, etc'.

'We are constantly checking the evolution of our companies to target potential regions like Middle East and Asia, new channels in America and the growing vehicles of distribution in order to help them to close better deals. There are

companies planning new strategies for the international market, for example', completes **Huidobro**.

At Natpe Budapest the only representative of the Spanish audiovisual industry is the distributor **Comercial TV** through **Paloma García**, sales director (see specific information



Sonsoles Huidobro, head of the Audiovisual Department



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PAY ATTENTION TO NEW FILMS



Nesim Hason, CEO

New Films International (USA) is making a difference in the content market: produces and distributes big-budget TV movies and TV series with actors and locations from different origins, to apply particularly well the international

market. For Central & Eastern Europe in particular, the headline is the very successful Bulgarian crime series *Undercover*, already with three seasons. The company is now involved in the production for the fourth season, and has the rights to produce a U.S. remake... this is a good example of how **New Films** is going further into business.



Saving Lincoln

Concerning own produced TV movies, **New Films** stresses the biography film *Saving Lincoln*, with the true story of Abraham Lincoln and his bodyguard: is a unique production featuring sets created from actual Civil War photographs—a technique called *Cinecollage*—with **Penelope Ann Miller** and **Bruce Davison**. The drama *Ashley* ('92) shows a teenage girl, distraught from her vain attempt to connect with her estranged mother, resorts to cutting herself. The main actresses are the winner of last *America's Next top Model*, **Nicole Fox**, and **Jennifer Taylor** (*Two and a half men*).

Living Dark: The Story of Ted the Caver ('112) is a horror film based on the popular "Ted the Caver" Internet urban legend; it tells the story of two estranged brothers, reunited for their father's funeral. *Beyond the Trophy* ('97) is a thriller with the story of men's obsession with power and how far they will go to claim the "PRIZE".

About distributed products, *The Iron Lady* is a drama film about the ex British Prime Minister Margaret Thatcher, starred by **Meryl Streep**... it has a lot of potential in many markets.



The Iron Lady, with Meryl Streep

The comedy *This Must Be the Place* ('118) shows **Sean Penn** performing a retired rock star returning to New York City

to find the man responsible for a humiliation suffered by his recently deceased father, during WWII.

The company distributes also the thriller *The Killer Joe* ('102) with **Matthew McConaughey**: when a debt puts a young man's life in danger, he turns to putting a hit out on his evil mother in order to collect the insurance. And the drama *Hesher* ('106), where a young boy has lost his mother and is losing touch with his father and the world around him.

Nesim Hason, CEO, says: 'Our company is 33 years old in the market, first we operated in London, then in New York and now our headquarter is in Los Angeles. We produce 3-4 big budget films per year, and now we want to develop production ventures in different regions of the world, as it is the case of *Undercover* about Central & Eastern Europe. We want to be a global and local player at the same time'.



Ashley

THROUGH ITV, ARRIVES CONSTRUIR TV



Alejandra Marano, managing director

At the beginning of the year, the Argentinean DTT network **Construir TV** has entered into partnership with **ITV-Inter Medya** (Turkey), who distributes its contents in China,

CIS, Balkan and MENA territories.

Alejandra Marano, managing director, remarks: 'It was a milestone for us to start working with a leading Turkish distributor and a great step towards our sales strategy in those territories', while **Annabelle Aramburu**,

sales director, adds: 'Our expectations are to focus in distributing and obtaining a strong presence on these major markets in a near future. We are heading to the region with our new documentary series, currently in production and set to be released on primetime next April'.

Can Okan, ITV president & CEO, adds: 'Short term perspectives could not be better, I am very pleased with this agreement as well as convinced that next markets are an excellent opportunity for both companies. I am sure that our expertise and deep knowledge in these territories and **Construir TV**'s innovative contents are the perfect formula for success'.

