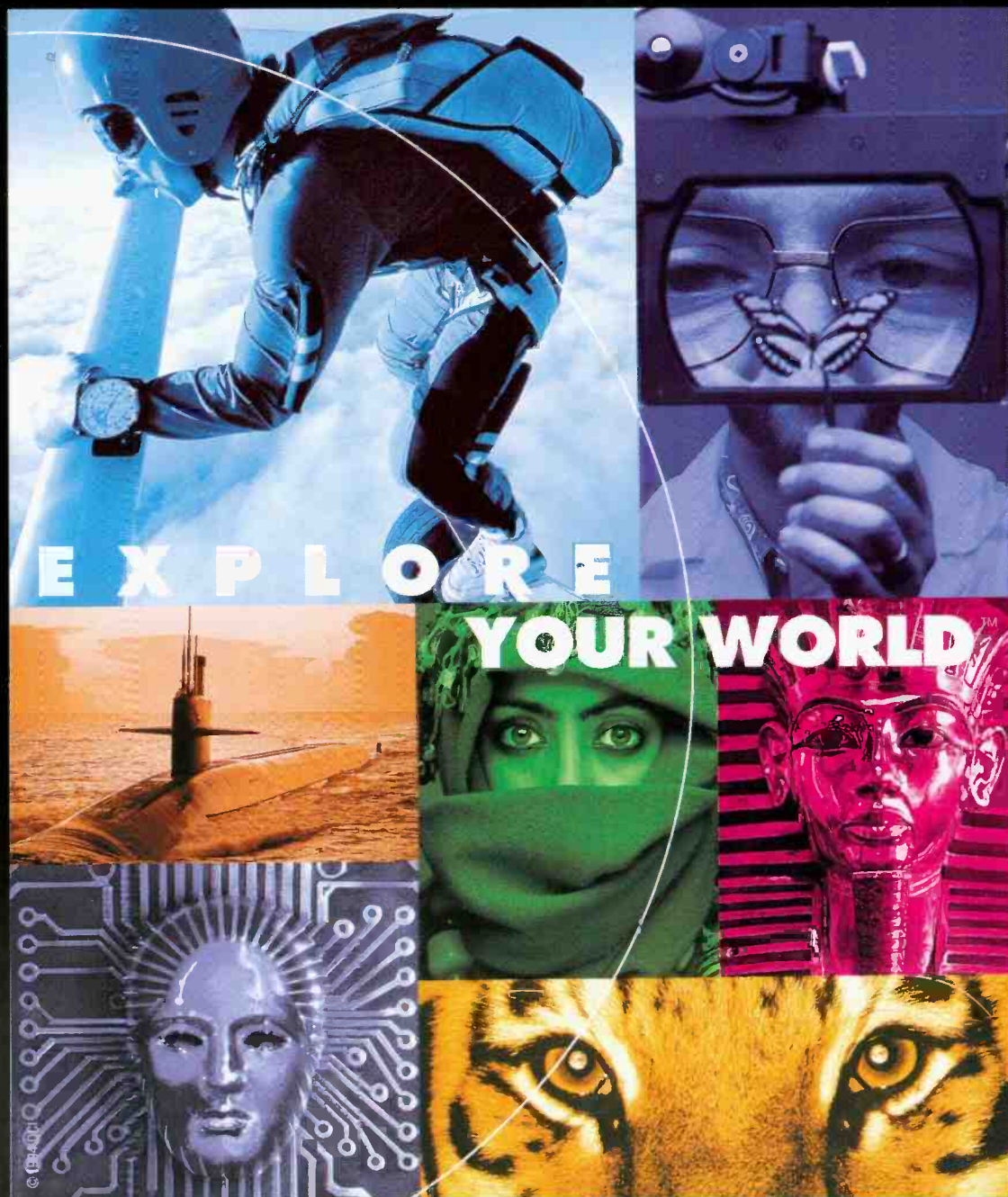


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DECEMBER 1994 MIPASIA ISSUE

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# TBI CONTENTS

## 22 ASIA

### A Giant Wakens

Economic prosperity and political stability has turned the Asia Pacific region into a growth area of unparalleled proportions. TBI looks at the world's most expansionist tv market.

#### 22 In Their Own Backyard

#### 28 One Billion Served

#### 34 Window Wagering



## 38 NETWORKS

### Profit Or Loss?

The launch of two new U.S. networks could boost production in the world's biggest tv marketplace or leave the newcomers with substantial holes in their pockets.

## 44 FINANCE

### Coming Of Age

The lucrative flotation of five of its biggest production houses has propelled Canada out of the shadows of its dominant U.S. neighbour.



## 48 MARKET INTELLIGENCE

### TBI's Guide To Mip Asia

What to look out for in Hong Kong at the region's first Mip.

#### 48 Market News And Mip Asia Briefs

#### 56 Contact Directory

#### 58 Mip Asia Product Listings

## DEPARTMENTS

### Monitor

Murdoch Studio In Culture Push 8

Stations Prepare For 'The Day' 8

New Storm Hits Rai Management 9

French Stations In Talent Battle 10

Vietnam Signs Film and TV Deal 12

Länder Vote On New TV Rules 12

Bulgaria Launches Private TV 14

Nigerian TV Deadline Extended 16

Star TV Courts Malaysian PM 16

Globo Group Edges Pay-tv Battle 18

## EDITOR'S NOTE

Asian Ways 4

## PERSPECTIVE

Hidden Cost Of A Free-For-All 6

## COMMENT

Smothered By A Crazy Quilt 19

## DATA

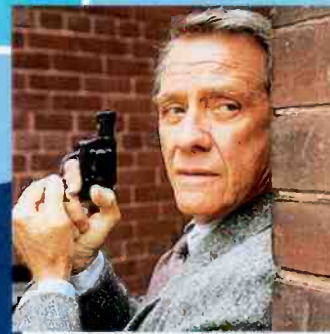
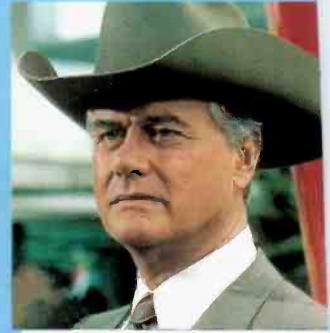
Slightly Out Of Synch 62

## HARD TECH

Networks Fear Tolls On I-Way 64

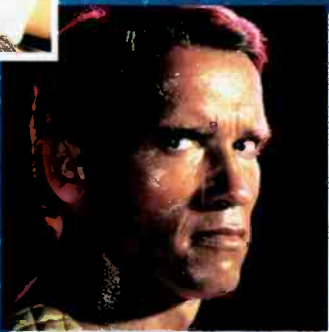
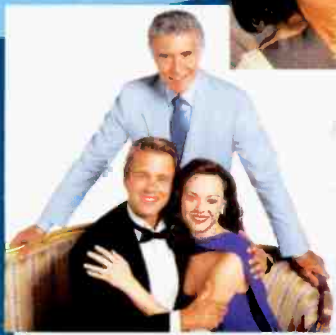
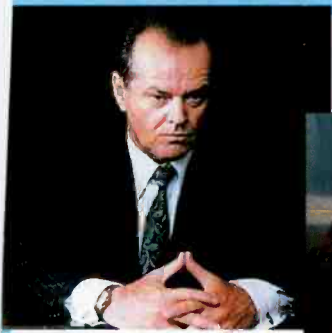
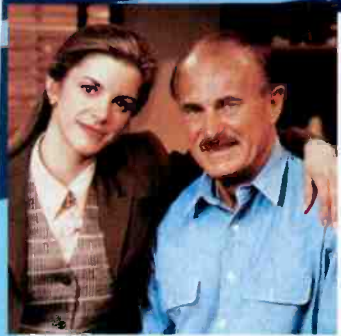


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# THE WORLD



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TBI is published monthly except January and August, 10 issues (ISSN 0953-6641) by Television Business International, a 21st Century Publishing company. TBI is available by subscription only at an annual subscription price of £50 United Kingdom, US\$102 Europe and US\$89 USA US\$110 Outside Europe including air speeded delivery. Send address changes to: TBI, 531-533 King's Road, London SW10 0TZ. All contents copyright 21st Century Publishing. Printed in England by Healey Brothers Ltd Ashford Kent. Reproduction by Graphic Ideas Studios, 1-11 Baches Street, London N1 6DL. U.S.A. POSTMASTERS: Send address changes to Television Business International, Publications Expediting, Inc., 200 Meacham Ave., Elmont, N.Y. 11003. Air freight and mailing in the U.S.A. by Publications Expediting, Inc., 200 Meacham Ave., Elmont, N.Y. 11003. Second class postage paid at Jamaica, N.Y. 11431.

# Asian Ways

Imagine you're a sales executive for a major European distributor, a German company, say, and you've got a fat catalog of programming to sell. Your company is allied to a terrestrial broadcaster, so the catalog gets topped up constantly with new, high quality programs. But, because of local regulations, you're barred from selling your shows in Spain and Belgium. No sales allowed at all. None. Nyet. Nada. You simply cannot go into those territories with your programming. Wouldn't happen, right? But if it did, you can imagine the howls of protest – from you, from your company, from your country. European quotas may cause problems, but nothing exists like one country's total ban on the product of another. Spin the globe a half-turn to Asia, and the hypothetical becomes real. Until December 1993, Taiwan banned the import of Japanese programming. Japanese distributors are seeing a boom now the ban has been lifted, but before the end of 1993, they simply could not sell their shows to Taiwanese stations. And Taiwan was not alone. Korea still bars Japan's television. Japanese distributors will, for the first time since World War 2, get a crack at that market next year when Korea's first cable systems go on-line. Then, Japanese cartoons and documentaries will air in Korea. Japanese broadcasters are still waiting to hear if the ban on dramas will be lifted. "We still have something of an inferiority complex towards other Asians," explained Ansei Yokota of Fujisankei Communications International, in Mark Schilling's story this issue. "It's because of our guilty conscience. So we are reluctant to offend them."

Avoiding offence is a good theme for any look at the business in Asia. The western industry's intensified focus on Asia kicked off with Star TV's launch in 1991 and reaches an important milestone with Mip Asia. Now that Asia has its own Mip, the danger is media companies from the west – Europe plus America – will view Asia as a region similar to Europe, a place where they can overlay existing ideas, views and habits. It's a very human reaction – use the familiar to understand the new. As the Japanese can tell you, it don't work that way. There is no European Union to step in and tell the Taiwanese and the Koreans to stop blocking the sale of Japanese programs. And the Japanese are not about to give near neighbors a Jack Valenti-style ear bashing. Business is not done that way in Asia. Whether we like it or not, governments can and do enforce much stricter controls over the media, for religious, moral and political reasons. Asia's diversity makes Europe look a small place. The region begins somewhere in the Middle East – as far west as Israel, even – and stretches to Hokkaido in Japan. North to south, it runs from Mongolia to Australia. It takes in a huge chunk of geography and multiple religions, peoples and political systems. One trade show in Hong Kong will change none of that. A hard-nosed bunch of deal makers will find advice about understanding and appreciating diverse cultures trite, like something your mother used to tell you. Well, it's time to listen to your mother.



The Editor

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MIP-ASIA STAND  
A-01



Imagine television without a gatekeeper – a system with vast capacity that is open to anyone with a program to present. Imagine consumers using it like the telephone, calling up whatever they want from myriad choices.

To the many who resent tv executives controlling what gets on the screen, such a wide open system seems the ideal alternative. Here every distributor has direct access to the consumer, who becomes the programmer in deciding what and when to watch.

This, in fact, is the kind of open system being introduced in the States by such regional telcos as Bell Atlantic, US West and Bell South. It goes by the name of Video Dial Tone (VDT) and was authorized by the Federal Communications Commission to help create competition for cable, which has been behaving as a greedy monopoly.

Since the telephone is a common carrier – open to all, with no content interference from the provider of service – VDT is asked to abide by similar rules. So, a new kind of television is born. But the historical truth is that the absence of a gatekeeper sounds better than it plays.

The telcos are given limited leeway to provide certain kinds of programs for their systems to make them attractive, but they have no power to exclude what others may choose to put on their lines.

That's an open invitation to pornographers (always the first ones in on new tv technologies) and ideological propagandists like the Ku Klux Klan.

The precursor to Video Dial Tone was the leased access channel introduced on the Manhattan cable system in the early 70s – a great idea, many thought, because it allowed anyone to become a commercial broadcaster in the same way that anyone can open a small shop.

With the leased access channel, the cable operator rented half-hour time periods to all comers on a first-come basis, at posted rates. And unlike public access, which is strictly non-commercial, leased access permitted the users to carry advertising in their programs.

No one rushed to get on the Manhattan channel – which was the national showcase for leased access – except the smutmeisters.

# The Hidden Cost Of A Free-For-All



BY LES BROWN

*Screw* magazine promptly nailed down a regular timeslot, and another was claimed by a talkshow in which all participants appeared nude. One show gave lessons in masturbation.

Backed by the constitutional guarantee of free speech, the local cable operator was powerless to force these untidy tenants to clean up their act.

As the word spread around the country, New York's naughty free enterprise channel gave cable a sleazy image just when the medium was beginning its expansion. But leased access was only an option, and when other cities awarded their cable franchises it was an option no one wanted. Today, leased access lives on in Manhattan but practically nowhere else, a noble idea killed by ignoble use.

The telcos were excoriated by the public in the late 80s for the rash of sex-

talk enterprises that sprang up when the 900 numbers were introduced. The 900 series was meant to allow entrepreneurs to provide special information services, for which they could charge by the minute.

A few weeks ago, when Nynex Corp. began a VDT trial in Manhattan, Time Warner exercised its right to claim space on the telephone system for a movie-on-demand service. To Nynex's dismay, one category of TW's offerings is adult movies verging on the hard-core, something the telco had hoped to avoid.

Not only is Nynex helpless to block this move by a cable competitor, but its own corporate name will be on the menu screen, and people may blame this straight-arrow company for vending pornography in their homes.

For all the concern about the gatekeepers' power to influence, manipulate and censor, there's a case to be made for letting an operator give shape and substance to his business enterprise for the sake of its survival. Gatekeepers have been a fact of life in all media since the invention of type. A newspaper without editors is simply not a newspaper.

Because the cable industry understandably prefers a weak competitor to an equal one, it has been lobbying hard to keep VDT operating under strict common carrier rules. The irony is that some of the very regulators and lawmakers who are most eager to create competition for cable agree.

Apparently having forgotten the lessons of phone sex and leased access, they are entranced by the idea of a wide-open tv system without gatekeepers. They can't imagine why a system open to everyone with a tv program to sell wouldn't be wonderfully democratic.

But VDT is far from a democratic cinch. An early invasion of the sleaze merchants can cause respectable purveyors to back away. We have seen often enough how quickly an open system can become a de facto closed one. **TBI**

**For all the concern about the gatekeeper's power, there's a case to be made for letting an operator shape his business for the sake of survival**





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# MONITOR

## AUSTRALIA

### Murdoch Studio Part Of Culture Push

**The prime minister promises  
\$1 billion for local production**

Rupert Murdoch's proposal to build a new production facility in Sydney was the center-piece of a national cultural policy launched a month ago by the Australian prime minister Paul Keating. Announcing the new policy, Keating said the aim was to bring cultural issues into the mainstream of national life to reinforce the idea of a culturally diverse nation and to "draw a line under our post-colonial era."

Under this cultural strategy, the federal government will spend about one billion dollars during 1994-1995, with more than half of this for the two public broadcasters, the ABC and SBS.

To boost production of programs that reflect Australia's cultural diversity, the government-owned SBS TV will receive additional funds to commission independent drama, documentaries and features. More than half of SBS TV's present schedule is made up of foreign programs in languages other than English.

Another special production fund of \$15 million a year is aimed at increasing local programs on the three commercial networks. This fund is earmarked for

high-quality adult and children's drama, documentaries and the development of multimedia applications. At least half will be available for independents, with the balance for in-house production by the networks.

The glitzy center-piece of the prime minister's cultural strategy, the construction of what Murdoch dubbed "Hollywood on the Harbour," was based on an eleventh hour handshake deal with the mogul. The proposal has some way to go before it is signed, sealed and delivered, particu-

larly since the state government has decided to invite tenders for the plum inner city site chosen by News Corp.

As announced by the prime minister, the plan is for 20th Century Fox to build a film studio with three sophisticated sound stages and associated pre- and post-production facilities. The federal government has promised to assist with "site preparation and development."

During the same visit home in October, Murdoch also shook hands with Telstra Corp. to form a joint venture to offer pay-tv and broadband services through Telstra's cable network. This deal, negotiated with the help of Sam Chisholm from BSkyB, will see News Corp. providing the programming, including Australian programs, marketing and subscriber management expertise.

The News Corp./Telstra joint venture will compete directly with the Optus Vision cable tv consortium made up of Kerry Packer's Nine Network, the Seven Network, Continental Cablevision of the U.S. and the telco Optus Communications.

The Seven Network faces a potential conflict of interest given its shareholders include News Corp. (15%) and Telstra (10%). However, Seven's chief, Bob Campbell, has said that he is committed to the Optus Vision project.

by Liz Fell — SYDNEY

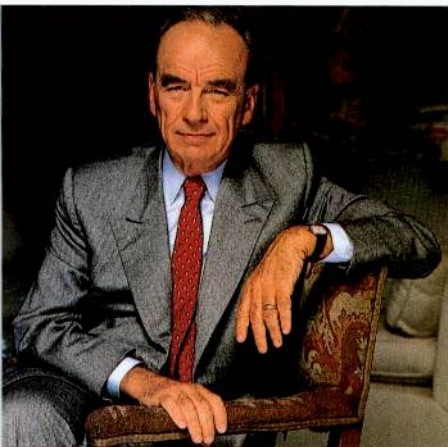
## CHILDREN'S TELEVISION

### Stations World Over Get Behind 'The Day'

**International tv day for children  
has grown into a global holiday**

It was a small idea on a large scale: what if all around the world, on a single day, tv and radio stations devoted some time to the well-being of children? It would be like tying the world together in common cause and would make for a unique alliance of the world's broadcasters.

James Grant, executive director of Unicef,



Murdoch: studio and pay-tv deals



surely had no idea he would be creating something of an international holiday when he posed the idea in a speech to the International Council of the Academy of Television Arts & Sciences in November 1991. But council members immediately took to the idea, and a year later, The International Children's Day of Broadcasting was launched with participation in 80 countries on six continents.

Now, in year three, the designated day for children is already a global institution, like Earth Day. It even has a nickname: The Day. For this year's observance on December 11, more than 1,000 stations and networks in 115 countries will participate, each in its own way.

Such is the success of the venture that the International Council has created a special prize for the best programming for The Day, to be presented each year in conjunction with the International Emmy Awards. The new award will be first conferred in 1995 for programming this year.

As there are no rules for the celebration, some broadcasters will be going all-out with elaborate presentations, while others acknowledge it by airing programs and public service spots distributed by Unicef. Some broadcasters are producing special entertainment shows for children, some are going with serious programs about children aimed at adults, and some are doing a combination of both.

Finland's YLE (TV1), Mexico's cultural Channel 11 and Australia's SBS TV are among the broadcasters giving over The Day entirely to special programming for children and families. Canada's TV Ontario will have a marathon format with child hosts from 6 am to 6 pm; the U.S. children's cable channel Nickelodeon is revamping its Sunday schedule on December 11 with programming relevant to The Day.

Italy's Rai1 will be going morning to night, but a day earlier. Part of its offering on December 10 will be a fund-raising telethon for the children of Rwanda and the former Yugoslavia. In this it will be joined by several independent local stations.

Several stations will be producing news programs in which children will be the reporters. In its six hours of special programming, Latvia will have a press conference with members of the parliament in which children will ask the questions. In Zimbabwe, President Mugabe will mark The Day with a televised news conference for youth reporters from the country's 10 political provinces. Denmark's Radio in Denmark is creating a program that will present reports from different parts of the country by 13 youngsters.

Aside from Nickelodeon in the U.S., all the Turner networks, including those in foreign markets, will each participate differently. TNT Latin America will offer five hours of Dr. Seuss programs, while CNN is creating special news broadcasts. The major U.S. networks, along with such cable channels as ESPN, will acknowledge The Day with Unicef's 20-second PSAs.

As a member of the International Council, Dieter Stolte, director-general of ZDF, was among

those who took the lead in creating The Day. "This project," he said, "has received more enthusiastic support than any outside endeavour in which the council has been engaged."

Art Kane, the council's executive director, said that after making the commitment themselves, the members became apostles in their own regions and urged and cajoled others to join in the effort. "The value of something like this is cumulative," Kane said. "Ultimately it leads to better programs for children."

He cited the exposure Robert Altman's *Video Pen Pals*, a 26-week series, is receiving. Distributor Unapix has made a 30-minute version available free, through Unicef, to all broadcasters for airing on The Day.

by Les Brown — NEW YORK

## ITALY

# New Storm Hits

## Rai Management

### MD and board member quit as pressure on Rai mounts

Rai's managing director and one of its five directors have resigned in the latest storm to batter Italy's crisis-hit state broadcaster, Rai.

Gianni Billia and Alfio Marchini, both appointed by the Silvio Berlusconi-led coalition government earlier this year, quit after Rai president Letizia Moratti abruptly fired several top managers at its three networks and appointed new executives linked to the right-wing parties.

The latest round in the battle for Rai has left the public broadcaster with a depleted management and growing clamor from critics. Despite a motion of no confidence passed by the Senate in her and her board, Moratti insisted she would stay on, and would act as managing director until a replacement for Billia could be found.

Italy's president Oscar Luigi Scalfaro weighed in in November, writing to the speakers of the Parliament asking them to guarantee access to the network to all political forces, including the opposition, and to guarantee the independence of Rai. Only a few days before, Scalfaro received a letter signed by 1,000 intellectuals, movie directors, writers and other figures, asking him to intervene to save the public broadcaster, and protect the freedom of the media.

As the battle rages, Rai is left with virtually no management and mounting difficulties. Crucial decisions regarding investments, acquisitions and production are on hold. Payments to suppliers have been delayed. Its library is empty and program directors do not know what to air the next week, one of Rai's board directors admitted.

## EU MEDIA BUDGET TO INFLATE

The European Commission has put forward proposals to tighten up program quotas and for a dramatic funding for the European audiovisual industry. Ministers responsible for broadcasting in the 12 European Union member states were due to meet on November 25 to discuss plans for a revised tv directive and to agree on the scope of the Media program after 1995. The plan for the directive is to remove the "where applicable" wording from the requirement on broadcasters to carry a majority of European-originated programs, in order to promote original fiction, documentary and drama. The proposal to increase the Media budget to \$400 million over five years for production, training and distribution ventures was expected to be opposed by the largest member states. The EU commissioner in charge of broadcasting, Portugal's Joao de Deus Pinheiro, has said he wants to decide both issues before he is succeeded by Marcelino Oreja of Spain at the end of the year.

As a consequence, the Rai audience has started decreasing; beside the lack of new product (fiction in particular), its news shows are daily losing force and credibility. In this light, the appeal of Fininvest's three channels is strengthening with both viewers and advertisers.

Little more than a year ago few would have doubted that, despite its financial difficulties, the Italian state broadcaster still had considerable strength in program-making and could realize the ambition of its management to take a leading role in Europe. Just a few months later, the alarming prospect of Rai becoming a minor force even in its home market appears a possibility.

by Cecilia Zecchinelli - MILAN

## FRANCE

# Top Two Stations Set Store By Talent

**Faced by a lawsuit from star presenter, TF1 backs down**

Star presenters are playing an increasingly important part in producing as well as fronting prime time shows on France's two leading networks, TF1 and France 2. Putting so many of their strategically-important slots in the hands of talent has proved a mixed blessing, however.

TF1 was recently faced with a lawsuit from Christophe Dechavanne after pulling his weekly variety show *Tout le toutim* and replacing it with Columbo.

Two years ago, TF1 commissioned Dechavanne's company Coyote Productions to make

two weekly magazine shows plus a daily access prime time (7pm-8pm) show. TF1 didn't want to put a talk show at 7pm, but Dechavanne did, and threatened to move to France 2. Afraid of losing its talented young star, TF1 had to back down. The talk show, *Coucou c'est nous*, turned out to be a hit with young viewers, and although the ratings were lower than *La Roue de la Fortune*, ad revenues went up.

But at the end of the last season, Dechavanne said he had enough with daily shows and asked for a weekly variety show. TF1 accepted, although it had no real replacement for *Coucou c'est nous* and had to try reruns of first *Rick Hunter* and then *Beverly Hills 90210* (which proved more successful).

