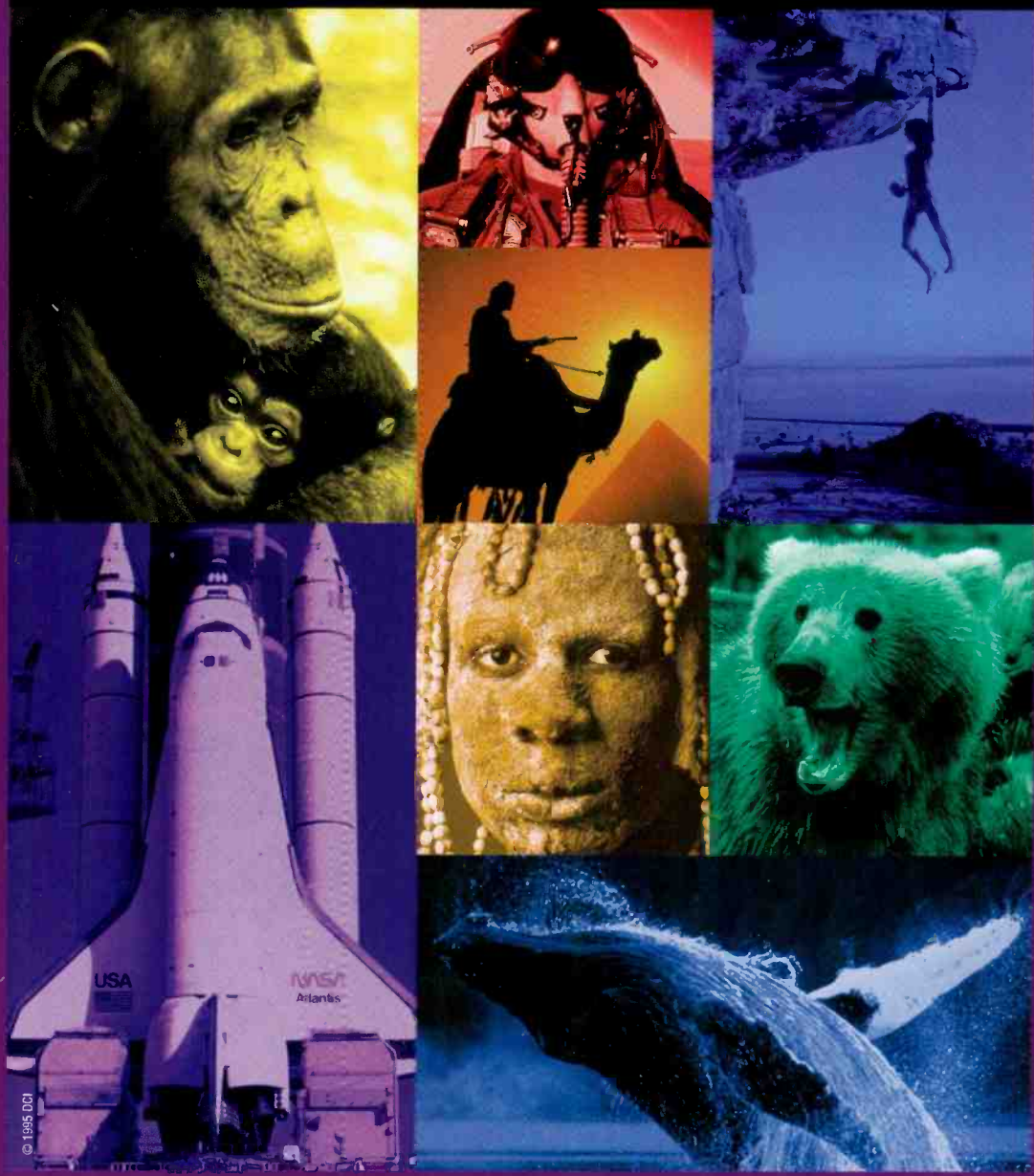


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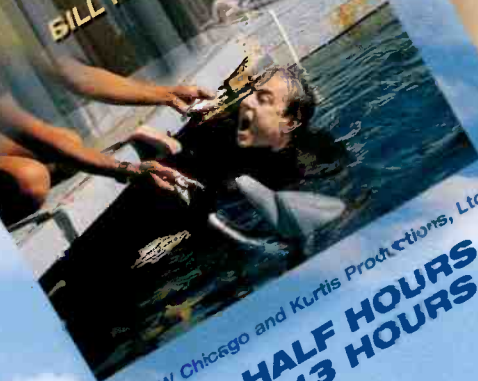
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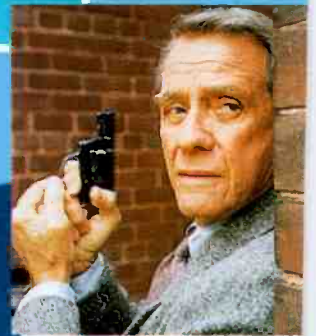
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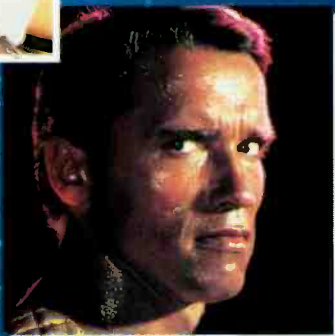
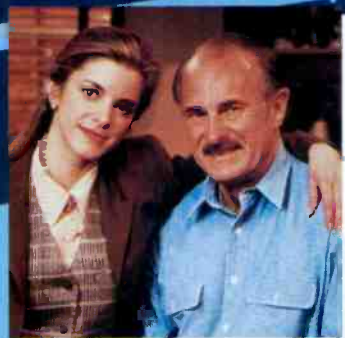
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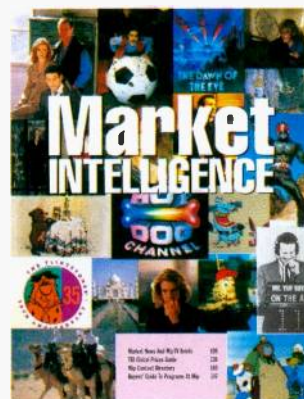
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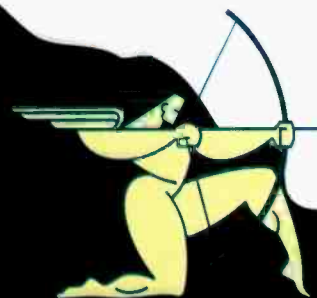
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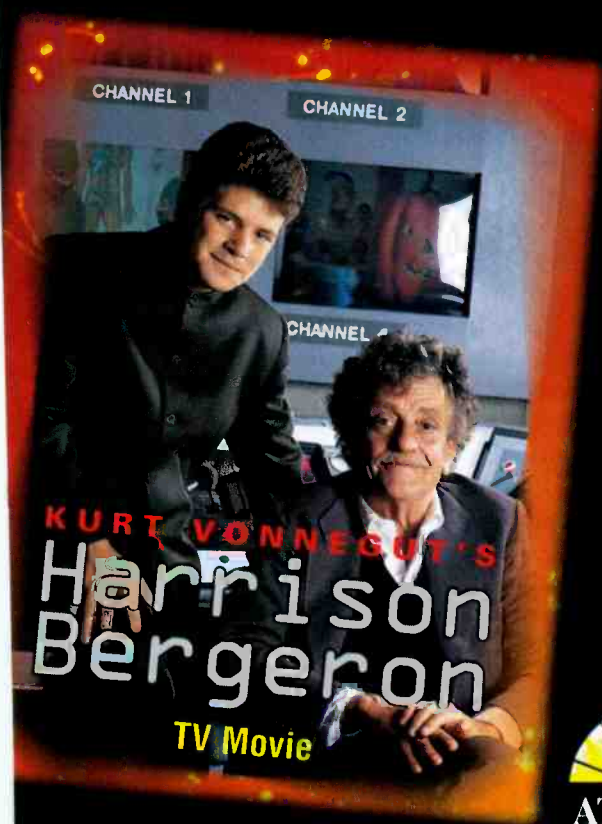
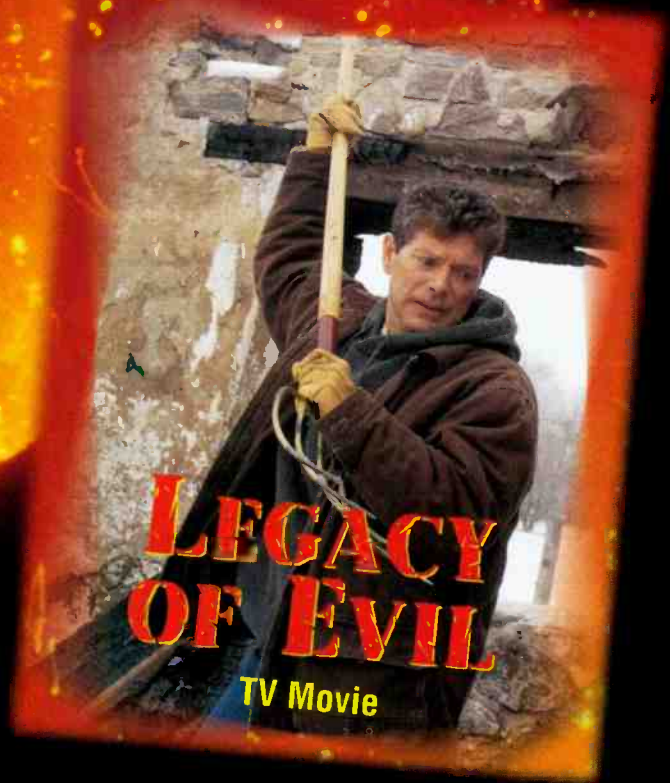
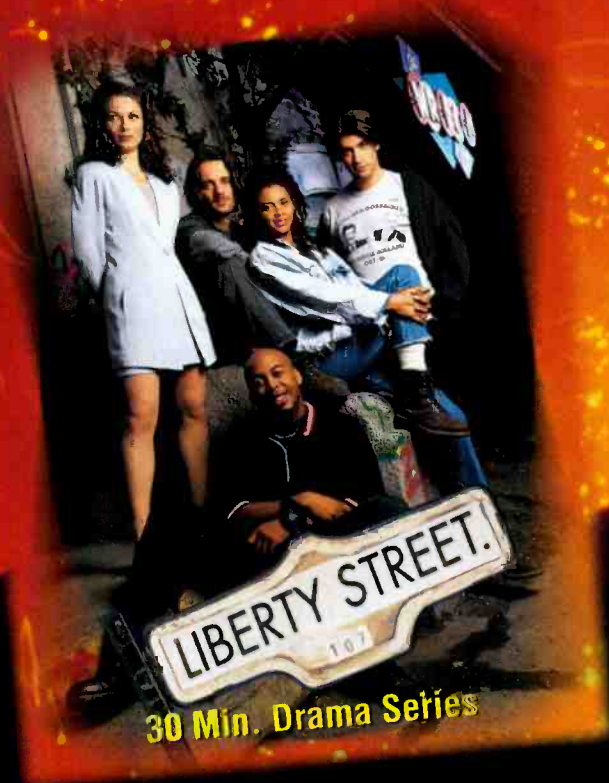
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Look, Up In The Sky...

I'll admit it: I'm biased. Failure does that to me. See a business go down in flames, crashing and burning, leaving nothing but a lake of red ink behind, and you make certain assumptions about that business. When I started writing about the media in the mid-1980s, cable was king in America. Cable operators were growing at the kind of biological rates you associate with Hot Zone viruses. The one-time-kings of the media jungle, the broadcast networks, had somehow managed to mutate into dinosaurs at five minutes to The Ice Age. And a few silly souls were trying to deliver television direct via satellite. Called direct broadcast satellite (DBS) at the time, these direct-to-home (DTH) schemes got nowhere. I remember covering the ongoing bankruptcy of one - USCI - seemed like my full-time job for several months. Granted, the money lost at that time wouldn't cover Rupert Murdoch's photocopying bill today, but I'd learned something: multi-channel tv was going to come down the wire, not out of the sky. Just about everyone in the U.S. media business was convinced this was the case.

I've remained biased towards the wire, though obviously haven't been so dense as to ignore the success of BSkyB in the UK. It's just I always figured the wire would catch up, and once it did, DTH programming services would become cable programming services. Several stories in this month's Monitor section have forced me to rethink my assumptions. Japan's beleaguered cable operators are already worrying themselves about a plan by Japan Satellite System (Jsat) to offer a digital DTH service. Jsat will next spring start beaming down 50 channels to small dishes. The plan mirrors the services Hughes Communications and USSB have launched in the U.S., with some initial success. As another Monitor piece reports, Hughes plans to export the technology and the approach of its DirecTV service to Central and South America.

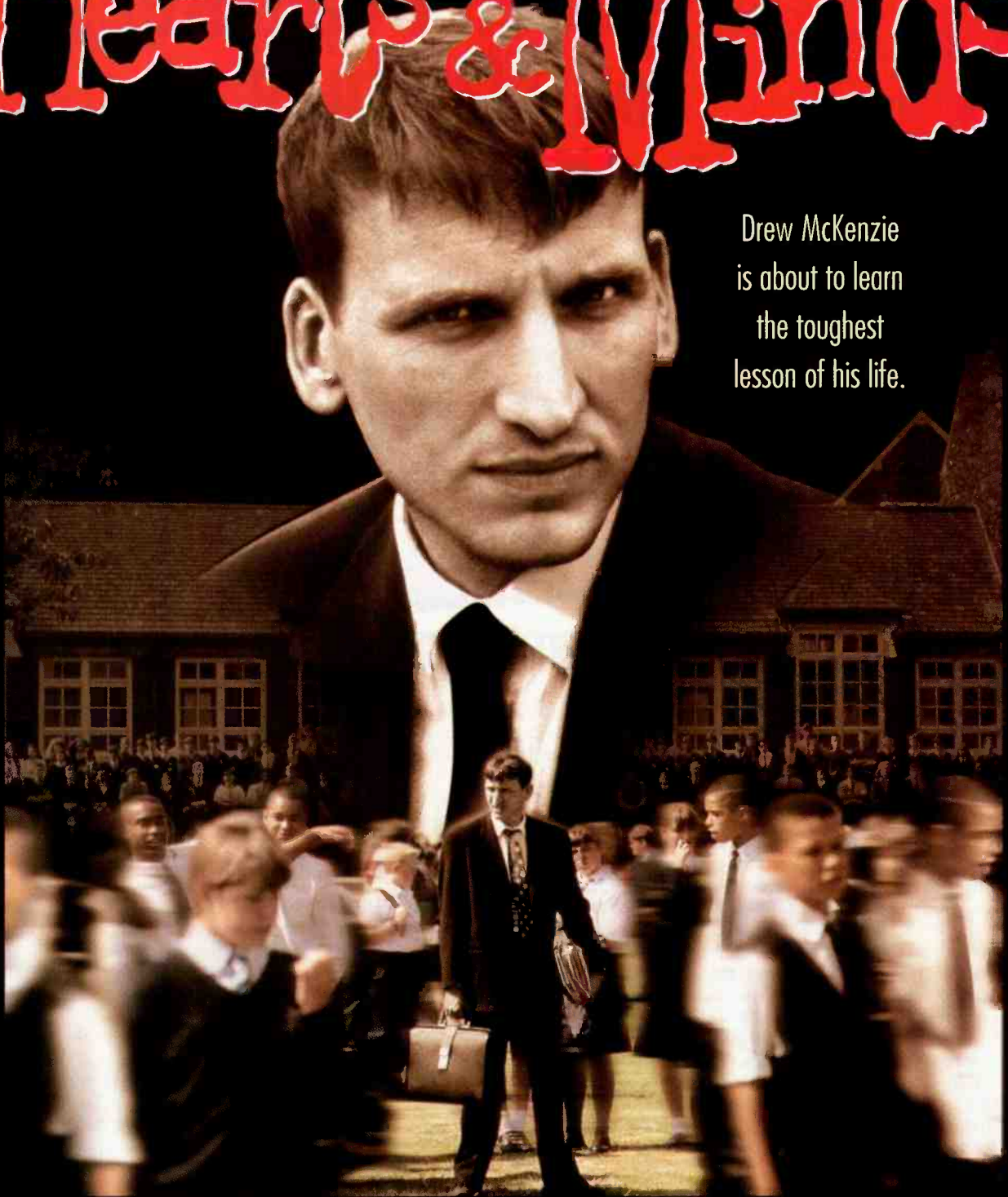
Digital technology, the agent that will transform all tv services over the next 10 to 15 years, has given the sky a critical short-term advantage over the wire. Satellite, cable and telephone can all, of course, offer digital services. The question is who can put the technology to use fastest? The answer: satellite. Satellite companies are already lofting digital birds into the sky. It will take cable companies years to upgrade all their systems to offer a plethora of new digital services to consumers. Ditto for the full roll-out of video dial-tone by the phone companies. Satellite can offer digital - and that means huge increases in programming volume - now, to everyone, with the caveat that everyone has to be convinced to buy a receiver. This has always been DTH's downside: convincing the consumer to cover some of the capital costs of the delivery system. But in places where cable has been slow to develop - Japan, Latin America, the UK - or hated by some consumers - the U.S. - the sky's promise of more services now could win over enough consumers to put pressure on the cable and telephone industries. Then, when the wire does go digital, it will have to win back all those customers looking to the sky.

The Editor

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We tend to think of programming as the creative side of television, the diametrical opposite of the business side. But I find myself marvelling at how creative the business side is, and, paradoxically, how businesslike and undynamic the programming side has become.

Programming in the U.S. is locked into a handful of formats. Beyond sitcoms, action-adventure hours, made-for-tv movies and news magazines, very little else enters the mix in primetime. Once in a while there's a breakthrough in style, but otherwise what passes for creativity in tv series are the variations on tried-and-true formulas.

The most creative new program form to be developed in the last 20 years was the music video, which put MTV on the cable map. But even cable, that electronic orgy, is more into recycling and imitating programs than inventing new forms.

Innovation, which should be a hallmark of the creative side, is oddly not much welcomed there. Yet it has been a way of life on the business side since the late 1920s, when William S. Paley created CBS to compete with NBC. He built a national radio network on a single creative idea: paying the stations for the use of their airtime. So was born affiliate compensation, which to this day is the glue between networks and stations.

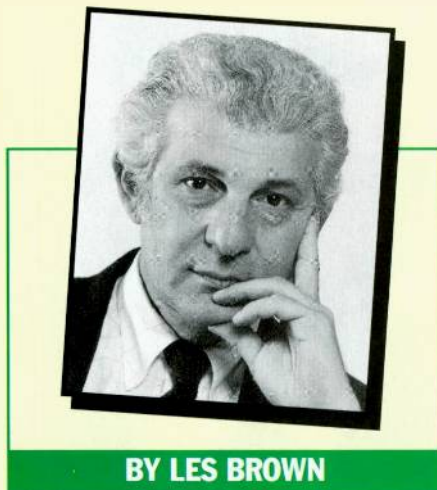
For my entire career on the industry sidelines, I've been intrigued by the ingenuity of the business side. Whether in bringing daytime sports into primetime, dignifying the practice of barter, or sharing ad revenues with the hottest Hollywood producers, business always seems to find new pathways to profits.

The business is at its creative best in stepping around new regulations and turning them to its own advantage. When the Federal Communications Commission last year slapped new rate regulations on the cable industry, the operators went into deep shock at being required to make refunds to their subscribers for having overcharged them.

The cable operators of course complied, but in calculating the payback found a miscellany of new things to charge for and in the long run will come out ahead.

Often what happens in tv is more engaging to a jaded viewer than what happens on it, especially the way in which industry conflicts are resolved

Screen Deals Keep You Watching



BY LES BROWN

Deal-making between companies is, of course, wondrously imaginative, no two deals ever being alike. And then there's "creative financing," which comes by its name honestly, or even at times dishonestly.

Often what happens within television is more engaging to a jaded viewer than what happens on it. I'm thinking especially of how creatively the great industry conflicts are dealt with and resolved.

When the FCC ruled not long ago that cable had to compensate broadcasters for carrying their signals, it set the two industries at war. But the bitterness that grew so intense over the months evaporated overnight when ABC found a creative solution. It happily accepted, in lieu of cash, guaranteed carriage of a new cable network it wanted to launch. NBC and Fox then hatched similar deals, and the antagonists became pals.

Later an intra-cable war erupted when Sumner Redstone's Viacom filed an antitrust suit against John Malone's Tele-Communications Inc. (TCI) for hampering the growth of Showtime and other Viacom services. The allegations were so explosive and the portrayal of Malone so unflattering that the rift between the parties seemed beyond repair.

Then Viacom acquired Paramount. To help pay down the huge debt, it put its cable systems up for sale. The buyer turned out to be a TCI-affiliated company. Under the terms of the purchase, Viacom dropped the suit and TCI agreed to carry Viacom's program channels. Peace was restored neatly and quietly.

No intra-industry conflict was ever as vitriolic as that between NBC and Rupert Murdoch. It flared up late last year after Murdoch's spectacular run on the other networks' affiliates. NBC filed a petition with the FCC that blocked a number of station purchases in which Murdoch's company was involved.

Chief among NBC's charges was that Fox was actually owned by Murdoch's Australian company, News Corp., in violation of the regulations on foreign ownership in U.S. broadcasting. The hostilities between NBC and Fox spilled out in angry public statements that grew uncomfortably personal.

NBC maintained it was acting on principle, but principle swiftly disintegrated in February when the two sides suddenly reconciled. All it took was an offer by Murdoch to carry NBC's Super Channel and CNBC on News Corp's Star TV in Asia. This olive branch was worth millions to NBC, which, of course, promptly withdrew its petition.

So it goes on the dynamic business side: action, variety, melodrama, comedy. When money is the medium, no one is locked into a format and anything may enter the mix.

There are rarely any surprises in programming anymore, but on the business side they never stop coming. **TE**

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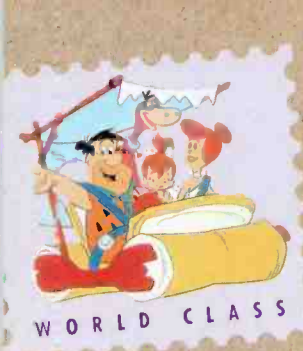


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MONITOR

JAPAN

Cable Industry Faces Direct Challenge

Jsat plans a digital direct-to-home service offering 50 channels in '96

What will happen to Japan's fledgling cable and satellite industry in the spring of 1996, when common carrier Japan Satellite Systems (Jsat) begins offering a digital direct-to-home (DTH) service?

That was the issue debated at a February meeting of the Japan Cable TV Association. The attending members decided that, rather than oppose the DTH service – similar in concept to Hughes Communications' DirecTV in the U.S. – they would study its potential impact on their business. But while publicly opting for calm over confrontation, the members were privately confessing their concerns.

The Jsat service may well be the solution that consumers, baffled by the complications and burdened by the high cost of Japan's cable and satellite services, are looking for. If it is, cable operators will face a tough struggle; even without the new competition, most have never seen a profit in Japan's still-immature cable market. Only 22% of Japan's 42.5 million tv households are passed by cable and just 1.62 million households subscribe.