For Natpe Budapest, both companies



Building a country

highlight the new documentary series currently in production as *Family in Overalls*, related to the life of everyday families whose members share vocations or occupations; *Building a country*, portraying the urgent need of more infrastructures, resources or energy in countries with a growing economy; *The work and I*, which shows people so passionate for what they do; and *Constructions, before and after* that deals with the impact of buildings in society, showing the architectural aspects but also the people using these.

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ARTEAR: TV SERIES WITH TWIST



Julieta Gonzalez, sales executive

Artear International (Argentina) highlights for Central and Eastern Europe 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



Left on the Shelf

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.

MTVA: HUNGARIAN CONTENT

Since 2012, **MTVA** has become an active participant of the most important international markets such as MIPTV, MIPCOM and also Natpe Budapest, which had been the only international place before to be represented.

Since its establishment, it has made several own TV series and tries to strengthen this field of activity in the future, too. At Sofitel, it highlights its drama series *Hacktion* (30x'52) and its new season *Hacktion Reloaded* (25x'52).

Also, the cooking documentary *Angel Gastro* (75x'52); the documentary *On the Spot* (10x'52); *Work matters* (56x'25) is a sitcom of '25-episodes; *Babel* (8x'52) is a documentary series about a reporter; and *The Past Confessed* (2x'26 or '52) is another documentary about a Budapest street that became a characteristic symbol of oppression and terror.



On the Spot

SUITE #213

TV FILM: FOCUS ON CEE MARKETS

TV Film International is a distribution company based in Miami since 1995. From the beginning, **Juan Pablo Carpenter**, director, has mainly worked with the territory of Latin America. But since the company added the new catalogue from **Chilevision** is introducing since Natpe Budapest the Chilean broadcasters telenovelas both, as format or ready made, in

the CEE territories.

Heading the catalogue is *The Sex Therapist* (120 episodes), still on air, about a presenter of a successful radio program whose objectives is to clarify doubts and sexual dilemmas that men and women address her with. *La Doña* is set in the Century XVII and based in the life of Catalina de los Rios y Lisperguer. She gets around with complete confidence and impunity in a violent world, a world rule by soldiers.

Luxury Women (70x'60) is a prime tiem telenovela with the story is based on passion, love, sensuality, conflict and pain. Mainly focusing on the most ancient profession of women, but modernized based on the present. *Undercover Agents* (78x'60) is a police telenovela that goes into the limits of power, the mystery of unfaithful relationships, the



The Sex Therapist

dark side of desire and uncontrolled passion; the corruption of law enforcement and the constant battles between the good and bad in our society.

Point-Blank presents an outstanding medicine student, whose life changes forever because a dramatic event in his life: his oldest sister suffered a terrible accident and is taken to the local health post, where his is working. Lastly, *Living with 10* where the Solé family (composed by 12 members) loses its patriarch when hi finds out that his best-guarded secret

DORI MEDIA, EVOLUTION



Elena Antonini, VP of Sales, and Nadav Palti, CEO

'The worldwide content market is moving from scripted to unscripted. There is a biggest dynamic, less risk. That's why, without leaving a producer and broadcaster of telenovelas and series —we have more than 6,000 episodes in our catalogue— we are investing today in developing entertainment formats.'

Nadav Palti, CEO of **Dori Media Distribution**, remarks: 'We already have

a slate of 40 different products and we are adding 4-5 new each market. On series, we offer *Little Mom* (13x'60) is a female comedy about the life after having babies that went on air in **Channel 10** in Israel'.

The Caravan is a factual reality where parents and adult sons have to share a 5-days trip. After years of living apart, families will re-unite for a week and travel together on a

caravan in a 24/7 documented Euro trip.

The Village is a big prime time reality shot in the Israel desert. Following with the reality shows, *Family Restart* gives families who



Family Restart



The Band

have become estrange a chance to reconnect. The show pairs parents and their adult children with a family coach in order mend their broken relationship.

The Band documents the rise of a new boy-girl band set to conquer the hearts of teenagers all across the county: an innovative format featuring 30 episodes documenting thrilling adventures of these young performers as they begin to form The Band.