Dechavanne's *Tout le toutim*, which looked like a 90-minute extension of *Coucou c'est nous*, did poorly. After its third bad set of ratings, TF1 announced it was dropping it.

Dechavanne was outraged by the way he was treated at his first failure and went to court for breach of contract.

TF1 said that it would schedule a new *Tout le toutim* within three weeks of the last one. Dechavanne saw the proposition as a trap and refused. Both parties finally decided that they could not afford a war and settled: Dechavanne is developing a new talk show for the end of January, and will keep commissions worth a staggering \$47 million a year.

This fall, France 2 handed its daily access prime time (7pm-8pm) slot to *Studio Gabriel*, a talkshow fronted by Michael Drucker. It has not so far been a success - scoring a market share below 20% compared to France 2's overall share of 24% - but Drucker has a long-term contract and stays on.

Another star presenter, Nagui, is producing monthly variety show *N'oubliez pas votre brosse à dents* (Don't forget your toothbrush) and weekly music show *Taratata* through his company Air Productions. He also presents the nightly gameshow *Que le Meilleur Gagne*, made by Grundy. A third presenter/producer, Jean-Luc Delarue, produces two nighttime talk shows for France 2 via the company he set up after leaving Canal Plus, Reservoir Prod. The new company will also produce some prime time shows this year.

As long as the viewing figures stay healthy, the risk of giving so much power of the presenter/producer may be worth it. But it raises the question of who really makes the programming decisions - the broadcaster or the talent?



The success of *Coucou c'est nous* is worth \$47m a year to its presenter

by Serge Siritzky - PARIS



# telenovelas

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### THIRD NET FOR RUSSIA

London-based International Network Television is to launch Russia's third national channel in partnership with Russian government bodies on December 31. The new channel, TV3 Russia, will reach a claimed 100 million viewers at launch via satellite, UHF and VHF transmissions, building up to coverage of the entire population of 150 million through 1995. TV3 Russia is the trading name of a joint stock company called Telekanal 27 jointly owned by INT and four Russian government agencies including the Ministry of Communications and the Council of St Petersburg. Mark Latham, joint managing director of INT, said TV3 would be a general entertainment service and would initially acquire most of its programming from abroad but would gradually increase own production. He declined to specify funding arrangements and programming plans.

### VIETNAM

## Cinema Deal To Spur Film And TV Growth

### MoU with British company spans production, libraries and sales

Vietnam's government is set to open the doors on the country's film and tv industry after signing a far-reaching agreement with a British company.

The memorandum of understanding signed by Bui Dinh Hac, general director of the Vietnam Cinema Department and Alan Robinson, chairman of London-based Mainline Television, on November 2 aims to set in train "the rapid development of Vietnam's film and television industry."

Among a series of proposed joint ventures is the development of feature films and tv programs for the international market. Production of a co-financed feature film, which will be shot and edited in Vietnam, is planned for next year. Frazer Ashford, managing director of Mainline Television, said they would be looking at producing "documentaries and a whole range of things" for television. "Up to now, their own industry has been the home market. They haven't been producing on a commercial basis for the rest of the world."

The agreement provides for the setting-up of a training and production centre and exchange of creative personnel between Vietnam and the UK. Video tape is virtually non-existent and most production equipment was furnished by the European communist bloc countries.

Ashford said that VCD currently produces around 12 features a year. Its archives date back to the 1950s and contain an unquantified amount of feature film, documentary and news footage. "Our first job will be to catalog the library and find out what is there and look to see how much of it is viable and can be converted to tape." The library could prove a goldmine for documentary producers.

Mainline will be distributing the VCD's film libraries on the international market, starting with Natpe in Las Vegas next year, and promoting Vietnam as a location for film and tv production.

With a population of 73 million, Vietnam is one of the more populous far-eastern markets, but has only been opened up to foreign investment by the communist regime over the last two years. National tv network VTV – which is also supervised by Hac – claims to reach 70% of the population.

Mainline is a subsidiary of European Broadband Systems, which has interests in UK cable tv and telephony operation via EuroBell. The con-

tact with the Vietnamese arose through Mainline's membership of a European Union technical committee, whose chairman is of Vietnamese origin and put the two partners in touch.

by Tim Westcott – LONDON

### GERMANY

## Länder Vote On Share Rule Change

### Decision could clear way for new commercial channels

It could be a good deal for Germany's commercial tv broadcasters. Though ready and willing to fork out substantial sums to launch channels on Europe's largest national cable system, they feel hindered by stringent, anti-media concentration laws.

Now, after months of wrangling among themselves, Germany's 15 state media directors have submitted an "audience share model" plan to revive the nation's complex media regulations, designed in the post-war federal structure to prevent undue ownership concentration.

Under present rules, no company can own more than 49.9% of a "general interest" broadcaster and only 24.9% of a "theme" or niche channel. In putting together shareholder structures, companies often ran afoul of the regulations, as was



Kirch: Links between his group and Pro 7 scrutinized

the case with sports channel DSF, which was forced to reshuffle its projected shareholders to obtain a license. Even after Bavaria's BLM had given DSF the nod, the Berlin authority MABB refused to admit it to the region's cable networks, arguing that the license was invalid since its cor-



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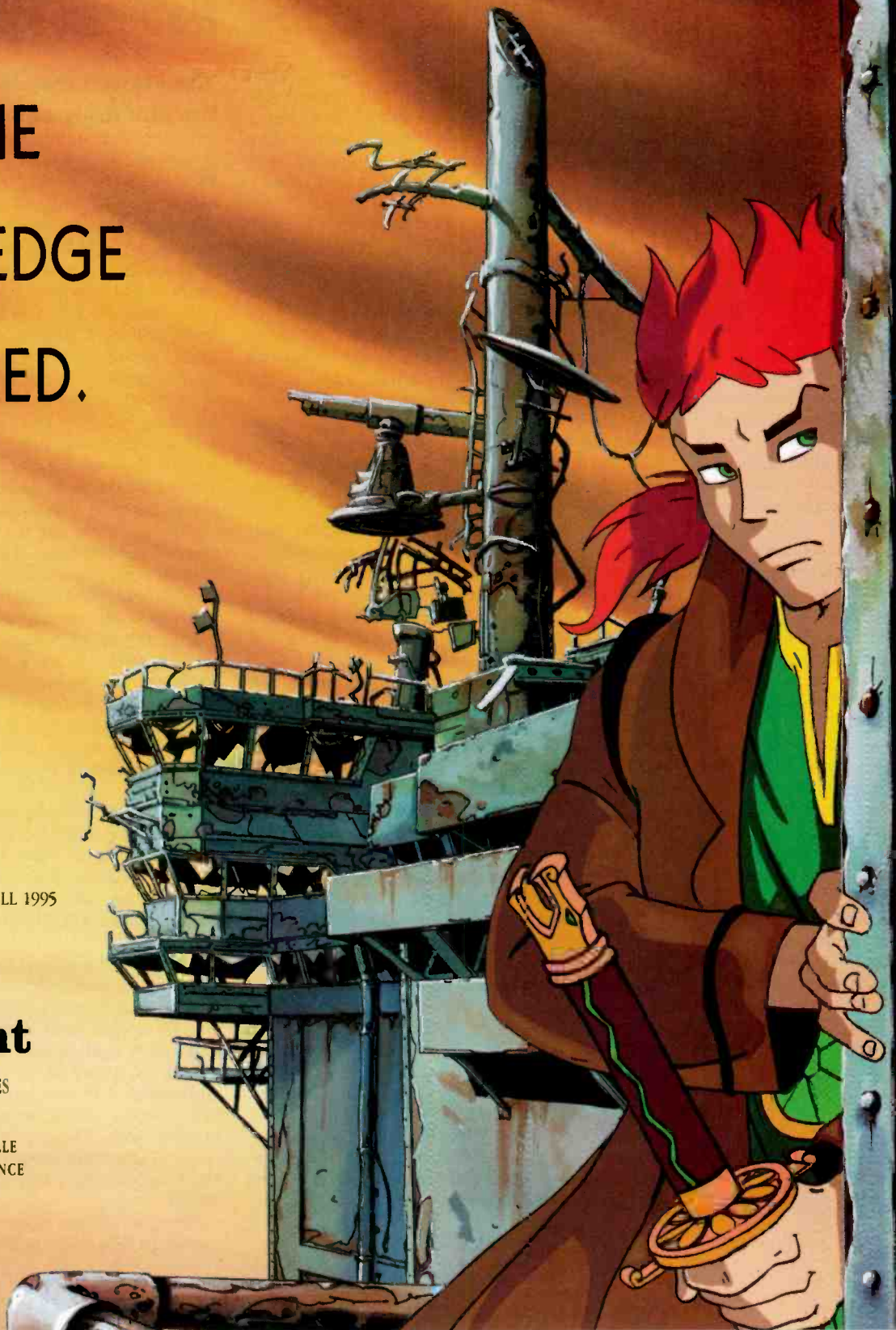
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## HILL BALES OUT OF THE ABC

David Hill, the controversial managing director of the Australian Broadcasting Corporation (ABC), has resigned two years before the end of his contract.



During his eight years at the helm of the national public service broadcaster, Hill's abrasive management style and entrepreneurial zeal led to conflict with the board and tensions with various government ministers. His relations with the government-appointed board deteriorated during recent months, though the only reason Hill offered for his departure was: "It's time to look for new adventures." The ABC's reputation suffered this year from a series of allegations that ABC TV accepted "backdoor" commercial sponsorship for some of its infotainment programs. The communications minister has also criticized the loss-making ABC Television International satellite service which it beams to Asia. The Senate in September decided to establish a broad parliamentary inquiry into ABC management and operations.

porate structure breached media regulations.

The private channel Pro7 also came in for close scrutiny by the media watchdogs, some of whom took a dim view of a 47.5% stake held by Thomas Kirch, son of film entrepreneur Leo Kirch. They contended that Pro7 was, in effect, part of the Kirch empire, which the Group flatly denies. The probes yielded nothing concrete, or Thomas Kirch would have had to prune his shares to less than 25%.

With the autonomous state regulators themselves often at loggerheads, the system has already proved to be outmoded. Lacking a national licensing policy, the job-conscious state authorities meted out licenses to all applicants of new cable license applications – 11 at last count – and something had to be done.

With the blessing of all 15 authorities and the two leading political parties, the Christian Democrats and the opposition Social Democrats, the state premiers are virtually certain to implement the proposed revision of paragraph 21 of the interstate treaty in their November 30 meeting. Rather than shareholdings, media ownership will be based on a channel's total share of the audience, with a proposed limit of 25%. Theoretically, the reform could open the way to single ownership of a channel, providing its audience share did not exceed the limit. Also a company could participate financially in several broadcasts as long as the limit was not exceeded.

In a position paper, the Kirch Group welcomed the new system "because it introduces a qualitative component in the assessment of marketing influences." The group called for implementation of supervisory councils but stressed that "growth should not be punished" in the reforms.

Bertelsmann also endorsed the system, but recommended the audience share model "should reflect as much as possible the real power structure. This could best be done on the basis of capital and voting shares."

Some problems remain unclarified. What would happen if a channel goes belly up, creating new relationships in the audience share? And it is not clear what would happen if a channel's share exceeds the set limit. And how much influence will program suppliers exert on the market?

The reformers will also have to define television's relationships with the radio and print media. The newspaper publisher, Springer Verlag, holds a 20% stake in the commercial broadcaster Sat1, while Kirch owns 35% of Springer, making a powerful tv and print media partnership. The Springer-Kirch axis has caused raised eyebrows in some circles.

- The Kirch Group and its partner in the planned Media Service digital tv joint venture, Bertelsmann, pledged look into alternative possibilities for introducing pay-tv channels after the European Commission blocked Media Service on competition grounds in November.

by Jack Kindred – MUNICH

## BULGARIA

# Tempo Awarded National TV License

**The station may have to wait out the elections before launching**

Another ex-Soviet bloc nation is about to get national commercial broadcasting. Tempo, a venture backed by one of the country's leading industrial concerns, has been awarded the national commercial tv licence for Bulgaria.

Tron Group, which owns a publishing house, the Standard newspaper, several local commercial radio stations and a cellular phone system, is backing Tempo. According to Krassimir Stoitcheff, Tron Group's director, there's considerable foreign interest in Tempo. Discussions have been held "with three or four interested parties," including "most of the people present in Poland and the Czech Republic." Stoitcheff said money to launch the service "can easily be found" and Tempo would prefer investors who can offer programming as well as funds.

Start-up costs for the 24-hour entertainment channel are estimated at \$7 million to \$10 million. Stoitcheff said he expects the service to be allocated a frequency shortly and begin transmissions by the end of next summer.

The future of Tempo may, however, hinge on the outcome of a general election being contested in December by the reformist Union of Democratic Forces and the former communist party, running as the Bulgarian Socialist Party. The winners in the election will likely move a new broadcasting bill through the legislature in 1995.

Bulgaria is already served by local terrestrial stations located in Burgas, Shumen, Varna and the capital, Sofia. New Television, for example, serves viewers in Sofia with a mix of news and entertainment and has agreements with Reuters, France Presse, ABC News and the Bulgarian Telegraph Agency.

Tempo will also find itself carried by and, perhaps, competing with a new cable industry. While rudimentary networks serving about 100,000 homes have been in existence for some time, new legal operators are set to emerge following the award of 45 exclusive licences by the authorities. The two largest and most important operators are Globo, which has secured the right to cable Sofia, Burgas, Shumen and Kurdzili, and Union Television, with permission to offer services in Bulgaria's second city, Plovdiv, and 13 others.

Tempo's future hinges on the tv advertising market in Bulgaria – estimated by various sources



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## ARGENTINA CABLES WOMEN

Argentine broadcaster Telefe and its production arm Produfe will team up with local producer Ernesto Sandler and publisher Editorial Atlantida to launch an advertiser-supported, female-oriented cable network in March of next year. The network, yet to be named, will be launched with 12 to 14 hours of first-run programming daily, all of which will be produced in-house. Studios are currently under construction and production is expected to be in full swing by December. Depending on the results of the initial launch, the network may extend programming to 16 hours daily, from 8 am to midnight, said Maria Dominguez, a Produfe project executive. With an extended schedule, the network may also purchase programming from third parties, though there are no current plans to buy foreign shows.

to be worth anywhere from \$13 million to \$30 million – and hitherto monopolized by BNT's two national channels.

Ivan Stankovic, vice chairman of SMS Bates Saatchi and Saatchi Advertising, said with 10 commercial stations currently operating in neighboring Serbia's capital Belgrade – which is still under UN sanctions – there is no reason why the same should not happen in Sofia.

However, in his view, "Bulgaria has no tradition in advertising across the board" and faces serious economic difficulties. While he added "there is enough space for new media... and the only potential loser is BNT," he warned the market is unlikely to settle down until at least 1996.

by Chris Dziadul — SOFIA

## NIGERIA

# Deadline For New Channels Extended

**Regulator allows broadcasters time to switch on new channels**

Getting private tv on to the air in Nigeria has not proved an easy task. The one-year deadline set for 14 "open" or terrestrial channels and 13 microwave services has passed, with only four "open" channels up and running. Operators of microwave services have had more success, with all but two having started up.

The difficulties faced by the country's first private channels are considerable: no radio or tv equipment is made in Nigeria, so transmitters, studio hardware and tape have to be imported. A

shortage of foreign exchange adds to the logistical problems. The National Broadcasting Commission (NBC) – the licensing body – has taken these difficulties into consideration and is allowing the broadcasters more time.

More stations are aiming to launch in time for the World Youth Soccer Championships, due to be held in Nigeria in March 1995, but others could wait until as late as November – when Nigeria will host a world film festival.

An NBC spokesman said it recognized that the one-year deadline was, in the circumstances, unrealistic. "Time is on the side of the private investors," he added. He expressed satisfaction that the four stations which have gone on the air are spread throughout the country: Clapperboard TV and Desmims TV are broadcasting in the capital, Lagos, while Minaj TV System and Galaxy TV are in the provincial cities of Ubusi and Ibadung respectively. About 85% of the print media are concentrated in the south-west of the country.

The 11 companies operating microwave services are also spread widely. According to the NBC, most are retransmitting around three channels downlinked from satellite. The NBC said that foreign channels carried include CNN, BBC World Service TV, European services MTV Europe, Sky News, Eurosport and UK Gold and South Africa's Bop TV.

by Titus Ogunwale – LAGOS

## MALAYSIA

# Star TV Courts Malaysian PM

**Murdoch hopes to smooth way into market for pan-Asian service**

Satellite television station Star TV may have gained a toehold in the south-east Asian country that has been its most vocal critic. Malaysia is considering a proposal by the Hong Kong-based company to broadcast programming it has had a chance to approve beforehand.

Prime minister Mahathir Mohammed said Star TV's majority owner Rupert Murdoch made the offer at a meeting between the two in the Malaysian capital Kuala Lumpur late in October.

Murdoch assured Mahathir the Malaysians could control the telecasts into the overwhelmingly Muslim country and that any programming would be tailored for the country. "I met Murdoch and he would like to broadcast to Malaysia," he said. "If we don't like it we can switch it off."

Mahathir, who has often railed against the



Nigerians are sampling rerun fare like the BBC's Eastenders on UK Gold





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## FIVE ALIVE, AGAIN

Britain's tv regulators just can't give those frequencies away. The Independent Television Commission is offering a license for the new Channel 5 for a second time, after rejecting the sole bidder in 1992. Bids are due in by May 30, 1995. Terrestrial coverage will be limited to between 50% and 70% of the population, and the channel will be required to produce or commission 40% of output in the first year. The license will be awarded to the highest bidder, though the winner must pass a "quality threshold" with its program plans and satisfy the ITC it has the financial backing to sustain the service for the ten-year license. (The sole bid for C5 in 1992 was turned down on these grounds.) A decision will be made by November 30 and the channel should be on the air no later than January 1, 1997. Companies already putting C5 plans together include Meridian, Pearson and Time Warner (forming a consortium, possibly with further partners), NBC, Virgin Communications, CanWest and Yorkshire/Tyne Tees TV.

"cultural imperialism" of satellite broadcasting, and of Murdoch in particular, is to send a team from his Information Ministry to London to study the BSkyB operation while the authorities consider Murdoch's offer. The prime minister insisted this gesture implied no commitment on his part.

Malaysia is hoping to launch its first satellite, designated as Measat1, in late 1995. Fanzil Abdul Rahman, parliamentary secretary of the country's Information Ministry, said the government was "very open to anyone who is interested to broadcast here. Once transmissions begin on Measat1 there will be 20 channels available, and we will need many programs then."

The signs that Malaysia's attitude to Star TV may be softening is a measure of the changes in south-east Asia since the network started in late 1991. Then there was considerable indignation among many governments that it was impossible to stop Star's free-to-air signals from being picked up by anyone willing to break the ban on private dishes that still exists in Malaysia.

This reflected unease at the programming content, but latterly more the fact that officials could not control or collect revenue from the service.

Murdoch's offer is a pragmatic gesture to increase the spread of his service to the country without causing offence. It also offers the chance for officials to control the flow of information.

If an excerpt agreement is struck it will also mirror others already made by MTV with the Indian and Korean governments and Australia Television International and ESPN with the Chinese.

## BRAZIL

# Globo Group Gets The Edge In Pay-Tv Battle

**Globo and Editora Abril compete to capture a huge untapped market**

The pay-tv battle in Brazil, begun in 1991 by Editora Abril, South America's leading publisher, is getting more intense by the month as media giant Globo Group scrambles to catch up.

In June of 1991, Editora Abril launched TVA, a five-channel enterprise transmitted over the air, via microwave and scrambled UHF signals, to viewers with \$200 antennas and decoders. In November 1991, Globo launched Globo Sat, a four-channel service transmitted to viewers equipped with far more costly satellite dishes. By mid-1992, TVA claimed 30,000 residential subscribers and Globo Sat only 12,000.

While Globo, owner of the giant broadcaster TV Globo, was slow out of the pay-tv starting-gate, underestimating its potential, it has been quick to catch up. In July 1993, Globo formed the

cable company Net Brasil with two smaller associates – Multichannel and RBS – and began laying cable all over southern Brazil. Net Brasil's cable operations now partially extend to 33 cities, while TVA directly or indirectly through affiliates reaches 40 cities.

Net Brasil, now claiming 230,000 subscribers estimates it will end the year with 260,000.

Net Brasil already has a slight numerical edge over TVA. And it has technical and economic advantages that could, in the long run, make it the big winner in the market. Net Brasil's installation prices (\$100 to \$230) are a bit cheaper than TVA's (\$150 to \$230). More importantly, TVA's terrestrial systems – TVA reaches 150,000 subscribers over the air and 75,000 via cable – cannot offer the same number of channels as Net Brasil's cable systems.

"TVA has been our biggest sales booster," said Net Brasil's marketing director Alberto Pecegueiro, a former Abril employee. "It introduced the public to pay-tv, and then we came along and offered a better alternative with more channels than TVA's over-the-air transmissions and no topographic problems."

TVA's response has been to try to increase the number of subscribers who get it via cable. In August, it gained \$35 million in new investment when the Chase Manhattan Corp. bought a 17% interest in the company.

Despite all this, TVA president Walter Longo refuses to admit he's in a tug-of-war with Net Brasil. "There are currently 330,000 residential pay-tv subscribers in Brazil, which means pay-tv in Brazil is penetrating less than one per cent of tv households," said Longo. "There is no competitive market yet because there is still lots of room – at least 10 years' worth – to grow without worrying about competition. This is the biggest untapped pay-tv market in the world."

Net Brasil and TVA have, however, locked horns for subscribers in some big cities, especially Sao Paulo, where both are laying cable at a furious pace, often in the same neighborhoods. Even Longo admitted "the situation in Sao Paulo is insane. It makes no sense to have two different cable wires on the same pole. It would make better sense for Net Brasil and TVA to sit down and decide who lays cable where in Sao Paulo."

In October, the Brazilian Chamber of Deputies passed legislation which regulates cable, a move that should see the establishment of regional cable operators to compete with TVA and Net Brasil. In Belo Horizonte, one such operator has already cabled the city.

The new law legalizes the pay-tv operations already in existence, allows for future pay-tv concessions (currently there are 101), gives the government the authority to issue more than one concession in a specific region, and stipulates the government's telecoms monopoly Telebras will only operate pay-tv in regions the private sector does not want to wire.

by Michael Kepp — RIO DE JANEIRO



# Smothered By A Crazy Quilt

**W**ant to tread on the multimedia superhighway made in Europe? Watch your step! Chances are the freeway you're looking for has been clogged up by that Old World specialty — stifling anything new with restrictive forms of regulation. The VERBOTEN signs are going up all over the infobahn.

Ask Bertelsmann, Kirch and Deutsche Telekom. Their common venture Media Service GmbH (MSG) has just met that kind of fate at the hand of the European Commission.

MSG was intended to provide technical infrastructure and administrative services like customer billing for pay-tv, generally thought to be the most promising business proposition in the upcoming digital era.

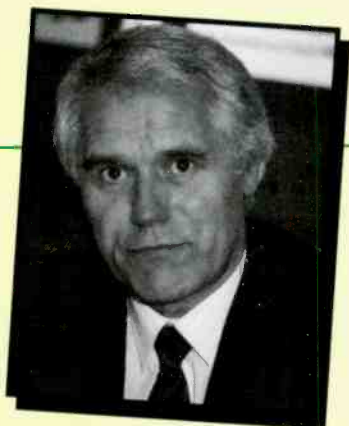
Because the MSG founders are among the most powerful media players in Germany, the Commission argued, the venture would prevent others from entering the German market for pay television. Therefore the deal was judged incompatible with the single market and blocked.

The MSG partners are impressive alright. Bertelsmann is the world's second largest media group. Kirch Group owns the largest German-language film library. Both have interests in private television and are partners in Germany's only pay-tv channel, Premiere. Deutsche Telekom, the state telephone monopoly, controls Europe's largest cable system with 14 million tv households connected.

"If you look into this case," said the EU's competition commissioner, Karel van Miert, "you must admit that there is really a very considerable degree of certainty that if you allow it, this is going to close this pay-tv market for a very long time."

Assurances and built-in guarantees that MSG would be a neutral service provider for the whole industry and not discriminate against anybody did not convince the Commission.

The disappointed reaction on the part of the MSG founders was accordingly somber. "I would consider this to be a blow to the whole German market," Telekom supervisory board chairman Rolf-Dieter Leister said. "It will delay Germany's entry into the new television technology."



BY WILFRIED AHRENS

A Bertelsmann statement said the Commission's ruling had, in the short term, closed possibilities for many smaller program producers to access future tv technology: "At the moment the MSG partners are the only people in Germany who have the technical and administrative capabilities to run such a business."