Using digital compression technology, Jsat's new satellite will be able to beam from four to ten channels per transponder or as many as 50 altogether, at costs significantly lower than present analog broadcasting systems. Although Jsat spokesmen have said the company hopes to "continue friendly relations" with cable-tv operators, the reality is that by pushing digital DTH services, Jsat's shareholders may not only hurt the cable business but shoot themselves in the corporate foot. One reason is that of the four trading houses that own Jsat, two – Sumitomo and Itochu – are deeply committed to expanding their pres-

ence in the cable tv market.

Also concerned about the arrival of digital satellite tv are six satellite channels that use Jsat's two analog satellites. When the 50-channel service begins, their very existence may well be threatened.

A major question-mark hanging over the whole issue involves policy at the Ministry of Posts and Telecommunications (MPT). Although MPT Broadcasting Administration Bureau director general Akimasa Egawa has come out strongly for the rapid introduction of digital broadcasting – and called down the wrath of NHK and electronics makers that have invested billions in analog HDTV – a personnel shake-up at the ministry is expected by this summer, and the outcome could have a major impact on the MPT's stand on the new service.

While the future of Japan's cable and satellite tv industry seemingly hangs in the balance, U.S. cable operator Continental Cablevision has announced its entry into the Japanese cable market. Together with trading house Tomen, Continental's international arm is launching a cable-tv joint venture called CT Telecom in April. The initial investment will be small – \$1 million split evenly by the two partners – but Continental plans to spend \$549.5 million to achieve its goal of recruiting 1 million subscribers.

So as not to infringe Japanese regulations that limit foreign ownership of domestic cable companies to 33% control, CT Telecom will establish a chain of locally-managed cable operators. In addition to conventional multi-channel cable, the stations will offer telephone and video-on-demand services. Also, the partners plan to purchase and invest in existing cable stations.

Tomen thus joins rival trading houses Sumitomo and Itochu in establishing close links with a major U.S. cable operator: Sumitomo's partner is Tele-Communications Inc. and Itochu's, Time Warner. The Americans may not exactly be riding to the rescue, but their infusion of capital and expertise will give Japanese cable a better shot at surviving the coming threat from the sky.

An earlier attempt to launch a direct-to-home service, Japan Satellite Broadcasting, ended in failure in December 1992 when the company went bust.

by Mark Schilling — TOKYO

AUSTRALIA

Murdoch Bests Packer In Pay-TV Battle

News Corp. will use all its tv assets to support the new services

Rupert Murdoch's News Corp. has outsmarted Kerry Packer's Publishing and Broadcasting Ltd (PBL) in the race to deliver a strong program package of movies and sport to Australia's fledgling cable tv market.

News Corp announced in March that it had forged a joint venture known as Foxtel with Australis, the satellite and microwave operator in which Tele-Communications Inc. (TCI) of the U.S. has the major stake, and Telstra, the state-owned cable operator.

Under the agreement, News and Telstra will each own 40% of Foxtel with Australis/TCI taking up to 20%. Further, News and Telstra will each take up to 8% equity in Australis.

Through these cross-shareholdings, all subject to regulatory approval, the Foxtel partners will offer formidable competition to Optus Vision, whose shareholders include Optus, Continental Cablevision of the U.S. and Packer's PBL.

In a rare appearance on his own Nine Network, Packer thundered: "Imagine it. Rupert is a ferocious competitor at the best of times. But imagine him spending the taxpayers' money instead of his own. What a competitor he'll be sitting there spending Telecom's money, buying his own programming. What a deal!"

Telstra, known locally as Telecom, will own and operate the cable systems, which it is promoting as "the first ever to deploy leading-edge digital technology." No details on the subscription management system or the brand of set-top boxes have been released at this stage.

Programming will come from Murdoch's global tv triumvirate: Fox in the U.S., Star TV in Hong Kong and BSkyB in the UK. According to News Corp. director Ken Cowley, the global news service the company is developing with Reuters is expected to end up on Foxtel. Also, Twentieth Century Fox will join as an equal partner in the joint venture company formed by Australis, TCI, Paramount, Sony and Universal to deliver two movie channels, Encore and Showtime.

Trading as Galaxy, Australis is delivering a package of 8 to 10 channels via microwave until the Optus satellite and Telstra cable systems come on stream.

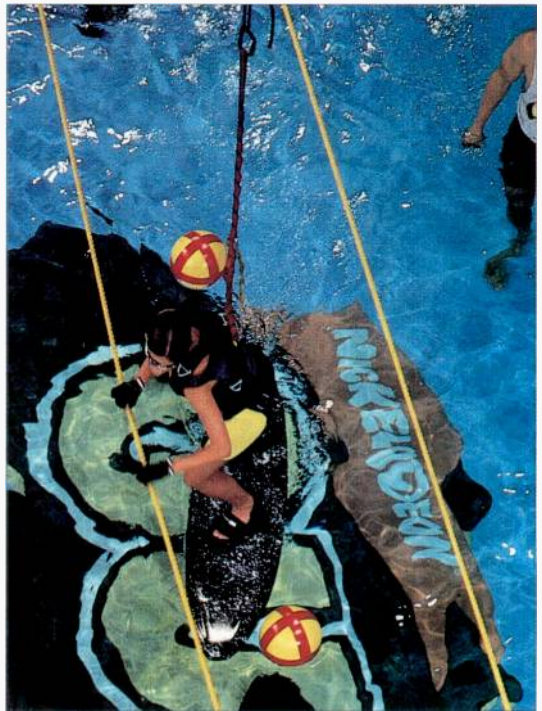
The Australis programming contribution to Galaxy will comprise the two movie channels, Prime Sports, TV1 entertainment and CNBC news

supported by NBC's Asian business news venture. A new company 50% owned by America's United International Holdings (UIH) is planning to supply four more Galaxy channels: Max for children, Quest documentaries and two as yet unnamed channels with 24-hour music and general entertainment.

UIH also has a 50% economic interest in ConnetTv, which has secured microwave frequencies covering 1.6 million homes in regional areas. Through links to Australis, ConnetTv has the satellite and microwave distribution rights to deliver Galaxy in these areas.

Another two pay channels are being developed by the state-owned Australian Broadcasting Corp. in partnership with press group John Fairfax and Cox Communications. Turner International will take a 20% equity position in the ABC's The News Channel and Viacom's Nickelodeon will take 40% of a children's and documentary channel. ABC's deal with Nickelodeon has provoked a strong reaction from local producers. Patricia Edgar from the Australian Children's TV Foundation last month branded the channel "television McDonald's."

by Liz Fell — SYDNEY



Nickelodeon: Tv McDonald's?

LATIN AMERICA

Hughes Going Direct To Latin Nations

Satellite broadcaster is modelling a new service on DirecTV in the U.S.

Hughes Communications, with three influential partners, has entered the race to provide a digital direct-to-home (DTH) service to all of Latin America, a lush market of 70 million tv households where cable and pay-tv have scant penetration.

Called Galaxy Latin America and modelled on

ISRAEL
SOAPS UP

Israeli production companies are scrambling to produce television soap operas. Currently four companies are filming or developing soaps: Telemidia, whose pilot of *Fool's Gold* has already resulted in a contract with the country's Second Channel; TNA Productions, shooting *Deadly Fortune* in English as well as Hebrew in the hopes of an international sale; G.G. Studios, producing *Mediterranean Affairs* for networks in Italy, Argentina and Spain, and Kayitz Productions' *Neve Narkiss*, still in the planning stages. Until this year, no Israeli soap had ever been produced. The present rush is based on the failure of current programming to attract viewers. Israeli stations by law must broadcast 60% locally produced programs. Until now, a majority of these shows have been news, political analysis and talk programs.

Hughes' rapidly-growing DirecTV system in the U.S., the venture has a proposed start date of February 1996, and so may beat PanAmSat and several other DTH aspirants to the draw.

It's to be a 144-channel system, with half the channels in Portuguese for the Brazilian market and the other half in Spanish for all the rest. The satellite footprint will cover Mexico, Central and South America, and the Caribbean nations.

Partnered with Hughes, which has the controlling 60% interest, are the Venezuelan-based Cisneros Group of companies with a 20% stake, and Mexico's MVS Multivision and Brazil's Televisao Abril (TVA), each with a 10% stake.

Capitalized at \$800 million, the new company expects to reach break-even swiftly because it will need only 1.3 million subscribers to hit the black, according to a spokesman. That quest will be eased by the fact that only two languages are needed to serve some 20 major countries in the hemisphere.

Gustavo Cisneros, chairman and ceo of the highly prosperous Cisneros Group, said the satellite service will help realize the long-held dream of a unified and integrated Latin America. "We are creating our own version of NAFTA (the recently established North America Free Trade Agreement), and Latin America will never be the same again."

At a New York press conference, Robert Civita, ceo of TVA's parent, Grupo Abril, noted that Brazil has a pay-tv penetration of only 18% and Argentina a cable penetration of 15%. "They should be sitting ducks for our service," he said.

Indeed, they might be if it were not for the competition. PanAmSat, in an equal partnership with Mexico's powerful Televisa, would have been first to cover Latin America with its Galavision DTH service had it not lost its PAS-3 satellite on an Ariane rocket last December.

In a bid to capitalize on that misfortune, Hughes plans to begin its service on the U.S. Ku-band satellite Galaxy 3R, to be launched in September, by directing that bird's transponders southward. This requires Federal Communications Commission (FCC) approval. Hughes has told the FCC that the satellite's use will be temporary and that the service will be transferred to Galaxy 8-1 in 1998.

Meanwhile, PanAmSat will be launching its replacement satellite in November or December, which may enable it to meet the Galaxy Latin America challenge head-on. Galavision plans to provide 40 channels to its Spanish and Portuguese service areas. Both the Hughes and PanAmSat systems will beam to 24-inch dishes.

Assuming an even start, the partners in Galaxy Latin America believe their establishment of regional production centers will give them an edge. The main broadcast center will be built by Hughes in Long Beach, California, but others will be constructed in Sao Paulo, Buenos Aires, Mexico City and Caracas. The aim ultimately is to have program origination centers in all of the 20 major countries in the hemisphere, centers that would

then be useful in marketing services. This, said Cisneros, "will make us the largest network in Latin America."

Except to point out that some 30 of the 72 channels will be used for pay-per-view, the Galaxy partners were at a loss to describe what the programming would be on Latin America's version of DirecTV. That will be decided in the coming months by a program committee.

by Les Brown — NEW YORK

EUROPE

EU Set To Tighten Quota Directive

Ministers vote on Media II - a bigger, but more focused scheme

By early April, European Union ministers will review and act on the latest measures proposed by Brussels to support the European audiovisual industry and enable it to compete with foreign - that is, American - competition.

As well as presenting a revised form of the 1989 Television Without Frontiers (TWF) directive that proposes tougher European program quotas, audiovisual commissioner Marcelino Oreja will ask member states to approve a doubling of the budget for the Media program, the EU's funding scheme for the audiovisual industry. In addition, Oreja will float a plan to invest \$80 million directly into European independent production.

The new draft of the TWF directive, approved by EU commissioners at a March 22 meeting, will toughen the existing requirement on broadcasters to carry a majority of European programming by removing the phrase "where practicable." This qualification has allowed some regulators - especially the UK - to interpret that the quotas should not be applied to channels in start-up phase, notably Turner Broadcasting's TNT/Cartoon Network and BSkyB's Sky One.

However, thematic channels would, under the revised directive, have the option of investing 25% of their program budget in European content. Program quotas would be deemed to have served their purpose after 10 years and would be abolished.

Under the Media II program, aid to the audiovisual industry will be increased to \$320 million and spent over the five-year period from 1996 to 2000. The new program, drawn up after lengthy consultations and much criticism of the original Media program, is intended to have a real structural impact, with the money going into three key areas: training, development and distribution.

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GYNGELL OUT AT NINE

Bruce Gyngell has stepped down from his position as executive chairman of Kerry Packer's Nine Network. When Packer merged Nine with his magazine arm last year to form Publishing and Broadcasting Ltd. (PBL), Gyngell's job was sidelined. Gyngell had taken the Nine job in 1993 after returning to Australia from the UK, where he headed British breakfast-time broadcaster TV-am until it lost its franchise. He gained his early industry experience as first presenter on Australian tv in 1956. Later he became the first head of SBS TV, the multicultural channel, and of the Australian Broadcasting Tribunal. A statement issued by Packer said Gyngell was retiring for "family reasons" but will continue as a director of PBL and chairman of Channel Nine Australia, the international arm. However, local press reports have suggested he may be preparing to take up another job in the UK, possibly as head of Yorkshire-Tyne Tees Television.

The major part of the budget – \$212 million – will go to distribution, with interest-free loans being made available to finance the "circulation" of film, video and tv productions and to encourage independent producers and broadcasters to work together. A total of \$62 million will be available to assist development, again in the form of loans with a maximum level of investment of 50%. The third part of the Media II plan calls for subsidies of \$46.4 million to finance schemes to improve technical and management skills.

Newly-installed Media II chief Jacques Demoli said there will be fewer "action lines" and more of a focus on companies and groupings which will have an impact on the industry.

Demoli told TBI the proposed direct-investment production fund would be "complementary" to Media II and be applied over the same five-year period but that it was still "an open question" whether it would be adopted. "It is just reflections and brain-storming at this stage."

Demoli said the plan is to set up a "financial instrument" to underwrite the production of films and tv programs by European producers. Like the proposed Media II program, the objective would not be to offer subsidies but to offer interest-free loans to stimulate product with a chance of commercial success.

"(As long as) we use more incentive mechanisms than subsidies we can set up a system with some credibility, and without any risk of subsidizing projects over a long period which have no market value," said Demoli. The proposed budget is \$80 million. Demoli said he hoped there would be a common position on the measure by the end of the French EU presidency in June.

The Media II proposals have already come under fire from marketing support organisation EuroAim, which will have its budget cut from \$15 million to \$10 million.

by Tim Westcott — LONDON

They Just Don't Know Any Better

Race to 'channel' Germany goes on with music and kids' launches

Another generation of thematic channels is signing on in Germany, even though those that launched in the first wave have yet to prove themselves. When all is said and done, four pop music channels and five children's and family channels, all competing for a slice of the advertising pie – DM8.96 billion (\$5.53 billion) last year – could be on the airways before year's end. For some of them, naysayers are predicting an early demise.

The DLM, Germany's council of regional broadcasting authorities, last month recommended issuing licenses to VH-1, Viva 2, Super RTL, TM 3 and the regional Berlin channel FAB from among the 17 applications. Under Germany's interstate media treaty, it is now up to the individual states to grant the actual licenses. The North Rhine-Westphalia authority on March 10 granted licenses to RTL Club GmbH for its Super RTL (jointly developed by Walt Disney and CLT Multi-Media), Nickelodeon and Viva 2, whose shareholders are Thorn EMI, Sony, PolyGram, Warner Music and Hamburg media entrepreneur Frank Otto.

The new battle in music tv will be for the older crowd. MTV and German-language rival Viva 1 already court the youth market with rock and pop video clips; their new stations will go after those over 30 with lighter fare. VH-1, an MTV Networks import from the U.S., moved to get a jump on the competition by beaming a sample program to households equipped with dishes on March 10. According to Peter Einstein, president, business director, MTV Networks Europe, the company borrowed time from Viacom's Nickelodeon in order to "bring the channel to the marketplace as soon as possible."

The DLM recommended a license for Super RTL for phase 1 of its development on condition that it must re-submit its license application if the service is converted into a Disney-only channel. Regulators turned thumbs down to Kabel Plus, a general interest channel, because shareholder Pro 7 was still being investigated for alleged breach of anti-media concentration laws. The DLM said misgivings that media mogul Leo Kirch would exert too much influence on Kabel Plus (his son Thomas has a majority stake in Pro 7) could be dispelled "if Pro 7 would disclaim any legally relevant media participation."



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CCTV LOOKS AT HONG KONG

China Central Television (CCTV) is spending 10 million yuan (\$1.1 million) on the first mainland China-made television series about Hong Kong, to mark China's takeover of the territory on June 20, 1997. The 18-part series, called *The Vicissitudes Of Hong Kong*, will recall the history of Hong Kong from the time British officials first set foot in the territory 150 years ago to the end of its rule in 1997 and will cover political, historical, economic and social issues. The series will be the broadcaster's biggest production for 1995. The first six episodes will be shown on CCTV in early 1996, with the remainder in 1997.

With children's channels proliferating, Super RTL and Nickelodeon – owned 90% by MTV Networks and 10% by Ravensburger Film and TV – will each face a tough battle to win the audiences they need. German pay-tv channel Premiere is preparing a children's service, Premiere 2, for launch later this year; Fun TV, a low-cost subscription service, is in the planning stages, and ARD and ZDF are serious about starting a joint children's channel, since they fear young people will desert public tv for the private channels.

Other problems facing companies eyeing the estimated \$12 billion consumer purchasing power of the nation's 9.6 million children involve Germany's stringent youth protection laws. When North Rhine-Westphalia granted Nickelodeon its license, the authority stipulated the channel must keep spots strictly separated from programming. Certain products such as medicines and vitamin preparations are taboo. And presenters will not be allowed to plug Nickelodeon products.

by Jack Kindred — MUNICH

SOUTH KOREA

Huge Push, But Cable Has A Long Way To Go

"Think big" approach has yet to produce a wired nation

South Korea isn't generally known for tackling things in half measures. Its approach to the development and launch of cable television has been no exception. While most countries would perhaps have begun their foray into a secondary television market tentatively, launching perhaps one or two channels, Korea has plumped for 21, with a further five due to go on line in the Fall.

Unfortunately, South Korea's standard "think big" business plan hasn't quite paid off this time. Of the country's 4.5 million tv households, less than 2% were actually wired up by the launch date of March 1, due to a shortage of cable and set-top boxes. The country has been divided up into 116 franchise districts, each with about 100,000 homes. One system operator is responsible for connecting homes and relaying transmissions in each of the districts; however, to date, only 54 of these licenses have been allocated.

So, though 21 channels – 20 basic and one pay – covering every conceivable programming niche from movies to documentaries to music to news hit the wires on the start-up date, only 135,000 homes are capable of receiving them.

Century Television Network, a basic service programming a mix of nature, cultural and educational documentaries, hopes eventually to broadcast eight hours a day during the week and 14 hours on Saturday and Sunday. But currently it has restricted its service to two, one-hour programs a day, repeated three times to make up a six-hour service. "We have invested a lot of money in programming," said Wonho Han, deputy assistant manager, programming division. "We don't want to waste good productions when there are no viewers."

Century estimates that although 15,000 households are technically subscribing to its service, no-one is actually being charged yet. Revenue isn't forthcoming from advertisers either; ad agencies are sitting on their funds until more homes are passed.

Other services are, however, transmitting longer schedules: news channel YTN is broadcasting 24 hours a day, business news channel MBN has 15 hours, as does the sole pay-tv network, movie channel Catch One, owned by the Samsung Corporation. Catch One's programming is made up of 70% domestic and 30% foreign product. It has exclusive license agreements with five of the U.S. studios: Warner Bros., Universal, Fox, Disney and Paramount.

South Korea's limits on the broadcasting of foreign programming mean overseas suppliers can't expect a sales bonanza, although co-productions are classed as domestic product. Century, which has the lowest ceiling of 50% foreign, is among the top three channels in terms of its amount of acquired product. It has bought some 300 hundred hours from U.S. and European companies, including Unapix, All American, RTVE and Jane Balfour Productions, while both MBN and YTN have done deals with CNN International for excerpts and features. (A 15% ceiling has also been imposed on foreign investment in the fledgling market.)

With the three terrestrial channels broadcasting a mix of lackluster fare, the consumer, once the new services are readily receivable, would appear to be getting a fairly good deal. Subscribers to the basic package will pay \$19 a month and an extra \$10 a month for Catch One. The premium movie channel says it expects a subscription base of 30,000 households by the year end and is forecast to break even in 1999.

Capital investment in the cable systems will take a lot of recouping, however. Official government figures put start-up costs at \$800 million, though the real figure is thought to be more than \$1 billion.

And cable can expect some new competitors. Though a ban is currently enforced on receiving direct-to-home satellite signals from overseas broadcasters, the local market will soon have to absorb another four terrestrial channels set to launch this year, as well as Koreasat's Mugunghwa satellite service, which goes up in June.

by Sarah Walker — HONG KONG



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HK Telecom Tests VOD

Hong Kong Telecom has begun a six-month commercial video-on-demand test to 400 homes in the territory, in order to assess programming requirements and prices as a prelude to a full commercial rollout. This is despite protests from executives at Wharf's Cable TV, who claim the service contravenes its exclusive right to provide pay-tv in Hong Kong until mid-1996. Under the government-approved test, Hong Kong Telecom will be able to charge approved prices for the service but won't be allowed to advertise. William Lo, Hong Kong Telecom's director of multimedia services, has said that eventually a full service network (FSN) will be implemented, providing home shopping and home banking services and possibly a multichannel entertainment service, in addition to entertainment-based VOD. Grantly Brown, senior vice president at CEA in Hong Kong, said Cable TV's claims VOD falls within its exclusive rights for pay-tv are wrong. "The legislation is very clear: it excludes point-to-point on-demand services."

CHANNELS

Nethold Gets Hold Of Transponders

European pay-tv group Nethold announced it has leased a total of 15 transponders on the Astra and Eutelsat satellite systems to launch around 100 digital channels. The first digital services will launch before the end of the year, probably in Nethold's key markets in Benelux and Scandinavia. Nethold said it would invest \$350 million to start the new services. Four transponders have also been reserved by Italian pay-tv network Telepiù, paving the way for the launch of a direct-to-home satellite-tv market in Italy. Other groups planning digital services include Canal Plus, News Corp. and CLT (see profile on page 34). David Elstein, program director of BSkyB, majority owned by News Corp., predicted last month the company would be operating 200 digital channels in the UK early in 1997, including "multiplex" versions of its existing channels, near video-on-demand and others' services.

HBO's Billion Dollar Dream

Home Box Office has signed a 10-year exclusive film licensing agreement with DreamWorks SKG, the studio founded by Steven Spielberg, Jeffery Katzenberg and David Geffen. The agreement, claimed to be worth up to \$1 billion (depending on the theatrical performance of DreamWorks' pictures), covers its output over the term of the license, starting in 1996, and grants the U.S. pay-tv network the exclusive right to show DreamWorks films on both HBO and Cinemax.

ESPN Launches Local In Brazil

ESPN has reached agreement with Brazilian cable-tv company TVA/Abril to launch a locally-produced, 24-hour sports channel. ESPN Brasil is scheduled to launch on June 15 and will be distributed exclusively to TVA's 300,000 cable subscribers and 42 affiliates around Brazil. Sports events featured will include national soccer leagues and cup competitions and extreme sports featured on ESPN2. The channel will be digitally compressed and broadcast in English and Portuguese.

All Horses, All The Time

Premier Horse Network (PHN), a 24-hour-a-day cable and satellite network devoted to factual and fictional programming about horses, will launch in the U.S. early in 1996. The premium pay channel, backed by private investors, will target the 14.5 million people in the U.S. who ride regularly, according to ceo James Matison. He said PHN would feature live and recorded equestrian events, programs produced in its LA studios and acquired product.

HBO Asia Doubles Subscriber Base

HBO Asia doubled its subscriber base to nearly 600,000 in 1994, according to William Hooks, managing director of the pay network. The channel's launch in Taiwan, combined with strong growth in Thailand and the Philippines, accounted for most of the increase. The channel also launched in Papua New Guinea and Bangladesh and, via a direct-to-home service satellite, in Indonesia.