Lastly, *Hi/lo Trivia* is a simple card game, with a smart twist: every time a card is opened, the players need to guess whether the next card is going to be higher or lower. Every card they call correctly equals money in the bank.

CBSSI: UNDER THE DOME



Armando Nuñez

Armando Nuñez, president and CEO, **CBS Global Distribution Group** (USA) announced that *Under the Dome*, series based on **Stephen King** and co-produced by his company **Amblin Television** and **CBS** was licensed in 200 international markets, including **Channel 5** (UK), **ProSiebenSat1-Group** (Germany), **M6** (France), **RAIDUE** (Italy), **Network Ten** (Australia) and **Global TV** (Canada). The series will be premiered in **CBS US** in June 24.

On the other hand, **CBS Studios International** and **Amedia Russia** have closed a multi-year and multi-platform (pay TV networks and SVOD service), volume deal to broadcast current and future series produced by the Hollywood studio: *Elementary* and *Beauty And The Beast*, as well as **CBS's** new fall and midseason series. **Amedia** will also broadcast content

from **Showtime**, including *Ray Donovan* and new seasons of *The Borgias* and *House Of Lies*.

At the same time, **MTV3** Finland also close a multi-year volume deal for the broadcast rights for its bouquet of channels, including *Reckless*, *The Millers* and *Reign*, as well as world-class premium content from **Showtime**.



Under the Dome

UNIVERSAL CINERGIA: PROMISSORY 2013

Universal Cinergia Dubbing has been in TV business since 2012 providing dubbing services to companies from the entire world in different languages. Is the sister company of **Universal Labs of America**, with more than 20 years of experience in Miami, US.

Liliam Hernández and **Gema López** attend Natpe Budapest for the first time trying to meet producers and distributors from Central and Eastern Europe interested in increasing their international footprint.

In Miami, Universal Cinergia operates a complex of 10,000 square feet, providing all facilities for the TV industry in the same place. Both executives highlight that those studios were built in six years with a team of high-qualified professionals. 'This expansion allow us to open new markets in several territories from Europe, Asia and Africa', they say.

'So far, 2013 has been a great year for us with great expectations after the main markets, Natpe Miami, MIPTV in Cannes and LA Screenings in Los Angeles. Now, we are here in Budapest seeking to meet local players and always thinking in a main objective: to promote **Universal Cinergia** as the #1 dubbing house without forgetting that we've always provide a personalized service with high-end technology and quality, and competitive prices.'



Liliam Hernández y Gema López



Luxury Women



ANGRY WORDS IS A NEW INTERACTIVE ENTERTAINMENT FORMAT FROM SPANISH COMPANY LA COMPETENCIA THAT WAS OPTIONED IN FRANCE AND A PILOT WILL BE PRODUCED IN THE NEAR FUTURE. DISTRIBUTES: TELEVISA INTERNACIONAL, MEXICO



KANAL D IS ONE OF THE TOP TURKISH EXPORTERS 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. DISTRIBUTES: KANAL D, TURKEY



SENIOR YEAR (70x'60) IS A THRILLER TELENVELA PRODUCED BY MTV NETWORKS LATIN AMERICA THAT NARRATES THE LOVE STORY BETWEEN A YOUNG GIRL AND TWO BOYS THAT WILL FIGHT FOR HER LOVE. DISTRIBUTES: 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. DISTRIBUTES: ARTEAR INTERNATIONAL, ARGENTINA



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. DISTRIBUTES: DORI MEDIA DISTRIBUTION, SWITZERLAND



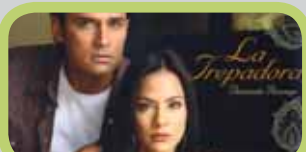
KING DAVID (30x'60) IS ONE OF THE MOST SUCCESSFUL EPIC MINISERIES PRODUCED IN BRAZIL IN HD AND WITH A HIGH BUDGET. AND IT HAS BEEN A SUCCESS IN THE US HISPANIC, TOO, THROUGH MUNDOFOX INCREASING IN 300% THE TIME SLOT. DISTRIBUTE: RECORD TV NETWORK, BRAZIL