Kirch's managing director Gottfried Zmreck accused the Commission of having blocked a "practical entrepreneurial initiative to develop this future."

But the anti-MSG decision does not just harm the German market perspective. The signal from Brussels spells no good for the digital television future in Europe at large.

The MSG case as handled by the Brussels bureaucrats is symptomatic of the discrepancy between technological progress, with all its economic potential, and government thinking in Europe. This

state of affairs differs radically from the pertinent philosophies in the U.S.

The result is obvious: while in the United States, billions of dollars have already been invested in digital tv and ventures like DirectTV are paying first dividends, Europe has been fettering itself in a crazy quilt of national regulations and outdated competition and ownership rules.

Harmonized rules are a long way away. Yet without them, the European communications and media industries will be falling further behind international competition.

As for building an infrastructure for digital services, one of the indispensable elements of multimedia, the MSG ruling has created additional uncertainties for all potential players.

In Germany there are more of them than just Bertelsmann, Kirch and Telekom. The Commission should just have read the papers. The presumed lack of competition proves to be a case of ignorance.

Companies and conglomerates at least as, if not more powerful, than the three have been preparing for the promising digital market.

Among them are utility giants like RWE and Veba with revenues in the dozens of billions of dollars and their own communication networks. Even the German state railroad Bundesbahn, which also has its own telephone system independent of Telekom, has plans to enter the digital communications field.

Siemens has forged digital alliances with American specialists like Sun Microsystems and Scientific Atlanta. All of them intend to be active in the pay-tv services business. And they are at least as formidable as the MSG partnership. Wait to see what will happen to their plans when scrutinized by Brussels.

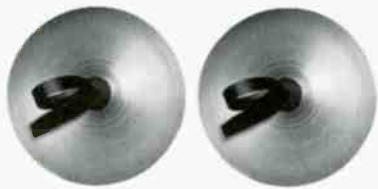
Those who will certainly not wait are the (unfettered) competitors from across the Atlantic, rattling their war chests full of cash. **TBI**

**While in the U.S., billions of dollars have been invested in digital tv, Europe is fettering itself in regulations**

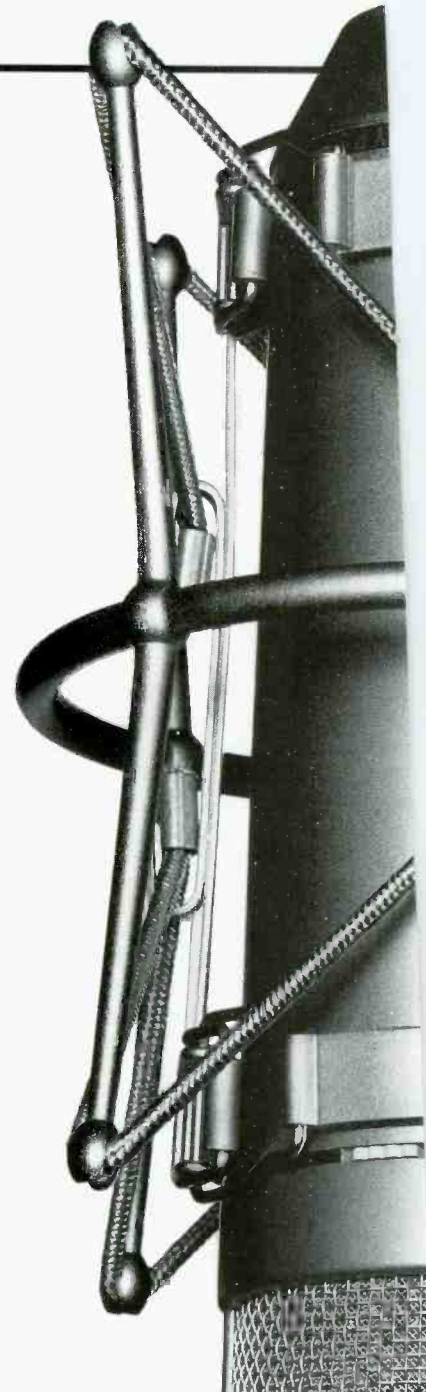


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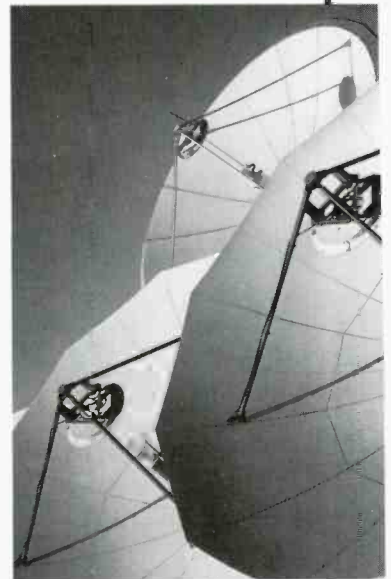


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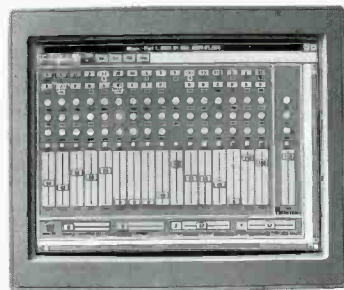
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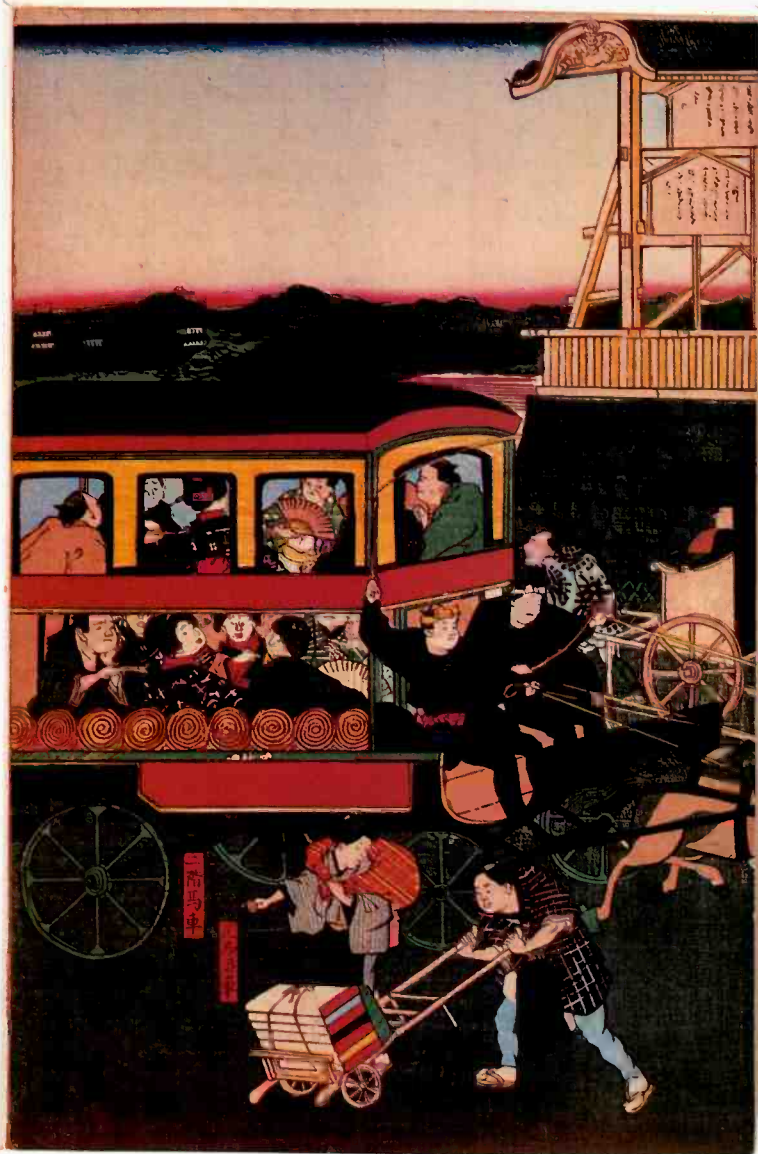
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# In Their Own Backyard

**Politics and economics are keeping the Japanese from launching satellite channels in Asia. They're leaving the business to Rupert Murdoch's Star TV and western companies like HBO, Turner and MTV. Selling individual series, on the other hand, is a good business getting better for Japanese broadcasters, now that bans on Japanese programming are being lifted in Taiwan and Korea. Mark Schilling begins TBI's look at Asia with a report on the media industry with the most to gain from an Asian boom**



Japanese broadcasters should have an inside track in Asia. They are by far the technological leaders in the region, with the most advanced facilities and highly trained technical staffs. Financially, they have the deepest pockets, despite a lingering recession that has hit advertising revenues. Japanese broadcasters can and will spend the earth to make top-quality programming appealing to international audiences. And most importantly, they are Asians themselves, sharing basic values and tastes with other Asian peoples.

Japanese broadcasters have been exploiting these advantages in Asia for decades, developing relationships, making and selling programs. But, for a vari-

ety of reasons, they have shied away from launching regional channels in competition with western services like CNN, BBC and MTV or Rupert Murdoch's hybrid operation Star TV.

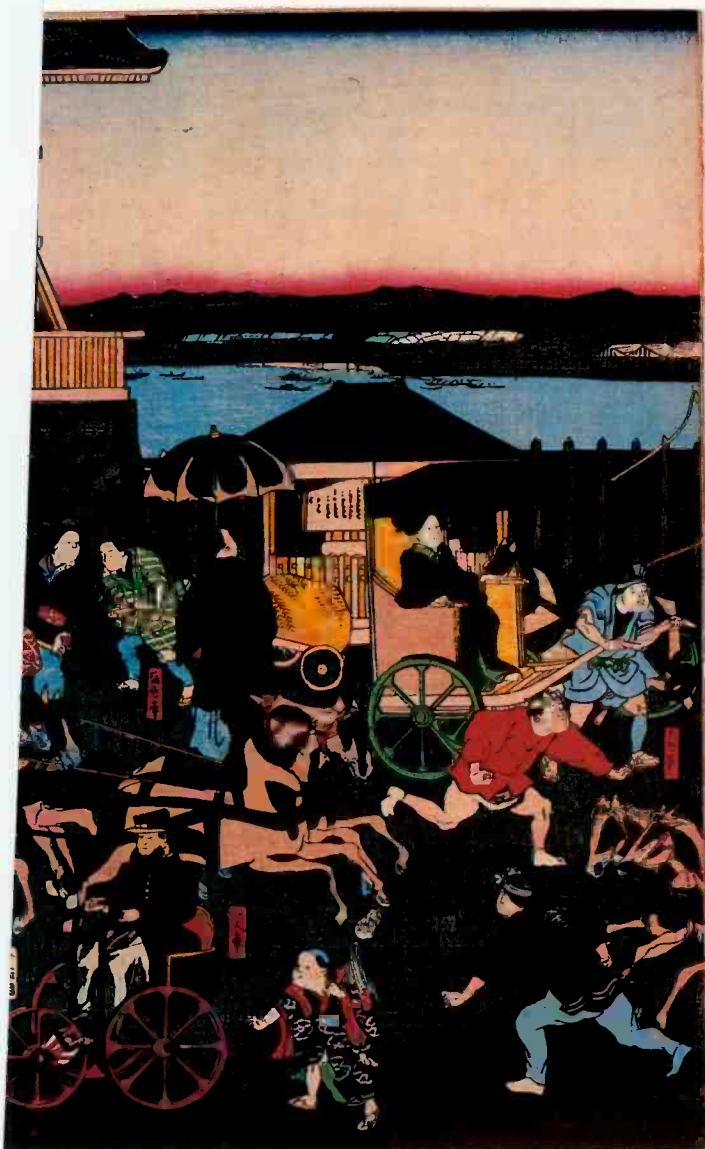
One reason is political. Nearly 50 years after the end of the war, Asians who were once under the Japanese colonial thumb are still sensitive to the threat of a Japanese "cultural invasion." Also, though Japanese broadcasters no longer sing the praises of the Greater East Asian Co-Prosperity Sphere, their relative permissiveness toward sex and violence and the freedoms they permit their journalists make many Asians, particularly those in official positions, uncomfortable. When NHK launched two 24-hour satellite

channels in 1989, Korean officials complained the programs were crossing Korean borders and, presumably, corrupting Korean minds and morals. NHK apologized and withdrew the services, but not before thousands of Koreans had already purchased dishes and receivers.

Given this kind of unpleasantness, said Fujisankei Communications International sales and marketing director Ansei Yokota, "Japanese broadcasters tend to be cowardly about (broadcasting in Asia). We still have something of an inferiority complex towards other Asians — it's because of our guilty conscience. So we are reluctant to offend them."

Political barriers even cause problems in the programming distribution busi-





ness. Taiwan enforced a regulation barring the import of Japanese dramas until 1993, while the Korean market will remain closed to Japanese shows until a Korean cable industry gets off the ground next year.

Economics – both the size of the market and cost of transponders – have also kept Japanese broadcasters out of the pan-Asian game. The numbers don't add up, at least for Japanese-language channels. Because of the legacy of colonialism and the growing interest in Japanese among Asian students, Japanese-language speakers are somewhat numerous in the Asian region – about three million Chinese are estimated to be studying the language – but it's hardly enough to sup-

port a Japanese-language service. And the cost of broadcasting by satellite from Japan remains prohibitive. Compared with other Asian common carriers, Japan's SCC and JSat charge nearly double or more for a lease on a transponder.

A third barrier was, until recently, internal regulation. The Ministry of Posts and Telecommunications forbade Japanese broadcasters from beaming programs via satellite to other Asian countries. Earlier this year, as part of its new policy for promoting cable and satellite broadcasting, the MPT reversed that ruling. Not surprisingly, because of the other impediments, none of the country's broadcasters has yet moved to launch a regional service.

One exception to the general reluctance to get into pan-Asian satellite programming is Sony, which has leased a transponder on Apstar 2, the satellite to be launched by Hong Kong-based APT Satellite Co. Beginning late this year or early in 1995, Sony will reportedly begin transmitting programs on Apstar throughout the Asian region. Much of the programming will likely come from Sony Pictures Entertainment's library of films and tv shows. Sony, however, says the plans for the transponder remain "in flux," including the date for the start of service.

Though satellite broadcasting does not appeal to Japanese broadcasters, they are not at all shy about selling their

By courtesy of the Board of Trustees of the Victoria & Albert Museum





Nippon Television Network has sold the format of its quiz Show-by Shobai to three territories

programs to their Asian counterparts. Sales have been spurred in the past couple of years by the launch of Star TV and a decision by Taiwanese regulators to lift their ban on Japanese dramas. The commercial networks, especially, are enjoying a bonanza: Asians love the entertainment programming produced in Japan. Prices, though low compared with Europe and the United States, are rising.

A breakdown of how the major Japanese players are doing business in the region follows.

**Dentsu.** Japan's largest advertising agency is also a leading agent for Japanese tv programs in the Asian market. Dentsu does few straight cash deals; instead, it barter the broadcasting rights to the programs in return for ad time, which it then sells to its clients. "Given the strength of the yen in most Asian countries, there is almost no point to cash deals," said Dentsu Media Services Tv Division manager Ryuichi Ishida. Of the shows in the Dentsu catalog, two of the most popular are quiz shows: *Waku Waku Animal Land*, a nature quiz that has been broadcast in 40 countries since its 1983 debut, and *How Much?* a guess-the-price program that is currently airing in Thailand and China. Both are refor-

matted and repackaged for local consumption, with local hosts and guests. Only the idea and some of the footage are Japanese. "These are kinds of programs that our clients can sponsor with confidence," said Ishida. "They do not present any problems with cultural friction."

**Tokyo Broadcasting System.** Long a drama powerhouse in its home market, TBS has been finding a ready market in the region for drama programs, particularly on Star TV, which has already broadcast *Hotel* and *Tokyo Elevator Girl*. Both series belong to the popular "trendy drama" genre of romantic fantasies about the lives of young, free, upwardly mobile urbanites.

Taiwan has also become a major market for TBS. Since December 1993, when the government lifted its ban on the broadcasting of Japanese dramas on Taiwanese tv, Taiwanese terrestrial and cable broadcasters have been snapping up Japanese dramas and other shows. "I would say that, overall, our sales in Asia have increased by tenfold since last year," said a spokesman for TBS's programming sales department. "But sales in Taiwan have gone up seventeen-fold."

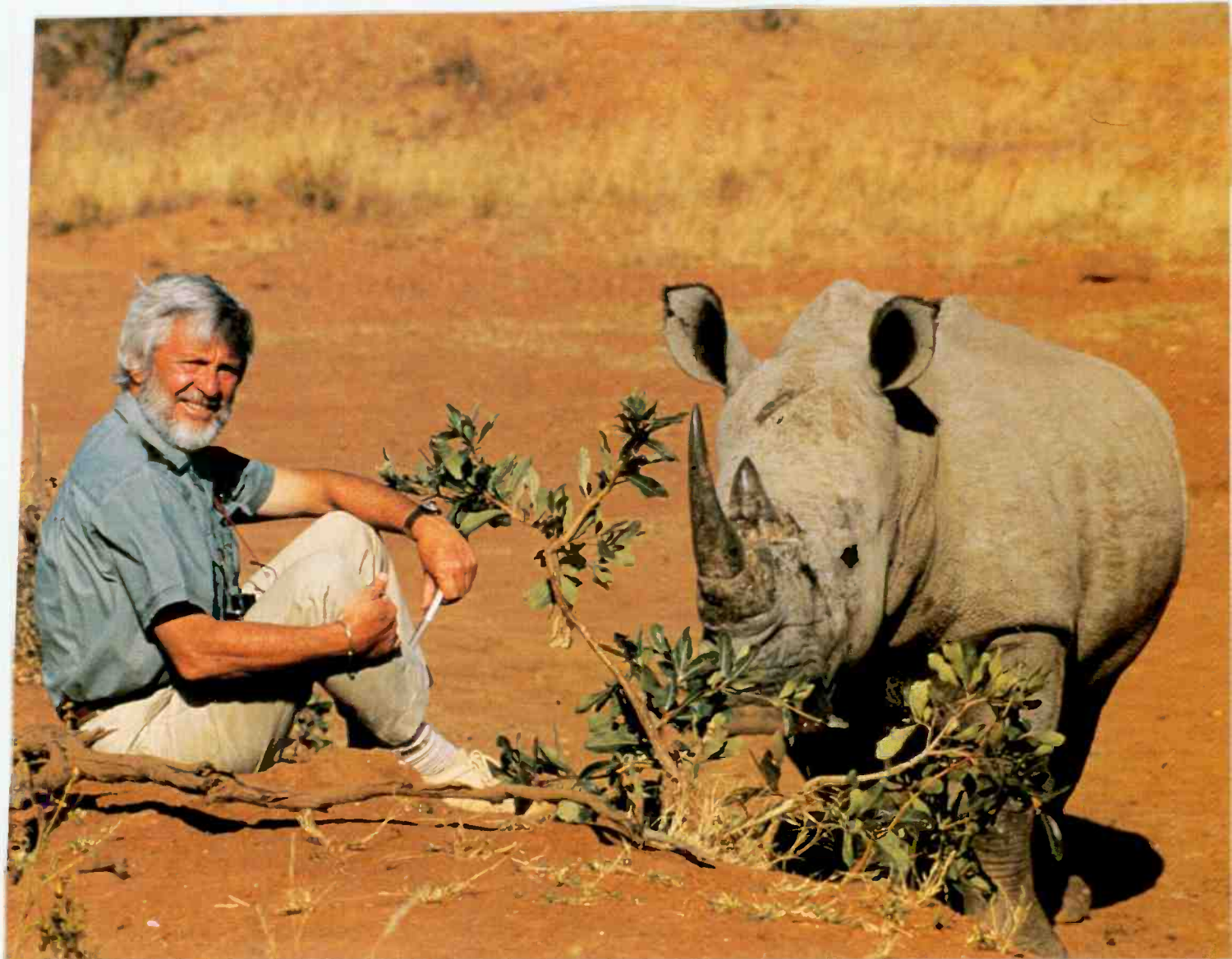
TBS is looking forward to the opening

of another major Asian market: Korea. In January of 1995, cable services will officially start in Korea and cable broadcasters will be allowed to show Japanese cartoons and documentaries – a post-war first. "We are hoping that the ban on dramas will also be lifted," said the TBS spokesman.

**Nippon Television Network.** According to program sales department general manager Shime Miura, the most popular genres with Asian buyers are drama and animation. "We've been selling to Star TV for some time now, and since last year, the demand for Japanese drama from Taiwanese cable and satellite stations has become quite strong."

In addition to completed programs, NTV has had success with format sales, specifically of its popular quiz program *Show-by Shobai*. This year broadcasters in Hong Kong, Taiwan and China bought the format and footage of the show. "The Chinese market has not been developing as fast as we had thought, but overall the Asian market is growing steadily," said Miura. "Also, the prices we have been able to get for our programs have increased. Given the economic power of Asia and the cultural similarities between Asia and Japan, this is a





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Contestants in over 40 countries are spotting the species in Waku Waku Animal Land

truly promising market."

**Fujisankei Communications International.** FCI, which handles international sales for Fuji TV and other companies in the Fujisankei Group, is finding that trendy drama series account for most of its sales in Asia. Among the best sellers are *Tokyo Love Story* and *The 101st Proposal* – both huge hits for the network in the early 1990s. Like agents for most other nets, FCI sells mainly individual programs or series; package deals are rare. "Since the beginning of 1993, Star TV has been a rapidly growing market for us," said sales and marketing department director Ansei Yokota. "But there is a limit to how much they can take. Right now, however, both Star TV and Taiwan's terrestrial stations are steady buyers of our programs."

Though FCI is putting more stress on its Asian sales effort, the amount of income generated, said Yokota, is only "a tiny fraction" of the earnings of the entire Group. "At present, our business with Asia is little more than a kind of cultural exchange."

**Asahi National Broadcasting.** Like its fellow commercial broadcasters, TV Asahi has benefited immensely from the opening of the Taiwanese market. It is doing a booming business with its samu-

rai series and trendy dramas in Taiwan; the trendies sell well in Hong Kong, too. Animation – a TV Asahi strength – also brings in the orders. "Asian broadcasters are buying trendy dramas that are two to three years old, so they are a bit out of date, but they go over quite well with local audiences," said TV Asahi program sales manager Mariko Imagawa. "Japanese and other Asians have the same faces, so the characters in our dramas are easy for them to relate to. Also, they seem to feel an attraction to Japan; by watching these shows they can learn what kind of clothes we are wearing and what kind of music we are listening to."

The most well-known TV Asahi program in Asia is still *Doraemon*, a series about a blue robot cat that's been a ratings winner for TV Asahi since 1979 and has become an audience favorite all over the region, including in Taiwan, China, Thailand and Indonesia. "*Doraemon* is truly an international hero," said Imagawa.

Though the market is still growing rapidly, with Taiwan first and Hong Kong not far behind, Imagawa worries that it will reach a saturation point. "Once you sell a drama for a particular time slot, you can't sell another drama for the same slot three months later."

#### Media International Corporation.

Japanese dramas may be hot in Asia, but MICO, the sales agent for NHK, still makes most of its sales in documentaries – a speciality for the big public broadcaster. Buyers include broadcasters in Taiwan, Thailand and China. Said program sales manager Yoshinori Fukushima: "There was interest in our programs from Asia before, but it's only recently that sales have really started to get off the ground. We definitely want to pay more attention to this market." **TBI**

#### Annual Sales\* Of Japan's Top Five Networks (\$ billion)\*

NHK	5.6†
Fuji Television Network	2.7
Nippon Television Network	2.0
Tokyo Broadcasting System	1.6
Asahi National Broadcasting Co.	1.6

\* Year to March 31, 1994  
† 1994 budget

Source: National Association of Commercial Broadcasters In Japan/Asian Wall Street Journal



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# One Billion Served



**The on-off relationship between China and outsiders keen to do business there goes back to Marco Polo. But economic reform – and official encouragement of cable tv – means that many present-day merchants of tv programming sense a much more favorable climate.**

**Matthew Grenier reports**

Imagine your dream audience viewing figures – then double them, and double them again. It may at the moment just be a dream, but as China's economic reforms raise the country's per capita income, so the prospect of an audience comprising a quarter of the world's population becomes more of a reality.

"Everyone is looking at east Asia because of its strength as a growth mar-

ket," said Charles Caminada of the UK-based distributor Hit Entertainment, "and China is potentially the largest of all because of its sheer size." Ever since Marco Polo entered Beijing in the 13th Century, western businessmen have had an on-off relationship with China, eyeing the millions of potential new customers while complaining about the difficulties of doing business with the Chinese. As

the economic reforms instigated by Deng Xiaoping begin to take effect, so the apprehension and suspicion of the 1980s is being replaced by a mixture of enthusiasm and heady excitement over the burgeoning Chinese television industry.