Arcade To Launch Two Channels

Arcade Mediagroep has applied for licenses to start broadcasting two tv stations in the Netherlands: TV10 Gold and Music Channel 6. TV10 Gold will present "the best of 40 years of tv history," with series like *Bonanza* and *Dynasty*, says Jeroen Soer, head of Arcade and is aiming for a 5% market share with an initial 12-hour-a-day service. MC6 is aimed at a 13-30 age group and will broadcast 24 hours a day of music and films. Both are due to launch in May.

BROADCASTING

Ufa And Canal Plus Form Rights Unit

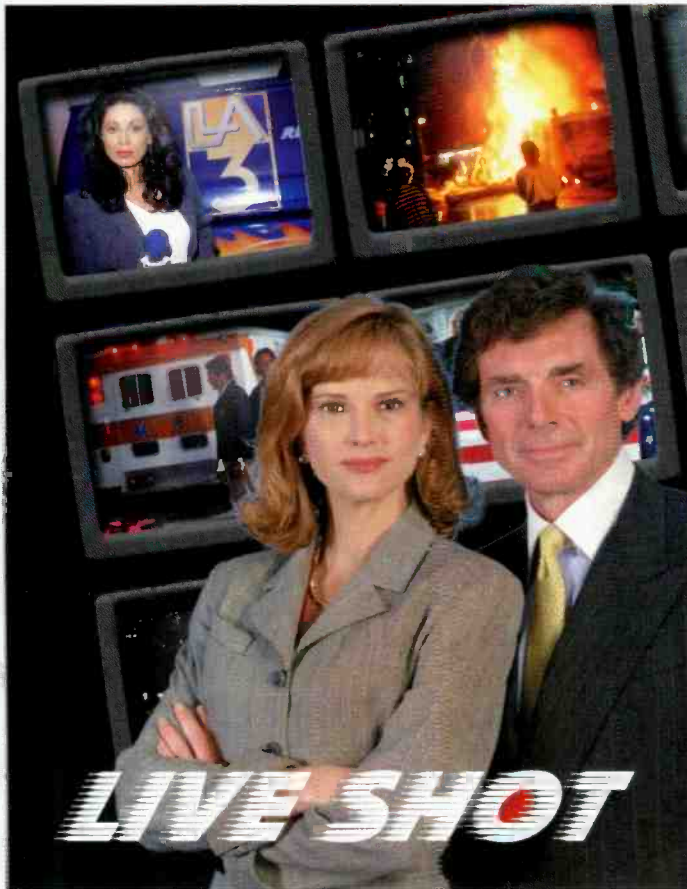
Bertelsmann and Canal Plus have followed the strategic agreement they signed last summer by setting up a jointly-owned operation to acquire tv, video and interactive program rights. Canal Plus Ufa will be equally owned by Bertelsmann's rights subsidiary Ufa and Canal Plus DA, distribution arm of the French pay-tv company. It will be managed by Berndt Bauer and Thomas Walker from the German company and Thierry Schulck and Stéphane Sperry from Canal Plus. Canal Plus Ufa has already acquired the rights to animated series *Duckman* and *The Critic*. The companies are partners in pay-tv channel Premiere.

Malaysia's MetroVision Forced To Delay

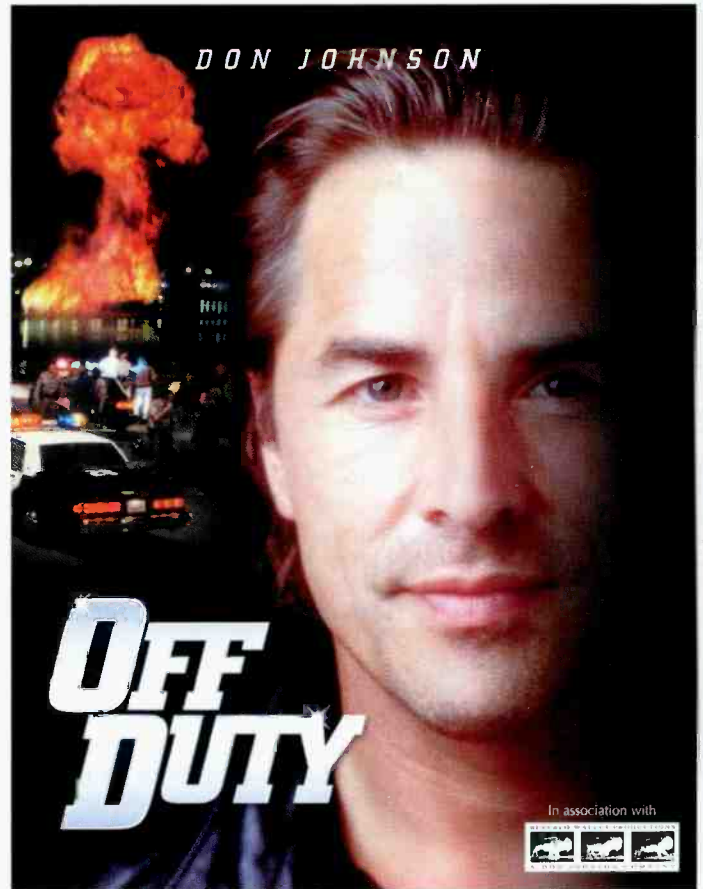
The launch of Malaysia's latest terrestrial television channel, MetroVision Channel 8, has been postponed from its original launch date of February 18, due to problems with the hardware needed to transmit the service. The channel may now begin broadcasts this month. A UHF-delivered regional station targeting the 3.2 million viewers in the wealthy Klang Valley district of Malaysia, Channel 8 aims to broadcast a mix of imported and domestic entertainment-oriented fare, initially 70 hours a week. According to City Television, the company behind the channel, the plan is to start up more regional stations in the country. Channel 8 will be Malaysia's fourth terrestrial channel and will face competition from state broadcaster RTM's TV1 and TV2 channels and also commercial network TV3.

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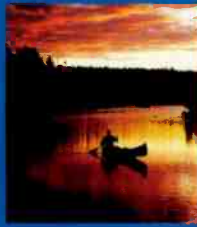
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Cecchi Gori Wins Control Of VideoMusic

Top Italian film producer-distributor Vittorio Cecchi Gori has bought national tv music channel VideoMusic, emerging as a new force in Italy's turbulent broadcasting industry. Cecchi Gori owns Italy's largest film library and Florence-based football club Fiorentina. He plans to turn VideoMusic into a channel offering a general program of film, sports, entertainment and news. The channel, created in 1984 by the Tuscany-based Marcucci family, was the first music broadcaster in Europe. Despite low advertising revenues, it built a strong audience of nine million among the young.

Tipp TV Estonia's Newest Broadcaster

A new commercial channel backed by a businessman with interests in music and entertainment went on the air in Estonia on January 10. The channel, Tipp TV, is broadcasting movies, documentaries, music, news and cartoons from 6pm until midnight. Unusually, the company has chosen to plough a considerable slice of its two-year investment of \$2.6 million into its own transmitter, so making it independent of the state phone company. Tipp TV's signal reaches viewers in a 100 km radius around the capital Tallinn, but company president Jüry Makarov said it would soon be available throughout the Baltic republic.

Russian Public TV Imposes Ad Ban

Ostankino's successor Russian Public Television (RPT) has withdrawn all commercials for at least a month as it prepares to formulate a new policy on advertising. The move, which comes shortly after the assassination of executive director Vladislav Listyev, is nevertheless unlikely to lead to a total ban; any financial losses will be met by the broadcaster's private investors. These currently own 49% of RPT shares and include the national airline Aeroflot, the ITAR-TASS news agency and several commercial banks; the government retains a controlling 51% stake.

CME Builds Slovenian Network

Central European Media Enterprises (CME) and two major Slovenian broadcasters have pacted to create the first independent national tv production and advertising sales company in the country. Known as Pro Plus, the venture will supply a 12-hour package of mixed programming daily to the two broadcasters and see CME, a U.S. company, invest up to \$6 million in the project. CME already has interests in regional tv in Germany and national commercial tv in the Czech Republic. Under this newest deal, it will acquire holdings in the two Slovenian stations, MMTV and Tele 59.

PRODUCTION

Seven Sets Up International Producer

Australia's Seven Network has launched a new company devoted to producing "a broad range" of programming for the international market. Seven Productions International (SPI) will be headed by chief executive designate Graham Benson, head of British independent Blue Heaven Productions. Benson will be based in London but will travel regularly to Sydney, as well as negotiating with partners in Europe and the U.S., according to Bob Campbell, the commercial network's managing director.

FINANCIAL

SBS Still In Red With \$2.8m Loss

Scandinavian Broadcasting System (SBS) reported increased revenues and widened losses from its network of European tv stations last year. Revenue was \$70.6 million in 1994 compared to \$50.5 million the year before, with net losses of \$2.8 million compared to \$2 million the year before. SBS, which is listed on NASDAQ, launched VT4 in Belgium this year to add to national and local tv stations in Denmark, Norway and Sweden.

PEOPLE

Plantin Steps Up To ITV CEO

Marcus Plantin, the man in charge of commissioning and scheduling the UK's ITV Network, will take over as chief executive as well when present incumbent Andrew Quinn retires. In 1994, the Network Center's first full calendar year in operation, ITV ended with a 44% share in primetime. ITV Council chairman Leslie Hill also said that 27 of the top-rated dramas on British tv were produced by ITV, 16 of the top 20 light entertainment series and 24 of the top 30 children's shows.

LEGISLATION

Greek Law Would Limit Ownership

Evangelos Venizelos, Greece's minister responsible for the media, said he intends to introduce a new media law. Among the proposals for commercial television would be a ban on shareholders controlling more than 25% of a commercial station's capital and a requirement stations pay the government rent on their frequencies. The rules for granting licences will take into account the number of employees, the time a tv station has been in operation, investments it has made and the "adequacy" of its programming.

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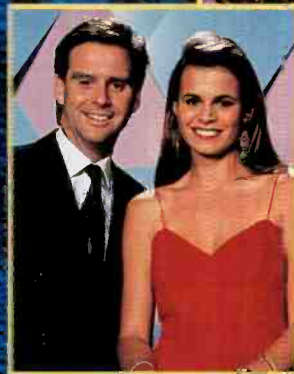
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The best thing to be said about the Group of Seven industrialized countries' conference on the Information Society is that it took place at all. As could be expected, the two-day meeting in Brussels produced more of the typical Superhighway hype but few concrete results.

In theory the G7 message sounds intriguing: Everything will be done to facilitate global communication services and networks. But behind the lip service is the reality of European national telephone companies clinging to monopolies that are due to be abolished no earlier than January 1, 1998. Meanwhile, neither Deutsche Telekom nor France Télécom, for instance, are doing anything in preparation for free market conditions. Japan is even less enthusiastic than the Europeans about opening its telecommunications markets.

Of course, it was France again which played the role of defender against American intruders. In the words of Marcel Roul, president of France Télécom, state regulated telephone is "necessary to guarantee economic and social cohesion." Nonsense. They just don't like competition.

It was Carlo de Benedetti, the chief of Olivetti, who directly addressed the French when he warned against underestimating "their monopolistic and protectionist inclinations" and cited the French Minitel system as an example: "State-initiated, subsidized and closed to the outer world."

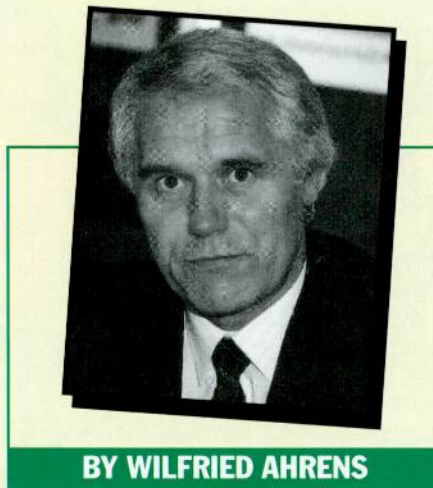
The French EU commissioner Edith Cresson demonstrated that kind of thinking when she proposed a special tax of 0.5% to be levied on EU telecommunication companies' profits — around \$750 million a year. The money, she said, should be used to promote educational programs and, of course, "la culture," whatever that is.

French-inspired dirigisme and protectionism will do much to harm Europe's chances on the global marketplace and strengthen the American competition.

One protectionist argument is jobs. The American experience shows that this argument is not valid. It is true, when AT&T was forced to dismantle 11 years ago many thousands of jobs were lost.

Deutsche Telekom and France Télécom are doing nothing to prepare for a free market. Japan is even less enthusiastic than the Europeans

Time To Cut Off Phone Monopolies



BY WILFRIED AHRENS

But in the meantime many more thousands of jobs have been created by the new competing telcos and their suppliers in the software, computer and related industries.

In Germany, the job-creating effect is already showing in the liberalized mobile telephone market. In their five years of operation, the two additional players in this field, Mannesmann Mobilfunk and E-Plus, have employed 3,000 people directly and created jobs for many more thousands indirectly. At the same time, fees have come down considerably, and all that with no harm to Deutsche Telekom.

In Brussels, the German Post Minister Wolfgang Bötsch promised to press for an earlier liberalization date than January 1, 1998. Chances are he will not succeed given the vested interests of political parties and unions in the existing monopoly structure.

AT&T chairman Robert Allen is among those who feel progress is too slow. "The 1998 target date is almost three years away," he said at the G7 gathering. "And three years is a long time in the fast-moving world of information technology. Neither the dominant telecom organizations of Europe nor their multinational customers can afford to wait three years for the benefit of competition. And we should remember that declaring a market open does not itself create a competitive market. That could take years beyond 1998. Without resolve across the region, it could take well into the next century."

U.S. Vice President Al Gore took Bötsch and the other Europeans by surprise when he announced that in 1995 "we intend to open foreign investment in telecommunications services in the United States for companies of all countries that have opened their own markets" for the first time in 60 years.

So, deregulation was the most urgently felt problem on the G7 agenda. But this of course is not the only hurdle on the route toward global communication. Others are perhaps even more difficult to overcome: high phone tariffs and the problems of technical compatibility.

The biggest problem in building the information superhighway will probably be how to get competing companies to agree on a common standard.

While all concerned know that collaboration on standards is the prerequisite for optimal market development, the video CD tug-of-war, for instance, shows that narrowmindedness can prevail.

Maybe, the G7 words of Jacques Santer will inspire more reasonableness. "What we are aiming at," the president of the EU Commission told the assembly, "is to construct a truly shared vision of human enrichment. For the benefits to be fully realized, competitive conditions will have to be fair and markets more open." ■

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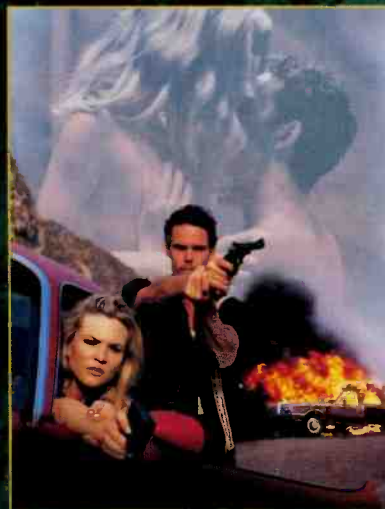
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One of Europe's biggest players in free tv is preparing for the digital era by making big investments in software and subscription television. Tim Westcott reports on the strategy of a Euro giant

CLT:

Major Major

With over 60 years of commercial broadcasting behind it and steadily increasing returns on its investments, Compagnie Luxembourgeoise de Télédiffusion (CLT) has an air of settled prosperity about it, an air which would not be out of place at one of the German banks that constitute the largest sector of the Grand Duchy of Luxembourg's economy.

Far from sitting back and letting the revenue from some of the hottest properties in European commercial television flood into its coffers, however, CLT is poised for its most ambitious strategic move yet.

Last year, CLT raised \$145 million from its shareholders to set up an in-house co-production, acquisition and distribution division, opened an office in Los Angeles and formed a Hollywood film rights acquisition venture with Dehyle Bär Media Holding. Later this year, or in early 1996, CLT is planning to enter the pay-tv arena for the first time, launching "bouquets" of digitally-compressed channels in its two major markets, France and Germany.

Last but not least, CLT is also working on what its managing director Michel Delloye calls the "consolidation" of its free-to-air tv business, and will launch at least three new channels in the course of this year.

To expand further a business which is making a progressively more important contribution to its revenues – \$2 billion in the last reported year (1993), or 80% of CLT's turnover – the Luxembourg company is set to make another attempt at entering the UK and is taking a close look at opportunities in Spain and central Europe.

CLT, which is controlled by Belgium's Groupe Bruxelles Lambert (GBL) and France's Havas through a Luxembourg-registered company called Audiofina, was early to the game of being a multinational media company. In what now looks like a far-sighted move, the Grand Duchy allocated a concession to use its radio frequencies to GBL and Havas' predecessors way back in 1931. Ever since then the Duchy, a tiny enclave of land between the Belgian, French and German borders, has been the base of activity for CLT.

Since 1973, when CLT opened an office in Brussels to provide programs for its first Francophone tv channel, it has increasingly operated on foreign soil. As European markets deregulated through the 1980s, CLT was ideally placed to play a pivotal role, launching channels in Belgium, Germany and the

Netherlands that are now market leaders, displacing public and private rivals. Only in France has CLT been unable to make its presence felt – so far.

Free tv powerhouse

In the field of free tv, CLT has already launched the youth-oriented Club RTL in Belgium, while family service Super RTL is set to launch April 28 in Germany. In September, the newly-formed Holland Media Groep, 51% owned by CLT-backed RTL4, will launch a youth-targeted channel, Veronica.

CLT has also declared its interest in bidding for the fifth national terrestrial channel in the UK, in partnership with Pearson and MAI, though it will limit its participation to 25%. Other new territories into which CLT is keen to expand are Spain, Poland and the Czech Republic – but in all three cases CLT executives admit that they have not been able to find suitable conditions or opportunities to plant the company's flag.

Despite the move into pay-tv, advertising revenue is likely to provide the major share of CLT's income for a long time to come. To a large extent, the steady progression of CLT's revenues over the last five years has been due to the strong growth of RTL in Germany, which is now Europe's wealthiest commercial tv station. In 1993, Germany accounted for 62% of CLT's turnover, compared to 31% in 1989. Revenue in Germany was up 28% that year compared to an increase of 5% in France.

The strength of RTL, the kingpin in a growing advertising market, meant that despite its dependence on advertising, CLT survived the early 1990s recession almost unscathed.

In 1994, RTL pulled in gross advertising revenue (ie before tax and agency commissions) of \$2 billion, equivalent to 32% of the top ten channels. It achieved a market share of 17.5% in 1994 and 19.7% in its target audience of 14-49 year olds. Chief executive Helmut Thoma said RTL's main strategy was to build up its lead in this demographic. "With a substantial lead in this target group, you get more advertising money even than if you are the overall market leader."

RTL is spending an increasing amount of its program budget on its own production, although acquired programs – especially feature films – still figure promi-

nently. It has its own output deals with MCA and Columbia Tristar and is hoping to bolster its viewing share among kids via CLT's European supply deal with Disney.

To consolidate its place in the German market, CLT launched RTL2, which has established itself as the largest of the smaller thematic channels (which include Kabel 1 and Vox) with a market share of 3.8% and 1994 gross ad revenue of \$236 million.

In France, M6, though its market position is far less prominent than RTL, was safely navigated through the recession, outliving the Havas-backed la Cinq. M6 achieved an overall share of 12% of the market in 1994 and a 17.2% share of the 15-34 age bracket. Turnover was up 15% at \$360 million and its share of the tv advertising market rose 0.9% to 15.8%. (M6's revenues are not consolidated with those of CLT.) Its profits are now respectable enough to have allowed M6 to float on the Paris bourse last year.

As well as investing more money in own production, M6 has launched a cable spin-off called Série Club and is looking into a further channel.

In Belgium, CLT is majority partner in RTL TVI, the market-leading channel in the French-speaking region of the country, and a second youth-themed channel Club RTL, which launched in February this year. In its first weeks on air, Club RTL was doing slightly better than its



Delloye: Consolidating free tv business



Sweet Valley High: CLT owns 25% of series producer Saban Entertainment

projected 5.5% market share. Because of the limited size of the market, RTL TVI buys in the majority of its drama and fiction programming, with its own production concentrating on news, magazines and information. Its evening news bulletin has supplanted the competing offering from public broadcaster RTBF as the market leader.

Holland's RTL4, in which CLT owns a 47.5% stake, has captured half of the advertising market from its public rivals and launched its own spin-off, RTL5, two years ago. The only threat to its dominance came from Veronica, the public broadcaster that decided to launch its own private channel in partnership with Endemol this September. The deal announced in March, which will give RTL4 51% control of a holding company operating both RTL stations and Veronica, appears to have aborted what would have been a tough battle. The partners expect their stations to take a combined 40% share of viewing.

Finally (in financial terms) there is Luxembourg itself. CLT has renegotiated its concession from the Grand Duchy. From this year onwards, CLT will finance the entire budget of public tv and radio instead of paying an annual license fee

to the government. The board of CLT will be reduced from its present 30 members to 20.

Rights, rights and more rights

Up on the third floor of CLT's glass-fronted HQ in Kirchberg, Luxembourg, Heinz Lehmann presides over a growing co-production, acquisition and distribution division which represents CLT's first coordinated move into software. The new unit started up in May last year.

"The main purpose of this division was to give CLT a new opportunity and to become a player in the field of rights," said Lehmann. "In the past there were some activities in the French market but no strategic approach at corporate level.

"No activity in new technology is possible without the software. The question was to get access to as much software as possible."

Lehmann cited one of his main objectives as making money from dealing with rights. He has recruited Heinz Thym, former director of sales at Pandora, to build up the distribution arm. "This division functions as a profit center," noted Lehmann.

At present, however, Lehmann is interested mainly in accumulating rights -

as many as he can, for as much of Europe as possible, and for a period of at least 12-15 years. He is also about to announce the division's first co-productions.

CLT now has a library of over 1,000 American, French, Italian and German feature films, including Cocteau's *La Belle et la Bête*, but most of its activity has been focused on the U.S. market.