THE POWERFULL DRAMA SERIES **PRISONERS OF WAR** WAS ADAPTED AS *HOMELAND* IN FOX, US, AND ALREADY SOLD IN RUSSIA AND TURKEY, AMONG OTHER TERRITORIES. DISTRIBUTES: KESHET INTERNATIONAL, ISRAEL



FASHION STAR IS A FAMILY "SHINY-FLOOR" FORMAT THAT HAS BEEN A SUCCESS IN NBC NETWORKS IN THE US AND IT WAS SOLD WORLDWIDE, AS FORMAT AND FINISHED PRODUCT. DISTRIBUTE: ELECTUS INTERNATIONAL, USA



LA TREPADORA IS A VERY FAMOUS TELENVELA FROM RCTV VENEZUELA, WHICH HAS CLOSED A DISTRIBUTION DEAL WITH SPANISH COMPANY COMERCIAL TV FOR EASTERN EUROPEAN TERRITORIES. DISTRIBUTES: COMERCIAL TV, SPAIN



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. DISTRIBUTES: VENEVISION INTERNATIONAL, USA



THE VOICE KIDS IS A VERY GOOD OPTION TO FOLLOW THE SUCCESS OF *THE VOICE* IN ANY MARKET, FEATURING THE SAME BLIND AUDITIONS AND BATTLES, BUT WITH TALENTED-KIDS THAT ADD EXTRA ENGAGEMENT FOR THE AUDIENCE. DISTRIBUTION: TALPA, HOLLAND



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. DISTRIBUTION: CARACOL TV, COLOMBIA



WITH THE STORY OF A WOMAN THAT WORKS IN A GOLD MINE, **THE RETURN (120x'60)** IT'S A BRAND NEW TELENVELA 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. DISTRIBUTION: TELEMUNDO INTERNATIONAL, USA



CONSTRUIR TV HIGHLIGHTS AT NATPE BUDAPEST REALLY INNOVATIVE PROGRAMS SUCH AS *THE WORK AND I* THAT SHOWS PEOPLE SO PASSIONATE FOR WHAT THEY DO, THAT THEIR JOBS IDENTIFY THEM. DISTRIBUTES: CONSTRUIR TV, ARGENTINA/ITV, TURKEY



G.A.U.L.A. (45x'30) IS ABOUT A COLOMBIAN ELITE POLICE UNIT FOCUSED ON KIDNAPPING STORIES, WITH REAL FOOTAGE, RESEARCH AND EMOTIONS. DISTRIBUTES: SOMOS DISTRIBUTION, USA



UNDERCOVER (12x'60) IS A HIGH END TV SERIES, WHICH SHOWS A SPECIALLY TRAINED AGENT THAT HAS BEEN APPOINTED TO THE MOST DANGEROUS MISSION IN BULGARIA TO GO UNDERCOVER IN THE GANG OF THE MAFIA BOSS. DISTRIBUTED: NEW FILMS INTERNATIONAL



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



AROUND THE NEXT BEND (12x'30) FOLLOWS TWO YOUNG ADVENTURERS AS THEY TRAVEL HALFWAY AROUND THE WORLD TO EMBARK ON A 2,500 KM RAFTING EXPEDITION DOWN THE MYSTIC GANGES RIVER IN INDIA. DISTRIBUTES: CINEFLIX RIGHTS, CANADA



POLICE OPERATION IS A DOCUMENTARY SERIES ABOUT THE POLICE FORCES IN SAO PAULO, BRAZIL, THAT HAS REACHED 35% OF MARKET SHARE IN NATGEO BRAZIL. DISTRIBUTES: MEDIALAND, BRAZIL



FOYLE'S WAR (3x'120 + 22x'120) IS A DRAMA SERIES THAT HAPPENS IN THE POST-WAR ERA, WHERE A MAN MUST GATHER INTELLIGENCE TO PROTECT THE NATION. DISTRIBUTES: ALL3MEDIA INTERNATIONAL, UK -

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