There are now over 170,000 foreign enterprises in China, with a total investment value of \$382.4 billion funded by capital from 146 countries and regions





### China By The Numbers

Ministry of Radio, Film and Television

Fu Xing Men Wai Daije 2

POB 4501

Beijing

Tel: +86 1 862753

Fax: +86 1 8012174

Ministry of Posts and Telecommunications

13 Xichanggan Jie

Beijing

Tel: +86 1 660540

Country population - 1,184,170,000 (nearly a quarter of the world's population)

Main cities and populations:

Shanghai - 13.4 million

Beijing - 10.9 million

Tianjin - 9.1 million

Shenyang - 4.5 million

Wuhan - 3.7 million

Guangzhou - 3.5 million

around the world. China's economic growth, which has averaged around the 10% mark over the past decade, has also led to an increase in demand for western consumer products and, in particular, western television programs. As CCTV, the state-owned corporation, branches into pay-tv, other stations extend their broadcast hours and new stations open up across the country every week, for-

eign broadcasters and distributors are rushing to claim a piece of the action.

Foreign programs, ranging from soaps like *Dallas* and *Falcon Crest*, through wildlife documentaries and animation, to Taiwanese and Hong Kong dramas, now consume about a third of television air time in China, selling for an average of \$1,530 per hour and taking advantage of hitherto undreamt-of potential audience viewing figures. As well as the city, provincial and local tv stations, there are also over 600 cable stations, with the lowest pay-tv costs in Asia, and the prospect of transmissions from the Chinese-owned Apstar satellite system.

But China will never be an easy place to do business. When the cable feed of ESPN was abruptly taken off air in February 1994 by the government, sceptics were quick to lament the impossibilities of dealing with the Chinese authorities and to announce that the Chinese bubble had burst. What had irked the government, however, was not the content of the programs - which even the most doctrinaire Marxist-Leninist would have been hard pushed to find ideologically unsound - but the fact that Beijing Cable had received the programs directly by satellite and the government had no chance to vet them. ESPN is now back on air, albeit in a different format, with programs being recorded by the cable station on to videocassettes and, after a delay for vetting, being relayed to the capital's sports fans.

Four months earlier, the Chinese State Council had issued Proclamation number 129, reiterating the ban on receiving foreign broadcasts and imposing severe restrictions on the ownership of satellite dishes. Owners of dishes were given six months to register their equipment with the authorities, and fines were imposed on people who didn't comply with the ruling. In another development, an official of the ministry of radio, film and television stated that foreign films would be subjected to "more careful screening," in order to "protect the national movie industry." The underlying purpose of these acts, however, was a government strategy to regain control over the television market and shape it more accordingly to its own wishes.

"The Chinese realize the value of what they have," explained Charles Caminada, who is on the verge of securing a deal for Hit, to supply over 150 hours of animation, "and won't pass it over to international companies without having some control over it."

The key to the Chinese government's strategy is cable television which had

originally been embraced by the authorities over 20 years ago as a propaganda tool for residential complexes and work units. The prospect of foreign-produced programs being broadcast into China by mainly foreign-owned satellites had clearly concerned the Chinese government - and led to Star TV dropping the BBC from its transmissions into China. Cable, on the other hand, offers both the prospect of some sort of control over program content and the key to the development of China's telecommunications infrastructure.

Indeed, flexibility over program content was demonstrated by the decision to allow Australian TV International, the overseas service of the Australian Broadcasting Corporation, to broadcast via Guangzhou TV and Radio's rapidly expanding cable network. While CNN had been turned down as too "American-centric" and the BBC was seen as "too British in focus," the decision to award the Australian company a direct feed into eight million households in southern China was a signal that foreign broadcasters would be tolerated as long as they played by the rules. As Wendel Wu, the general manager of the ABC's Melbourne unit stated, "they see us as far less threatening."

The first foreign program to appear on Chinese television was *The Man From Atlantis*, and, according to legend, so many people stayed at home that night to watch the program that the weekend crime rate in Beijing fell dramatically and films played to empty cinema houses. During the 1980s, foreign business delegations returning from China would frequently complain about the problems of doing business with the Chinese and the lack of suitable business facilities. It was only in the 1990s, with the massive improvement in the logistics of doing business - of faxes and taxis, hotels and phone calls - and a wider readiness and greater self-confidence on the part of Chinese station managers, that the market for foreign programs expanded.

Foreign programming distributors dealing with the 15 provincial stations, local stations in the 20 biggest cities and, occasionally, CCTV are now finding less resistance to doing deals. "China is more or less similar to how you do a deal anywhere in the world," said John Neill, the general manager of BBC Worldwide in Hong Kong, which has recently sold programs to CCTV and the Guangdong provincial station. "But you need to know people, and that takes time."

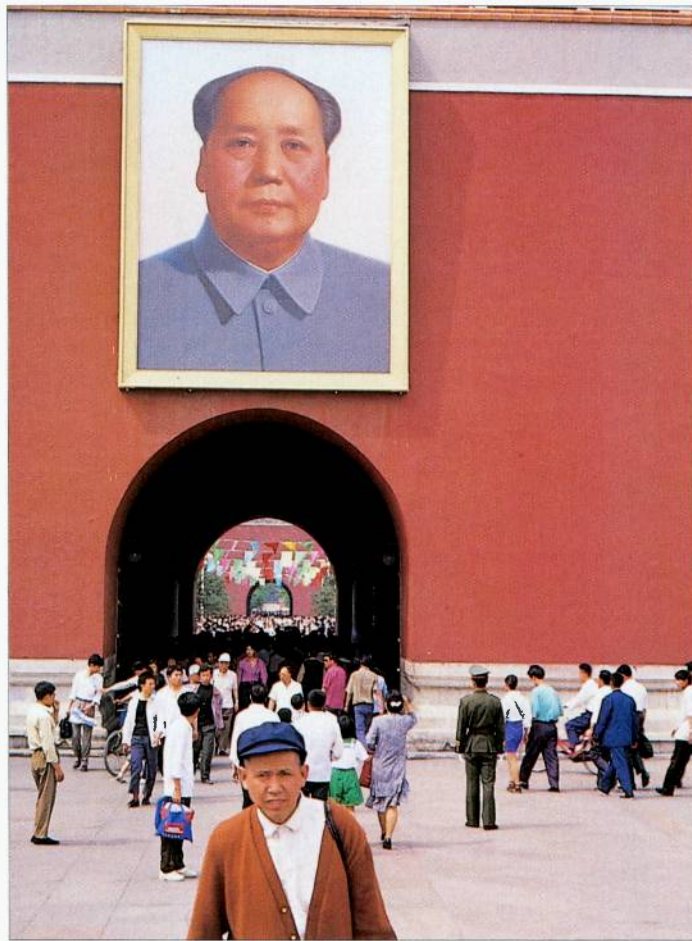
CBS, which made its first sales to China in 1985, and has more recently

sold *Dr Quinn, Medicine Woman* to CCTV, always deals directly with broadcasters. Moreover, the majority of deals have been barter deals. The norm in China is one minute of advertising per hour of programming, although in some major cities, just 30-second spots are allowed. "When you work with the China market," a CBS spokeswoman said, "you should really know where you can get the advertisers, where the money is coming from and where the target audiences are. When we work with broadcasters in China, we are not just giving them a program, but are coordinating where and when that program should be aired to get the maximum audiences and benefits for advertisers."

For Neill, however, "bartering deals take an awful long time, and there is no guarantee of success, while the process itself also undermines the direct contact with the station." He believes that deals in China benefit from personal relationships, adding that "the Chinese like to have confidence in you." Another distributor puts it more succinctly – "without a Chinese partner," he said, "it is virtually hopeless."

Many other programmers, including Brazil's TV Globo, which recently sold seven telenovelas to China to add to its sale of *Voce Decide* to Beijing TV, prefer to work through agents already based in China. The drawback of this approach, however, is that even if the agent has good connections, this could become a liability if they should suddenly fall out of favour.

Whether selling direct, or through an agent, barter or cash, the market that all foreign programmers are moving toward is cable. As well as attempting to discourage people from purchasing satellite dishes, the Chinese government also aims to make private satellite-tv reception irrelevant by developing a vast and sophisticated cable-tv network, much of which is being built with foreign investment. Only 10% of all homes currently receive cable, but the government continues enthusiastically to issue cable licenses at a rate of almost 100 a year. If co-ordinated correctly, cable-tv revenue could generate \$30 billion by the year



Future viewers for NYPD Blue?

2000. "China has tapped into public demand for popular television programming and is using it as a catalyst to build a national communications infrastructure," stated one strategist.

One of the most sophisticated projects is in Shanghai – notable as the political base for many of the current leaders in the Politburo – and the early phase of a

### **"China is using television as a catalyst to build a national communications infrastructure"**

\$115 million network there already feeds 12 channels into 700,000 homes via fiber-optic cable. In June 1994, China Agribusiness Development Trust and Investment Group borrowed \$90 million for a telecoms project in Beijing, while Cable and Wireless is working with the ministry of posts and telecommunications on further expansions of the cable network. The benefits for foreign television

programmers will be immense, as cable operators, though supposedly limited in their dealings with foreign broadcasters, are more open to direct contact and further away from the control of the authorities in Beijing.

According to one industry source, both Disney and ABC are taking the cable route, preferring it to the difficulties which have surrounded satellite broadcasts. Similarly, CBS, which has mainly sold documentaries, tv magazine shows, movies and drama series to China, said it is "very interested in cable development."

The launch of the Apstar1 satellite project in China in December 1993, funded and backed mainly by Chinese-owned companies, was seen as the surest way of entering the politically-sensitive area of broadcasting directly into China by a host of foreign broadcasters – including Home Box Office and Turner Broadcasting System. For some programmers, the experience since the satellite's launch has taught them about some of the uncertainties – of broken promises and delayed deadlines – of doing business in China. Satellite looks like taking a back seat in Chinese broadcasting.

"The globalization of television which is taking place in Asia is essentially a local activity," said David Hill, managing director of the Australian Broadcasting Corporation in Sydney. "It is rebroadcasting that is going to dictate the growth in the future." Another forward-looking program distributor, this one based in Beijing, is now looking to move into production in China, reflecting the technological improvements which have occurred over the past decade and the gaping holes which are waiting to be filled in the Chinese service industry.

"In terms of normal distribution, of travelling around the country, it is very difficult," Neill confirmed. "It is hard work, but it will pay dividends in the long term because you know the people." The idea that the Chinese are difficult to do business with is gradually receding and is slowly being replaced by an awareness that antagonistic western approaches to business negotiations only serve to alienate prospective buyers. "Be



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polite," Neill added, "and listen to their terms. Shouting and banging the table will get you nowhere."

It is a view that is shared by CBS International president James Warner and which he summarized in a single word – "patience." The Chinese market is still in its nascent phase, and it will take a long time before the hours of negotiating will

reap rewards. As the economic independence of the provinces increases, and more and more licensees buy their own television sets, so the broadcasters will have greater independence and, as Caminada suggested, "relationships will have a very strong business and long-term role in a very important market."

"The problems in China," he contin-

ued, "are that it will take a long time to develop. It won't change overnight, and you need to use the same long-term view that you would use if you were dealing with Japan." Distributors will then find they share the world view of the Chinese broadcasters themselves, whose sense of history reminds them of the dangers of a short-term outlook. □

## Ten Tips For Doing Business In China

By Lisa Solomon

The following tips have been gathered from seasoned China business travelers. No doubt that after a few visits to the People's Republic of China (PRC) you will supplement this list with your own insights.

### 1. Do Your Homework: Your Counterparts Will Have Done Theirs

Before you depart, become familiar with current PRC governmental directives and policies that affect your industry. If you plan to initiate a joint venture, identify the municipal, provincial and/or central government agencies and bureaus that have the authority to grant required approvals. Read up on cultural highlights, local history and customs, as demonstrating an interest in the region will impress your hosts.

### 2. Don't Forget To Present Your Calling Card

It is customary throughout Asia, when meeting someone, to exchange business cards. Be sure to pack an ample supply of your cards, preferably bilingual, with English printed on one side and Chinese on the other. Use both hands in giving and receiving cards and take the time to read a proffered card thoroughly, as this signifies respect.

### 3. B.Y.O.

Bring your own survival kit that includes aspirin, packets of tissues, remedies for stomach problems, sugar substitutes and all prescription medications that you require.

### 4. More B.Y.O.

It is a rare business deal that is concluded during a quick blast through China. Don't forget to pack your sense of humor, an inordinate amount of patience and a flexible, creative and adaptable attitude. Such qualities will be invaluable in the often protracted process of hammering out an agreement. If you have a temper, leave it at home. Often, the louder you yell, the less you will be heard. The Chinese value "old friends" and distrust, and can take advantage of, those who simply want to close a quickie deal. Establish a realistic timetable for your project and remember that long-term relationships and trust form the basis of most successful ventures.

### 5. Smoothing the Way

If you are going to China without the assistance of a local host governmental unit or company, bring along a colleague who both speaks Mandarin and is familiar with the challenges of Chinese travel and local business practices. Accurate interpretation of all negotiations is critical. Be certain that your translator is familiar with the technical jargon of your industry. Get the final deal on paper in both languages in order to reduce future misunderstandings.

### 6. Eat, Drink And Be Merry

Develop adequate proficiency with chopsticks because positive performance in the dining-room equals, if not rivals, your achievements in board room. Be prepared to indulge in delicacies you have never encountered before, sit through numerous multi-course meals and drink an inordinate amount of alcohol with your Chinese hosts. One rule of thumb on the banquet circuit is to taste first and ask about the origin of the dish later. It is also appropriate, on the final night of your visit, to host a meal for your Chinese counterparts. Have someone local assist with menu selection and appropriate seating arrangements.

### 7. Gift-Giving

It is appropriate to present modest gifts (not cash) to your hosts at the end of your visit. Quality pens, executive planners, calendars and other classy items with your company logo are winners. Although tipping is not standard practice, imported cigarettes are appropriate to give drivers and other service personnel who assist you.

### 8. The Issue of "Face"

A subtle yet powerful social force in China, essential to building or ruining working relationships, is the notion of "face." "Giving face" means giving a colleague respect and social standing; "losing face" means being embarrassed. Be sensitive to these issues and think about ways to build a positive working relationship by giving your host "face."

### 9. Connections, or *Guanxi* (Gwan-she)

Good *guanxi* serves as the basis for a long-term and productive working relationship. *Guanxi*, the oft-quoted Chinese word for relationships, permeates business and social dealings. Just because someone has an appropriate-sounding title does not mean that he or she has the authority or the connections to assist your company. Tap your local resources to identify who possesses *guanxi* and work to cultivate long-term mutually beneficial relationships with these people.

### 10. Do Re Me.....

Karaoke is alive and well throughout Asia. There will inevitably come a time when you will be presented with a microphone and requested to sing your favorite song. I recommend thinking of a few songs for your repertoire (complete with lyrics) – and it is an ideal way to cultivate *guanxi* and give yourself good "face."

*Lisa Solomon is a Hong Kong-based American employee of a company that establishes and manages joint ventures in the PRC.*





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# Window Wagering

**Asian television channels are opening up to western programming. But being sure of the best deal from licensing a program is still a guessing-game at this stage in the development of Asian television. Worse, it will all change soon.**

**Sarah Walker reports**

Asia is under siege. Bombarded by the new arrival of satellite-delivered television signals, television executives are now facing the advancing hordes of program distribution sales people from the West. The objective for both sides is simple: as much profitable business in as short a time as possible.

On the face of it, this would seem simple to achieve. New distribution opportunities are being provided by the emergence of secondary cable and satellite markets. Cable development is forging ahead, providing relatively sophisticated markets in Taiwan and Korea and pushing up license fees in both those countries. Others aren't far behind. Hong Kong's Cable TV service promises to be the biggest in the world, Singapore CableVision will ultimately have capacity for 64 channels, and cable in both Thailand and the Philippines is



Cohen: keeping options open

advancing at a rapid rate. The market is also opening up in China and in India – once its 50,000 or so cable operators are legalized and form a coherent structure – it could be a force to be reckoned with. All these services need channels of programs to broadcast. The opportunities look exciting.

But straightforward cash for cassettes for a five-year license period isn't the full picture, and might not be the most profitable way for a distributor to do business in the long term. The decisions dis-

tributors have to make are over where they are going to license their programs (by territory or pan-region, terrestrial or cable and satellite), for how long (by licensing large amounts of programming now, is there a danger they will not have enough quality to supply new opportunities in a rapidly changing market in a year's time?), and – a particular concern for the larger distribution companies – should they be holding product back to take advantage of available transponder space and launch their own pay-tv channels?

"We are currently evaluating the marketplace and opportunities in terms of pan-Asian versus going in market by market, the ratio of library to local product, whether it should be niche targeted as opposed to general entertainment," said Bert Cohen, chief operating officer of Worldvision Enterprises. "The value is the software. If you have it you can make major decisions and move product quickly. We are selling very short windows so product is available at very short notice."

While many independent distributors claim the Asian region now accounts for about 25-30% of their business, for the Hollywood studios with big-budget theatrical product to sell, the returns just aren't high enough to part with large packages of highly sought-after programming at such a low price. Only Columbia Tristar International Television (owned by Japan's Sony Corp) has deemed the area important enough to have an executive based in Hong Kong.

The others operate out of Sydney.

"Asia only accounts for between five to 10% of our revenues," said one studio executive, "and this is unlikely to change in the future.



Devlin: license fees are increasing

The prices paid now are low and unlikely to rise because as stations develop more finance they are unlikely to pay more for acquisitions. They will put their money into producing their own programming."

Others believe the studios' reluctance to sell product into Asia is about more than just low license fees. In the future the amount of transponder capacity in the region will enable the studios to launch their own channels and control their own distribution vehicles.

Disney has leased transponders on Apstar 1 and is in discussions with a local company, Po Hsin Entertainment, to launch a satellite-delivered cable channel in Taiwan, while Columbia Tristar is rumored to be eyeing a stake in HBO Asia. Both Andy Heyward, president of Dic Entertainment, and Stan Golden, president of Saban International, said future channel launches would not be inconceivable, while Spelling Entertainment has made no secret of the fact that it intends to launch cable channels in Asia using the Worldvision library.

Despite this, cable and satellite markets are an opportunity for sales teams. "License fees have gone up by about 25% in Taiwan as a result of the planned





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<p><b>Intelsat 503</b> 183°E Nippon TV Network TV Asahi TV Tokyo</p>	<p><b>PAS-2</b> 169°E ABS-CBN Chinese TV Network CMT Discovery ESPN KDD (Japan) Liberty/Prime Intl NBC *Turner MTV Asia</p>	<p><b>Superbird B1</b> 162°E 12 tv channels for Japan</p>	<p><b>Rimsat G2</b> 142.5°E Asia Television Network (India) RAJTV (India)</p>	<p><b>Apstar 1</b> 138°E CNN I CETV Discovery ESPN HBO Asia TNT/Cartoon TVB I *ChinaSat *One Leader Communication *Po Hsin Entertainment *Reuters *Walt Disney</p>	<p><b>Rimsat G1</b> 130°E Taiwan TV Sun TV (India) Udaya TV (India) Asianet (India)</p>	<p><b>Mungunghwa 1 (Koreasat)</b> 116°E due to launch Apr 95</p>	<p><b>Palapa B2p</b> 113°E ABS-CBN (Philippines) AN-TEVE ABN ATVI Radio TV Brunei CNN CFI Channel Nine (Aus) Discovery ESPN Asia GMA (Phil) HBO Asia NBC People's Network (Phil) RCTI (Indnsa) Radio TV Malaysia SCTV (Indnsa) System TV Malaysia TPI (Indnsa) TNT/Cartoon TVB I</p>	<p><b>Asiasat 2</b> 110.5°E due to launch mid 95 coverage: Middle East, CIS, Asia, Australia capacity: 24 C-band, 9 Ku-band</p>
<p><b>Intelsat 508</b> 180°E ANBC CBS CNBC CNNI ESPN Nine Network (Aus) NBC News RFO Worldnet/CSP AN/Deutsche Welle TV</p>		<p><b>CS/SCC</b> 158°E Asahi Newstar MTV Star Channel GARA CNNI (all for Japan)</p>				<p><b>Mungunghwa 2</b> 116°E due to launch Oct 95</p>		<p><b>Palapa B2R</b> 108°E TVRI Indonesia</p>
		<p><b>JC Sat 2</b> 154°E 15 tv channels for Japan</p>						
		<p><b>JC Sat 1</b> 150°E 15 tv channels for Japan</p>						

\*Customer name: not necessarily name of channel

regulation of cable tv," said Tom Devlin, senior vice-president, international sales at Hearst Entertainment. "And at Cable TV in Hong Kong, the license fees they are offering are not ridiculous for the product I have. It provides more of a market for tv movies than TVB or ATV because when the terrestrials buy a theatrical package from the studios there are usually a number of tv movies thrown in."

U.S. basic cable channel E! Entertainment Television has also clinched a deal with Cable TV for a three-hour weekly block of E! programming. According to vice-president of international development, Jon Helmrich, the company has

also done deals for cable in both Taiwan and Korea. As has Fox Lorber, whose sales to Asia make up 30% of business.

With the cable market still at a nascent stage the program sales market to date has been led by the terrestrial broadcasters. Although primarily scheduling in-house or locally-produced programming during primetime hours, a lack of production finance at all but the major broadcasters such as TVB in Hong Kong and SBC in Singapore has limited the production of big-budget dramas and action-adventure series, providing openings for distributors. Rysher reported strong sales of the action shows *One West Waikiki* and *FX* in the region, as

did Thames Television for *Matrix* and *Homicide* and Paramount for *Star Trek*, *The Untouchables* and *McGyver*. "Although it was broadcast in English, *McGyver* was a huge success in Taiwan because it is very visual," said Stephen Carey, vice president of sales for Australia and the Far East.

"Imported product is very U.S. driven because broadcasters look for volume product to play in regular time slots and U.S. shows are also less dialog-led," said John Jackson, general manager of CTE's Australian office. The UK distributor has sold *Inspector Morse* just about everywhere. Shows that have proved to be big revenue-earners have been those



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**Which Transponder?**

About 14 satellites targeting the Asian region are scheduled for launch before the end of 1996. At this point in time their transponder capacity is greatly needed by the broadcasters queuing up to launch their channels. This demand puts the price of a transponder high. But prices are most likely to come down when the 40 new satellites join the 30-plus orbiters already over the Asian skies by the year 2000. At that time there will be 750 Asian transponders on the market, and that is not including the approximately 300 controlled by Intelsat. Estimates generally reckon there will only be a market for about 500 transponders. The squeezing of as many as six channels into a capacity segment where only one would have gone before could see an approximate capacity for 2,000 channels in the Asian market.

short on dialog. Documentaries continue to be a hard sell for political content reasons.

But the markets are not all about terrestrial monopolies. The development of cable is providing more of a market for niche-orientated programming, and more price competition. The BBC has already sold a number of natural history and documentary shows to Century Cable in Korea. While in Taiwan, license fees paid by cable are comparable with terrestrial broadcasters, providing competition for the first window.

In many instances it is the lack of competition that has kept prices out of line with population and economic

growth.

"In Singapore, Singapore CableVision may provide more opportunities but right now even if I was able to sell everything in the catalogue it would not add up to a lot. There's not a whole lot of negotiation going on at the moment with the SBC," said one distributor.

Although a similar situation has existed in Korea - the three terrestrial broadcasters, facing no outside competition, set the pricing at an inflexible and fairly low level - competition from the 20 new cable channels set to launch in March has resulted in a movement in prices.

In most countries license fee rises have been slow and steady as opposed

to explosive, and collectively the revenue potential of the region is still smaller than Europe. The disparities of viewing population against prices paid for programs between western and Asian countries are huge.

China and India, the two biggest markets in terms of population, still pay very little and remain difficult to deal with. "Basically India doesn't want to pay anything for product," said Devlin. "A viewing population of 900 million people and they want to pay \$400 for a 30-minute episode of *Popeye*. It just doesn't compute in my mind. I can make more money in Jamaica." **TBI**



# Pack Of Six

Voyager: Paramount's latest Star Trek spin-off will spearhead its exploration of the network business

**The launch of two new U.S. networks next month could transform production in the world's biggest tv marketplace – or leave the new players in the game with a \$150 million hole in their pockets. Or both. Richard Huff weighs up the odds**

**D**oes the United States really need another television network? Media conglomerates Time Warner and Paramount think so and are willing to bet millions that the U.S. is ready for its fifth and sixth broadcast networks.