Last year it formed a joint venture with Los Angeles-based Deyhle Bär



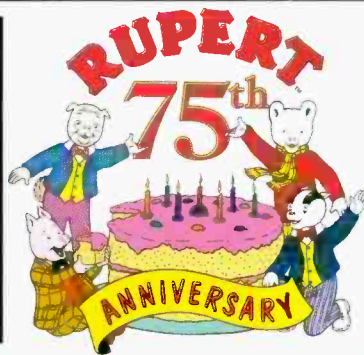
Lehmann: Moves into software



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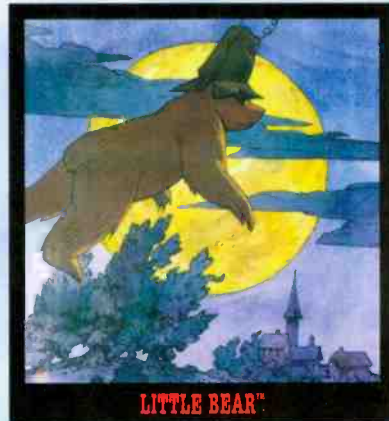
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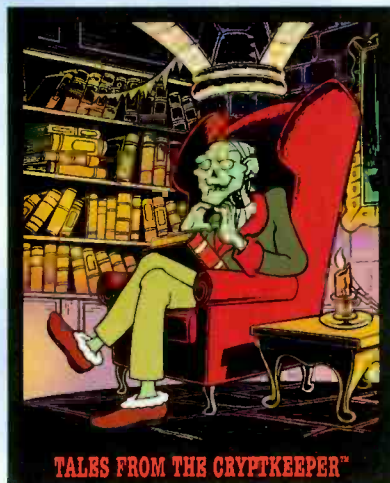
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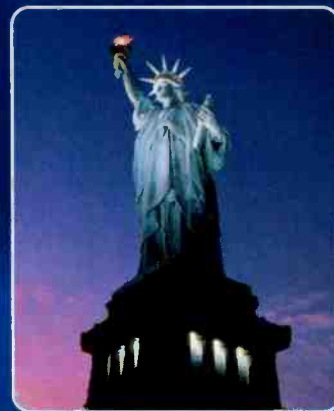
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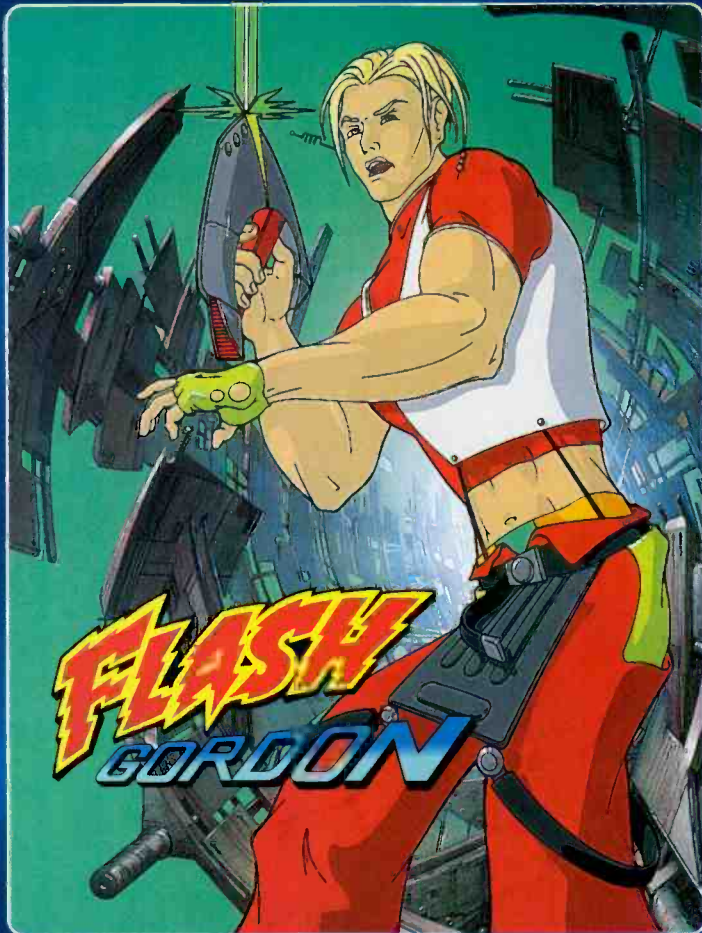


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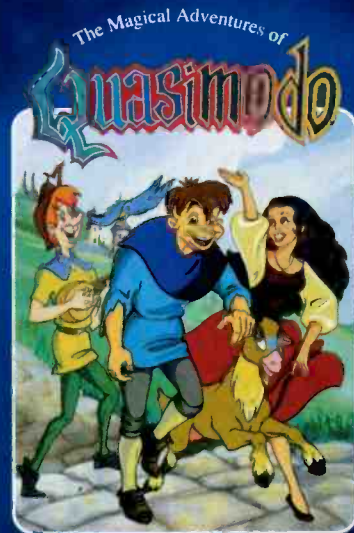


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Media Holding to acquire theatrical, video and tv rights to U.S. films. Former head of television Jean Stock was also sent out to LA to open an office for CLT to keep an eye on developments in the U.S. market.

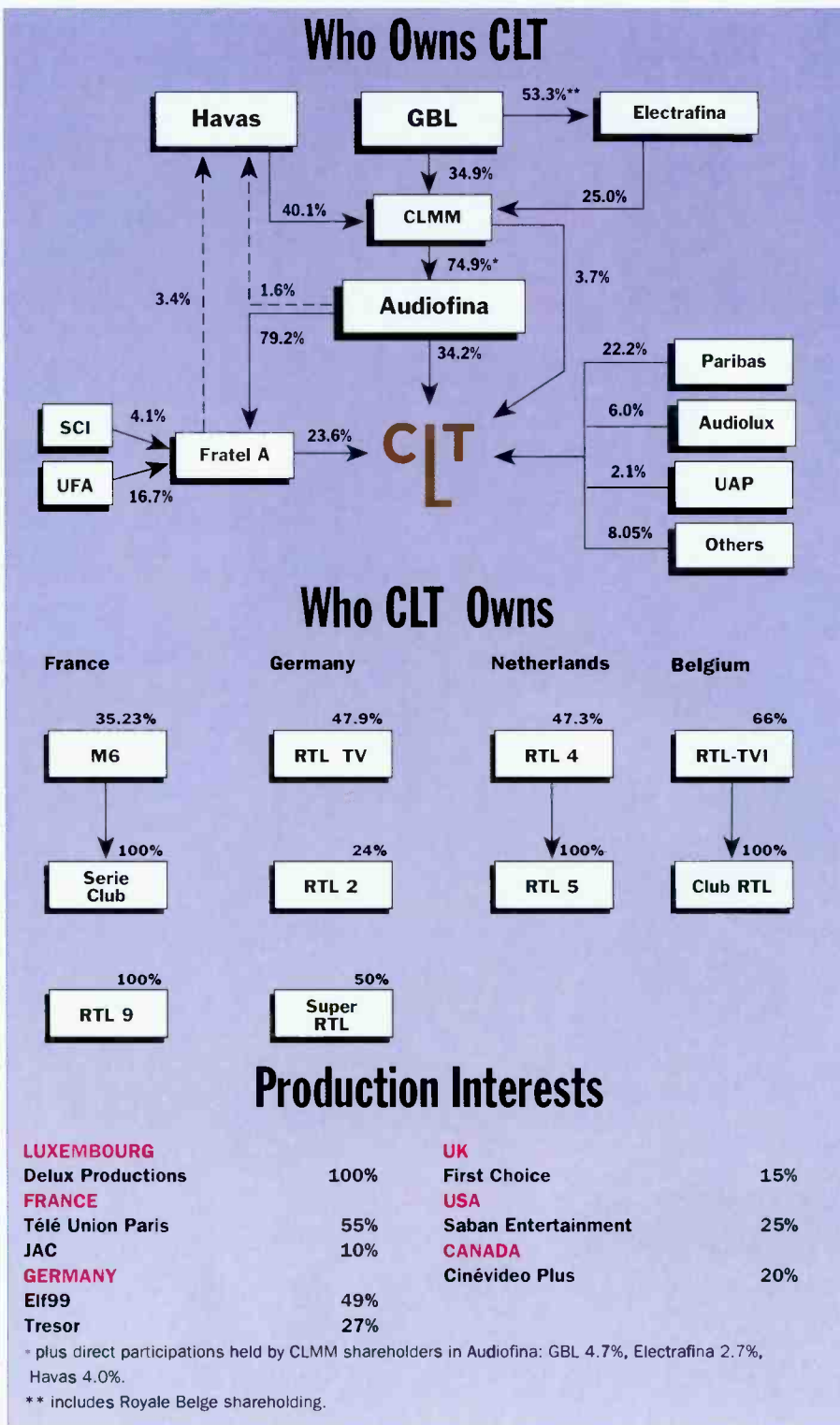
Stock's successor, Ferd Kayser, explained the significance of the "strategic link" with the LA company is due to its "solid position" in the market. "You either have to have such a position yourself or you need a partner. Otherwise, it's very difficult to get access soon enough to the rights."

CLT has acquired German-speaking film, video and tv rights to *The Mask* and rights for *Nobody's Fool* in France, Germany and Benelux. Through two of the companies in which it owns a stake, CLT had a hand in two Oscar-nominated European features: *Sirens* (British indie First Choice) and *Farinelli* (Belgium's RTL-TVI). But Kayser said CLT has no plans to become more of a player in the film business itself. "We agree to step in as a financier by acquiring the rights, not as a co-producer."

The company is in the market for tv product – principally tv movies, tv series and animation – and has already closed deals for tv series with Worldvision and Saban (in which it is a 25% shareholder). Last year, CLT also announced a multi-territory deal with the Walt Disney Co that included the Super RTL joint venture and what was proclaimed at the time as a "long-term program supply deal." So far these deals have not gone further than Germany, where RTL has just firmed up an output deal, although RTL4 and RTL-TVI have separate deals with the U.S. studio.

Noting Disney's adherence to the formula of family entertainment, Lehmann said CLT "could not have a better American partner" in this genre.

Although its tv channels are subject to European program quotas of varying strictness, Lehmann and CLT are enthusiastic about the quality of U.S. product. "We have to go to the American market because there is not enough programming in Europe." But he points to one of CLT's first co-productions – the adventure stories of Enid Blyton – as an example of a program tailor-made for a pan-European market. The children's author is equally well-known in the UK, France and Germany. The series, in 24 episodes of 30 minutes, is a 50/50 co-production with British independent producer Cloud Nine. Filming, in English with an English cast, will start in New Zealand this month (April). Lehmann is also hoping to close an even larger co-



production deal with the TVNZ production subsidiary South Pacific Pictures and Gaumont: a 22 x 1-hour series based on writer Jack London's *South Sea Tales*.

In addition to investing in its own rights, CLT can tap an international network of production companies as well as

its European stations. The most recent addition to the fold is Holland's Endemol Entertainment, in which RTL4 has acquired a 24.9% stake as part of the deal signed in March.

One company – Delux Productions – is based in Luxembourg and since last

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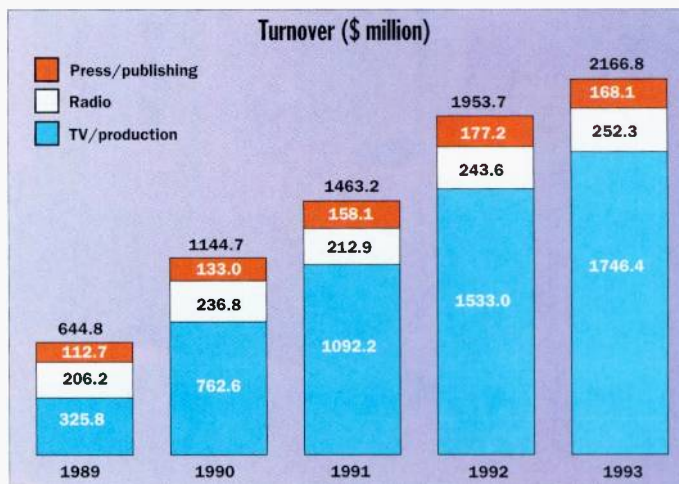
A coproduction France Animation - Cinar - TF1, with the participation of Canal Plus

year, when it bought out Holland's JE, has been 100% owned by CLT. This year Delux is launching an English-language miniseries based on an Alastair Maclean novel, *The Way To Dusty Death*, which presold to BSKyB and is being considered by CBS and Showtime. Delux also co-financed Disney series *Stick With Me, Kid*.

Apart from Delux and Télé Union Paris (a joint venture with Jacques Antoine, creator of gameshow formats including *Fort Boyard*) however, CLT has a minority position in each of the production companies it's invested in. Nevertheless, Lehmann speaks of developing synergies between the companies to create international co-productions.

The question of the broadcasters is potentially more vexed. RTL and M6 have both reduced the level of bought-in programming in their schedules as their position in the market has strengthened. They also operate as independent stations, and would be unlikely to take kindly to having the product of one of their major shareholders forced on them.

Kayser said that although the stations



we always have to acquire such a lot of programs we don't need."

Pay-tv player

So far, Delloye and Kayser are reluctant to fill in more than the bare outlines of CLT's digital strategy. Even the timing is vague. Kayser says CLT will move "as late as possible" but will be among the first in the market.

As for the composition of CLT's bouquets, Kayser will only say that "there will be as many as possible" – some thematic services operated by CLT itself and others from third-party operators.

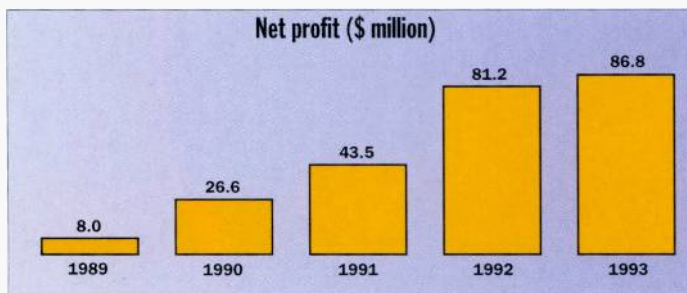
"You need a minimum of critical mass. (It's) like aviation, you need a minimum of power to get off the ground."

With at least three pay-tv companies – News Corporation, Canal Plus and Nethold – all planning to launch digital

dominant player in each market. Challengers such as CLT risk being shut out if the likes of companies like Canal Plus and News Corp. carry their dominance into the digital environment.

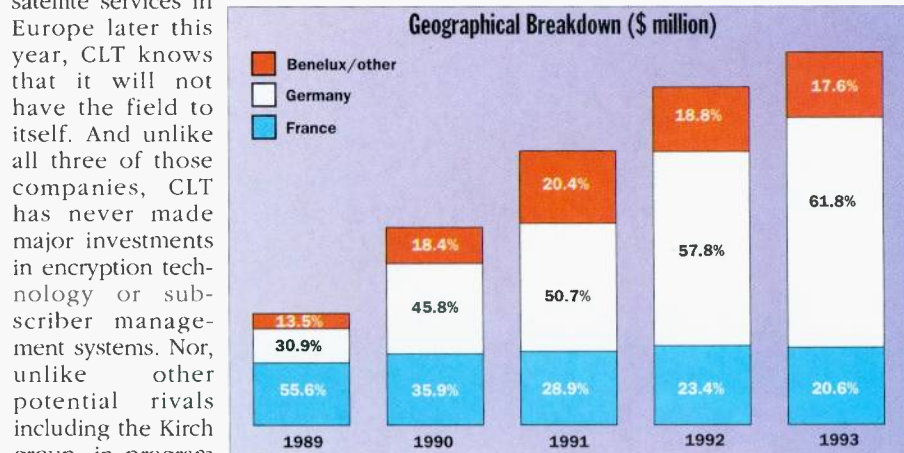
In France, Canal Plus has resisted several attempts (including CLT's) to challenge its near-monopoly of pay-tv, and cable reaches only one million homes. In Germany, most homes are cabled by Deutsche Telekom and the Canal Plus/Bertelsmann/Kirch joint venture Premiere has failed to make a substantial impression. CLT had a hand in alerting the European Union to the anti-competitive dangers of the planned Deutsche Telekom/Bertelsmann/Kirch Media Service joint venture.

"We want to make sure that our competitive position is going to be protected and that our fate is not going to be in the hands of a competitor," said Delloye. Unless it can be guaranteed that it would not be required to sacrifice control of its pay-tv operations to a rival, CLT will build its own "infrastructure or entity," said Delloye.



in which CLT has a stake will be offered first refusal "at certain arm's length conditions" on product that it acquires, it will be up to the station whether or not to buy it. "If they have no interest because they do not believe in the quality of the product or because they believe it is too expensive, we would never impose the program." Though he admitted it was a "worst case," Lehmann said programs could even be sold to a station's competitor, noting that both TF1 and France 2 were very keen to acquire French rights for Saban's *Sweet Valley High*.

Thoma, who said the escalating cost of rights was one of the major problems RTL faced, welcomed CLT's move. "Is there a danger of RTL losing its independence in program strategy? I don't think so because this (rights acquisition activity) is on a very limited basis if you compare it with Kirch. I am positive about this move. One of the problems is that





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The question of conditional access and programming could be solved partly by CLT's choice of partners. CLT does most things in partnership – and is proud of its track record in this area – so it is a given that it won't be entering the digital arena, in either France or Germany, alone. "It's a small world," said Delloye. "If you assume that everybody is talking to everybody else you are probably not too far from reality."

Possible partners from outside Europe include Hughes Aerospace's DirectTV, which is looking to expand overseas, as well as U.S. studios, such as Disney and Warner Bros. looking for strategic partnerships and openings for new channels. In Europe, CLT's partners in free-to-air channels include Bertelsmann, Tele-München and Bauer in Germany and Lyonnaise Communications in France. CLT executives expect Kirch to launch a competing bouquet – though not necessarily subscription-funded.

CLT's free-tv channels will offer a valuable publicity mechanism, plus the potential for joint bidding for rights. Kayser said the CLT digital bouquets will complement rather than compete with its free-to-air services.

But the key to the new packages is likely to be pay-per-view, which cable operators across Europe are eager to exploit to offer a potential competitive edge against the established pay-tv and DTH operators. Alongside Lyonnaise, TF1 and France Télécom, CLT is part of Telcarte, a joint venture which is offering a two-channel PPV service to French cable subscribers and which expects to reach 300,000 homes by year end. Telcarte offers one film on each channel repeated at two-hourly intervals. Each viewing costs \$6, and subscribers can order either directly via a set-top box (manufactured by France Télécom) or by telephone.

Studios selling into the European market are eyeing the development of pay-per-view with interest, as it offers the possibility of a new window. However, it's not without its difficulties. While most expect PPV eventually to overshadow or even replace video rental, studios want, if possible, to preserve the video window, worth billions of dollars, before embracing a still-embryonic new area of business. There is still no established window for PPV, although the consensus is that six months after video is the likely solution.

Although the expectation is that rights will be offered on a non-exclusive basis, studio sources said that PPV rights could

be offered exclusively in some cases. "There is obviously a deal that will secure that for you," said one studio source, noting that pay-tv rights for Scandinavia were offered on a non-exclusive basis until last year.

Though it's easy in retrospect to underestimate the feat of launching its free-to-air channels, CLT's move into the digital era is likely to be its greatest strategic challenge. For some years, digital services will be delivered via cable and satellite, which are still marginal businesses in most European markets after almost a decade in existence and huge capital costs.

The risk element is further increased by the threat of bidding wars escalating the cost of key film and sports rights. And for CLT, its new activities bring it into areas of the tv business where it has little experience.

Thoma said he is "concerned by the whole evolution (of digital) because in the long run it will certainly cost us viewers." But he added: "We're in a better position if our shareholders get involved in it rather than our main competitors."

However, if CLT's strategy pays off, it could end up laughing all the way to the bank. 

The CLT Story

1929

Société d'Etudes Radiophoniques formed in Luxembourg by French radio pioneers

1931

Compagnie Luxembourgeoise de Radiodiffusion (CLR) formed and obtains monopoly over Luxembourg radio frequencies

1933

Multilingual radio broadcasts begin officially on March 15

September 1939

Radio Luxembourg stops broadcasting at the request of the Luxembourg government

1945

Radio Luxembourg resumes activity

1954

CLR renamed CLT (Télédiffusion) and wins franchise to start a tv service, Télé Luxembourg (later RTL Télévision)

1974

Alliance of Groupe Bruxelles Lambert and Havas gains control via Luxembourg company, Audiofina

1978

RTL Télévision opens an office in Belgium headed by Jean-Charles de Keyser

1983

Plan to launch LuxSat scrapped

1984

January: launch from Luxembourg of German-language RTL Plus (later RTL Television)
June: Bertelsmann buys a stake in RTL Plus

1987

March: launch of M6 (France)
December: RTL plus moves from Luxembourg to Cologne, Germany. Launch of RTL TVI (Belgium)

1989

April: CLT buys 24% of KMP, parent of Tele 5 (Germany)
Oct: RTL Véronique (later RTL4) launched

1990

RTL Plus becomes first private channel in Germany to break even

1991

RTL TV production facilities open in Metz, France
3E consortium, including CLT, thwarted in bid for ITV license in Britain

1992

Michel Delloye joins CLT as managing director
RTL4 (Netherlands) breaks into profit

1993

Oct: launch of RTL5 (Netherlands)
March: launch of RTL2 (Germany) and Série Club (France)

1994

May: program acquisition, co-production and distribution division forms
Joint venture with Deythe Bär Media. LA office headed by Jean Stock opens
October: 10% stake in M6 floated

1995

Feb 15: launch of Club RTL (Belgium)
April 28: launch of Super RTL (Germany)

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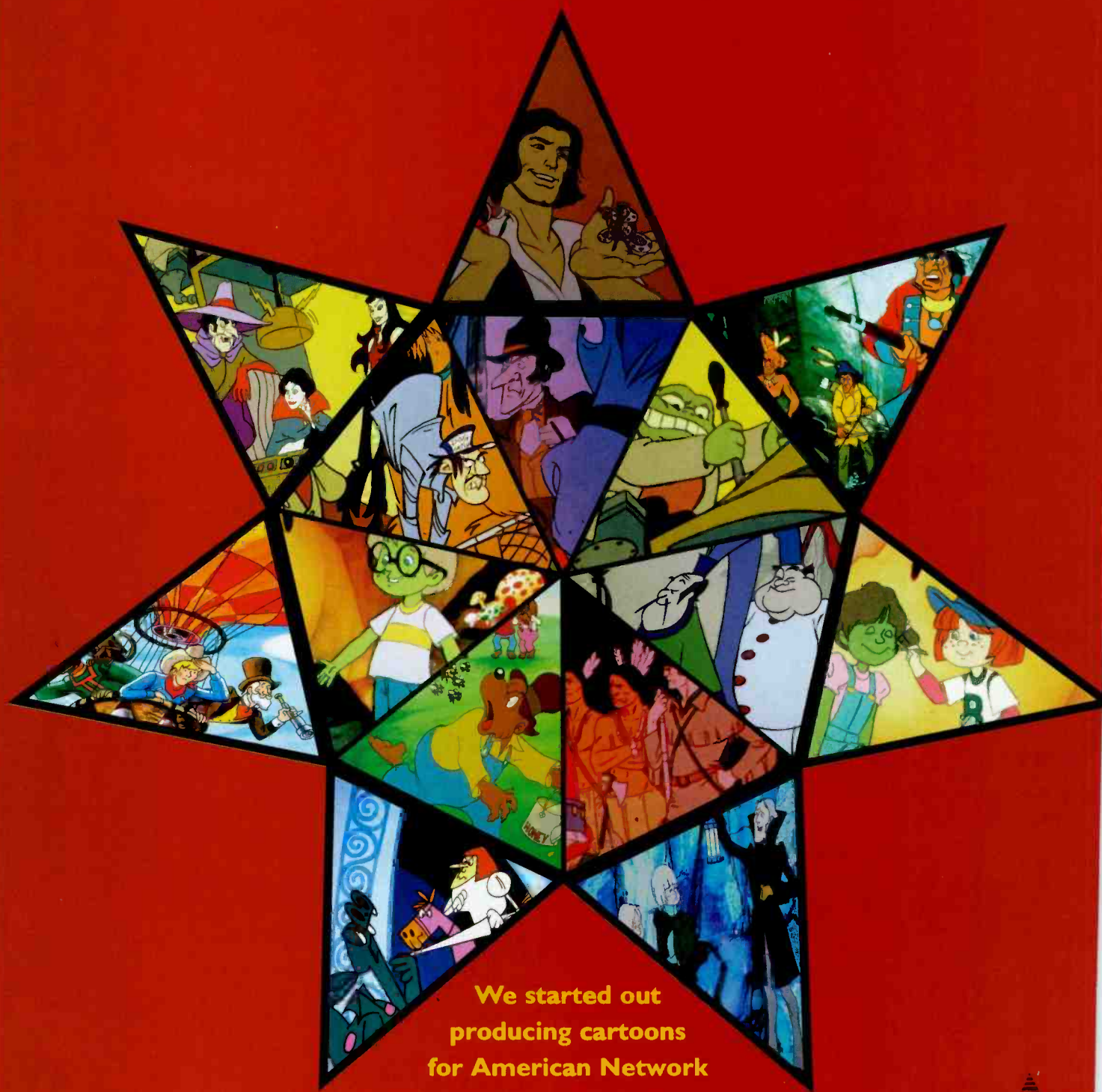


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**SOUTHERN
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Australia's Labor government is increasing its already lavish funding of Australian film and tv as part of a wide-ranging culture policy.