Within a week of each other in mid-January, Time Warner will launch its WB Network while Paramount and partner BHC Communications, a subsidiary of Chris-Craft Industries, will launch the United Paramount Network.

The launches have media observers scratching their heads. With only a limited number of decent non-affiliated broadcast stations available, most industry insiders believe the business will only be able to support one more full-time player. Two new entries surviving is considered a long shot.

"There's room for maybe one more network," said Paul Schulman, head of the Paul Schulman Co., a firm that handles media buys for several national advertisers.

Talk of another network trying to follow Fox Broadcasting's steps in chasing the Big Three has swirled in the industry for years. Favorable changes in FCC reg-

ulations (fin-syn – Financial Interest in Syndication rules), which limited networks from owning the programs they aired, made it more attractive for studios to want to own networks. That, combined with better returns for the networks now in operation, made broadcasting a good business. Speculation about a new network forming became a reality this year when Time Warner and Paramount announced plans for their competing networks.

Both are starting small and both are long on ambition. Which one will succeed may come down to a matter of how much money either parent company is willing to spend.

Time Warner and Tribune Broadcasting flip the switch on for their WB Network on January 11 with one night of weekly programming consisting of two hours of half-hour sitcoms. The WB Network is expected to launch to about 80% of the 95.4 million tv homes in the U.S. through a combination of traditional broadcast stations and partner Tribune's Chicago superstation WGN.

In time, said network president Jamie Kellner, WB will help launch new sta-

tions in markets underserved by broadcast outlets. The network will also rely on cable operators to launch the channel in areas not served by broadcasters, although that expansion isn't expected until at least the third year of operation.

At launch all of its programming muscle will be in primetime, although Kellner said daytime programming will come down the road. A WB kids' block is planned for next fall.

Kellner is no rookie when it comes to launching and expanding a new television network. In 1986 he helped guide the launch of Fox Broadcasting for Rupert Murdoch. He's also credited with having the foresight to launch the Fox Children's Network, which has since become a leader in children's programming. And to make sure he hasn't forgotten anything about starting a new network along the way, Kellner has brought in Garth Ancier, Fox's first programming head, to supervise the new network's programming operations, along with Susan Daniels, who before joining WB, was director of comedy development at Fox. Kellner has also hired other former Fox staffers in such areas as marketing



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Kellner: no rookie in launching new networks

and promotion.

And Kellner's competition in the new network business isn't a rookie either. Indeed, before being named to head the new operation, United Paramount's Lucie Salhany was head of the Fox Network.

UP takes to the airwaves on January 16 with two nights of programming, including three hour-long dramas and two sitcoms. UP is expected to launch on stations reaching between 80-85% of the country. Not all of UP's clearances will be in pattern with the rest of its schedule. Early on the networks affiliate count included 21 "secondary" affiliates, 16 of which are Fox affiliates, meaning the network's programming may air in late-night or on weekends.

Each of the Big Three networks has about 200 affiliated stations, while Fox has 157 primary affiliates and 42 secondary outlets. Combined, the current networks account for about 775-800 (including secondary deals) of the 1,157 available commercial VHF and UHF stations in the country. Factor in those stations already signed on with one of the two new networks as full-time affiliates, and there are less than 300 affiliates left up for grabs, many in smaller, out-of-the-way markets.

Based on station clearances alone, most industry analysts are giving UP the best shot at succeeding.

"Coveragewise, Paramount is far ahead because of the traditional clearances," said Dennis McAlpine, co-director of research with Josephthal Lyons & Ross, an investment banking firm. "(WB) is relying on cable clearances."

Media buyer Schulman agrees. "Right now, looking at the station line-ups, I've got to give it to Paramount."

According to WB's Kellner, the new network shouldn't be viewed in the

shadows of the traditional broadcasters like ABC, NBC and CBS.

Kellner counters talk of station numbers by saying "looking at station counts is an old-fashioned way of thinking," especially in today's era of new technologies and delivery systems.

At the press conference to announce the launch of UP, Salhany said when it came to delivery, her network had WB beat.

"Right now we have more affiliates and we have stronger affiliates," she said, declining to discuss specifics about WB's approach. "We're deeper in the country and we will be at sign-on far deeper, so we've sort of left them behind."

Salhany also said using cable to further the network is not the way to go. "I'm not taking a shot a cable, but cable systems don't have general managers, program managers, marketing people, sales people in the market having a feel for that market and their local identity... Without that, I think you lose a lot."

According to Kevin Tannehill, a veteran television executive consulting for UP on the launch, the difference between the two is that "we want our stations to go up in value, while Warner Bros. (which doesn't own stations) wants to preserve their production and distribution pipeline with the sunset of fin-syn."

UP is going after a male audience, which network executives say is underserved, while WB is going after an audience similar to that of Fox: younger, 18-49 adults. Both audiences are sought after by advertisers.

At launch, UP will program Monday and Tuesday nights, two of the most competitive when it comes to domestic television. The cornerstone of UP's programming will be *Star Trek: Voyager*, the latest in Paramount's very popular series of *Star Trek* spin-offs. On January 16, UP will open with a two-hour premiere episode of *Voyager*. Once the network is up and running, the big budget hour-long series will air Mondays at 8 pm. At 9 pm, comedian Richard Jeni stars in *Platypus Man*, a sitcom about the host of a cooking show in search of Mrs Right. That series will be followed by *Pig Sty*, a comedy revolving around five young men sharing a New York apartment.

Tuesday nights will be devoted to two hour-long dramas. *Marker*, starring Richard Grieco (*21 Jump St*) as a son repaying his father's debts or "markers," will air at 8 pm. And at 9 pm, UP offers *The Watcher*, an anthology series set in Las Vegas. UP has also ordered *Legend*, an hour-long action series starring Richard Dean Anderson (*MacGyver*).

Across the dial, WB is putting its fate in the hands of comedy. It's also going to concentrate firepower on Wednesdays, a slightly weaker night when compared to the current network offerings.

WB will air *Muscle*, a half-hour sitcom set in a Manhattan fitness club. Comedian Robert Townsend (Fox's *Townsend Television*) stars as a well-intentioned father of a dysfunctional family in *Father Knows Nothing*. *Unhappily Ever After* takes a comedic look at a recently-divorced middle-class father struggling to survive on \$8,000 a year. WB has also hired Shawn and Marlon Wayans, two of the stars of Fox' former series *In Living Color*, to star in a sitcom titled *The Wayans Bros*.

Both companies have stressed that their networks won't be programmed totally in-house. All but one of UP's shows are produced by Paramount, while WB has ordered one series from Walt Disney's Touchstone TV, another from Witt-Thomas Productions (distributed by Warner Bros.) and a pair from Warner Bros Television.

"I've talked to all of the studios and they understand," Salhany said when she announced the launch. "We're launching a network. Paramount is a partner launching this network. We've been working for months getting our very fine programming together for us. Going forward we will be dealing with everybody."

The programming on both networks will also follow the traditional syndication route and be sold simultaneously to international markets.

Where the two differ is in their approach to the station/network relationship. The traditional broadcasters actually pay stations to carry their programming. Compensation - payments to stations for airing the programming - was



Salhany: stronger affiliations put UP out in front





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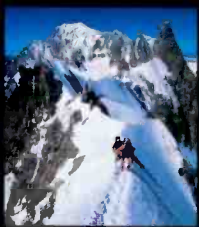
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something that was started in the early days of network television to assure the network's programs got on the air. To some smaller stations, those compensation payments can mean a lot to the bottom line. But in recent years, as network fortunes dwindled, compensation payments were reduced. Prior to the cuts, each of the Big Three networks were spending about \$100 million each year on compensation payments to affiliates.

In what Kellner called a "courageous" move, WB is not paying affiliates to carry the programming but getting paid by those stations. In fact, WB is using cable as a role model. Cable networks have dual revenue streams. They collect payments from cable operators which retransmit their programming and also sell advertising time on the programs aired. WB is doing something similar. Like any network, WB will sell advertising time. The network will also get a percentage of an affiliate's "incremental" profits brought on by being an affiliate.

Kellner said when he was asked to draw up the budget for the new network, he couldn't make the numbers work with WB paying stations to carry the programming. On the other hand, UP isn't getting paid a fee for its programming nor is it paying affiliates to carry it. Instead, both sides will split the advertising time on UP shows.

Expansion plans call for the WB Network to add another night perhaps next summer and additional nights in the coming years. UP's Salhany said a third night would be added to her network's schedule "within the next couple of years."

In comparison, Fox launched with one night of programming in April 1987 on about 106 affiliated stations. It launched its seventh night, a bit ahead of schedule, in June 1993.

While each of the new network's parents is expected to lose millions on the new ventures — some of those losses have been estimated to reach \$150 million before the red ink stops flowing — it may actually be advertisers who make out the best. Early pricing puts the advertising time on each of the networks at a level higher than syndication and lower than either of the four broadcast networks. More time available also means more leverage for the advertiser.

"It's going to provide us with two additional sources with which to negotiate," Schulman said. "It helps in pricing."

McAlpine agrees. "For advertisers (the new networks) are fine. The more time available the lower the prices."

Reportedly, UP is garnering a higher premium for its commercial time based on the strength of the *Star Trek* franchise and the broader station line-up. UP is also said to be projecting a 6 rating, which is about what Fox was doing on a really good night when it launched.



Platyflop Man: cooking up Mondays on UP

If Fox's history is any indication, ratings for the two networks won't have a big impact on the much larger broadcasters already in business, at least at the start. Most tv researchers say that Fox's impact wasn't felt until year two or three. In fact, in the beginning some of Fox's larger stations saw ratings drop when they switched from syndicated fare to the network.

"At this point we're looking at it as sort of like first-run syndication," said David Poltrack, executive vice-president of research and planning at CBS. "They seem to be focusing on young males, which is

already an audience that is spread out on a lot of other alternatives."

As such Poltrack predicts that the new network's programming will take the largest chunk of viewers out of shows geared for younger audiences.

"Initially they will have minimal impact," he said. "They won't have any more impact than (the syndicated beach series) *Baywatch*. Actually, *Baywatch* has more of an impact."

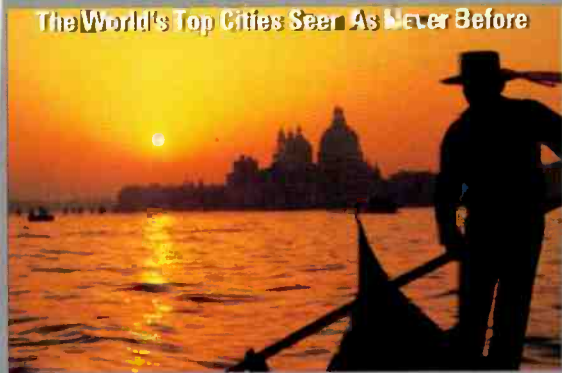
If either of the new networks want to use Fox as the model, they'd better open up their pocketbooks. For seven years the network struggled for acceptance with viewers and the media. Then last year, Fox agreed to spend \$1.58 billion for the rights to broadcast professional football, stealing a package away from CBS. Shortly after, the network spent \$500 million to invest in New World-owned television stations, this time stealing stations away from CBS and the others. It wasn't until then that Fox shed the moniker of a weblet, or fledgling network, and became the fourth network.

"It's all a game of chicken, who breaks first," said McAlpine. "It all depends how long they are willing to go down the road. Come January the saber-rattling stops and it's fish or cut bait time." **IBN**



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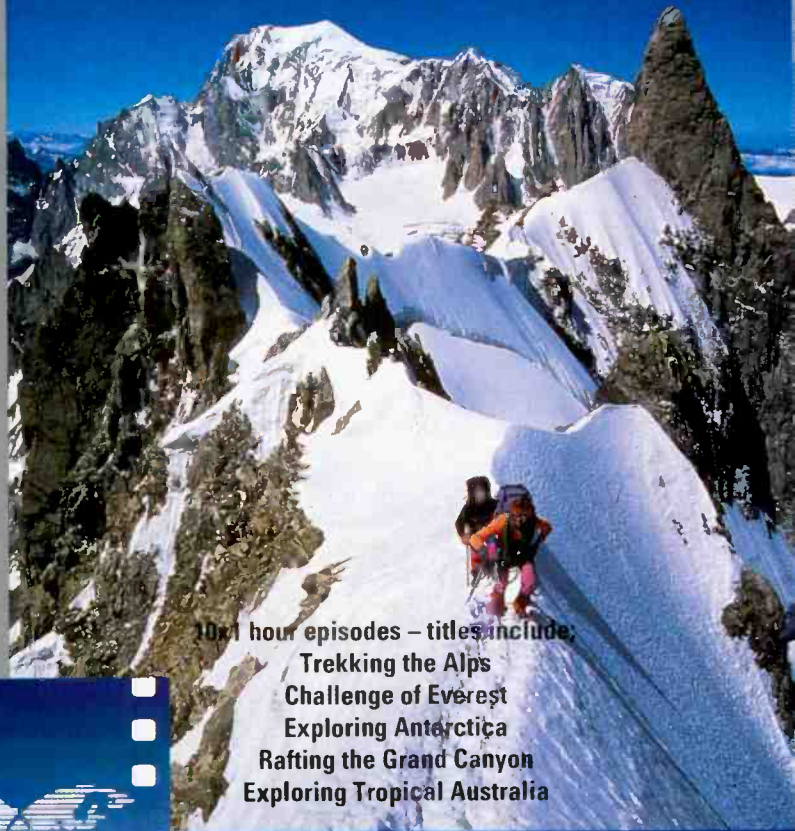
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# Maturing Process



Due South: The Alliance series cracked U.S. network primetime

**The public flotation of five of its biggest independents marked Canada's emergence from the shadow of Hollywood, and forced the investment community to view the entertainment business in a more positive light. So how did they spend the money and do they still look like a sound investment?**

**Noel Meyer reports**

**B**etween June 1993 and May 1994, five of Canada's best and brightest television and film production houses went public with Initial Offers to Purchase (IPOs), raising in excess of \$107 million (U.S. throughout) in the process. They were Paragon Entertainment Corp, Alliance Communications Corp, Cinar Films Inc, Atlantis Communications Inc and Nelvana Ltd. The amounts raised ranged from \$2.5 million for Paragon to almost \$43 million for Alliance.

While there are other Canadian production houses which have gone public in the past – the Quebec-based Le Groupe Coscient and Astral Communications Inc, for example – this was the first time that a wave of companies has taken the plunge.

"It's an interesting situation," said Micheline Charest, CEO and chairman of Cinar Films. "I don't think you will find it repeated anywhere else. I think it is a sign of a maturing process."

That process had its roots back in the sixties, seventies and eighties, as successive government initiatives sought to move Canadian production out of the shadow of Hollywood. Propelled at first by tax shelters and then by government funding mechanisms such as TeleFilm Canada, independent provincial bodies, and the acumen of producers in cutting co-production deals, the industry began to flourish. These days, it is the leading foreign supplier to U.S. networks and stations.

Canadian content regulations helped

the production industry in not only providing a venue for material but also by establishing a number of production funds, such as the Rogers Telefund, which provided capital for producers. During the 80s companies such as Alliance, Atlantis and Cinar came into their own, co-producing with partners around the world and controlling their own distribution.

Still the industry as a whole wasn't taken seriously as a sector of the economy. It was seen more as a protected cultural enclave: Charest and others think that going public has changed that attitude.

"I would say the principal effect has been to greatly enhance the amount of foreign investment paid to the industry by the





Charest: financiers are taking the business seriously

financial community, the banks, the brokerage firms, and the financial press," said Sandra Macdonald, president of the Canadian Film and Television Production Association. "For many years they had the habit of dismissing the industry as either too small, too new, too transient or too inclined to ups and downs. But, if you read the financial press now, there have been more serious articles on the industry in the last year than in the previous decade."

Far and away the most successful initial public offering (IPO) was Alliance Communications Corp, which raised an initial amount of \$24 million and then, because market demand was hot, went back with a second offering and raised a further \$18 million. In October 94, Onex Corp, a holding company, purchased \$12 million worth of Alliance's debentures.

Alliance's stock has remained hot despite a flat performance for other entertainment stocks. First issued at a \$9 share last August, it is now trading at \$11.40. Roger Dent, entertainment analyst at Toronto stockbroker Wood Gundy, has a buy order on the stock until it reaches \$18.

Alliance finances, produces, and distributes films and series for television and theatrical release. Its projected 1994 revenues of \$78 million are expected to double in 1995.

In the past year Alliance has scored a number of firsts. It has produced the most expensive movie ever made in Canada — a sci-fi film called Johnny Mnemonic starring Keanu Reeves, which cost \$23 million. *Due South*, featuring a Mountie teamed with a Chicago cop, was the first foreign-produced primetime

series to air on a major U.S. network; CBS recently ordered a full 22-episode season. Alliance's animated kid's show *ReBoot!*, about adventures in cyberspace, has become ABC's number one kids' show.

One of the reasons for Alliance's size is the belief of founder, chairman and CEO Robert Lantos in the importance of distribution. Lantos started in the industry by buying the Canadian rights to an erotic film festival he saw in New York when he was still a student at McGill. In 1978 he hit the big time by producing *In Praise of Older Women*, and in 1985 he formed Alliance with other producers.

Lantos has said that one of the main reasons he took the company public was to be in a financial position to lock up independent distribution rights. Since going public, Alliance has struck deals with New York independents Miramax Film Corp and New Line Cinema. It now has the Canadian rights to *The Mask*, *Bullets Over Broadway* and *Prêt à Porter*.

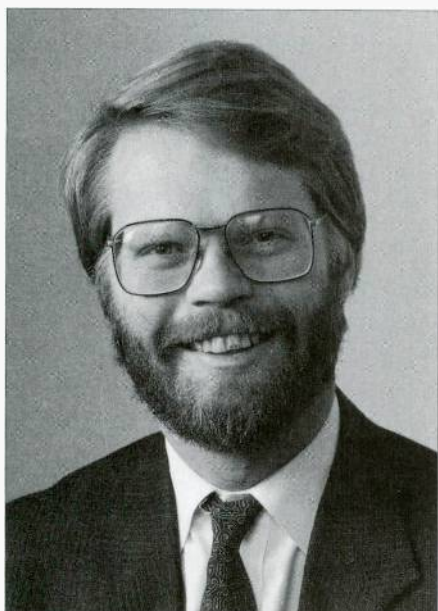
"Alliance has made very good use of the money it raised," said Dent. "It has acquired a number of Canadian rights and properties, the Samuel Goldwyn library and the Lumiere Canadian library rights. It bought into a music publication company and used some of it to support production and its application for a Canadian speciality broadcaster license. It has made very good use of the money."

With 200 titles in the Goldwyn and 1500 in the Lumiere libraries, Alliance now has Canada's largest inventory. When the Canadian Radio-television and Telecommunications Commission approved ten new cable tv channels out of 48 license applications, Showtime, Alliance's movie channel, was one of those which got the nod.

Alliance has so many fingers in the entertainment pie that people often forget that Paragon Entertainment Corp was the first of this wave of companies to go public in June 1993. Paragon issued shares at \$1.25 for proceeds of \$2.5 million. The stock has been trading close to its issue price ever since.

Paragon was founded in 1985 by Jon Slan, its present chairman and CEO. It develops, finances, produces and distributes television programming and features films. The company is best known





MacMillan: Atlantis production slate doubled

for Shari Lewis' *Lamb Chop's Play-Along*, an Emmy award-winning children's puppet show, which is still running on PBS and YTV. The company has also produced 54 episodes of *Alfred Hitchcock Presents* for The USA Network and Global Television.

As well, Paragon is producing 26 new episodes of Vampire-turned-good cop series *Forever Knight* for Global TV and U.S. syndication. The company also produced Kevin Costner's Wyatt Earp.

Paragon's future plans centre heavily on its \$8.5 million purchase of British producer Handmade Films' 23-title library. Paragon has largely stayed out of the feature film business because of the cost and the risk. It now intends to make and distribute ten low-budget movies through Handmade in the next three years.

Cinar Films Inc commenced operations in 1976 and went public in September 1993 with the issuing of two million shares at \$3.90 and raised just over \$7 million in disposable cash. Cinar stock is now in the \$5.00 range. The company started as a distributor of European films to the North American market. Although Cinar has just premiered *Million Dollar Babies*, which started in mid-November on CBC and CBS, its corporate mission has been to produce and distribute non-violent children's and family, animated and live-action programming. *Million Dollar Babies*, based on the Canadian Dionne quintuplets, is Cinar's first mini-series.

Cinar used roughly half of the cash it raised to pay down debt. "We produced

more shows and reinforced the profit centres of everything we do," said Micheline Charest. "Since we have gone public," added vice-president of finance Don Tiechroeb, "we have been increasing production 20-25% a year. Cinar is one of the winners."

Atlantis Entertainment was founded in 1978 and went public in December 1993 by issuing 2.5 million shares at \$10.40, which raised \$26 million. Atlantis stock is trading near its issuing price. Its business is production and distribution, with an emphasis on family programs. Its productions include *TekWars*, *Monkey House*, *The Ray Bradbury Theatre* and *Maniac Mansion*.

When going public, founder and chairman Michael MacMillan stated in the prospectus that of the money raised 55% would be spent as working capital for increased program development, 30% to build up Atlantis' distribution library and 15% to finance the development of related businesses.

MacMillan said that Atlantis went public "because we were being presented with more opportunities than we were able to grab. This year we have almost doubled our production slate to 110-115 hours.

Since going public, Atlantis has bought a 40% share in YTV and received a speciality license from the CRTC for The Life Network. It has also bought minority stakes in Salter Street and Great North - mainly regional production houses, but active internationally. It has also acquired an audio post-production company, sound Mix. "The vast majority of the money raised," said MacMillan of the IPO funds, "has gone into increased working capital for the production activities of our own programs and a small amount has gone into acquisitions. In terms of third-party distribution rights, we found the opportunities but they were too expensive. They were simply overpriced."

The last company to go public was Nelvana in May 1994. It raised \$22.4 million with 2.2 million shares at \$10.10. Shares have been trading slightly below issuing price. Nelvana also belongs to the children's programming niche, producing and distributing animated tv programs including *Tales From The Cryptkeeper*, *WildCATs*, *Jim Henson's Dog City* and *Rupert*. With Nelvana's year end not yet in sight, Dent believed it was too soon to pass judgement on the company. "Nelvana has only been public for a couple of months and has not made significant use of the proceeds."

Throughout the industry there is a

feeling that going public has marked a new start. But there is also a certain disappointment with the way some of the stocks have fared.

"There is a real learning-curve and I think that maybe the investment community isn't there yet," said Charest. "Canadian public entertainment companies are not there yet either."

"I don't think investors know how to treat Canadian entertainment stocks yet," said MacMillan. "I think there is a big challenge for all of us in trying to communicate what we are about. It is a new sector for the investment community. Further confusing the matter is that the various companies are not all the same. We are in different areas - feature films or television and animation. It will take some time for those differences to be clear."

At least, according to Charest, the financial community is now "recognizing that television and movie production is big business and one that has a big upside in Canada." The downside, some claim, is that the few companies to go public could suck in all of the available investment, marginalizing other producers. "They tend to create the impression that everyone can do what they can," said Macdonald. "You shouldn't draw the conclusion that going to the market makes financing production easier (for the rest of the industry)."

Charest notes that she has heard a few isolated grumblings among the smaller production companies dividing the industry into the big ones that went public and the small ones that didn't. "There have been some isolated comments that success would take away some of the (government) incentives, but I disagree with that perception. There may be some polarization within the production community, where little guys suddenly see some conflict in the relationship, but I think that is a perception issue."

Some believe some of the little or not-so-big guys might make their own offerings in the not-too-distant future. "I'm sure the possibility exists," said Charest. "When the companies went public, everyone seized a window of opportunity and it closed very quickly. It would be hard for anyone to go public now, but maybe in December, January or February things will turn around."

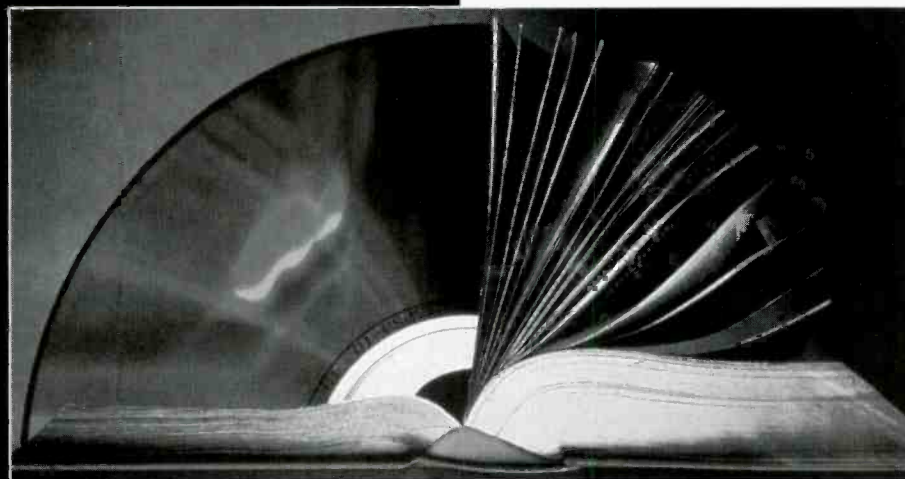
Not everyone agrees. "How many significant production companies can we have?" asked MacMillan. "This is a small country." As Canadian production continues to increase, the answer is up for grabs. **TEI**



# Milia '95

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# MARKET NEWS

● **Atlantis Releasing** will be unveiling a tv movie called *Following Her Heart* and youth-oriented magazine show *High Octane*.



Starring Ann-Margret, *Following Her Heart* (above) airs later this month on the U.S. NBC network and is billed as a "romantic coming-of-age story" about a woman who dreams of performing at the Grand Ole Opry in Nashville. *High Octane* is fronted by Sophia Coppola, daughter of film director Francis Ford.

● **Fox Lorber**, in association with Great Entertainment Group, has acquired the rights to five sci-fi features and animation series produced by Japan's Toei Anima-



tion (including Gaiking above). Each is available as a 26x30 minute series or as a 100 minute animated feature.

## CETV Launch Set For First Day Of Market

**FAMILY** values are on the agenda for Hong Kong entrepreneur Robert Chua as he seeks to offer millions of Asians – and, in particular, millions of mainland Chinese viewers – family entertainment.

Chua launches his China Entertainment Television (CETV) on December 1 with a promise there will be no sex, no violence and no news. Chua is aiming for a 20 million potential audience by the end of 1995, with a more modest eight million estimated at start of transmissions.

The \$50 million, 24-hour venture will run gameshows, dramas, infotainment and beauty, medical and fitness programs, and even lessons on etiquette, all in Mandarin. Around 90% of its audience is expected to be Chinese.

Distributed via the Apstar1 satellite, CETV will be carried by cable operators in the three major Chinese cities, Guangzhou, Beijing and Shanghai, as well as in the populous provinces of Sichuan and Fujian. The Philippines' largest cable operator, SkyCable, will also take CETV. Cable systems will get the service free for the first two years, though one Taiwanese cable operator has agreed to pay a fee after a trial period.

Most of the programming (60%) will come from Chua's long-established Hong Kong com-

pany Robert Chua Productions; he said 37 deals had been signed with Chinese provincial terrestrials to co-produce programming. Suppliers in Taiwan, Hong Kong and Singapore will provide the remaining 40%. He added

that he was talking with Warner Bros, among other western suppliers.

Chua's, is the only foreign network to conclude deals with Chinese cable stations, a mark of the way he has carefully cultivated his mainland contacts over the last decade and a half. Chua forecast he would break even within 12 to 18 months. However, his advertising looked to be thin at launch, with just two clients signed up to run commercials for consumer products and Chinese property.

CETV plans to launch a second channel with a different theme at the end of 1995.



Chua: deal-maker

## Korean Toon Network Open To Ideas

**THE** Orion Cartoon Network has joined the clutch of cable channels launching in South Korea next year. The network, which was awarded a license in October, will sign on some time after spring 1995. It hopes eventually to provide 12 hours a day of programming sourced from both the domestic and world markets.

The plan is to acquire and co-produce thousands of half-hours of animation. However, Zen Entertainment's Peter Keefe, who is acting as a consultant for the channel, said the

rules as to what percentage of programming will have to be domestically produced or co-produced, or indeed what the government's definition of a co-production is, are not yet clear.

After Mip Asia, Keefe, Orion chairman Chul Kon Tam and several Orion executives plan to visit children's terrestrial and cable broadcasters like the BBC and Nickelodeon to glean ideas. The visits will have a two-fold advantage in that they may assist in the development of future co-productions.



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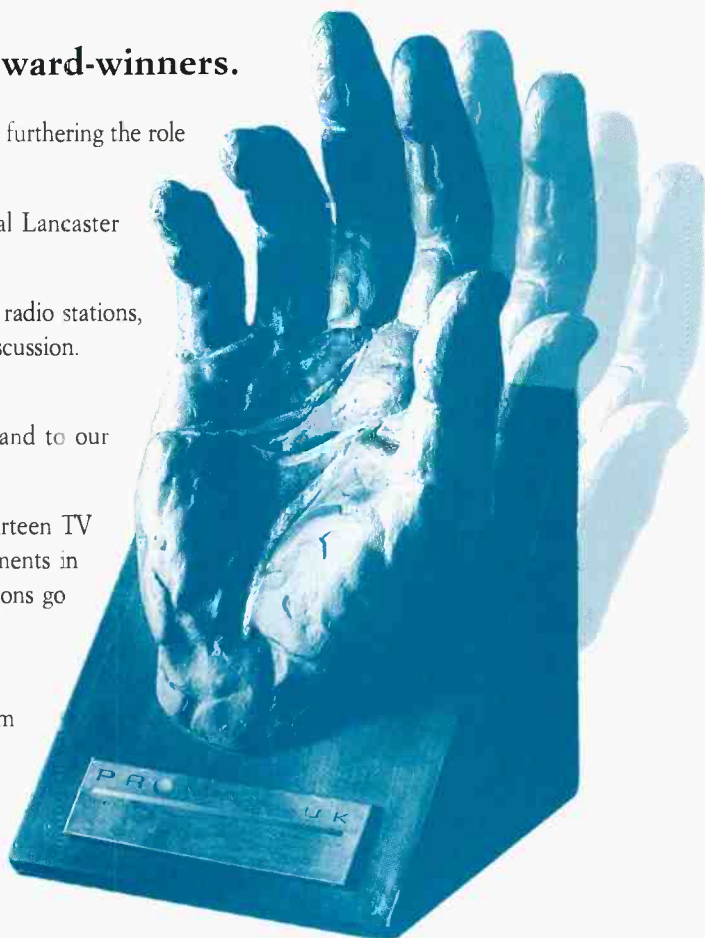
We welcomed over 500 British and international delegates from TV and radio stations, production houses, distributors and agencies for two days of stimulating discussion. A big hand to you all for attending.

Thank you also to our speakers for taking part in such lively debates and to our sponsors for supporting the event.

And a big hand - in fact, a fistful of hands - to our award-winners. Thirteen TV organisations and eleven radio stations were honoured for their achievements in promoting and marketing the electronic media. Extra special congratulations go to BBC Television, the winner of our Judges' Special Award.

The 1995 PROMAX UK Conference & Awards are scheduled for 10th-11th November in London. Make sure you have the details in the palm of your hand by contacting Amanda Clegg at Chevron Communications on +44 (0) 532 438283, fax +44 (0) 532 454196.

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## Monolith Thinks Big

A team of Japanese film and tv producers is using Mip Asia to launch a new venture, Monolith KK, that plans to finance 15 to 20 projects a year, including big budget and art house features, tv films and miniseries. Monolith is in the process of building its own distribution network across Asia.

The first tv project off the blocks is *Keaton*, a co-production with British independent Portman Zenith in association with the European Co-production Association. A two-hour pilot is in development and a series of 90-minute episodes is envisaged. The series is based on the Japanese comic strip Master Keaton, about the adventures of an Anglo-Japanese art sleuth. It will be produced by Monolith's Hiroyuki Ikeda and Portman's Chris Brown, executive produced by Portman chairman Victor Glynn and written by Gavin Scott (*Young*

*Indiana Jones*). Shooting starts across Europe next year.

Monolith's Shinya Egawa has set up a joint venture with Cinewa in Los Angeles to develop "big budget" product for film and television. Forthcoming projects include feature films *Dance-O-Rama*, directed by Randa Haines, and *The Channel*, directed by Louis Mandoki.

Besides Ikeda and Egawa, the Monolith board will be made up of Saturu Iseki (whose credits include *Howard's End*, *The Crying Game* and *Ran*); Yoshitomo Hanada, previously finance director of Nippon Film Development and Finance, and Yuko Ishida, president of Japan Datacom.

The film and tv distribution network is expected to include partners in Korea, Malaysia and Singapore.

## GRB Builds On License Sales

GRB Entertainment has already sold its 13x30 minute series *World Of Wonder* into seven territories in the Pacific Rim, after retaining the distribution rights itself. The Discovery Channel showed the series in the U.S. and wanted to air the series on its Asian network. *WOW* and a second Discovery series *Movie Magic* (30x 30-minutes) will form the basis of a deal with a Japanese distributor which will also embrace future co-productions.

The LA-based producer has a joint venture with TV New Zealand in the works called

*Underwater Frontiers*. The new show, envisaged as a 13-parter, will make use of the Kiwi pubcaster's library of underwater footage and locations off the shores of NZ.

GRB will also be showing the ski film library of Warren Miller, acquired just before Mipcom, comprising 13 feature films and 18 one-hour tv specials.

Gary Benz, president of GRB, said it had already been "very successful" in the far eastern region, selling most of its catalog through direct deals.

## Long-Term Play Starts To Pay Off

WITH nothing new to sell at Mip Asia and its catalog already sold out in some territories, Unapix International will be at the market to support its customers in the region, according to managing director Scott Hanock.

The U.S. distributor has been doing business in Asia for 10 years and brings in one-third of its revenues from the region. Unapix has achieved growth in an area where licensing fees are small – and are not likely to go up much in the near future – primarily by going into new territories overlooked by the big players. As well as selling in markets like Sri Lanka, Pakistan, Cambodia, Brunei and Laos, Unapix is dealing with the cable and satellite operations that are starting to compete with established state-owned outlets.

According to Hanock, Unapix has pursued a strategy of filling a range of niche requirements, offering a catalog of sports, documentaries, education and film programming.

New science and technology and adventure and nature series are projects Hanock is hoping to get off the ground for 1995, with some Asian co-production involvement. In addition, Unapix is talking to three film companies about distributing theatrical and video properties.

Adding another string to his bow, Hanock is also acquiring packages of programming on behalf of Taipei cable system Trans World Network. One deal with a U.S. major has already been inked and two more are in negotiation, he said.

● **Mitsubishi Corporation** will have its 100-minute, live-action feature *Zeiram* at the market. A highlight of the Tokyo Fantastic Film Festival, *Zeiram* depicts the battle between bounty hunter Ira and the "biological homicide weapon" of the film's title.

● **Fremantle Corporation** has a new role as exclusive distributor for Granada LWT product in China. The deal gives Fremantle sole distribution rights for some 5,000 hours of Granada LWT's programming – including *Jewel in the Crown*, *Poirot*, *Upstairs, Downstairs* and *Prime Suspect* – to China's 900 million viewers in 23 million tv homes.

● **Twentieth Century Fox International Television** heads up its Mip Asia slate with the dramatic series *Chicago Hope* (below).

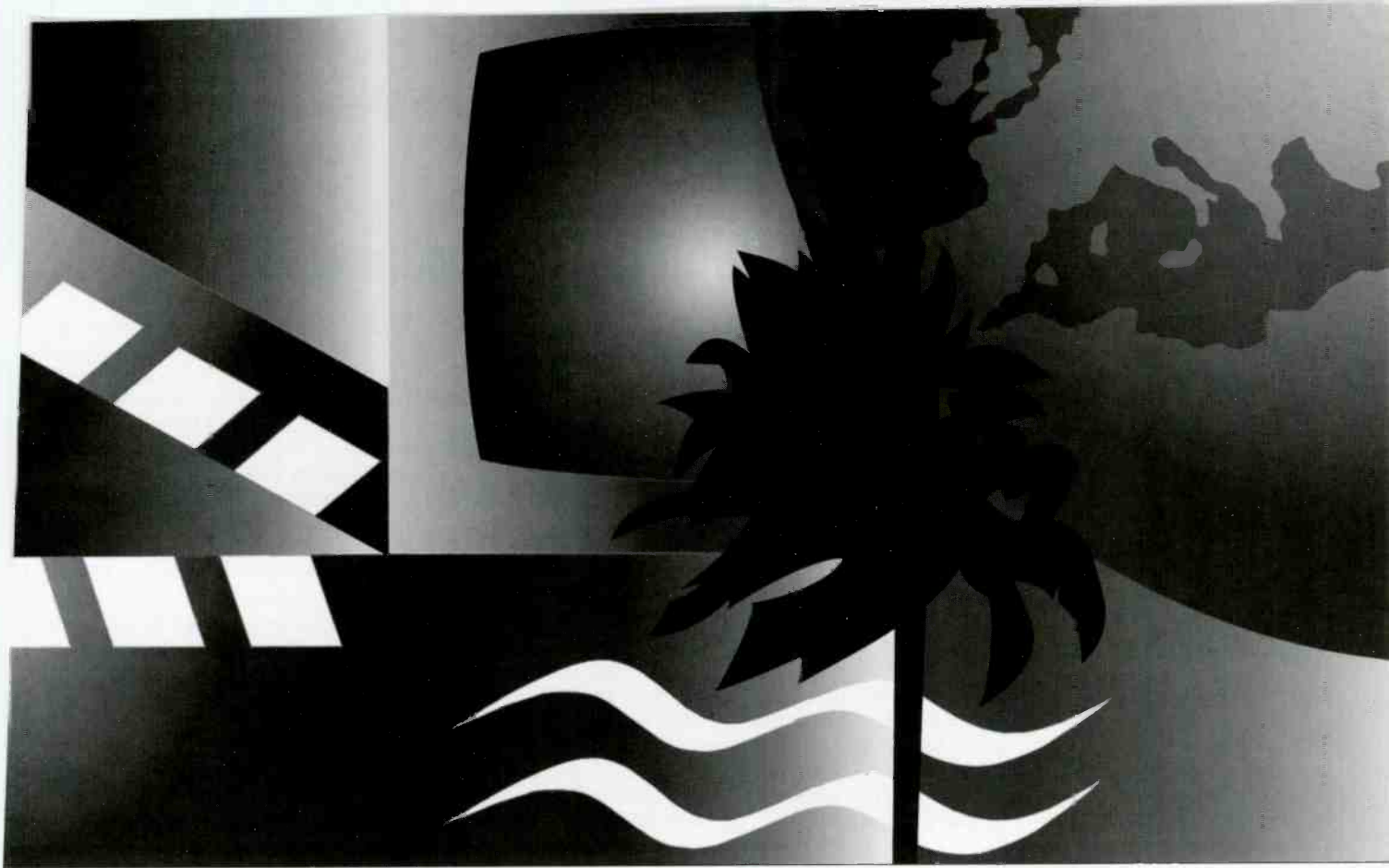


Chronicling the experiences of the dedicated team who work inside a major metropolitan hospital, it portrays the difficulties medical staff face in balancing life-saving medicine with financial necessity. Also from Fox: mother-in-law sitcom *The Five Mrs Buchanans* and half-hour sports series *This is The NFL*.

● **Grundy International Distribution** is including Mandarin-dubbed versions of existing product at Mip Asia. Included in the Mandarin line-up are the popular soaps *Neighbours*, *Shortland Street*, the fast-paced drama serial chronicling the lives of the patients and staff at a modern private medical clinic, and *Sons and Daughters*.

● **Channel 4 International** will be bringing six documentaries to Mip Asia. They include *Liberation*, a 73-minute account of the experiences of the first men and women to liberate Hitler's con-





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centration camps, *Tough Love* (52 minutes) on the treatment of juvenile delinquents in the U.S., and *Healing Wounds*, about the work of ambulance crews in pre-ceasefire Belfast.

● Banking on the worldwide appeal of news about show business, **E! Entertainment Television** is offering a range of features, live specials and news programs including *Q&E!*, launched at *Mipcom*, *The Gossip Show* and *Extreme Close Up*. To tie in with *Mip Asia*, E! Live Premieres coverage of the new feature film *Star Trek Generations* will be on show.

● **Asia Scope** is a new production from *Film Australia* which could prove useful homework for visitors to next year's *Mip Asia*. The six-part series concentrates on an overview of the entire continent, including its history, environment and social systems. Other factual product includes *Niagara's Gold*, *The Raid* and *Fit For A King* – a portrait of the King Of Tonga.

● *Roseanne: An Unauthorized Biography* (below) is a two-hour movie from **Polygram Film International Television** which drama-



tizes the life of the tv star Roseanne Arnold from troubled adolescence to the present day. *Coldblooded* is a comedy film starring Jason Priestley about a reluctant hitman. British product on offer includes comedy series *The Baldy Man* (6x30 minutes) and *Battlefield*, a 6x two-hour documentary series on World War II.

## China's Cable Pipeline Opening Up

**CHINA** is sending 81 buyers to *Mip Asia*, making up the largest contingent from any one country in the Asian region. Among those represented will be regional state-owned tv stations, production units and the ministry of film, radio and tv.

The statistics – a population of 1.2 billion and an estimated 140 million tv sets – have already set the pulses of western program providers racing. There may be official strictures against the installation of satellite dishes and cable redistribution of foreign channels, but cable tv outlets are multiplying, and it is estimated 30 million households are already connected to some form of cable. There are 45 major tv stations in China besides the state broadcaster China Central TV (CCTV).

According to Xu Xiongxiang, general manager of the China TV Program Agency, tv stations are permitted to broadcast around 20% foreign programming. At present, the four-

channel CCTV has less than 10% foreign programming. Drama series are most in demand, followed by animation and – as long as the price is low – documentaries. Xiongxiang said broadcasters would normally pay around \$1,000 per hour for drama or animation. It is common practice for programs to be supplied free on a barter basis with revenues from commercial sales split between the supplier and the licensee.

The China TV Program Agency – China's sole exhibitor at the market – is a publicly-owned body mainly responsible for distributing Chinese programs. Genres it represents include drama series, variety shows, documentaries and animation.

The agency occasionally buys programs itself and then handles sales within the country and, said Xiongxiang, is willing to act as a "go-between" for foreign producers and Chinese tv stations.

## Saban Shakes On Chinese Barter Deal

**U.S.** distributor Saban International has concluded its first barter deal in China for two animated 26x30-minute series: *Round the World in 80 Dreams* and *Gulliver's Travels*. A local advertising agency in China sold the airtime – one 30-second spot per half hour – to local companies.

According to Saban International vice-president Michel Welter, the two shows, which will make up a stripped Saban hour, will begin broadcasting in 1995 on 30 different tv stations covering 70% of China. These include Beijing TV, Shanghai TV and Guangdong TV, plus 27 regional stations.

As ratings information doesn't yet exist in China, the deals are being done on potential

market coverage, so the price of each 30-second spot will be fixed for each region. A separate deal had to be done at each of the 30 stations.

Saban has already concluded a number of co-productions in China. *Jin Jin and the Panda Patrol*, a 26x30-minute series was made under the direction of the Chinese government, while *Saban's Little Mouse on the Prairie* was done in collaboration with a Chinese animation studio. To date, Saban has invested \$45 million in a variety of entertainment-related projects in the country.

According to Welter, three more co-production projects with Chinese partners are planned for 1995.

## Worldvision Evaluates Channel Venture

**U.S.** production giant Spelling Entertainment has made no secret of the fact that it intends to launch cable channels in Asia using product from its distribution outfit Worldvision.

"We are currently evaluating the marketplace and opportunities in terms of pan-Asian versus going in market by market, the ratio of library to local product, whether it should be niche targeted as opposed to general entertainment," said Bert Cohen, chief operating officer of Worldvision Enterprises. "The value is

the software; if you have it you can make major decisions and move product quickly. We are selling very short windows, so product is available at very short notice."

Product available from Worldvision at *Mip Asia* includes the four-hour miniseries *Texas*, 13 half-hours of sitcom *Madman of the People* and *Models Inc.*, the one-hour dramatic series which it has already sold to NHK (Japan), SBC (Singapore), SCTV (Indonesia), ITN (Sri Lanka) and CTV (Taiwan).



# Asia Set To Buy Off The Box

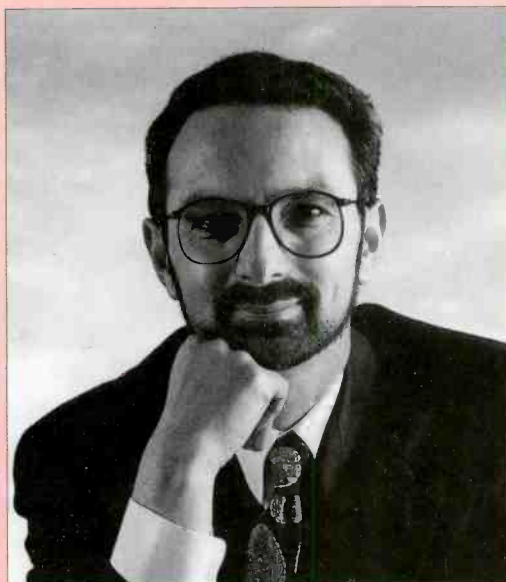
**SOUTHEAST** Asia is set for a home shopping and infomercial frenzy, according to companies specializing in this area.

Quantum International, which claims to have launched the first home shopping segment in the region on SBC in Singapore, is taking a stand at Mip Asia and sending all of its senior executives. "We are looking to establish ourselves as a provider of programs to quality broadcasters throughout Asia," said David Carman, president of Quantum International.

Richard Whinfrey, managing director of Regal Shop International, said Asia was his company's fastest-growing region worldwide. Regal is already supplying a half-hour daily segment to TV1 in Malaysia.

Working with joint venture partners to help supply telemarketing and fulfillment, Quantum is poised to announce expansion in Singapore and in Japan (where it already programs an hour on TV Tokyo in partnership with Mitsui). Carman identified Malaysia and Thailand as other markets ripe for home shopping and said talks were ongoing with two pan-Asian satellite broadcasters. Zee TV, the Indian channel broadcast as part of the Star TV service, already carries a nightly two-hour home shopping segment supplied by Quantum.

As home shopping segments are not designed for peak-time, they enable broadcasters to save on program costs and make



Carman: quality supplies

profitable use of timeslots where ad revenues are low. Suppliers usually split revenues with the broadcaster or offer a percentage of sales.

U.S.-based infomercial association NIMA International is itself capitalizing on the potential in the region with a one-day conference at the Hong Kong Convention Centre the day before Mip Asia opens its doors.

# Discovery Targets Pre-sales

**DISCOVERY** Enterprises Worldwide is offering its largest-ever slate of seven projects for pre-sale, as well as 400 hours of original programs. All seven documentary series were also on offer at Mipcom, but, according to Jamie Grossman-Young, director of global co-productions, further upcoming projects could be ready in time for Hong Kong.

*The Forbidden City*, a one-hour documentary focusing on life inside the former palace of the Chinese emperors, will be available in



Discovery is pursuing pre-sales with films like *The Forbidden City*

the last quarter of 1995. The program will tell the story of life in the palace through the use of diaries of the emperors and their courtiers.

A three-part miniseries, *The Last of The Czars*, tells the story of the Romanoffs, the last imperial rulers of Russia. It will be available in the second quarter of 1995 and has already been pre-sold to NHK in Japan and Canal Plus in France.

Also on the slate are *Carriers: Fortress At Sea* (two hours), available in the first quarter of 1995, and *Nile: River Of The Gods*, available in the second quarter of 1995.

Although the U.S. cable network's major buyers in the region are Australia and Japan, Grossman-Young said Mip Asia would offer a chance to explore other possible sources of co-production funding.

- **Moonstone Entertainment** is due to start shooting this month on *Jungle Boy*, a 26x1-hour series which will be available at Mip Asia. The series, about a boy who is brought up in the wild by jungle animals, will be shot entirely on location in India and feature state-of-the-art special effects.

- **Hearst Entertainment's** new movies for MipAsia 1994 include *Betrayed: The Story of Three Women*, *See Jane Run* and a new episode of *Ed McBain's 87th Precinct* called *Lightning*.

- *Betrayed*, starring Meredith Baxter, which was made for ABC and tells the story of a mother whose daughter enters into an affair with the husband of her best friend. Two new tv movies in development: *Higher Laws* for CBS and *Living The Lie* for NBC.

- The true story of aid worker Sean Devereux is told in *The Dying Of The Light*, a drama/documentary from Yorkshire/Tyne Tees International. Devereux was shot dead in Somalia in January 1993 on the orders of a local warlord the Unicef worker had criticized. The \$2million program, produced and directed by Peter Kosminsky, was made in association with the International Broadcasting Trust.

- **France Television Distribution** will offer drama, documentaries and current affairs at Mip Asia. Drama highlights include *Saint Exupéry*, *The Last Mission* (below), about the aviator/novelist, and *The School Teacher*.