As Chris Dziadul reports, it's a bonanza for local production

"There has probably never been a better time than the present to reassess our national cultural policy," begins Creative Nation, the Australian government report published late last year. Analyzing the impact of global economic and technical change on "what is distinctively Australian" about the country's culture, the 100-page report set out to bring cultural policy into the mainstream of government decision-making and respond to the assault of "homogenized international mass culture."

The establishment of a fund for local television production was one facet of the report, which embraced performing arts, literature and visual arts and crafts as well as film, tv and radio. With Australian programs comprising 60% of all programs shown on television, the business is already in pretty good health. Australian films and public and private television benefit from substantial federal subsidy. Since it was set up in 1988, the Film Finance Corporation (FFC) has invested over \$296 million (\$U.S. throughout) of government money in film and tv production. Funding of the

Australian Broadcasting Corporation (ABC) will rise from \$381.6 million this financial year to \$389.0 million in 1995-6, while funding for the multicultural Special Broadcasting Service (SBS) will go from \$56.1 million to \$58.8 million.

SBS will be the principal public sector beneficiary of Creative Nation. Its tv service, which is watched by over 18% of Australia's 17 million population each week, has been allocated \$9.6 million over the next four years "to commission high-quality Australian programs."

According to Andy Lloyd James, general manager of SBS Independent, which will administer the funding, it will add another 25 to 30 hours of drama and at least 12 hours of documentaries to SBS's locally produced programming each year. This will be entirely commissioned from independent production companies and – as the broadcaster will not be looking for "bland mainstream material" – it will "give them an opportunity to get their thinking going hard."

The money will also open up possibilities for co-productions – predominantly dramas and low-budget feature films – although prospective partners will

have to accept "a genuine role for an Australian producer, that is proper co-productions as opposed to co-financing."

Lloyd James added that the money should ensure SBS is "very well-placed for the future in terms of delivering both a completely free-to-air service and niche programming," remaining – as it was once described – "the pay broadcaster that is free." Yet ironically, the service has kept up with the pay-tv revolution now sweeping the country by entering into a joint venture with Australian Provincial Newspapers and Australian Capital Equity to form Pay Alternative Narrowcasting (PAN TV), a company that will act as a program provider for pay-tv operators. The two 24-hour services it plans to launch – a world movie channel which will concentrate on films from the non-English-speaking world (and be able to draw on around 8,000 hours of subtitled product in SBS's library) and a world news channel – are likely to be followed by a world business channel and eventually ethnic services in such languages as Cantonese, Italian, Greek and Arabic.

A similar path is being taken by the Australian Broadcasting Corporation (ABC), which was awarded two satellite pay-tv licences by the minister of communication late last year and is now expected to add two channels to the Galaxy package (supplied with four channels each by Australis Media and UIH-backed XYZ Entertainment) in the second quarter of this year.

This will be undertaken through Australian Information Media Pty Ltd (AIM), a 51/49 joint venture between the ABC (through its holding company Arncliffe) and John Fairfax Holdings/Cox Communications. Working alongside Turner Broadcaster's CNN and Viacom's Nickelodeon, it will spend around \$74 million over the next three years developing a round-the-clock news channel and a service offering children's programming during the day and drama, documen-

Keeping Culture Alive

taries and general entertainment in the evening.

Kim Williams, the ABC's general manager of subscription services, said the channels would carry more Australian content than that offered by pay-tv operators – at least 40% in the case of the news channel and 25% (35% in prime-time) on the children's, arts and entertainment service.

While AIM is expected to operate on a purely commercial basis and at arm's length from ABC, the latter – which runs a single 24-hour terrestrial channel reaching 98% of the population – will continue to rely solely on government funding.

Nick Collis-George, ABC's head of tv production, said "considerable efficiencies over the last five years" have not prevented its level of production "dropping slightly every year." However, ABC's schedule is still strongly weighted in favor of Australian programming. Around 70% of total output is acquired from overseas (principally the UK, with the balance from other parts of Europe and the U.S.) and local independents, but at least 75% of programs in prime-time are Australian-made. Over 100 hours of first-run Australian drama are transmitted every year.

The ABC is actively involved in a number of co-productions, although many are with local partners due to the strongly Australian nature of some of its programming. Penny Chapman, head of tv drama, said the broadcaster "tends to look to the BBC and Channel 4 in the UK" and was "hopeful" about BSkyB. Among the productions it is currently working on with Southern Star and BBC Enterprises is the drama/action series *Police Rescue*, which will see a further nine episodes produced this year.

Chapman said that the ABC is keen to do more co-productions in Europe; it is currently developing a four-hour miniseries, scheduled over two nights, with Rai and is looking to work with German and Czech partners – and Asia.

In Asia, the ABC plans to produce a six-hour miniseries (budgeted at \$1.5 million an hour) on a Chinese family saga called *The Wives of Kwong* in conjunction with an Australian (Bob Weis of Generation Films) and a Chinese partner (CCTV, Shanghai TV or Guangzhou TV). It is also developing a four-hour miniseries with Film Australia named *Molly and Bondan* which will form the basis for a co-production with an as-yet unnamed Indonesian partner.

The ABC is already strongly involved in Asia, working alongside Australian



Film Australia: Produces in national interest (pictured here: Koalas)

government agencies to provide training programs for broadcasters in Laos, Vietnam and Cambodia. Moreover, in the case of Laos and Cambodia, it has helped local professionals to produce a small number of documentaries which will eventually be shown by international satellite service Australia Television (ATV).

Launched in February 1993 following a decision by the ABC to enhance its international broadcasting, ATV received a start-up grant from the government but is increasingly relying on sponsorship to meet its annual budget of \$5 million. It is delivered free-to-air throughout the region

by the Palapa satellite and watched by around one million viewers.

Despite their public status, neither ATV nor any other operations undertaken by ABC will benefit directly from Creative Nation. Instead, Australia's commercial tv sector will for the next three financial years be able to draw upon \$15 million per annum from the new Australian Television Production Fund (ATPF). The report acknowledges the importance of Australian programming in a global context – overseas sales in 1993 alone raised over \$48 million – and says "in any one year a maximum of 50% of the fund will be available to commercial tv licensees engaged in production and the remainder will be channelled to Australian independent producers."

Crucially, the fund will increase the amount of quality Australian programming as it will not count towards the quotas which are currently imposed on all national and commercial broadcasters. These oblige them to provide at least 50% Australian programming in their schedules and produce a minimum amount of first release Australian programming. Pay-tv operators are expected to allocate 10% of their drama program expenditure towards Australian productions, although this figure is currently being re-examined by the Australian Broadcasting Authority (ABA) and may be increased to 20%.

At least 10% of the fund will be made available for children's programming.



Police Rescue: ABC co-pro gets another green light

This is already well represented in the industry thanks to the Australian Children's Television Foundation (which produces films, tv programs and audio-visual media for children), Film Finance Corporation (FFC) and the Australian Film Commission (AFC).

According to John Stephens, Nine Network's program director, the fund "will be useful as far as doing straight Australian productions" is concerned but is unlikely to affect the service "dramatically." Indeed, Nine Network, which is currently Australia's leading commercial broadcaster with average ratings of around 33% across the country, already devotes some 60% of airtime to Australian productions and has achieved its success thanks to a schedule composed largely of news, current affairs, infotainment and sport. Although Nine uses most of the larger independent production companies, it currently has five children's shows in development with outside partners, it prefers to produce much of its drama, infotainment and light entertainment in-house.

Nine Network's strengths are in areas such as sport, where it currently has all Australian free-to-air rights to a whole string of events, including Wimbledon, Test and One Day cricket series, most leading car races and golf tournaments. Stephens is aware of the service's reliance to an older demographic audience. This was partly rectified by introducing *The Price is Right* as a lead into

the News last year. Nine Network's intention is now to take two years off the current average age of viewers (late 30s) each year over the next five years.

Elsewhere in the industry, the ATPF is broadly welcomed by Film Australia, which was up until 1989 wholly funded by the government but has since then operated mainly in the commercial sector. Although involved in numerous projects, its core activity remains

Australia's National Interest Program – effectively 20 programs which are made "in the national interest" each year, with the latest contract – due to expire in June 1998 – worth \$19 million.

Bruce Moir, Film Australia's managing director, said that given the amount of U.S. programming currently bought by Australia, the fund may "create a much better relationship between commercial broadcasters and producers" in the country.

His sentiments are echoed by Phil Gerlach, the co-founder and ceo of Total Film and Television. In his view, the fund will significantly raise the quality of productions and further confirm that "Australian audiences prefer Australian productions to foreign ones."

He added "there is probably more subsidized funding (in Australia) than anywhere else in the world. We have over the last 15 years developed an industry which is now slowly pouring back the massive balance of trade deficit. Between 1990-5, for instance, the (international) success of Australian film and tv has been on an arithmetically increasing curve."

Ultimately, Gerlach said this "support for the industry is not just a cultural but an economic issue which brings benefits to Australia." It is also likely to secure the industry's financial future and – when coupled to the impact of pay tv – see it double in size in the next three years. **TEI**



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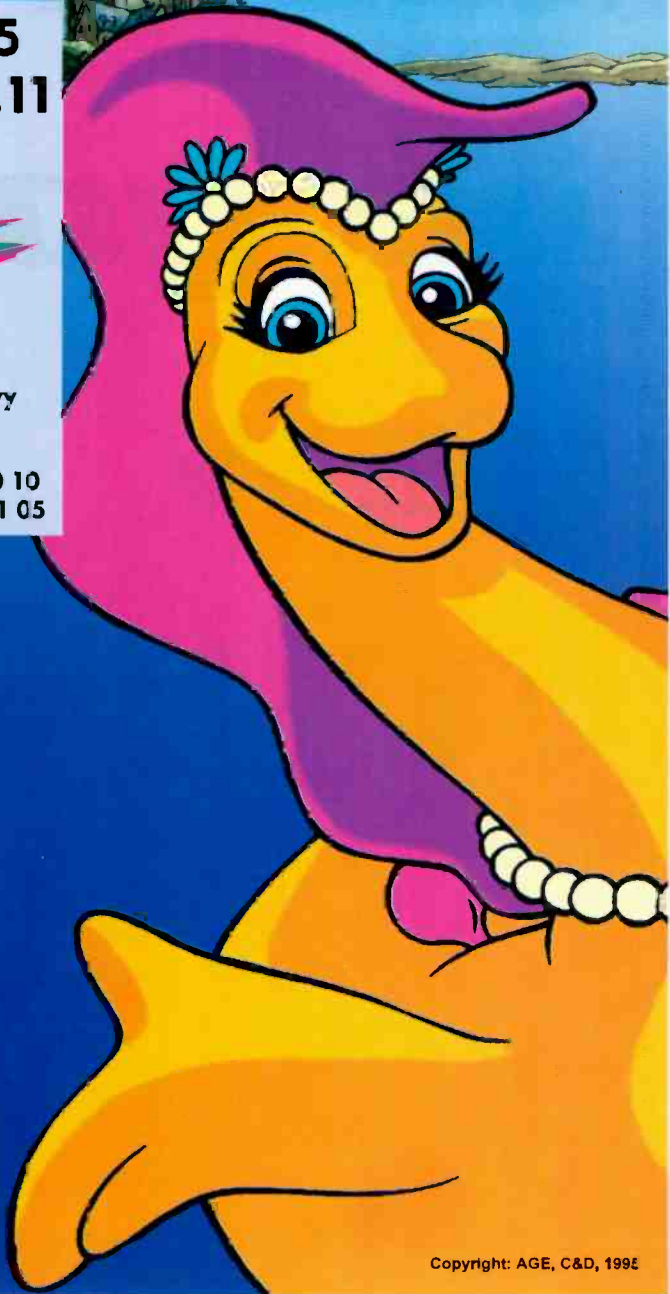
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Creative Population

There is more to Australian production than outback doctors and Melbourne teenagers. Chris Dziadul profiles the leading independents



SS sales head Robyn Watts

Southern Star

Southern Star (SS) celebrated 21 years of existence in 1994 with sales revenues of \$45 million (over double those of three years earlier), profits of 15% and productions worth almost \$19 million, thereby making it one of the largest companies in the Australian entertainment industry.

A vertically-integrated company, SS began life as an animation production business for Hanna Barbera. It subsequently expanded its activities and underwent several important ownership changes culminating in a management buyout in 1988. It sold its Hanna Barbera rights to Turner Broadcasting in 1993 and last year restructured into three divisions: sales, production and audio and video duplication.

SS Sales is headed by Robyn Watts and divides its activities between film (obtaining Australasian product and selling it worldwide to distributors), tv

(either its own or acquired programs sold, to broadcasters worldwide), video and licensing and merchandising (its own product, but the company also represents Paramount).

SS's production arm (SS Entertainment) is meanwhile split into five sections (Southern Star Xanadu, Hal McElroy-Southern Star, Southern Star Sullivan, Southern Star Concept and Mr Big Cartoons) and overseen by its chief executive, Errol Sullivan. He believes the company will spend between \$37-59 million on productions in 1995, among which will be \$7.4 million on *Blue Heelers* (a drama series partnered by Seven Network), \$4.4 million on 13 episodes of *Police Rescue* (a drama/action series partnered by the ABC and the BBC), \$2.2 million on *Blue Murder* (a four-hour docu-drama), \$2.9 million on three tv movies and \$1.5 million on children's game shows.

Roadshow, Coote and Carroll

R, C & C is a wholly-owned subsidiary of Village Roadshow, which also has production operations in both Queensland and Los Angeles (Village Roadshow Pictures USA).

According to Matt Carroll, a founding member of R, C & C, the group as a whole produces 100 hours of drama a year, along with at least 50 hours of miniseries and several movies, soaps and children's programs. Among its current productions are the drama series *Law of the Land* for Nine Network (26 hours/year) and *GP* for the ABC (40 hours/year). In its Queensland studios, which are a joint venture with Warner Bros and among the best in Australia, it is currently undertaking a considerable amount of production work for several U.S. companies, including HBO.

Besides already handling Warner Bros and Disney exclusively in Australia, the group is also expanding into the cinema business in several Asian countries including Singapore, Thailand, Hong Kong and Taiwan.

Grundy Worldwide

Grundy is now one of the largest production companies in the world, with headquarters in Bermuda and local production centres in 17 countries including the U.S., UK and its birthplace, Australia. It is also one of the most prolific, producing 2,000 hours of programming a year, of which 750 hours are serialised drama and most of the remainder game shows. Co-productions currently stand at between 12 to 20 hours a year.

Grundy's most successful shows to date include the serialized drama *Prisoner: Cell Block H* and *Neighbours*, one of the world's best selling and – with over 2,000 episodes already recorded – longest running family serials.

Although Ric Burns, Grundy Organization's chief executive in Australia and New Zealand, acknowledges the company's business "is centrally Australasia and Europe," its involvement in the U.S. – where its 52-hour series *Dangerous Women* was produced – is indicative of a "low key but ongoing investigation into the market."

Grundy's global perspective is further demonstrated by its involvement in Chile (currently the setting for a 13x30 minute sitcom called *Mother and Son* being made in conjunction with TV Nacional) and South Africa, where it is negotiating with both M-Net and the SABC. It is also co-developing a concept with Spanish Television Services in Argentina which fuses the novela and serial into a single style.



Ric Burns, Grundy's man down under

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Beyond International

Beyond produced 180 hours of programs worth \$14.8 million in 1994. Of this, around 25% was drama and 40% information and documentary programming. Total output is expected to rise 15% in 1995.

Current productions include *Just Kidding* (comedy, Nine Network), *Fire* (drama series, Seven Network) and *The Times* (news magazine, Seven Network); it is also involved in several joint ventures including Beyond Simpson Le Mesurier (which produces telemovies for Nine) and Beyond Imagination Propr. Pty Ltd (*Coca Cola NRG* on Network Ten).

The company has in addition made significant inroads into the U.S. market, having worked with Fox to produce *Beyond Tomorrow* and seen *Beyond 2000* carried on The Discovery Channel. More recently, it has also sold children's drama *Ocean Girl*, to Disney, and the children's animation program *Blinky Bill* syndicated in the country.

While Beyond's own output currently accounts for only half of all sales (it also distributes material for the ABC, Seven Network and Broadway Video) it plans eventually to increase the volume of production and sales.



Beyond series *Human Nature*, presented by Olivia Newton-John, is airing on Discovery

Fremantle

Fremantle was formed by Paul Talbot in the 1950s and two decades later split into Fremantle Corporation (a program distributor) and Fremantle International (an acquirer of rights to game shows). The latter subsequently grew much quicker than Fremantle Corporation and was acquired by Los Angeles-based All American Communications. Fremantle Corporation remained in Paul Talbot's hands.

Richard Becker, the managing director of Fremantle in Australia, said that his operation continues to handle both companies products despite Fremantle Corporation's change of ownership. Among the most recent are the gameshow *Strike It Lucky*, kids program *Now You See It* and children's/family gameshow *Blockbusters*.

By providing formats and production support, it is also helping to produce game shows in Indonesia (*Family Game* and *Newly Wed Game*) and Singapore (*Pyramid Game*).

Furthermore, Becker believes Fremantle will begin to spend more time developing dramas "for world consumption." In 1994 these amounted to 13 hours of airtime, while game shows topped 100 hours.

Portman Entertainment Group

British independent Portman has been active in Australia for five years and is planning to consolidate its presence by opening a fully-fledged production subsidiary in Australia later this year.

Chris Brown, who is heading the Australian operation, said Portman plans to produce at least one tv series in Australia a year. It has a series in development with the ABC called *Aunts Up The Cross* and is producing six tv movies with Network 10. The third, *Blackwater Trail*, is launching at Mip-TV.

Brown said Australia would act as a production base for projects in the Asia Pacific region. Portman is developing features and tv series with Japan's Monolith and with several Kiwi production companies. Portman is also interested in acquiring Australian product for its newly-revived distribution arm.

Primetime Television Associates is the UK's largest independent distributor and a former stablemate of Portman in the Team joint venture. Some 60% of its catalog is made up of Australian programming. Accounting to managing director Simon Willock, Primetime has sold Australia's longest running sitcom *Hey Dad* to both ARD and commercial networks and *Fast Forward* to RTL.

Film Australia

Although it regards Australia's National Interest Program as its core business, Film Australia has developed commercially-funded projects since 1988. It is due to receive \$20 million in government funds between 1994-98 under the current agreement and will produce 20 culturally-based programs each year.

Around two-thirds of Film Australia's annual turnover of \$13.3 million is accounted for by commercial productions. Its most recent mainstream entertainment programs include *Escape from Jupiter*, a \$2.9 million 13x30 minute family drama co-produced with NHK and made in association with the ABC and the Film Finance Corporation (FFC); *Napoleon*, a \$3.7 million 90 minute feature film co-financed by Herald Ace (Japan) and the FFC; and *Johnson and Friends III*, a 26x10 minute series co-financed by Film Australia, Fuji Television and Avalon Studios New Zealand.

"As Australia is a relatively small market, everything we do requires substantial foreign participation," said Ron Saunders, Film Australia's executive producer. Film Australia's future plans are to move into adult drama and raise the production levels of both children's and family programming.



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Catherine Cookson's Mini-Series include: The Gambling Man, The Glass Virgin, The Dwelling Place, The Cinder Path and The Man Who Cried. Source: BARB

Total Film and Television

Launched in 1992 as a company by co-founders Phil Gerlach and Heather Ogilvie, Total set out to be a vertically-integrated company with low overheads and staffing.

According to Gerlach, it "worked out a new way of doing business" by undertaking a joint venture with Polygram for music publishing for feature films, tv and multimedia, signing a record deal with Polygram and entering into a contractual relationship with UIP for theatrically releasing its films. Total sold a 25% stake to Michael J Solomon last year.

Total has also co-produced several theatrical films of its own with partners including Alliance (Canada) and Samuelson Productions (New Zealand). A further eight features are currently in development (with budgets ranging from \$2.6-8.8 million) to which it retains tv rights.

Gerlach generally favours co-productions as they "give you a wider pool of creative talent at all levels to resource a film at all levels."

Total also undertakes many tv productions including *Live it Up* – a 30 minute talk show broadcast five times a week by Network 10 – and *The Big Byte*, an international magazine series on new technology currently made for SBS, TVNZ and Star TV and also likely to be piloted in several European countries and the Americas. It is in addition financing *Wisdom of the Elders*, a four-part international documentary series being made in conjunction with Great North (Canada) and Oracle (Australia).

Gerlach adds that the company is focusing a lot of energy on Asia and currently considering three proposals to produce Chinese-language programming. It may also shortly open a regional office in Beijing and shoot up to four films in South Korea.



Vertically integrated: Total partners Gerlach and Ogilvie

JNP Films Pty Ltd

JNP Films was formed in 1978 and has since enjoyed its greatest success with the series *A Country Practice*. Believed to be one of the longest-running primetime dramas in the world, it has been sold widely overseas and will soon notch its 1,100th episode.

The company also currently has five theatrical and three tv movies in production. James Davern, JNP Films' founder and managing director, said the former will range in cost from \$3-7.4 million while budgets for the tv movies will typically be around \$1.1million each. In his view, these and the cost of producing series (usually \$148 -296,000 per hour) are considerably lower than in Europe since "we have had to train ourselves to work efficiently and shoot quickly."

Burbank Animation Studios

Among current programs in development and pre-production at Burbank are *The Computer Kids*, a 26x30 minute live action children's series being made in conjunction with Crawford's, and *Cliff Hanger*, a 65x30 minute animated series with IF Films of Singapore. Significantly, Burbank plans to the company also plans to establish a digital ink and paint facility in Southeast Asia, a region which most Australian producers are keen to penetrate.

Managing director David Field also heads Chequers Productions, which in 1994 produced 94x30 minute Chinese-language programs – *Eye on Australia*, *Chopsticks*, *Town Talk* and *The 1994 Australian/New Zealand Karaoke Championships* – and are currently being shown on New World Television, the Chinese-language narrowcast pay-tv service of Australis Media. All four productions have also been sold in South-east Asia.