- Telenovelas form the bulk of the catalog presented by Florida based **Venevision International** in Hong Kong. They include *La*

*Mujer Prohibida* (The Forbidden Woman) a tender love story in 127 60-minute episodes, *Belissima* (Beautiful) and *Mundo De Fieras* (World Of Fury). The Venezuelan company's catalog also features documentaries, music, comedies and children's programming.

● **Paramount Television**

**Group/Viacom Entertainment** will have one new series available at Mip Asia: *The Marshal*, an action drama starring Jeff Fahey about a modern-day law-maker who has a reputation for never letting any of the fugitives he tracks get away. Returning product includes some heavy-hitters like *Frasier*, *Roseanne* and *Star Trek: Deep Space Nine*.

● **MGM/UA Telecommunications Group** will be screening a new series of classic science-fiction anthology series *The Outer Limits* for the first time at Mip Asia. The new series consists of 20 one-hour episodes and a two-hour movie draws on the work of writers like Robert Heinlein, Isaac Asimov, Ray Bradbury and HG Wells. Picking up from the 1960s series, *The Outer Limits* explores



the "bizarre, frightening and disturbing."

● **Turner International** lines up with an animated version of the *The Mask* from New Line Television and Sunbow Productions. *The Pagemaster*, in association with 20th Century Fox, a live-action/animation adventure through the fantastic world of literature, comes to the market courtesy of Turner Pictures, as does the feature film *Amelia Earhart: The Final Flight*.

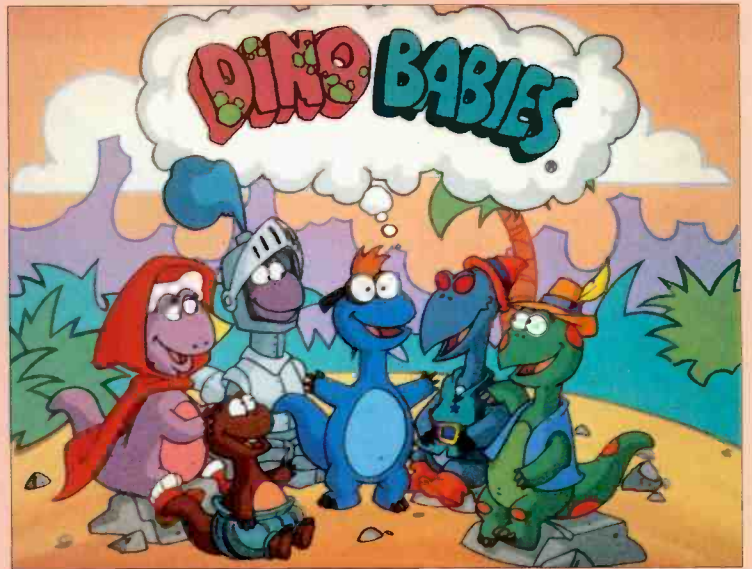
## Wolf In The Hunt For Co-Pro Partners

U.S. animation producer Fred Wolf is looking for funding for two projects: *The Fantastic Voyages Of Sinbad The Great*, based on the Arabian tale of the same name, and *Antics*, a comic fantasy based one million years in the future.

Both series are still in the early stages of development, but a 26x30-minute format is envisaged and production could start immediately if sufficient funds became available, according to Wolf.

Artwork, a mini-bible and a film storyboard are available for *Sinbad*. The Australian company which hatched the idea for *Antics*, Bug Apple Co., has made a three-minute fully animated pilot. The show, which postulates a world taken over by insects, is similar in tone to Wolf's earlier hit *Teenage Mutant Ninja Turtles*, playing "like a soap opera" but depicting a "low end of crime and corruption" similar to sci-fi films like *Bladerunner*.

Fred Wolf Films is also planning to co-produce a further 13 episodes of *Dinobabies* with Chinese animation house Shanghai Morning Sun; the program is distributed by Westinghouse Broadcasting International. Wolf said he hoped to uncover new far eastern contacts among broadcasters, distributors and production companies at Mip Asia.



Wolf is developing 13 more episodes of *Dinobabies*

## Film Roman Scores Beta Deal

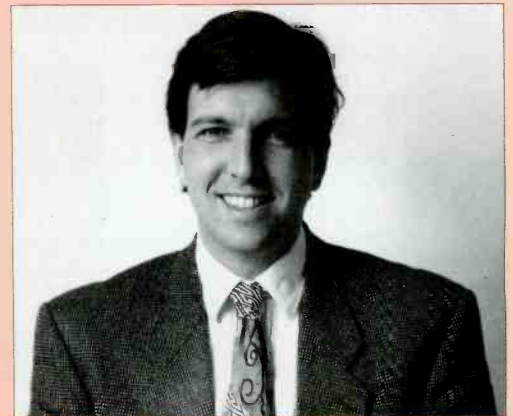
ANIMATION studio Film Roman is to accelerate its worldwide production and distribution activity after signing a deal with Beta Junior.

The agreement covers European tv and merchandising rights for up to 12 new series over the next three years. Beta Junior, part of Germany's Kirch Group, will have first option to rights for German-speaking territories, Scandinavia and eastern Europe. Film Roman has retained the UK and Ireland, the former Soviet Union and an option on the French-speaking countries and Spain, together with video rights throughout Europe.

Existing Film Roman shows, including Fox series *The Simpsons* and *The Critic* and *Mighty Max*, co-financed by Canal Plus, are excluded from the deal. Neil Court, acting as a consultant for Film Roman, said four series which will be part of the deal are already in development with U.S. networks and syndicators.

The catalyst for Film Roman's entry into the international market has been the reluctance of U.S. broadcasters to finance the entire bud-

get for new series. The company sees the international market as ripe for exploitation and the series co-produced with Beta will, anticipated Court, "become a critical part of its catalog."



Court: four FR series in development



- New Shows from **DSL/Producers Entertainment Group** include *Future Quest*, *Mysterious Forces Beyond* and *Laurie Cooks Light N'Easy*. *Future Quest* provides an up-to-the-minute look at what's new in science and technology for the 21st Century, while *Mysterious Forces Beyond* is a contemporary and cutting-edge investigative series looking into the paranormal realms of the world's most confounding mysteries, including telekinesis, psychic healing and ghosts.
- France's Gaumont Television is concentrating on selling animated series *Highlander* (40x26 mins) at Mip Asia. Also on show will be two 90-minute dramas; love story *A Beautiful Storm*, and the story of an anorexic ballet dancer, *Dance for Life*. Documentary *Haroun Tazieff, the Fire of the Earth* about the life of the famous volcanologist, will also be available.
- Sally Field stars in *A Woman Of Independent Means*, as the recipient of a multi-million dollar inheritance, represented at Mip Asia by **ITC Entertainment**. The miniseries is in three two-hour episodes. Returning product includes romantic drama *Second Chances* and the massive ITC library featuring *The Saint*, *The Persuaders* and *Thunderbirds*.
- **Sunbow Productions Inc** present *The Puzzle Place* this market. Using the culturally diverse "people puppets" for the pre-school age group, this series teaches kids that skills and problem-solving can be fun.
- Available from **Beyond Distribution** is *Human Nature*, a magazine series in 26 one-hour parts on the relationship between human beings and the world. Worldwide rights including Australia and New Zealand are on offer. Also on offer are *Lonely Planet*, a magazine travel series available for Asia and specific European territories, and *China: Unleashing The Dragon*, a 4x1-hour documentary.
- *Nova* is an award-winning general interest documentary series from **Tapestry International** which "invites viewers to come along for scientific adventure and discovery." Ten new episodes of the 60x1 hour series, made by WGBH of Boston, will be up for discovery at Mip Asia. Subjects covered include a "wild child" who was imprisoned by her parents from

infancy, the story of the great auk and the menopause.

- Returning product from **Genesis International Television Distribution** includes *Emergency Call* (52x30 minutes), about fire and rescue squads, talk show *The Whoopi Goldberg Show* and the Bob Eubanks-fronted romantic gameshow *Infatuation*.
- Electronic retail consultant **Bud Margolis** has compiled a book on the techniques of the growing home shopping business called *Home Shopping Secrets* – the detail behind profitable and efficient electronic retailing. The book forms the basis for new channels looking at infomercials and home shopping channel opportunities and comes as part of a turnkey consultancy package provided by Margolis. The book clearly explains the successful techniques of how to increase sales from television and includes chapters on the history of home shopping; a presenter's manual; the art of selling; cooking on a shopping channel; customer service and order entry. The advice combines a mix of live examples and recommended guidelines. Margolis, who has just finished a stint with QVC in the UK, is currently working with a number of broadcasters worldwide on a number of projects. For more details on the report fax Margolis on + 44 81 878 2993.
- *Tattooed Teenage Alien Fighters from Beverly Hills* leads the pack for **DIC Entertainment** this market. When their tattoos flash, four teenagers are summoned by a benevolent space blob to fight alien monsters. Also from DIC: *Sailormoon* featuring a young girl who doubles as a karate-kicking avenging angel, and *Bump in the Night*, 26 half-hours of

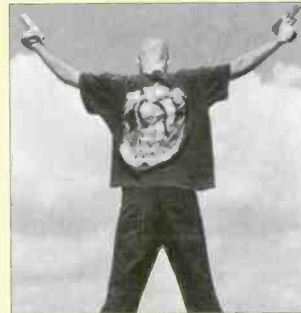


stop-motion animation.

- **Desclez Productions** is using Mip Asia as the forum to introduce *Little Star*, its latest puppet series for preschoolers. Set in the future, *Little Star* follows the voyages of discovery

of the space station *Mimosa*.

- **Trimark Television** launches the international television distribution of *Love & a .45* at Mip Asia. *Love & a .45* (below) is a fast-paced, darkly comic journey through the contemporary American landscape of murder,



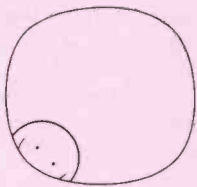
music, controlled substances and unbridled love. *Hong Kong 97* is an apocalyptic action-adventure set in the city on the last day of British rule. The film stars Robert Patrick (Terminator 2) as a corporate assassin trying to make good his escape.

- **Rysher Entertainment** will bring completed product including *One West Waikiki* (11x1 hours), *The VR Series* (11x1 hour), *Highlander* (66x1 hours) and *Thunder In Paradise* (20x1 hours) to market. *FX*, an action/suspense thriller based on the Bryan Brown feature film, is now in pre-production.
- The imprint of the mythical half-man half-beast is on two offerings from **PM Entertainment**: a 26x30 minute animated series called *The Adventures of Bigfoot* and a live-action film *Bigfoot, The Unforgettable Encounter*. The California-based outfit is also showing *Storybook*, *Lionstrike* and *Steel Frontier*.
- *Rolanda* is the new daily talk magazine from **KingWorld**. Taped magazine features are incorporated with traditional talk format of *The Oprah Winfrey Show*. *American Journal*, an original daily newsmagazine strip that focuses on current popular breaking news in a fast paced format, as well as the game shows, *Fotoplay*, *Poker Palace* and the children's consumer game show, *Gran Spree 5001*.
- Canadian animation producer/distributor **Nelvana** will be displaying its ever-widening range of production including *Jim Lee's Wild C.A.T.S. Covert Action Teams*, *Tales From The*

*Cryptkeeper* and *Babar*.

- France's **4D/Marina** will be on the USPA stand with animated product including multi-county co-production *Dog Tracer* (26x26 minutes), *Bamboo Bears* (52x26 minutes) and 104x5 minute *Mr Men (Mr Bonhomme)*. Other highlights of its catalog include family interactive game show *The VR Game* (52x26 minutes).
- A second series of *Robocop: the Series* in 20 one-hour episodes is on offer from **Rigel Independent Distribution**, heading a roster of action-adventure series including *Land's End*, *Santa Monica Bike Patrol* and *Universal Soldier*. Rigel is also looking for interest in interactive gameshow *Yo-Yo*.
- Barcelona animation studio **D'Ocon Films Productions** is unveiling new series *The Street Cleaners*, aimed at the whole family. The mission of the heroes of this series is to dispose of rubbish and "anyone who is making life difficult for the town dwellers." Also on offer are *The Wood Keeper* and *Sylvan*.
- New from **MTM Entertainment** are *For The Love Of Aaron*, a two-hour tv movie starring Meredith Baxter, and *Boogie's Diner*, a 40x30-minute teen sitcom set in a diner-cum-clothing store. MTM will also be representing comedies, miniseries, tv movies and infotainment programs from Australia's Nine Network
- Long-running drama *Blue Healers* (104x1 hours) will be on offer from Australian distribution outfit **Southern Star**. *Blue Healers* is based on the lives and loves of young police stationed in a country town. *The Battlers*, a miniseries set in the 1930s depression, plus telemovies including *Police Rescue – The Movie*, *Bedevil* and *Proof*, will also be on show in Hong Kong.
- Educational network **TVOntario** will be at Mip Asia to represent a range of new titles including magazine shows *Inquiring Minds* and *Future Vision*, rainforest documentary *Clayoquot: The Sound of Wonder* and children's shows *Polka Dot Shorts* and *Mathica's Workshop*.
- **Curb Entertainment** will have a range of thriller and drama features led by *Deadly Past*, starring Carol Alt, billed as an erotic thriller depicting the tragic consequences of seduction, betrayal, jealousy and greed.

# TBI's 1994 MipAsia Program Guide and Contact Directory



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**ARTEAR**


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Shinning Time Station

**CBC**  International Sales



Side Effects

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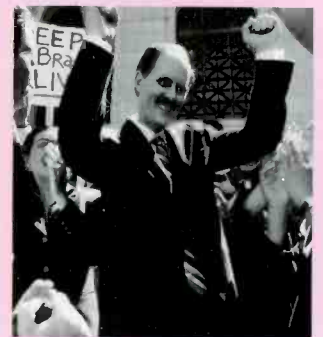
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**CONTACTS:**  
George Rodman

Martin Poole

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My Brother's Keeper

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My Wildlife/In Care of Nature

**MARATHON INTERNATIONAL**

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Fax: 331 4434 6605

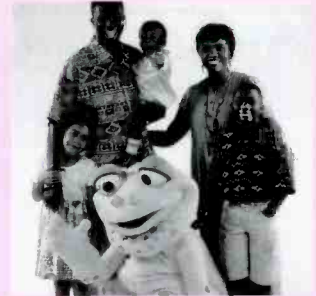
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Mantis

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Jimmy Page/Robert Plant  
(Unleaded)

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Anna Banana

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**ADVERTISERS INDEX**

Antena 3 Television S.A.	27	Gaumont S.A.	13	NATPE '95 International	IBC
Artear	17	International Broadcast		ORF	45
Coral Pictures	11	Network (IBN)	42&43	Promax	49
Deutsche Telecom	20&21	ISPR	7	TF1 Enterprises	BC
Discovery Communications	FC	KPMG	33	Turner International	IFC
ESPN	15	Marathon International	25	Unapix International	5
Family Channel	35	MIPTV	51	Worldvision Enterprises	2&3
France Telecom	39	MILIA	47		
France Telecom RSI	31	Monte Carlo	41		

# THE BUYERS' GUIDE TO PROGRAMS AT MIPASIA

**PRODUCT TITLE**                      **EPISODES**                      **RIGHTS**                      **DISTRIBUTOR**                      **NEW OR RETURNING**                      **STAND NO.**  
 TV    Theatrical    Video

## ACTION/ADVENTURE

American Gladiators	130 hours	•	•	•	Samuel Goldwyn	Return	
Cobra	22 hours	•		•	Harmony Gold	Return	
Live! The World's Greatest Stunts I-IV	4 hours	•		•	Film Australia	New	G.32
EARTH 2	1x120mins	•		•	MCA TV International	New	H.09/G.10
Extreme	7x60 mins	•		•	MCA TV International	New	H.09/G.10
Firestar	88 mins	•		•	W.M.S.	Return	F.06
Gladiators 2000	26x30 mins	•	•	•	Samuel Goldwyn	Return	
Hostile Intentions	Feature	•	•	•	Saban	New	L.19/K.20
M.A.N.T.I.S.	1x120 mins	•		•	MCA TV International	New	H.09/G.10
Wild West Showdown	26 hours	•	•	•	Samuel Goldwyn	Return	
World's Most Dangerous Stunts	1x60 mins	•		•	GRB Entertainment	Return	C.08

## ADULT

Around the World of Dark	60 hours	•		•	W.M.S.	Return	F.06
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## ANIMATION

Aaahh !!! Real Monsters	13x24 mins			•	Nickelodeon	New	M.38
Animated Horror Stories	13x30 mins	•		•	DK Vision	New	A.17
Bill Body	75x30 secs	•		•	Jade Animation	New	J.32
Billy the Cat	26x26 mins	•		•	EVA Distribution	New	B.12
Budgie the Little Helicopter	13x30 mins	•		•	Westinghouse	Return	
Casshan	4x30 mins	•		•	Harmony Gold	Return	
Choppy and the Princess	52x28 mins	•		•	W.M.S.	Return	F.06
Cliff Hanger	65x30 mins	•		•	I.N.I. Entertainment	Return	G.08
Coeurs Brules II	9x90 mins	•		•	Pandora	New	E.29
Dinobabies	13x30 mins	•		•	Fred Wolf Films	Return	
Duckman	26x26 mins	•		•	UFA Film und Fernseh	New	
Force Five	130x30 mins	•		•	Fox Lorber	New	C.28
Greatest Tune on Earth	4x24 mins	•		•	A.C.T.F.	Return	G.31
Help	104x35 secs	•		•	DK Vision	New	A.17
Hugo & Egon	20x4 mins	•		•	Penta TV Germany	New	E.05
International Family Classics Vol.II	13x60 mins	•		•	I.N.I. Entertainment	Return	G.08
The Karaoke Kid	6x30 mins	•	•	•	Mitsubishi Corp	New	D.04
Little Toot	1x60 mins	•		•	I.N.I. Entertainment	Return	G.08
Magic Knights, Rayearth	40+x30 mins	•		•	TMS	New	N.2
Maps	4volsx30 mins	•		•	TMS	New	N.2
Max & Molly	13x28 mins	•		•	Penta TV Germany	New	E.05
Mort & Phil	26x30 mins	•		•	Jade Animation	New	J.32
Mundial - Soccer Fever	52x30 mins	•		•	TMS	New	N.2
My Patrasche	26x30 mins	•		•	TMS	New	N.2
Nature Knows Best	6x26 mins	•		•	EVA Distribution	New	B.12
The New Adventures of Speed Racer	13x30 mins	•		•	Westinghouse	Return	
Omer	26x26 mins	•		•	Pandora	New	E.29
The Red Baron	40+x30 mins	•		•	TMS	New	N.2
Romuald	18x10 mins	•		•	EVA Distribution	New	B.12
The Secret Garden	39x30	•		•	Mitsubishi Corp	New	D.04
Shoe People	26x15 mins	•		•	Jade Animation	New	J.32
Tales of the Tooth Faries	26x5 mins	•		•	EVA Distribution	New	B.12
Toysters	13x30 mins	•		•	Jade Animation	New	J.32
Waldo	26x26 mins	•		•	EVA Distribution	New	B.12
Willi Wuhlmouse Takes a Trip around the World	26x30 mins	•		•	Jade Animation	New	J.32

## CHILDREN'S/YOUTH

The Adventures of Dodo	65x5 mins	•		•	WTN	New	G.28
Allegra's Window	20x26 mins			•	Nickelodeon	New	M.38
Anna Banana	26x30 mins	•		•	The Multimedia Group	New	L.31/K.32
Battletech	26x30 mins	•		•	Saban	New	L.19/K.20
Dunaroo	6x25 mins	•	•	•	ORF	Return	D.32/D.34
Eye TV	26x30 mins	•		•	WTN	New	G.28



# MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Gullah Gullah Island	20x26 mins				Nickelodeon	New	M.38
Hello Spencer	44x28 mins	•		•	Penta TV Germany	New	E.05
Hugo the TV Troll	live	•	•	•	I.T.E.	Return	B.28
The Intrepids	52x26 mins	•	•	•	Marathon International	New	E.01/D.02
Leonie Lionheart	44x28 mins	•		•	Penta TV Germany	New	E.05
Lift Off	78x27 mins	•		•	A.C.T.F.	New	G.31
Little Lord Fauntleroy	6x30 mins	•		•	BBC Worldwide TV	New	J.01/H.02
Noe's Kids	80x7 mins	•	•	•	Marathon International	New	E.01/D.02
Round the Twist	13x24 mins	•		•	A.C.T.F.	Return	G.31
See How They Grow	56x10 mins	•		•	DK Vision	New	A.17
Snapshot	34x5 mins	•		•	DK Vision	New	A.17
Sweet Valley High	22x30 mins	•		•	Saban	New	L.19/K.20
VR Troopers	52x30 mins	•		•	Saban	New	L.19/K.20
Winners	14x48 mins	•		•	A.C.T.F.	Return	G.31
The Wonderful World of Animals	24x13 mins	•	•	•	Marathon International	Return	E.01/D.02

## COMEDY

The Baldy Man	6x30 mins	•			Polygram Film Int'l TV	New	H.32/J.35
Frontline	13x30 mins	•			Beyond Distribution	New	F.32
Just for Laughs	12x26 mins	•		•	Rozon Inc.	Return	P.16
Michael Courtemanche Special	1x60 mins	•		•	Rozon Inc.	Return	P.16
My Brother and Me	13x26 mins	•		•	Nickelodeon	New	M.38
SCTV	185x30 mins	•			Catalyst Distribution	Return	L31./K.32
Surprise Surprise	8/10 mins	•		•	Rozon Inc.	Return	P.16

## CURRENT AFFAIRS

The Health Show	19x23 mins	•			CBC International Sales	New	K.21/J.22
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## DOCUMENTARIES

Air & Space Smithsonian Magazine ..	13x30 mins	•		•	Unapix International	New	A.01
Al Filo De Lo Imposible	61x30 mins	•		•	RTVE	New	B.07
The Alps: Kingdom in the Clouds	2x60mins	•		•	IBN	New	C.07
Asia Scope	1x44 mins	•		•	Film Australia	New	G.32
Barcelona '92: 16 Days of Glory	1x3 hours	•		•	Unapix International	New	A.01
Battlefield	6x120 mins	•		•	Polygram Film Int'l TV	New	H.32/J.35
Beyond Borders	13x30mins	•		•	IBN	New	C.07
Bodyguards	1x52 mins	•		•	Channel 4 Int'l	New	G.24
China: Unleashing the Dragon	4x60 mins	•		•	Beyond Distribution	New	F.32
Crime International	13x30 mins	•		•	WTN	New	G.28
De Polo A Polo	14x30 mins	•		•	RTVE	New	B.07
Earth Quest	8x60mins	•		•	IBN	New	C.07
Expedition Malaspina	6x60 mins	•		•	RTVE	New	B.07
Eyewitness Series 2	13x30 mins	•		•	DK Vision	New	A.17
Fit for a King	1x55 mins	•		•	Film Australia	New	G.32
The Forbidden City		•		•	Discovery Enterprises	New	F.01/E.02
Gene Hunters	1x52 mins	•		•	Channel 4 Int'l	New	G.24
Healing Wounds	1x52 mins	•		•	Channel 4 Int'l	New	G.24
Horizon	20x50 mins	•		•	BBC Worldwide TV	New	J.01/H.02
La Aventura Del Hombre	40x60 mins	•		•	Artear	New	B.15
The Lairovs Go West	1x35 mins	•		•	Amaya	New	E.37
The Last of the Czars		•		•	Discovery Enterprises	New	F.01/E.02
Liberation	1x72 mins	•		•	Channel 4 Int'l	New	G.24
Lillehammer '94: 16 Days of Glory	1x3 hour	•		•	Unapix International	New	A.01
Mah Jong Orphan	1x45 mins	•		•	CBC International Sales	New	K.21/J.22
Martha Graham - The Dancer Revealed	1x60 mins	•		•	Amaya	New	E.37
Masters of War	13x60mins	•		•	Harmony Gold	Return	
Medicine Demystified	52x15 mins	•		•	The Multimedia Group	New	L.31/K.32
Movie Magic	30x30 mins	•		•	Film Australia	New	G.32
Muhammad Ali	6x60 mins	•		•	Mitsubishi Corp	New	D.04
Natures Invention	26x26 mins	•		•	Pandora	New	E.29
Niagara's Gold	1x44 mins	•		•	Film Australia	New	G.32
On Top of the World II	13x60mins	•		•	IBN	New	C.07
Paleoworld	13x25 mins	•		•	Discovery Enterprises	New	F.01/E.02
Pirates & The Following of High Seas	60 & 90 mins	•		•	Beyond Distribution	New	F.32
Prophecy	1x135 mins	•		•	CBC International Sales	Return	K.21/J.22
The Raid	1x55 mins	•		•	Film Australia	New	G.32
The Red Barron	3x50 mins	•		•	Discovery Enterprises	New	F.01/E.02