A Country Practice: celebrating 1,100 episodes

However, Davern voices concern about the Australian production industry such as the "state of uncertainty" it now finds itself in and the impact of pay-tv. "The trouble is tv is customer driven and there is therefore a tendency towards aiming for the lowest common denominator."

Crawford's Australia

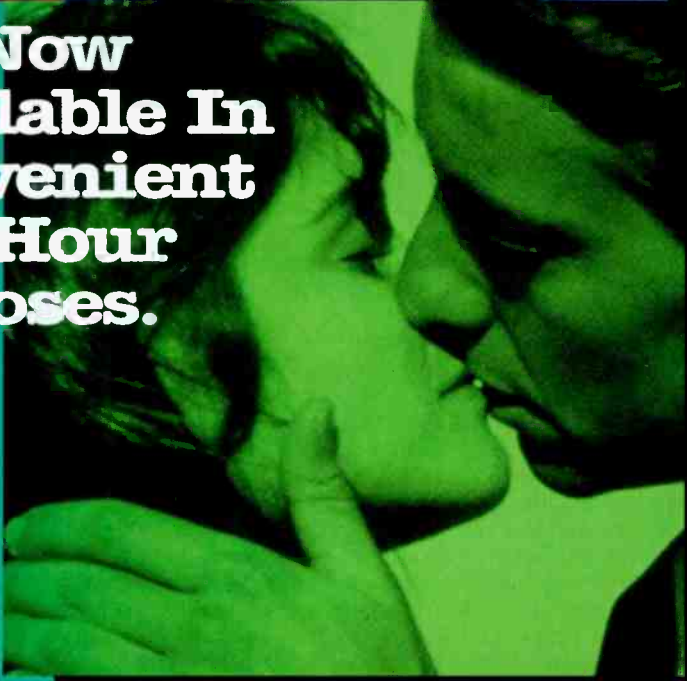
Founded in 1945 as a partnership to produce radio programs, Crawford's is today one of the largest tv production companies in Australia. Among the programs it currently has in production are *The Feds* (three tv movies costing \$1.1million each for Nine Network), *Newlyweds* (a half-hour sitcom, costing \$74,000 per episode, which will be aired on Seven Network), *Weddings* (a lifestyle program for Nine Network) and a telemovie (also for Nine Network) about Ronald Ryan, the last man to hang in Australia. Among the co-productions it has in development is *Violent Earth*, a miniseries being made with Nine Network and a French partner.

The company has also recently entered into a joint venture with Victorian International Pictures (VIP) – a team of directors, writers, producers and screen editors – to form a partnership which will jointly produce tv series and telemovies. Those currently in development include an action police series and a seven part drama set in New Guinea.

According to Denis Spencer, Crawford's director of international sales and program development, the company, which has so far concentrated on drama, plans to diversify to comedy, lifestyle shows, quiz shows and entertainment.



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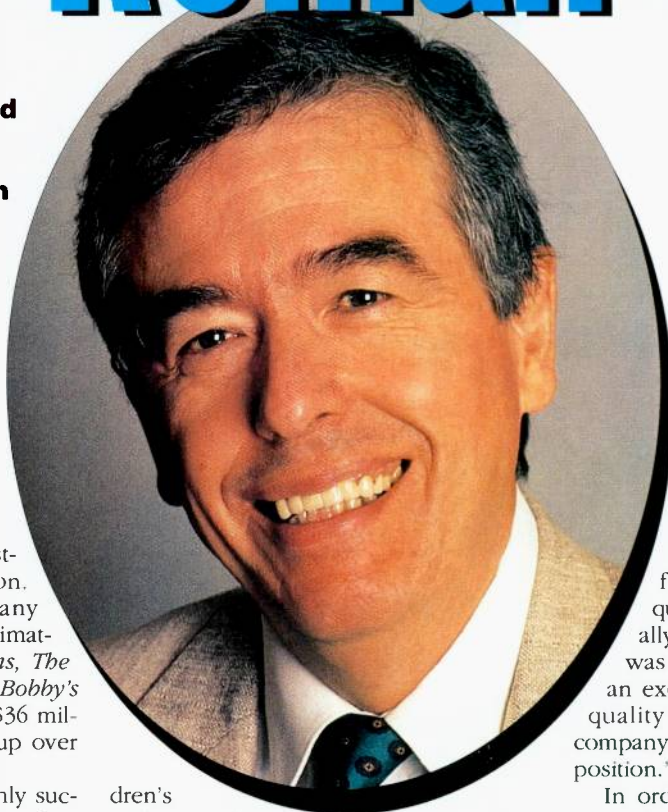
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**ARTEAR
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The Roman Era

The studio behind some of the top-rated animated shows in the U.S. is raising its profile with an increasing number of international co-productions and its own distribution division. By Barbara Bliss Osborn



Film Roman is one of the best-kept secrets in U.S. animation. The north Hollywood company produces some of the top U.S. animated series, including *The Simpsons*, *The Critic*, *Garfield and Friends*, *Cro*, *Bobby's World* and *Mighty Max*, and did \$36 million worth of business last year, up over 30% since 1992.

In the past, the company's highly successful series have been produced as work-for-hire – a history which accounts for Film Roman's low profile. But two years ago, the company began stepping out of the shadows, creating its own characters, pitching and producing its own shows, and introducing itself to the international market. The company's international distribution consultant Neil Court said that his job has largely been buttonholing people and saying, "By the way, Film Roman is the company that did these shows."

Company founder Phil Roman decided to expand his business not so much in pursuit of a global empire but simply as a way to stay in business. For 40 years, Roman worked as an animator with the big Hollywood studios. When he set up his own company a decade ago, he began producing animation for the networks, but network license fees began to fall. The only way to continue to produce high-quality animation was to find additional partners.

In 1992, the company cut its first international deal, a co-production arrangement with Canal Plus on a chil-

dren's action series called *Mighty Max*. That agreement was followed by an investment in a Russian animation studio, and last November, the company signed a major output deal with BetaFilm.

Roman admits that company developments have not followed a master plan. "We've reacted to situations as they've come up," he said. The company's executive vice-president, Bill Schultz, added that only now was Film Roman trying to figure out how to shape its future. "We're still being opportunistic," he said, "but we want to begin to control our destiny."

Film Roman is banking on the company's reputation for quality to see it through the expansion. London-based consultant Neil Court called the kids' tv business a "meritocracy." Court admitted that it's possible to make a killing on cheap animation, but said that approach is no good in the long term if you want programs that can be recycled every few years. "Cheap and nasty animation has a short shelf life."

Court added that sustaining the com-

pany's reputation is important for other reasons. The artistic quality of the product is personally important to Phil Roman, who was an artist long before he became an executive. In addition, Court said, quality product "sets a tone for the company. It gives Film Roman a market position."

In order to ensure quality, company executives had to be able to control the budgets. "One of the things people don't understand," said Schultz, "is that producing a show and controlling the deficit is a great power to determine the success of the show. Quality and success don't always equate, but if you can support a higher budget, it may give the show a better chance to succeed." While a low-end animation series may be budgeted at \$200,000-\$300,000, Film Roman's series tend to cost between \$350,000 and \$500,000 per half-hour episode.

To judge from next year's production slate, the company has convinced a lot of people that Film Roman shows are a good bet. In addition to the six series that the company already has on air, CBS has ordered two new series, *The Adventures of Felix The Cat*, based on the original 1930s cartoon, and *The Mask*, produced with Sunbow Productions and New Line. Also likely to get a final go-ahead is *T-Bear and Jamaal*, currently in development for the Fox Children's Network. Fox has also ordered eight 11-minute episodes of *Klutter*, which will

serve as a pilot for another new series.

In addition, Film Roman will produce a new first-run syndicated series, *B.R.U.N.O. The Kid*, about a 10-year-old computer genius who becomes a digital super-spy, based on an idea by Bruce Willis, as well as two planned half-hour specials based on the 1996 Olympic mascot Izzy, for which Film Roman holds exclusive worldwide rights.

Unlike the company's major competitors Disney or Warner Bros., Film Roman has no house style. *Garfield* doesn't look like *The Simpsons*. *Cro* doesn't look like *Mighty Max*. Roman said that's a selling point for the company. "We don't have a formula. Each series is tailored to have its own identity." The diversity of in-house projects also keeps Roman's animation staff happy since they have a chance to work on different kinds of projects.

Happy staff are important to Roman. His animators contend that because he himself is an animator Roman is more sensitive to the needs of creative people. The company offices are relaxed. There are no time-clocks or bells. No one — including top brass — wears a tie. Another Film Roman institution that sustains staff creativity is a monthly exhibition mounted in office hallways featuring work by an on-staff artist.

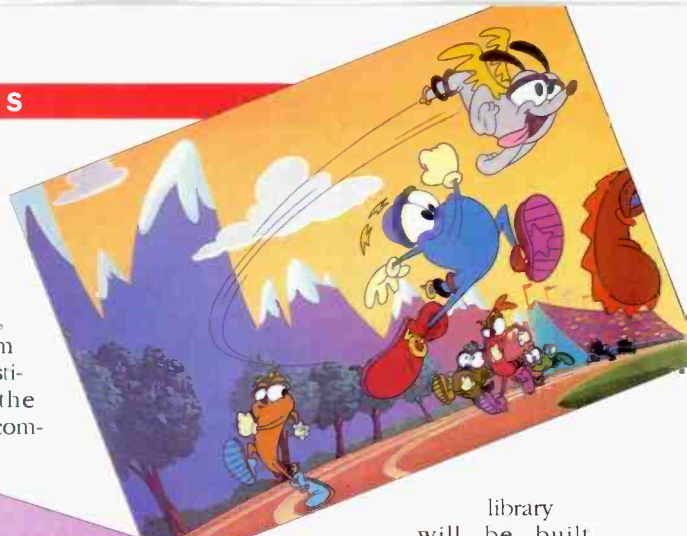
On the sales side, Film Roman's two-person international staff is preparing for an exponential leap in business from its upcoming production commitments. The international distribution division, established just last year, is handled by Neil Court and LA-based director of international distribution Regis Brown. Although the company doesn't hold worldwide rights on every property it produces, it holds a lot of rights on many of them.

Last year, the company entered the market with just two products: *Film Roman Presents... Animated Classic Show Case*, a packaged series of 12 one-hours acquired from the Russian animation studio Soyuzmultfilm; and a Christmas special, *Nick and Noel*.

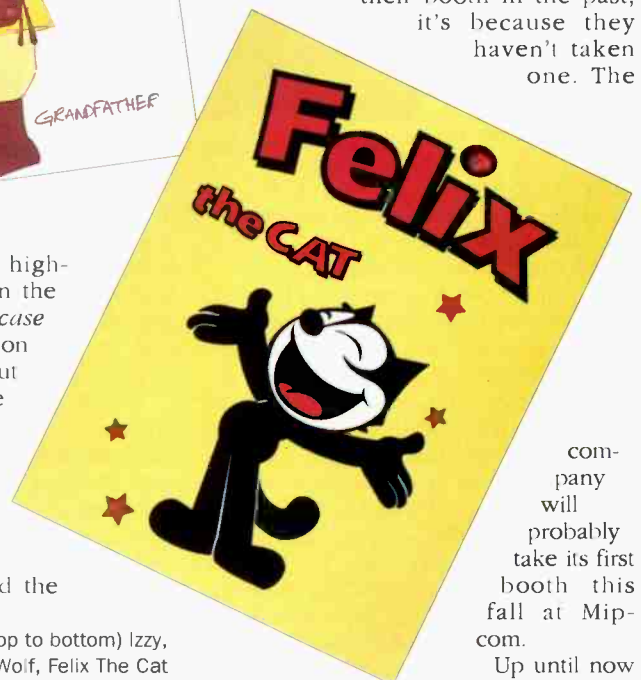
The Christmas special, said Court,

gave the company the chance to tell buyers the Film Roman story, while the *Animated Classic Showcase*, although it didn't feature Film

Roman work, testified to the com-



pany's eye for high-quality product. Sales on the *Animated Classic Showcase* did not "light the world on fire," admitted Court, but Brown noted that the company banked \$1.5 million on it last year. Roman won't rule out the possibility of bolstering the library with additional acquisitions, but he said the



library will be built around the company's own in-house product.

Film Roman set up its distribution operation because it thought it could distribute its own work better than a third party with a lot of product. Comparing its modest operation to that of the studios, Schultz said that Disney and Warner Bros. have a big operation designed to move an enormous amount of product. "We have a small staff designed to move a small amount of product. If you compare man-hours, I think you'd probably find that we spend more time per project."

In some territories, Film Roman will use local agents for reasons of cost efficiency. Court explained the product has to be sold country-by-country even though each individual territory may not pay very much. So far, Film Roman has used an agent in Southeast Asia, and the company is looking for agents in Latin America and Africa.

Brown and Court, as well as Roman and Schultz, attend the markets, but if you haven't noticed their booth in the past, it's because they haven't taken

one. The

company will probably take its first booth this fall at Mip-com. Up until now

Each one unique: Film Roman animations (top to bottom) Izzy, Bobby's World, Peter And The Wolf, Felix The Cat

it hasn't been necessary. Having one, Court said, will enable some of the smaller territories that aren't pre-sold to look at shows, but principally a booth solves the "shoe leather problem." "The markets are wonderful exercise for a week," Court said, "but having a booth is less exhausting."

At this year's Mip, Film Roman staff plan to tie up presales on *Felix The Cat*, which, despite the participation of several co-production partners, still carries a deficit. In addition, the company will shop around new projects in development and continue to look for potential co-production partners.

Court has been consulting with the company for two years, overseeing sales and brokering international deals. Prior to his involvement with Film Roman, he was Nelvana's sales director and supervised the start-up of Le Studio Ellipse, the Nelvana-Canal Plus joint venture.

Court has also helped pull together Film Roman's biggest deal in Europe, the three-year output agreement with Beta-Film. Beta agreed to bankroll the company for up to \$50 million in exchange for certain distribution rights on a maximum of 12 series.

An undisclosed minimum series commitment is included.

For Film Roman, the deal was a must. "It became very apparent," said Court, "that if we were going to do two or three series a year, we needed one core deal that would provide deficit financing for us." The Beta deal means that Film Roman doesn't have to be "out chasing financing all the time." Beta's commitment also helps in terms of network pitches, he said, since U.S. executives understand that the company has a way of covering its deficits.

The agreement calls for Beta to receive most continental European distribution rights in tv, video and merchandising. But Film Roman retained rights in

the UK and Ireland and the option to keep some French and Spanish rights. That stipulation allows Film Roman to raise additional financing in those territories. Already the company has enlisted Spain's TVE on a pre-sale basis for *Felix The Cat*, TF1 for *B.R.U.N.O.* and FR3 for *T-Bear and Jamaal*.

Although less quantifiable, the Beta deal also offered Film Roman an incalculable boost to the company's image. "Beta is one of the leading companies in Europe," said Court. "If they are putting that faith in Film Roman, people know we're serious."

The Beta deal is Film Roman's anchor

not accustomed to finite budgets and schedules. That's a discipline we're hoping to instill at the studio."

Both Roman and Schultz are cautious about the future of their Russian business developments. "It's a shame if you have this population of talent not to be able to tap into it, but it takes so much more than raw talent," said Schultz. "There are so many problems Russia is facing just in terms of doing day-to-day business."

Film Roman executives promise additional near-future announcements with Japan and the UK. Court predicted that within the next six months the company would also announce its first real co-production, an agreement in which the company would be involved in physically co-producing shows in Europe.

Also in the future are projects for the company's newly-established interactive division. At the moment, that division is solely engaged in research. "We don't have a lot of money to throw at it," Roman said, "but we're exploring. We won't see as much red ink as some other players."

Given the vast and rapid expansion of the company, the key concern voiced by outsiders is whether Film Roman can sustain its reputation for excellence. Film Roman now employs 250 people and Roman himself, the company's artistic paterfamilias, has gotten more remote from individual projects as business has mushroomed.

Roman said that he's still involved in the first season of every series to make sure the show "gets off in the right direction. After that," he said, "the worst thing you can do is look over somebody's shoulder."

Schultz promised that quality will not be sacrificed for quantity. "Volume is not the goal here," he said. Echoing Schultz, Roman expressed a willingness to take things gradually. "After all, Roman wasn't built in a day." **TFI**



The Mask, co-produced with Sunbow and New Line, is part of a busy slate

in Europe, but the company also made a significant investment in Russia. In the late 1980s, Roman went to Russia and was very impressed by the animation he saw. "The working conditions were very bad," he said, "but what they got on the screen impressed me very much."

Working with Russian producers in Los Angeles, Roman found a studio in Moscow with whom he could collaborate. The first Film Roman-Argus Studios collaboration is a half-hour special called *Puss in Boots* now in mid-production. "It was a test for both of us," said Schultz. "We came up with the story and they would execute it. It's somewhere between a co-production and an overseas contractor. They (Argus Studios) are

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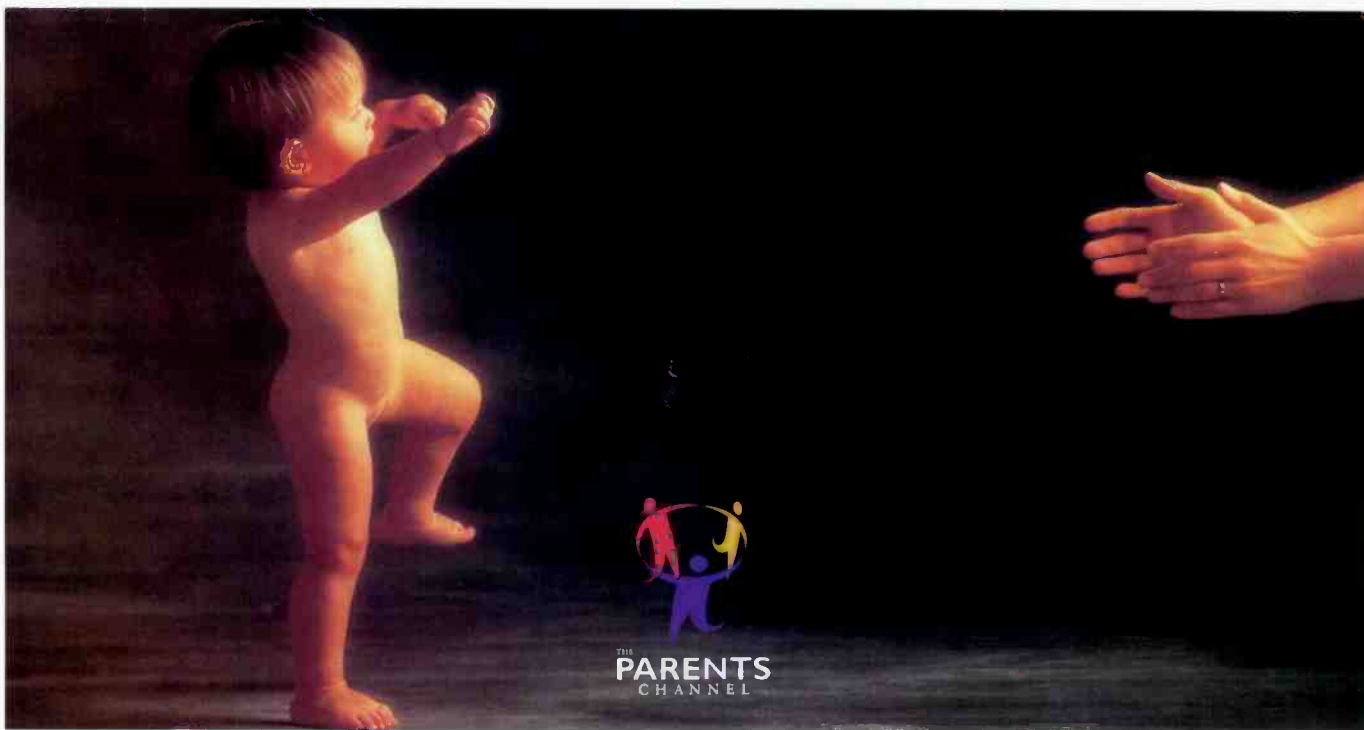
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First Steps

Canadian producers have reversed the traditional process by getting their shows onto U.S. networks. Now, Noel Meyer reports, three Canadian broadcasters are taking entire channels across the border

For years, U.S. television product dominated the Canadian airwaves, either through the cable carriage of U.S. networks or through U.S. television series being shown on Canadian networks during primetime.

Now, to some extent, the tide is turning, and Canadian product is finding an audience in the United States. Television series like Alliance's *Due South* and *Reboot* are just the tip of the iceberg. Networks are next. Last May, MuchMusic, the Canadian all-music channel, struck an agreement with Rainbow Programming Holdings of New York and as a result launched on U.S. cable July 1, Canada's national day.

Trio and Newsworld International, two channels operated by the Canadian Broadcasting Corporation (CBC), launched on the DirecTV satellite service in September last year, and Malofilm

Communications is preparing to launch its service, The Parents Channel, down south.

MuchMusic, like MTV, is a youth music channel, but the added ingredient is the live television feel pioneered in Canada by Moses Znaimer, the creative mastermind behind Toronto's City tv. Both MuchMusic and City tv are owned by Chum Ltd., a radio and tv broadcaster based in Canada's largest city.

"MuchMusic is informal, slightly flawed and like an old buddy that you might hear on the radio and want to hear more of," said Rainbow's senior vice-president Laurie Giddins.

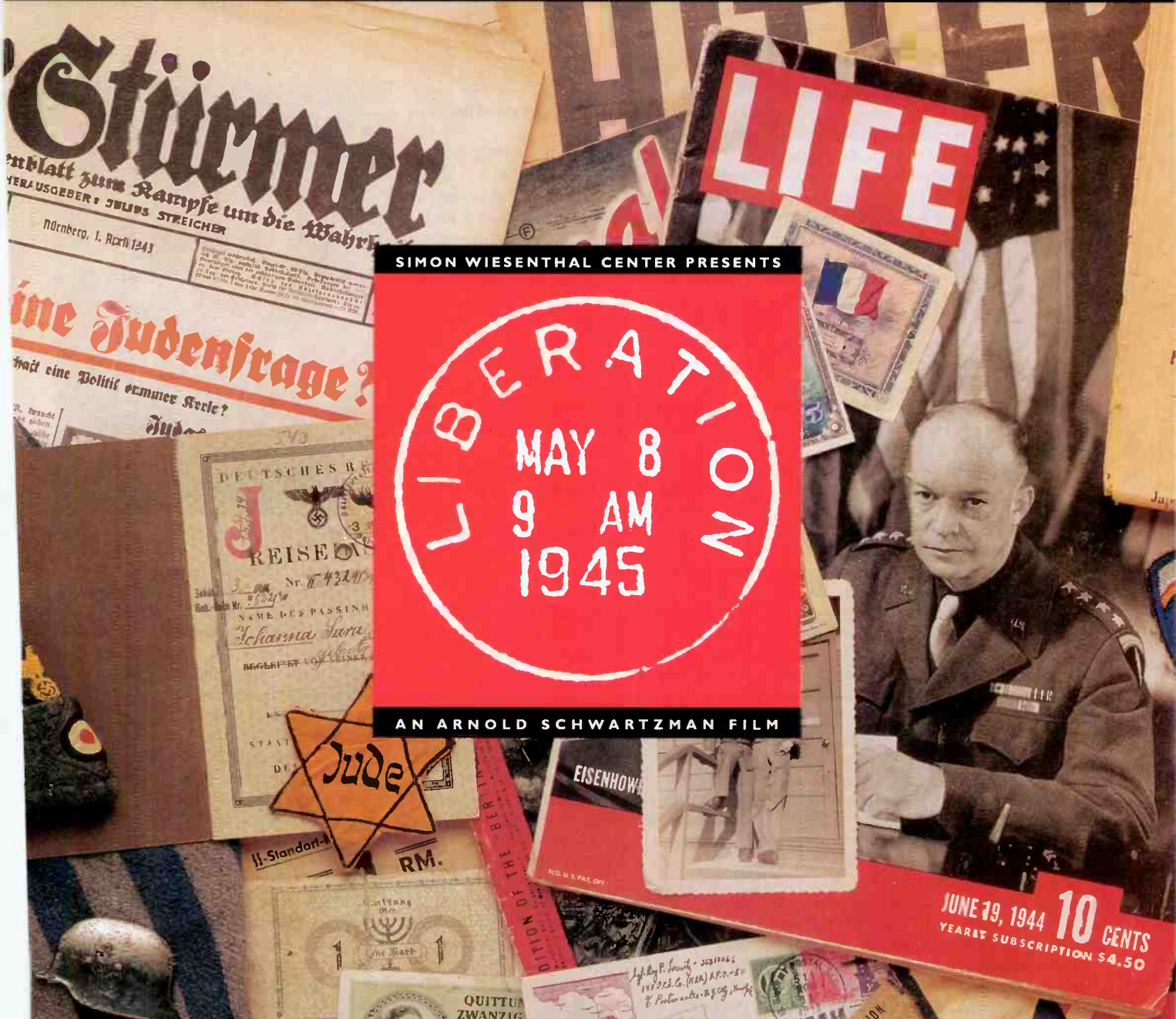
"The notion of an alternative approach is very exciting. It is cool and the manner of presentation and the diversity of the playlist is the most important thing we offer. MTV sits in the middle of the dial and we have to offer

something different – spontaneity."

While hosts are generally shot in a more or less traditional way, when they go on assignment they do double duty as both reporters and camera operators, shooting the subject as they tackle the interview. This allows for considerable economies in production. As well, the City tv/MuchMusic building in Toronto has been rebuilt, with 38 tv powerpacks scattered around the building, in the cafeteria and parking lot. Almost any area of the building may become an instant studio.

Owned by Cablevision Systems Ltd., the fifth largest cable operator in the U.S., Rainbow's corporate mandate is to provide quality niche marketing to help fill expanding channel capacity. It markets programming services like American Movie Classics, Bravo and the Independent Film Channel. Rainbow approached

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MuchMusic after doing extensive market research.

"Much to our surprise," said Giddins, "we saw that there was room for expansion in the music category as channel capacity grew. Sitting to the north of us was this product that was fabulous, fully tested, proven and produced that we could share with the U.S. market and over time customize and tailor so that it would be more appropriate for a U.S. audience."

MuchMusic now has a potential audience of three million in the U.S., broken down among Cablevision subscribers, DirecTV viewers and C-band satellite systems. Along with the various forms of cable and satellite distribution, the service is also being made available to local broadcasters near large college towns.

Giddins expects MuchMusic to turn profitable within three years. And within three to five years, she forecasts an audience of 15 million. "Of all the services that have been introduced within the last six to twelve months, I think we are leading the pack. We hit the market at the right time, as established American music product moved away from an all-music format and because of their success became perceived as mainstream."

If MuchMusic is succeeding because it is stylistically different from available product, the same promise might hold true for Newsworld International and Trio, two services which launched on DirecTV, and have yet to find any terrestrial cable distribution.

Newsworld International (NWI) and Trio are the result of a joint venture between the CBC and Power Broadcasting Inc., a blue-chip Canadian company.

North American Television Inc., the company running the two networks, is still putting the finishing touches on its ten-year business plan. Incoming president and chief operating officer Sandy McGovern is full of optimism.

McGovern, a fifteen-year veteran of network start-ups and turnarounds, was the senior vice president of business development at Discovery Communications and helped bring The Learning Channel and The Discovery Channel out of the blocks.

"I would not have left Discovery unless I had an opportunity to run a network and this was an opportunity to run two networks," said McGovern. "It appealed to me because the two partners were so well grounded in the business and well funded. That is a key in this business. They were very realistic about the environment and realized it was a difficult time to come into the market but

they felt they were there for the long term and they already had the DirecTV deal."

Power Broadcasting Inc. (PBI) is less well known than its partner. It is a division of Power Inc., which, through a subsidiary Pargesa, holds minority position (via GBL) in Europe's Compagnie Luxembourgeoise de Télédiffusion. In Canada, Power has an 80% interest in yet-to-launch Power DirecTV, (Hughes Communications-owned DirecTV has the other 20%). Power also has sizeable financial and print investments.

Part of NWI's appeal will, executives believe, lie in a technical innovation. NWI has signed agreements with broadcasters around the world to access their news broadcasts, and by pressing a button on the DirecTV remote control, the newscast will be broadcast in the original language instead of in translation.

NWI's promotional video focuses on the CBC's reputation as a reliable and accurate provider of news, and plays on the number of top-notch Canadian journalists who have found fame and fortune in the U.S. on network television, journalists like Peter Jennings and Arthur Kent.

NWI is using the CBC's 14 international bureaus as sources but it also has writers, producers, anchors and journalists of its own. NWI's focus is to provide an international perspective on the news, distinctly appearing to be global rather than Canadian, British or American.

The editorial perspective is to report the story of the day, reported from the perspective of the country in which it occurs. NWI focuses on news, business and current affairs with a half-hour of news at the top of each hour and current affairs or documentary programming filling in the other half.

With CNN International and BBC



McGovern: In for the long term

World both offered to cable systems from early 1995, NWI will face stiff competition. At the moment North American Television is still putting the final touches to its business plan, including arrangements for marketing and distribution.

"We will be expanding on the bilingual aspect," said Sandy McGovern, "as a point of differentiation. It will be an asset for us. Cable operators are starting to look for ways to penetrate neighborhoods where English is not the first language, and they are looking for services where they can produce a foreign-language tier. I can see Newsworld added to that tier."

Trio promises to deliver the best of Canadian television programming, fully developed and never seen there before, to audiences in the United States.

"The product on Trio has been thematically proven in the U.S.," said McGovern. "*Street Legal* is something similar to *L.A. Law*, but it is new and fresh programming and that will be one of the drawing cards." Just as NWI is able to draw on the attraction of Canadian journalism, Trio can draw on the power of Canadian actors who made their names on Canadian television before heading south.

Nothing exemplifies this more than *SCTV*, a series that launched comics John Candy, Martin Short, Rick Moranis and Dave Thomas. Trio is being packaged and marketed as a low-violence, family entertainment channel. While it draws some of its programming from the CBC it has also signed deals with major Canadian production houses, including Alliance, Atlantis, CTV, Chum, The National Film Board, Salter Films and



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While North American Television is still in its start-up phase, with only two employees and two consultants, McGovern expected things to start moving after March 10, when its ten-year business plan was due to be finalized. As for distribution, it will go after every possible avenue, from cable to satellite to MMDS. "With the reregulation environment we will have to be very flexible. We will probably be carried on new product tiers and à la carte."

To an extent, MuchMusic, Trio and NWI have all benefited from being in the right place at the right time, with a full slate of developed programming and proven resources to draw on. All three services are carried by DirecTV as part of their \$29.95-a-month Total Choice package. While it is clear that with satellite service U.S.S.B. carrying MTV, DirecTV needed a music station, Trio and NWI also fit into DirecTV's program requirements.

"We thought those were the strongest services for the type of subscribers that DirecTV would be delivering. They were available a year and a half ago, and we felt they would be very attractive services for our subscribers," commented DirecTV's spokesperson Linda Brill.

Another new channel coming out of Canada is Malofilm Communications Inc.'s The Parents Channel (TPC). Originally slated to be launched in April of this year, TPC is now waiting for the digital revolution to free up channel capacity. Like MuchMusic, it has a staunch ally in the distribution sector.

Malofilm has teamed up with Vision Group Inc., a Tele-Communications Inc. subsidiary, to market the channel. Aimed at providing parenting skills over the air it has a clear demographics target. It also has competition in two proposed new services, Parent Television and The Parenting Satellite Network, both also



Street Legal: Canadian shows offer a fresh alternative

delayed due to the current shortage of capacity.

Malofilm is in a strong position, said TPC managing director Steven Harris: "Our business plan requires only a short period of deficit financing. We could do this ourselves; we are a debt-free company, but that is not our plan. It wouldn't be an intelligent business decision to be involved in a large-scale operation like this and not have strategic partners in the U.S.,".

Malofilm, based in Montreal, is Canada's largest video distributor and a pre-

mier production house. It has produced 25 theatrical films, the most notable being Canada's largest international critical success, *The Decline and Fall of the American Empire*. Harris is also Malofilm's president and CEO.

Malofilm plans some production in Montreal, where costs are less, and in the States, where the channel will be headquartered. Harris reported the project has generated significant interest from both would-be advertisers and potential strategic allies.

Harris believes there is a bright future for Canadian programmers heading south. "A lot of people forget that cable originated in Canada. We have incredible media and a wonderful talent pool filled with technologists, creative people and broadcasters. We like what we do, and we are very passionate about this business and we have a real passion for quality.

"You don't see much tacky programming on Canadian tv, and I think that as a result, we can produce great networks. As long as we continue to strive for excellence, the world is our market." **TEI**

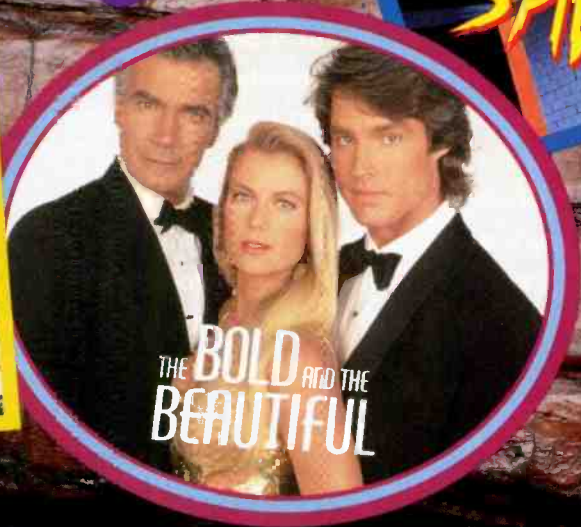




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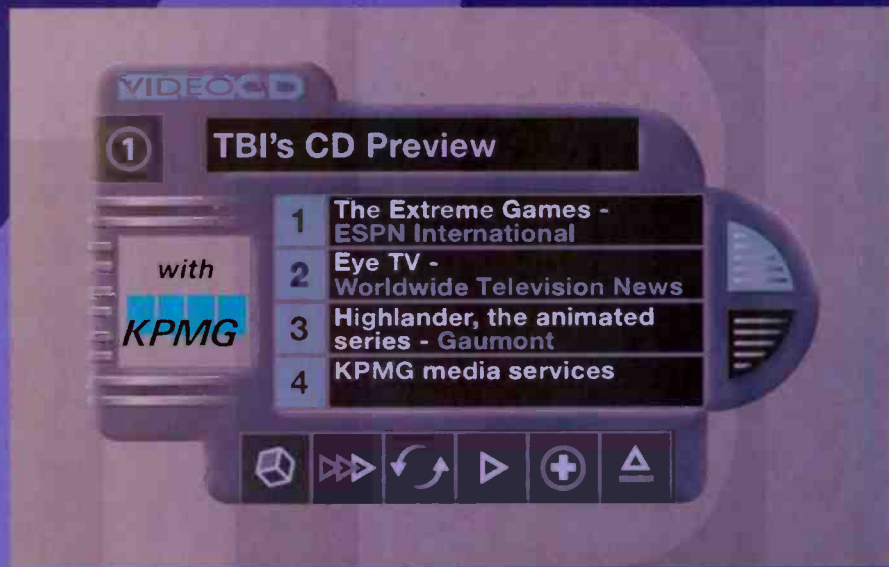
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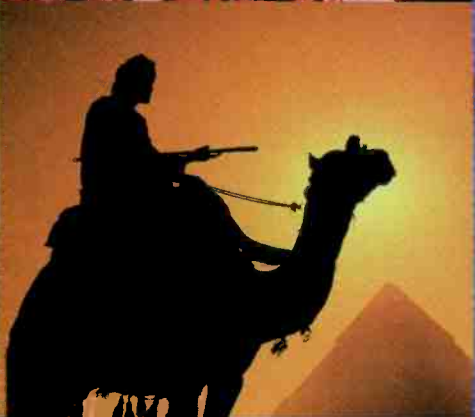
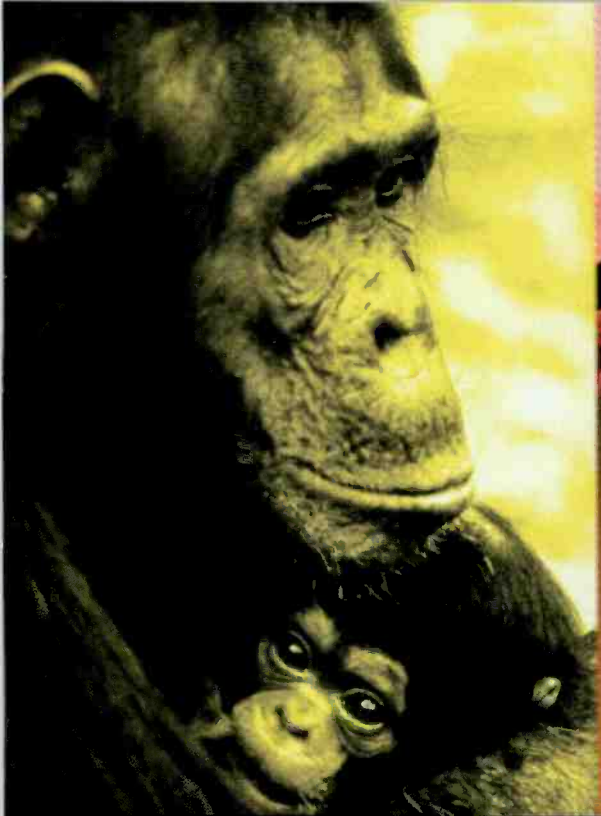
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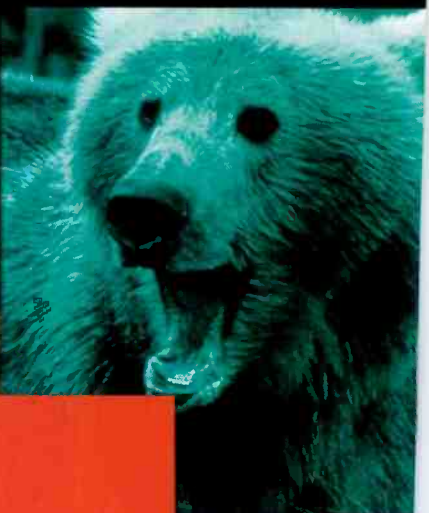
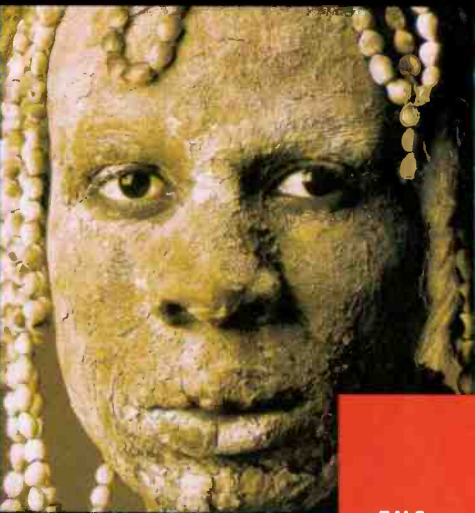
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Big Ideas

Lost Civilisations: 10 hours of ancient history

Mega-documentaries are back in vogue, mainly thanks to the success of recent long-form series like *The Civil War*. There's no shortage of subject matter, but the trick is persuading broadcasters to fit them into their schedules. Richard Huff reports

After years of lying dormant, the mega-documentary – best described as non-fiction programming of 10 hours or more in length – is making a comeback.

Largely thanks to a couple of high-profile long-form documentaries in recent years, producers in the U.S. are taking a harder look at the multi-part, multi-hour documentary. Some broadcasters, such as PBS, are finding the longer documentaries provide them with a much-needed publicity and ratings boost, while others are finding sustaining viewer interest over the long haul a tougher road.

Producer Ken Burns may have single-handedly revived the mega-documentary with *The Civil War*, which clocked in at 11 1/2 hours and at the time of its telecast in 1990 became the highest-rated series in the history of public broadcasting. Burns topped his previous ratings (and minutage) mark with *Baseball*, an

18 1/2 hour ode to America's well-loved pastime. According to Nielsen statistics for the telecast, more than 43 million people tuned into all or part of Burns' *Baseball* when it aired last summer.

For comparison, *The Civil War* drew 38.9 million viewers to PBS. Burns' *Baseball* averaged a 5.5 rating (percentage of the nation's 95.4 million tv homes) and an 8 share (percentage of the sets in use) for each telecast, which is two and a half times PBS's seasonal primetime average.

Burns' projects each took slightly different paths to success. *The Civil War*, while promoted heavily at the time, benefited greatly from word-of-mouth promotion during its telecasts. On the other hand, *Baseball*, having come after *The Civil War*, was able to benefit from a large promotional budget created by funding from General Motors. *Baseball* also benefited from Burns' new-found celebrity.

Yet, Burns' projects are not the norm

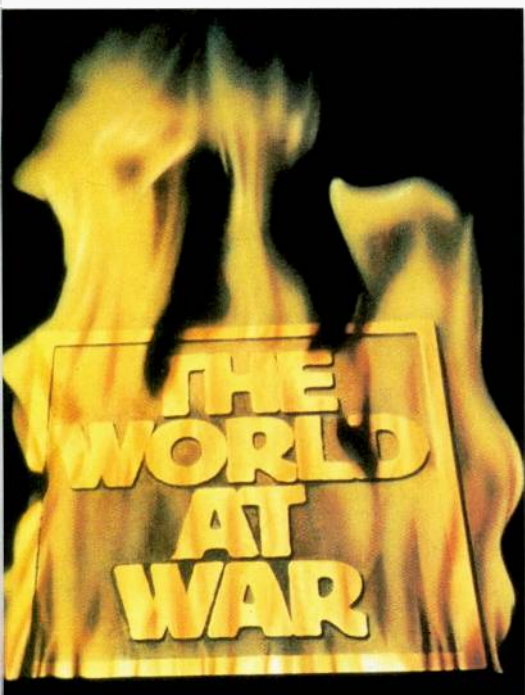
for mega or standard-length documentaries. The average documentary doesn't achieve Ken Burns-like promotion or ratings.

And while the numbers produced by *Baseball* were high by PBS standards, those same numbers would cause instant cancellation on the broadcast networks.

"I think it's a little easier for us to air these," said former PBS vice president John Grant. "It's hard to get network-like ratings, which need to generate network-like advertising numbers, with a documentary, and it's hard for the networks to blow out 10 hours of programming."

Indeed, so far the mega-documentaries have been limited to PBS and cable. NBC is set to enter the fray this summer when it telecasts the 10-hour *Lost Civilisations*, though only as a weekly series.

Lost Civilisations is the next big documentary to come down the pike from the folks at Time-Life Video & Televi-



World at War: 70s blockbuster series

sion, which co-produced the series with Itel. In addition to NBC's telecast, the cable rights to *Lost Civilisations* were parcelled off to cable's Discovery Channel, which will air the series through the year 2000. Discovery International will have the international cable and satellite rights to *Lost Civilisations* in South America, Asia and the Middle East.

Time-Life will also sell a videocassette version of the epic documentary via its direct response unit.

Lost Civilisations is one of the pricier mega-documentaries to come along in awhile. According to Betsy Bruce, president of Time-Life Video & Television, the project is costing about \$12 million, or somewhere in the neighborhood of \$1.2-\$1.5 million an hour. The project is being shot entirely on film, uses computer animation and required film crews working around the globe.

"That's more than is spent on a typical documentary," Bruce said.

And with those numbers, ancillary video sales and parcelling off network and cable rights is an important part of the financial mix.

The key to a mega-documentary, said Bruce, is that it has to be "the definitive" history or collection of information for it to be a success. "It can't be disposable. People are hungry for this kind of programming."

Time-Life's *History of Rock 'n' Roll*, which recently aired in syndication via Warner Bros. Domestic Television, will

also be sold on home video via Time-Life's direct mail sales units and peddled internationally by the Warner Bros. international sales wing.

But Time-Life will find some competition in the marketplace for *Rock 'n' Roll*. Boston public station WGBH and the BBC are working on two mega-documentaries, including one, tentatively titled *Rock 'n' Roll*, which aims to chart the history of pop music. WGBH's Elizabeth Deane and the BBC's Hugh Thomson are executive producers.

The BBC and WGBH are also working on *The People's Century*, a 26-parter that will tell the story of the 20th Century by concentrating on the single feature that the producers believe has made it different from previous centuries: the role of the common person and the rise of mass politics. Executive producers on the series are WGBH's Zvi Dor-Ner and the BBC's Peter Pagnamenta.

Linking with a co-producer for a mega-documentary is almost a ritual, according to executives involved with the productions. High production costs and promotional expenses force producers to seek partners. In the case of some internationally-flavored projects, a partner is brought in as a way to gain access to film archives.

Turner Broadcasting, which is working on *The Cold War*, a 20-hour plus project that just started development under the guidance of Jeremy Issacs, will seek a Russian partner in order to gain complete access to Russian files and footage.

"Ted (Turner) feels very strongly that it cannot be told without complete access to Russian archives," said Pat Mitchell, executive vice-president of TBS Productions.

Mitchell said that when looking at a budget of roughly \$500,000 a hour, it's imperative to bring in a partner.

"You have to give up some distribution windows when looking at co-production partners." While agreeing to give up some distribution rights, Mitchell said Turner vows to hold onto the copyright of the project around the world.

Turner's *The Cold War* is the brainchild of Ted Turner himself, said Mitchell. Issacs, creator of *The World at War*, one of the best-known mega-documentaries ever, is heading up the Turner effort, which is expected to reach full stride by 1996. Mitchell said that when the complete budgets and plans are set, *The Cold War* could hit 25 hours in length.

"This will be a major event," she said. "It will be the biggest series Turner has

ever done, and certainly the most important."

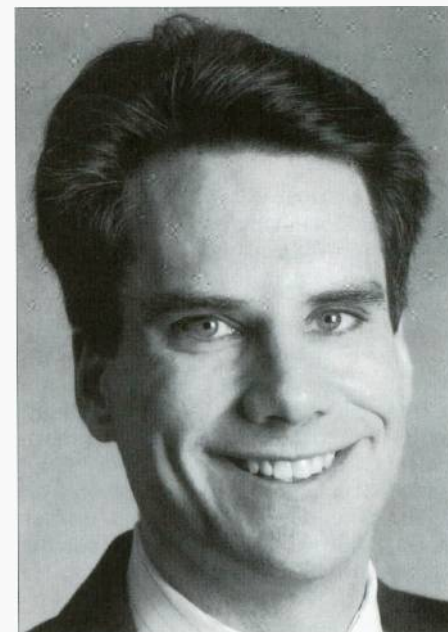
The Discovery Channel's Clark Bunting agreed that a co-producer is necessary when doing a mega-documentary, and even some minor ones, although a partnership isn't always dependant on dollars and cents alone.