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
The Real World III	20x30 mins			•	MTV	New	M.38
Supercities II	13x30mins	•		•	IBN	New	C.07
The Space Shuttle	1x100 mins	•		•	Discovery Enterprises	New	F.01/E.02
Tough Love	1x52 mins	•		•	Channel 4 Int'l	New	G.24
The UN Put to the Test	1x50 mins	•		•	Amaya	New	E.37
Tennessee Williams	1x90 mins	•		•	Amaya	New	E.37
<b>DRAMA</b>							
Bizet's Dream	1x52 mins	•		•	The Multimedia Group	New	L.31/K.32
Chateau Des Oliviers	13x52 mins	•		•	France Television Dist.	New	G.01/F.02
Crosswinds	1x90 mins	•		•	Pandora	New	E.29
Daisy	4x60 mins	•		•	Fox Lorber	New	C.28
Death in the Family	4x60 mins	•		•	Fox Lorber	New	C.28
Donde Estas Amor De Mividia	26x60 mins	•		•	Artear	New	B.15
Germaine and Benjamin	12x26 mins	•	•	•	Marathon International	New	E.01/D.02
The House that Mary Bought	1x102 mins	•		•	Pandora	New	E.29
Japanese Drama Series	1500 hours	•		•	Mitsubishi Corp	New	D.04
MMG Engineers	13x60 mins	•		•	Fox Lorber	New	C.28
My Brother's Keeper	1x120 mins	•	•	•	Hallmark Entertainment	Return	
New York Undercover	22x60 mins	•		•	MCA TV International	New	H.09/G.10
Neueve Lunas	39x60 mins	•		•	Artear	New	B.15
The Return of the Native	1x120 mins	•	•	•	Hallmark Entertainment	Return	
Redwood Curtain	1x120 mins	•	•	•	Hallmark Entertainment	Return	
Saint-Exupery	2x52 mins	•		•	France Television Dist.	New	G.01/F.02
The School Teacher	12x90 mins	•		•	France Television Dist.	New	G.01/F.02
Seaforth	30x50 mins	•		•	BBC Worldwide TV	New	J.01/H.02
Shadow of a Doubt	1x120 mins	•	•	•	Hallmark Entertainment	Return	
Side Effects	13x47 mins	•		•	CBC International Sales	Return	K.21/J.22
Stick Wife	1x120 mins	•	•	•	Hallmark Entertainment	Return	
Street Legal: Last Rights	1x93 mins	•		•	CBC International Sales	Return	K.21/J.22
The Right Verdicts	7x60 mins	•		•	MCA TV International	New	H.09/G.10
<b>FEATURE FILMS</b>							
Sherwood's Travels	1x120 mins	•			UFA Film und Fernseh	New	
<b>GAMESHOWS</b>							
Crazy Cartoon Soccer	live	•	•	•	I.T.E.	Return	B.28
EC Plays Lift Off	13x24 mins	•		•	A.C.T.F.	Return	G.31
Hugo the TV Troll	live	•	•	•	I.T.E.	Return	B.28
<b>LIGHT ENTERTAINMENT</b>							
Egos and Icon	Monthlyx60 mins	•			Catalyst Distribution	New	L31./K.32
Entertainment Now!	Weeklyx30 mins	•		•	WTN	Return	G.28
Home Video Clips	180x1 min	•	•	•	ORF	Return	D.32/D.34
Media TV	Weeklyx30 mins	•			Catalyst Distribution	New	L31./K.32
Ooh La La	Weeklyx30 mins	•			Catalyst Distribution	New	L31./K.32
Out of Control	26x30 mins	•		•	Fox Lorber	New	C.28
Shining Time Station	40x60 mins	•			Catalyst Distribution	New	L31./K.32
<b>MINISERIES</b>							
Anne of Green Gables & Sequel	4&5 hours	•	•	•	Sullivan Ent.	New	L.31/K.32
Dazzle	4 hours	•			Multimedia Entertainment	New	A.07
Eye Level	6x30 mins	•	•	•	Sullivan Ent.	New	L.31/K.32
Heidi	4 hours	•		•	Harmony Gold	Return	
Mercy	4 hours	•			Alliance	New	E.13/D.14
Op Center	4 hours	•			New World	New	K.01/J.02
Power of Love	2x60 mins	•			UFA Film und Fernseh	New	
<b>MUSIC</b>							
Ballet Scenes from Vienna	2x45/2x30 mins	•	•	•	ORF	Return	D.32/D.34
Ballet - Torero	1x60 mins	•		•	RTVE	New	B.07
Brigitte Bardot	1x75 mins	•		•	France Television Dist.	Return	G.01/F.02
The Brit Awards 1995	1x90 mins	•		•	Polygram Film Int'l TV	New	H.32/J.35
Cameron Nuestro	1x58 mins	•		•	RTVE	New	B.07
Country Music Shows	128x30	•		•	I.N.I. Entertainment.	Return	G.08
The Eagles: Hell Freezes Over	1x90 mins	•		•	MTV	New	H.38



# MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Jean Michel Jarre	1x52 mins	•		•	France Television Dist	Return	G.01/F.02
Jimmy Page/Robert Plant (Unleaded)	1x90 mins			•	MTV	New	H.38
MTV European Music Awards	1x60/1x150 mins			•	MTV	New	H.38
New Year's Day Concert	1x75 mins	•		•	ORF	Return	D.32/D.34
Peter & the Wolf	1x52 mins	•		•	Amaya	New	E.37
Placido Domingo's Tales from the Opera	4x60 mins	•		•	BBC Worldwide TV	New	J.01/H.02
<b>REALITY</b>							
Cannibals	60 mins	•		•	Harmony Gold	Return	
Masters of Illusion	1x60 mins	•		•	Film Australia	New	G.32
World of Wonder Wow!	13x30 mins	•		•	Film Australia	New	G.32
<b>SERIES/TELENOVELAS</b>							
Antonella	165x60 mins	•			Artear	New	B.15
Deader than Ever	5x120 mins	•			UFA Film und Fernseh	New	
Due South	10x60 mins & 2 hour pilot	•			Alliance	New	E.13/D.14
Hi Octane	4x30 mins	•			Atlantis Releasing	New	N.01
Jacqueline Susann's Valley of the Dolls	65x30 mins	•			New World	New	K.01/J.02
Nano	200x60 mins	•			Artear	New	B.15
The New Adventures of Flipper	26x60 mins	•		•	Samuel Goldwyn	Return	
Road to Avonlea - Cycle VI	13x60 mins	•	•	•	Sullivan Ent.	New	L.31/K.32
Tales from the Crypt	53x30 mins	•			New World	New	K.01/J.02
<b>SPORTS</b>							
Crazy Cartoon Soccer	live	•	•	•	I.T.E.	Return	B.28
Meremere (Bikers)	60 mins	•		•	W.M.S.	Return	F.06
Sandblast	65x30 mins	•		•	MTV	New	H.38
Shredding H2O	13x30 mins	•		•	Unapix International	New	A.01
Snowboarding	3x60 mins	•		•	W.M.S.	Return	F.06
<b>TALK SHOWS</b>							
The Dennis Prager Show	1x30 mins strip	•			Multimedia Entertainment	New	A.07
The Susan Powter Show	1x30 mins strip	•			Multimedia Entertainment	New	A.07
Vanessa	1 hour strip	•			Multimedia Entertainment	New	A.07
<b>TV MOVIES</b>							
Avalanche	1x90 mins	•			Atlantis Releasing	New	N.01
Butterbox Babies	1x120 mins	•	•	•	Sullivan Ent.	New	L.31/K.32
Caught in the Crossfire	1x120 mins	•			New World	New	K.01/J.02
Children of the Dark	1x120 mins	•			Multimedia Entertainment	New	A.07
Coldblooded		•			Polygram Film Int'l TV	New	H.32/J.35
Cult Rescue	1x120 mins	•			New World	New	K.01/J.02
Following Her Heart	1x90 mins	•			Atlantis Releasing	New	N.01
Harlequin Romances	4x120 mins	•			UFA Film und Fernseh	New	
The Harlequin Alliance Romance	4x120 mins	•			Alliance	New	E.13/D.14
Only the Angels Listened	1x120 mins	•	•	•	Sullivan Ent.	New	L.31/K.32
Reflections on a Crime	Feature	•	•	•	Saban International	New	L.19/K.20
Roseanne: An Unauthorised Biography		•			Polygram Film Int'l TV	New	H.32/J.35
Rugged Gold	1x120 mins	•			Alliance	New	E.13/D.14
Trial At Fortitude	1x95 mins	•			Atlantis Releasing	New	N.01
Trust in Me	1x90 mins	•			Atlantis Releasing	New	N.01
Zeiram 2	1x100 mins	•		•	Mitsubishi Corp	New	D.04
<b>VARIETY/SPECIALS</b>							
A Midsummer Night's Ice Dream	1x50 mins	•		•	Multimedia Grp. Canada	New	L.31/K.32
Cirque du Soleil: Saltimbance	1x55 mins	•		•	Multimedia Grp. Canada	New	L.31/K.32
Dean Martin & Jerry Lewis TV Special	1x90 mins	•		•	I.N.I. Entertainment.	New	G.08
<b>WILDLIFE/NATURAL HISTORY/ENVIRONMENTAL</b>							
Among the Whale Sharks	1x45 mins	•	•	•	ORF	Return	D.32/D.34
Earthfile VI	13x30m ins	•		•	WTN	Return	G.28
The Human Animal	6x50 mins	•			BBC Worldwide TV	New	J.01/H.02
Human/Nature	26x60 mins	•			Beyond Distribution	New	F.32
Lonely Planet	13x60 mins	•			Beyond Distribution	New	F.32
My Wildlife/In care of Nature	13x26 mins	•	•	•	Marathon International	New	E.01/D.02

# Slightly Out Of Synch

**An influx of foreign programming has burdened eastern European broadcasters with escalating language conversion costs. A new study suggests that the most widely-used methods are not necessarily cheapest, nor are they likely to show a program to its best advantage, reveals Josephine Dries**

The television landscape in the central and eastern European countries has changed considerably since the downfall of communism. With the opening of national borders to the western world, the expectation of the viewing audience for more western programming increased. The national, and often still state-owned, broadcasters want to meet their audiences' needs and try to schedule popular western films, series and soaps. However, lack of finances limits their possibilities and broadcasters do what is within their reach through barter deals and the goodwill of their western colleagues.

Research by the European Institute for the Media (EIM) in Düsseldorf estimates the annual total of foreign programs broadcast by eastern European television channels (not including Ukraine, Moldova and Belorussia) to be 19,000 hours. These programs are translated into different national languages and dubbed, voice-overed or presented with subtitles. Figure 1 shows that up till now the most common method of language transfer in television has been voice-over (41%).

The relatively low percentage of subtitling (23%) is remarkable. Considering the bad financial position of most eastern European broadcasters, one might expect a bigger share, seeing as it is a relatively inexpensive method of language transfer. Voice-overs – often involving only one or two actors playing all the roles and with the original soundtrack audible in the background – are even cheaper, however, and many broadcasters are still using this method.

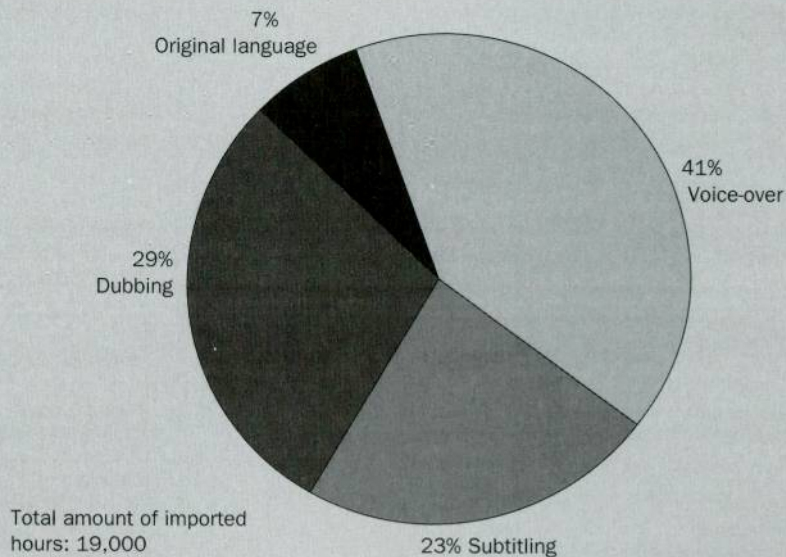
The large home market and dominant position of the national language is often referred to when explaining the origins of the dubbing tradition in certain (western European) countries. For small countries, with a smaller language area, the high costs of dubbing cannot be justified by the size of the home market. In Scandinavia, Greece, Portugal and the Dutch-language area, subtitling has developed into a traditional and cultural standard.

This argument does not apply to the countries in eastern Europe. There, where one would expect countries to choose subtitling, being a cheaper, less complex and faster way of language conversion, dubbing is given preference. In the Czech Republic, Slovakia, Bulgaria

## Voice-overs

Other than in western Europe, several states in the east (Poland, CIS states, Baltic states) use voice-over as their main method of language transfer in television. Although the costs for voice-over are

**Figure 1:**  
**Language Transfer in Eastern Europe**  
**Share Of Total Imported Programs 1992**



Source: EIM

and Hungary, the majority of imported programs are dubbed (see figure 2). None of these four countries has a dominant language or a vast audience which, when compared with the western situation, would "justify" this.

Romania on the other hand, with 23 million inhabitants and one of the biggest east European countries, subtitles 90% of its imported television programs and can, together with Slovenia (one of the smallest with two million people) which subtitles 62%, thus be considered a so-called "subtitling" country.

estimated by the EIM to be slightly higher than subtitling, these countries seem to prefer re-voicing imported programs. At the annual meeting of the Working Group on Language Transfer in Television and Film in Istanbul in November 1993, Jan Ivarsson, Working Group advisor and a senior subtitling expert, called voice-over the "worst possible method." It is seen as too simple a way of getting the message across. The viewer simply gets the dialogue "read" with the moving image, most of the time without any difference in intonation or acting effort.



Doing this, the characters in the film lose their identity and acting quality can only be transmitted visually and not orally. Language transfer through voice-over can in no sense maintain or do justice to the quality of the original version.

## No translation

The former USSR states, in addition to broadcasting in their national language, also program a vast number of hours in Russian. These are mostly programs taken from Russian television directed at the Russian communities in these newly-independent states.

Likewise in Hungary and in the Czech and Slovak Republics where there are foreign broadcasts for the national minorities in those countries. Several east European broadcasters have been obliged by new national broadcasting laws to commit themselves partly to programs which are not translated at all. Apart from this, several broadcasters have contracts to rebroadcast programs from some western organizations like CNN and the BBC. Most of the time these broadcasts are not translated, focusing on the English-speaking and higher-educated elite in these countries.

The translation, subtitling, dubbing or revoicing of programs is in most countries done by internal departments of the national broadcasting services. Few private companies deliver full-service subtitling or dubbing to television. Technical equipment is most of the time still in the hands of state companies. In Poland,

Laserfilmtext, a private laser subtitling company, recently started to work for cinema distributors in Poland.


## Cinema

In western European countries, one language transfer method is used in all audiovisual fields – television, theatrical releases and video. Subtitling countries make an exception by dubbing for young children unable to read. The situation in eastern European cinema is, for some countries, somewhat different as in television. 78% of the foreign programs on Lithuanian television are voice-overed, 71% of foreign films in the cinema are subtitled. The same applies to Poland, Latvia, and Estonia. The situation is similar in Slovenia where Slovenian Television programs a diversity of dubbing, subtitling, voice-over and programs in their original language, but where in the cinema all films are subtitled. Lewis Mintfort, agent for 20th Century Fox in Warsaw, cannot fully explain this difference between television and cinema. "Four years ago, when we came to Poland, choosing subtitling seemed the logical thing to do." The market was new and not very stable, and investments for dubbing may have been too high, which meant the automatic choice of the much cheaper subtitling. "The cinema market in Poland is, however, still not very strong," says Mintfort. Attendance in the Czech and Slovak Republics is much higher than in Poland which is almost three times bigger in population. There-

fore, he does not see Poland developing into a dubbing country in the near future.

Even in Hungary, which is developing into a dubbing country, this seems to apply only to television because in cinema a majority of the foreign films are still shown with subtitles.

Mapping the language transfer activities in eastern Europe gives a very varied picture. All methods are widely represented; some countries are devoted to just one method, others use a mixture of all three. The future development of these activities will depend very much on the growth of the audiovisual sector and the popularity of television and cinema in general. Audience research will have to bring out the preferences of the national audiences, their familiarity with foreign languages and experiences with language transfer methods used so far.

Since 1986, the EIM has been carrying out several research projects on language transfer in European film and television. Through this, the Institute acknowledges the importance of language in the European audiovisual sector and wants to bring this to the attention of political and social institutions as well as to the audiovisual professionals. A publication entitled *Dubbing and subtitling: Guidelines for producers and distributors*, which outlines the requirements for high-quality dubbing and subtitling, will be published in the near future. 

*Josephine Dries is a researcher at the European Institute for the Media*

Figure 2:

### Methods of Language Versioning (%)

	Television		Cinema	
Dubbing	Czech Republic	45	Czech Republic	64
	Hungary	80	Slovak Republic	94
	Slovak Republic	94		
	Bulgaria	70		
Subtitling	Romania	90	Poland	<u>100</u>
	Slovenia	62	Romania	100
			Slovenia	100
			Hungary	60
Voice-over	Poland	<u>100</u>	Latvia	<u>85</u>
	Russia	<u>100</u>	Lithuania	71
	Latvia	95	Estonia	<u>85</u>
	Lithuania	78		
	Estonia	<u>95</u>		

Source: EIM

*Underlined amounts are estimates*

# Broadcasters Fear Tolls On I-way

**Britain's terrestrial broadcasters battle digital Simulcrypt...  
Cox Cable goes after coupon collectors...  
France Télécom wins I-way endorsement**

**U**K terrestrial broadcasters are hopping mad about a decision by the European DVB group (DVB stands for Digital Video Broadcasting) to approve a European conditional access system called Simulcrypt for future digital pay-tv services.

This column has touched on the activities of DVB before: essentially, it's a forum for anyone who's got any part to play in Europe's digital future, and it has already defined an MPEG-2 related standard for European digital satellite and cable transmissions. It's also due to define a draft digital standard for terrestrial television early next year.

The trouble with Simulcrypt, as far as the broadcasters are concerned, is that it allows the dominant European pay-tv operators (like Canal Plus in France, BSkyB in the UK, and Film-Net in Scandinavia) to control access in each of their own territories to the new digital set-top boxes that are expected to be launched to European homes in the middle of next year. They will be able to do this because they will be permitted to own the bit of the box that the subscriber will plug his enabling card into – the so-called “smart-card interface.” This means that only enabling cards carrying the pay-tv operators' proprietary encryption systems will work with the new boxes.

So if HBO, say, ever wants to deliver a digital

service in Europe one day, it's going to have to be with the agreement of moguls like Rupert Murdoch.

Because of the possible anti-competitive implications of this development (vertically-integrated programmers like Canal Plus and BSkyB would be acting, in effect, as the new digital gatekeepers on the infobahn), DVB has also agreed a Code of Conduct. This is intended to ensure that the dominant operators allow access on fair, equitable and reasonable terms to prospective new pay-tv services. However, the UK broadcasters say their own legal advice is that the code isn't worth the paper it's written on, and they've refused to sign it.

Why isn't this a problem in the States? Because the people who operate cable and satellite pay-tv channels there aren't the same ones who own the encryption technology used to scramble them. If they were, you could bet your bottom dollar the U.S. nets would be up in arms, too.

## Set-Top Discounts

With Time Warner's sophisticated full-service network trial well behind schedule in Orlando, Florida, U.S. advertisers are about to be offered a rather simpler option by Cox Cable. The cable operator is to mount a test with Acu-Trac Services of an electronic coupon service which will eventually

roll out to a thousand households in San Diego.

Called Coupon-Select, the service allows cable television viewers to order a coupon in response to a television ad by pressing a button on their remote control. When the button is pressed, a calculator-sized printer spits out a coupon.

Acu-Trac, which operates coupon services for some major advertisers, including Procter & Gamble, Colgate-Palmolive and RJR Nabisco Holdings, believes that in the test coupon redemption will rise to 35% from its present low of 3%.

Electronic coupons are one of the most ubiquitous services proposed for the infobahn, but most of the models proposed so far involve a message being sent back to the cable head-end from the subscriber's set-top box telling the service provider all about the product choice and the circumstances in which the coupon was ordered. In this way, not only are buy-rates boosted, but the advertiser is able to build up a handy marketing database about subscribers' preferences.

Coupon-Select is different: it involves no immediate electronic message back to the advertiser. The coupons will be redeemed and processed in the normal (manual) way. This will probably provide rather less data, but on the other hand, as a tried-and-tested method, will be a lot cheaper to implement.

## Phone Vision

Gérard Théry, the former head of France's state telephony operator, France Télécom, has just submitted his long-awaited report on the country's approach to the infobahn.

His solution?

France Télécom should be given the task of building fiber-optic cable out to every French home by the year 2015, at an estimated cost of somewhere between \$29 billion and \$38 billion. This new broadband network should use state-of-the-art ATM (Asynchronous Transfer Mode) technology, the same as that currently being employed in the Time Warner Full Service Network in Orlando.

At the same time, Théry says France Télécom's monopoly should be removed, and that it should be privatized along similar lines to those proposed for Germany's PTT, Deutsche Bundespost Telekom.

U.S. readers may be puzzled as to why Théry should insist on a telephone-based route for the superhighway, but there are sound reasons for it. France's cable and satellite sectors are not expanding fast enough to offer any comparable alternative in the same time-scale, and the telephone system already offers some 6.5 million subscribers access to interactive online services – albeit relatively crude ones – via the Minitel system. **TBI**





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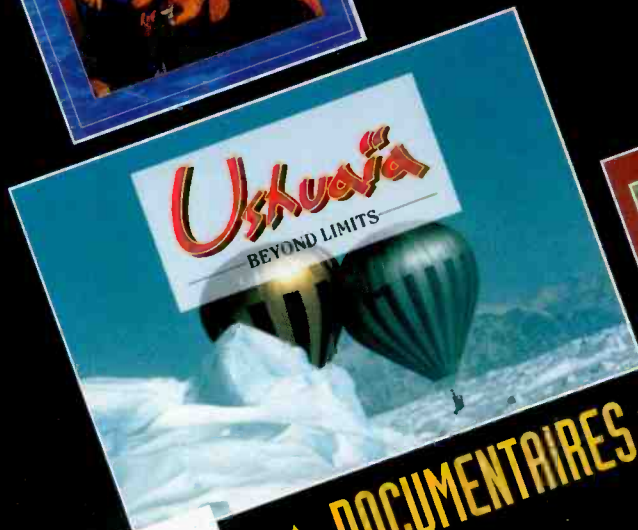
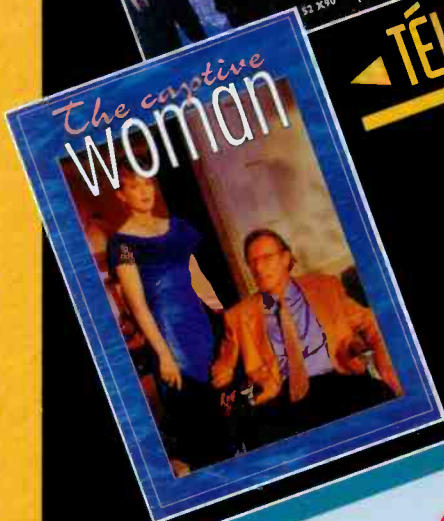
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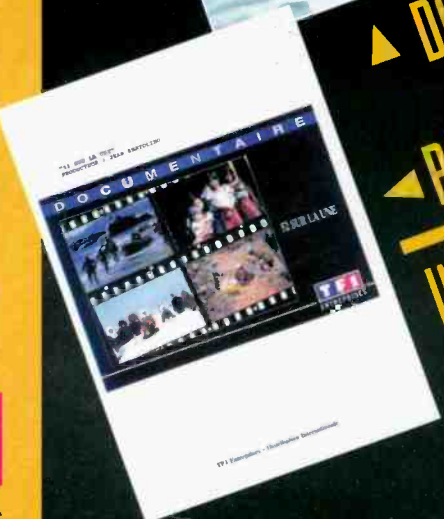


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