"We try to have as few partners as possible," Bunting said. "The vast majority (of documentaries) are done with either one or two groups, then we divvy up the rights streams based on the partners who can exploit it. The economics become much more attractive with a partner that brings something more than cash. The investment is both editorial and financial and a back-end that is real."

PBS's Grant said the recent spurt of mega-documentary production doesn't indicate there is a trend toward the format, but that simply the topics covered have warranted the extra exposure.

"We've tried to say to producers that bigger isn't the question, better is," Grant said. "Length is somewhat irrelevant if the quality sustains."

Typically, the mega-documentaries are used by PBS and cable as a huge, and sometimes expensive, promotional tool. They are often programmed as stunts, with three, four or five two-hour



Bunting: not just dollars and cents

installments airing over successive nights.

Generally, viewership is at its best on the first night. All of a network's and producers' promotional efforts are

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geared toward the launch. And critical reviews usually run on the first day of a multi-part telecast.

People do not spend much time viewing documentaries, said PBS' Grant. For example, some multi-part documentaries lose half of their audience by the time the last episode airs. "We get that whole big audience there on the first night and then dare them to come back," Grant said.

Turner's Mitchell is also quick to say there isn't a trend toward the bigger documentaries. A year ago, she said, the network developed several in the six-hour-plus range, that didn't fare quite as well as predicted.

"We thought that in our schedule we had to create a big event," Mitchell said. "We are not a place people turn to for documentaries, but what we've determined is that the four and two-hours actually do better for us."

Mitchell said the past performance has led to a rethinking of TBS's program-



Mitchell: Creating a big event

ming strategy, which, in the future, is likely to rely on one or two-hour films under a common umbrella title. The network started to develop a 10-hour project, titled *To The Millennium*, but after Turner conceived *The Cold War*, the documentary was scrapped.

Yet, Mitchell isn't ruling out the mega-documentary. In fact, she said there is one in development at the network, on which a decision to proceed, or not, will come this summer.

Often one key aspect in pushing a documentary to 10 hours is the potential for back-end video sales through retailers and outlets such as Time-Life Video & Television.

According to Time-Life's Bruce, 8 to 10 hours is a minimum for direct mail video sales, while 20 is a gold mine. With the exception of a few titles such as Burns' *Baseball* and *The Civil War*, rarely does a retail customer buy a complete set at once. However, with a 10-hour project such as *Lost Civilisations* or *The History of Rock 'n' Roll*, Time-Life can soften the sales blow by selling consumers "continuity" packages that let them sign up to receive one video a month.

"It has to have a unifying theme, such as 'this is about rock 'n' roll,'" Bruce said of potential mega-documentaries. "After understanding that, every hour has to be great because that's the way consumers receive the videos."

All involved with producing long documentaries admit that getting a commercial broadcast network to air a project of that magnitude is almost impossible. NBC will air *Lost Civilisations* as a weekly series during the summer, a slow programming time of year that has little consequence for its overall standings. Each U.S. network is expected to create a project geared toward the millennium, although while early, none of those documentaries is expected to air over several nights in primetime. Instead, the commercial networks will scatter the projects over the next few years leading up to the year 2000, but air them with a common banner.

"They are tough to sell to networks," said one executive. "It's a real commitment on the part of a broadcaster to suck up 10 hours of their schedule."

Likewise, getting a public broadcaster to donate that much time takes some doing. Plans for televising *The People's Century* call for four installments of six to eight-hours to air sporadically starting this fall, with the entire 26 hours to air as a weekly series in 1999.

Convincing a broadcaster to take a mega-documentary on appears to be endemic to the format worldwide, according to executives and producers involved with those projects.

As the commercialization of broadcast markets around the globe increases, sellers of mega-documentaries face increased troubles. Some markets have gone from having 10-hours a week of documentary fare to just a handful each month. A lack of space has forced producers to alter their product for sales

abroad.

It's called having the work "versioned" for sale in a particular region. Ken Burns' *The Civil War* was trimmed for sale in the UK and elsewhere. And PBS's Grant expects the 26-hour *The Peo-*



Walzog: time slots in short supply

ple's Century to be abbreviated as well. "I can easily see people cherry-picking episodes," he said.

Discovery's Bunting agreed. "There aren't many places in the world that are willing to give a 10-hour slot to American programing. Ken Burns, of course, will get the slots, but for many foreign broadcasters, four or five hours is ideal," Bunting said.

According to Nancy Walzog, president of Tapestry International, the one-hour documentary is Tapestry's bread and butter. "Many times broadcasters don't have the time slots or there are particular parts of a mega-documentary that they don't want to air," Walzog said.

There is some growth, she said, in the emerging markets where cable is growing as well as local terrestrial broadcasters. "Available (program) slots in countries like France and Germany are becoming fewer and fewer. France used to have quite an active market for documentaries, which has since dropped off," Walzog said. "The few documentary slots remaining are going to locally-produced programs. It's a tight, competitive market." Nevertheless, Walzog said she thinks the international market will mirror the U.S. arena and eventually open up to the mega-documentary. **TV**

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A Friendly Invasion

Cable channels Discovery and A&E have been critical to documentary production in the States. As they roll out international services, what impact will they have in countries where public service broadcasters already feature the genre prominently in their schedules? Marie Beardmore reports

Holylands: A Discovery/C4 co-production with an edge



Back in 1985, when Discovery Channel launched, budgets were so tight that sending a package by Fed Ex was "a career move," remembers Clark Bunting, now the network's senior vice president, programming. As it celebrates its tenth anniversary, Discovery is a very different proposition, showing 1,000 original hours of programming for an investment of \$110 million a year.

"The first five years we were learning to distribute the signal; the second five years we were learning how to produce in volume; this next five years we are mastering how to create knowledge and how to distribute it."

Discovery has now expanded out of the U.S. market, distributing knowledge into Europe, Asia and Canada via satellite-delivered, regionally-tailored versions. It has also launched a European version of The Learning Channel. Nick Comer-Calder, vp programming, Discovery Europe and The Learning Channel, said that the key to winning audiences internationally is to tailor programs to each country wherever possible. "Dis-

covery Europe does not simply show reruns of Discovery U.S.," he said, explaining that there is a 25% overlap of programs on the two networks at any one time but these need not necessarily be U.S. programs.

He stressed that the two channels are autonomous and said the target for the next five years is to have 75% original programming on both Discovery Europe and The Learning Channel.

He added: "This year we plan to co-produce or commission 40 hours of programming from Discovery U.S., and 80 hours of programming from Discovery Europe only."

Even where the subject matter is the same, the treatment is often different: "(It is) typically less polished than in the U.S. — often shot on Hi-8 with unscripted, instinctive commentary — which our European audience relishes," said Comer-Calder.

Channels within Europe are also treated as separate entities. Discovery Europe is currently in talks with Yorkshire TV about co-producing the *First Tuesday*

documentary series with Sweden's SVT and is also talking to other Scandinavian countries about possible national versions.

Comer-Calder said that far from being a threat to established European broadcasters, Discovery is complementing them and even expanding the market for documentary programming. Besides, he added, "documentary channels in Europe do not have the distribution to poach the audience of established broadcasters."

Five years down the line, he is pleased with how Discovery Europe has been received: "I'm delighted that we've met this desire to cooperate rather than some knee-jerk reaction to squeeze us out... I think we are useful allies for them."

The unofficial alliance with terrestrial stations makes economic sense. Co-productions are already part of the picture as channels have an interest in working together where possible to share production and dubbing costs. *On the Road Again*, a documentary retracing the hippy trail from London to India, is a



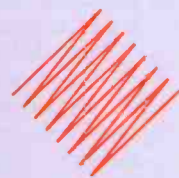
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Discovery/BBC co-production that will be stripped across Discovery and the BBC in the same week, with the BBC getting the first window. "It's a win-win situation," said Comer-Calder. Discovery has also co-produced three programs with Channel 4: *The Plague Beirut*, *Bosnia*, and the just-wrapped *Holylands*.

Indeed, two channels working together to raise awareness of the genre offer the viewer more windows to see it. It's a way of working which Comer-Calder wants to develop further, both in the UK and Scandinavia, where Discovery is already available, and for future Discovery ventures. There are several being mooted in Europe and a Chinese service may be launched by the end of the year.

The BBC takes a positive view of the automatic documentary channels. "Any addition to the international mix and breadth of documentaries can only be a good thing," said Paul Hamann, the corporation's head of documentaries. But he also believes it is a mistake to think that programs are interchangeable. "Documentary channels do not contain the

British documentaries that work all over the world are those that have an edge."

Sy Lesser, executive vice president and chief financial officer of A&E Networks, said quality is paramount in programming on his network: "We commission and produce most of our documentaries," which are targeted at middle earning, educated, 25-54 year olds. Now in its 11th year, A&E is less visible in Europe than its peer Discovery, but the web plans to put itself on the international map when it starts the European roll-out of The History Channel which Lesser said could happen as early as the end of this year.

Lesser believes The History Channel, which debuted in the U.S. in February, is a natural progression for the web. He said its impact on broadcasters will only be positive, and ruled out any idea of possible conflict. "We are a niche channel; no one is doing what we do." As with the A&E Network, which has co-produced *Panorama*, *Timewatch* and specials such as Michael Palin's *Pole to Pole* with the BBC, co-productions with established broadcasters are likely, even where the major partner in the venture is a cable operator.

Lesser said potential third parties in Europe have responded well to his initial pitch which requires partners to provide 75% of the programming schedule, with A&E Networks furnishing the remainder from its library. Talks are still in progress, but he said the final partners are most likely to be cable and satellite players.

In France, documentary channels could have a free rein were it not for Canal Plus' dominant position in the market. TF1 and M6 do not really figure in the picture, preferring to schedule magazine/reality type shows, while FR3 and the documentary channel Planète always take the second window. This leaves Franco-German cultural channel Arte as Canal Plus' main rival, particularly when the two are jousting for first-run rights. (Arte is unique among its peers in having both cable and terrestrial carriage in France.)

Documentaries make up about 7% of Canal Plus' schedule and command an annual budget of upwards of \$10 million

upwards. The channel is religious about taking only first-run product. "As a pay service, people expect it," said Catherine Lamour, Canal Plus' director of documentaries. Canal Plus frequently co-produces in order to get better quality product. With a budget of about \$300,000 per documentary, Lamour also needs co-producers to make "better films." There are no co-productions with Arte, however. "I would like to work with them but they insist on the first run which I cannot agree to," said Lamour. Canal Plus has nevertheless had some successful unions, including *Children at War*, a co-production with FR3 which won an Emmy Award.

One consequence of the low cable distribution in most European markets is that documentary channels are frequently among the array of thematic services which are used as a driver for cable itself. The French Canalsatellite package includes Planète, launched in 1988 and programmed by the pay network's subsidiary, Ellipse, while in Spain, Documania is part of an equivalent pay-tv package.

The latest market to spawn a documentary service is Hungary, where Spektrum, operated by HBO Hungary, started up in February. Steve Smith, managing director off both HBO Hungary and HBO's programming arm, Kabelkom Programming, a joint venture between Time Warner, UIH & U.S. West, said he was "ecstatic" with early responses to the channel, which is currently offered by 12 operators but may eventually be offered by a further 50.

Indeed, Smith said Spektrum will be like a lifeblood to Hungary's cable industry, and operators are already so convinced of its success they are holding back price increases of up to 50% until they secure its carriage.

Hungary's public broadcaster MTV meanwhile, subscribes to the view that a documentary channel is no bad thing. Éva Rácz, its head of program acquisition, said the service would offer more documentary programming if there was time - MTV1 only broadcasts for 12 hours a day and MTV2 is only on air from the afternoon to early evening - but said Spektrum is not about to eat into MTV's documentary audience.

The documentary genre has been boosted by the extra platform provided by the thematic channels, which in turn has been good news for established broadcasters, under pressure to reduce budgets but fighting to keep hold of audiences. **IB**



On the Road Again: On BBC and Discovery in the same week

range of the BBC and Channel 4; independently and collectively their scheduling is disappointing."

Peter Salmon, Channel 4's controller of factual programs, generally welcomes the mixed broadcasting environment: "The interest of American-based documentary channels has made our documentary sector the business it is today." But he added that there are attendant risks with providing an ever increasing volume of programming for the documentary webs. "They tend to want too many coffee-table factual series... the

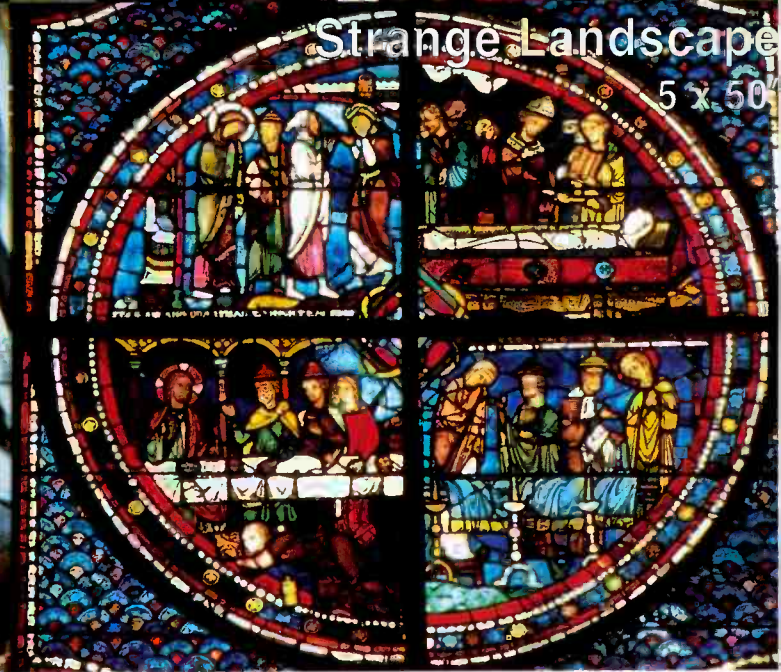
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From Market To Market

The story of Canada's documentary specialist Great North reveals you don't need to be big, or from a big city, to be a producer/distributor with an expanding slate and a worldwide network of contacts. Karen Murray reports

From Spirit to Spirit:
Co-produced by
Great North with
partners in Sweden,
Australia and New
Zealand

Alberta-based Great North Productions represents part of a growing tide of regional production activity in Canada. The majority of entertainment industry activity still emanates from the country's main production arteries in Toronto, Vancouver and Montreal. But now the wave of domestic production has overflowed into other cities. And Great North is at the forefront of that surge.

Last year, the company experienced some significant milestones in its evolution. Among the highlights were deals with Nelvana to co-produce a 13-part tv series, *Jake and the Kid*, and several co-productions with Toronto-based Atlantis Films, including the drama series *Destiny Ridge*. As well, Atlantis purchased a 20% stake in Great North.

Company founder Andy Thomson

said the infusion from Atlantis signalled a major turning-point. The partnership sprang from a 12-year association when the two companies worked together on many projects. Atlantis president Michael MacMillan now sits on Great North's board of directors.

"The value of ideas he (MacMillan) drops on the table at board meetings far outweighs what Atlantis put in (financial-



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ly). It has had an incredible impact on what we do and how we do it," said Thomson. Thomson maintained a 60% stake in the company, shared equally with co-owner Patricia Phillips. The remaining 20% is divided among several investors.

Production budgets for 1994 at Great North totalled U.S.\$5 million, a substantial increase from the less than \$1.4 million reported in 1990. That total is expected to take another leap in 1995, rising to \$7 million.

Great North has more than 40 projects in development, including a four-hour dramatic mini-series, *The Voyage of the Naparima*, that focuses on the Irish immigration to Canada after the Great Famine of 1847; one-hour documentaries on St Patrick and Ray Bradbury; *Men Without Legs*, examining the crisis in policing; and a study of the ominous side of the computer revolution, *Cybercrime*. That's a fairly weighty production slate for a company that hails from a province where the population of 2.7 million is less than one-tenth of Canada's total.

Revenues for the company's distribution arm, Great North Releasing, are equally impressive. Figures for 1994 indicate revenues have quadrupled to \$0.9 million. Revenues for 1995 are estimated to top \$1.4 million - money is generated solely from documentary programming.

The catalog for Great North Releasing at Mip will contain close to 400 hours of programming. That's a mammoth leap from the 160 hours offered at the last Mipcom, or the 82 hours of programming which the company distributed at the first Mip market it attended in 1991.

Thomson said the distribution catalog is due to the creation of Lifescape Television - a subsidiary of Great North Releasing - which will exclusively distribute lifestyle programming, such as cooking, travel and fishing shows. "We think it's going to be wildly successful. We think there's a huge market (for lifestyle programming) and it's amazing to see how it (the distribution company) has really turned the corner," he said.

Ironically, the company was born out of a happy accident in 1987, when Thomson was hired to produce the documentary film *In Search of the Dragon*, a China-Canada co-production. (The 96-minute documentary has since been sold to more than 30 countries.). He initially established Great North (with then partner Tom Radford) because the various funding agencies wanted the production to be done in Alberta. Thomson relocat-

ed from Toronto where he had been working since 1985. Prior to that, he had spent close to two decades working for the National Film Board.

Thomson recalled that there was no strategic plan to establish a western Canadian company. It was merely a function of necessity to get *In Search of the Dragon* made. "I didn't see it as a permanent move. But it became clear that it was the place to be."

He quickly discovered there was a growing appetite for regional production. Federal broadcast watchdog, the

"We don't want to do features, Imax, corporate videos or commercials. We want to do quality television programming with international appeal" - Thomson

Canadian Radio-Television and Telecommunications Commission, and federal funder, Telefilm Canada, were being pressured to correct imbalances in how funds were being distributed.

The resounding complaint was that the lion's share of funding was being directed to major centres. As a result, it became both fashionable and feasible for broadcasters and producers in production meccas, like Toronto and Vancouver, to link up with regional producers.

"By coincidence, at the time, there really was a strong interest in regionalizing Canadian production and all of a sudden we found ourselves to be quite in demand," said Thomson.

His NFB experience prepared him for the task of building a company in the private sector. Working for the public producer he had cut his teeth in the production industry and built a network of connections. The last three years he spent at the NFB, he worked as an executive producer of the drama studio in Montreal. That meant he had spent much of his time establishing relationships with potential co-production partners. It also gave him the well-rounded experience that was needed to build a regional production company that was not limited to one genre of production.

After completing its first documentary project, the company's next three projects were dramas. And Great North has continued to produce both genres. "We didn't want to be pigeon-holed. We were focused much differently than we are today. Our original mission statement was to produce western Canadian programming in any format," said Thomson.

"Today, we're focused on producing tv programming, period. We don't want to do features, Imax, corporate videos or commercials. We want to do quality television programming with international appeal." He added: "We don't care that the stuff we do is firmly rooted in western Canada to the same degree that we used to."


The change in mindset stems from Thomson's experience at international television markets. He evolved from a national sensibility into an international sensibility. He cited the first Mip market he attended in April 1991 as one of the company's most significant turning points. He noted that the first Mip trek came after he had badgered Atlantis Releasing president Ted Riley to try to distribute documentaries.

Riley said he suggested Great North set up its own distribution company. "Atlantis has no interest (in distributing documentaries) and I knew there was a crying need for documentary distributors in Canada. Andy has taken to it like a fish to water, so much so that I thought into the company."

But Thomson remembered at that first Mip, the company was anything but an overnight success. He found the flurry of activity more than overwhelming. He said it seemed as if no one was interested in talking to them, every film he'd ever wanted to make had already been produced, and by the third day, he was ready to throw in the towel.

Atlantis partner Peter Sussman noticed the downtrodden Thomson and came over and told him not to get discouraged. He explained that his first experience at Mip would be invaluable for sowing seeds for future deal-making. Within moments, Thomson said people began turning up and buying product.

He has since discovered Sussman was also right about the value of networking at the market. "The opportunities are there. As a focused documentary distributor, we end up developing relationships with documentary end-users around the world. Most of the stuff we do now is stuff that's being done to fill a demand."

Thomson said the future game plan is to develop more permanent relationships with broadcasters, such as Discovery Channel in the U.S., Ireland's RTE and ARD in Germany. "I have moved a lot from being a pain-in-the-ass flag-waving Canadian to, I guess, more of an understanding that we are in a global marketplace. If you look at broader issues you realize films don't have to be wrapped up in the Maple Leaf." 

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Peak Practices

TBI's fourth primetime survey, based on responses from 80 broadcasters in 40 countries, provides some clues about what program genres get the largest primetime audiences around the world, and – most importantly for program buyers and sellers – the role that imported and domestic programming play in broadcasters' schedules, both inside and outside primetime.

Compiled by Chris Dziadul and Jane Birch

Some 80 broadcasters in 40 countries contributed to TBI's fourth primetime programming survey, which gives a global perspective on what switches viewers on the world over.

It has been well documented that local programs tend to score higher in the ratings than imports, which is why it is tough for many program-sellers to break into overseas primetime schedules.

Broadcasters seem keen to test the formula, which is bad news for international distributors. Germany's ZDF has seen its percentage of imported output tumble from 53.8% to under 16% in just a year. As was evidenced in the 1994 survey, several broadcasters in the booming Far Eastern tv markets, including the Philippines' ABS/CBN, Indonesia's SCTV and Malaysia's TV3, are increasingly turning to domestic productions, while India's state and private tv are both dominated by local product.

Indeed, one in three of almost 40 countries surveyed – ranging from the U.S. and Brazil in the Americas, France, Ireland and Greece in Europe and India, Japan and Taiwan in Asia – appear to be virtually impenetrable for foreign producers.

There are still some oases for sellers, though. Now that it's off the world's blacklist, South Africa welcomes imports. Pay-tv network M-Net, as a film-based service, relies heavily on Hollywood product.

Eastern Europe also has an open-door policy for foreign productions with films and imported series doing well on Czech TV, on Polsat in Poland, and also on RTR in Russia, where the second strongest primetime show is the glossy U.S. soap

Santa Barbara.

The dependence on imports leaves a niche for broadcasters to pitch domestic programs. Nova, the fledgling national commercial broadcaster of the Czech Republic, took a gamble stripping locally-produced movies in primetime and was suitably rewarded with Czech films occupying all of its top five primetime slots. Getting the right balance of programs is equally important. Nova's average market share is now 70%, a reflection of a schedule that provides a window for local shows but also recognizes the almost universal appeal of some U.S. product.

Australia's Nine Network, Malaysia's TV3 and Greece's two leading private networks Antenna TV and Mega Channel all rely on domestic product to fill this crucial slot.

Although most genres are represented in primetime, some are more popular than others. News programs, for instance, now top the schedules of several public broadcasters including ARD, Danmarks Radio and Russia's RTR.

News and current affairs is not a universal favorite. The genre gets only one mention – the evening news on Globo TV – in any of the four Latin American channels surveyed and in the UK is only represented by Channel 4's documentary series *Cutting Edge*.

There are primetime favorites, though. Drama figures strongly in primetime on many channels, including the BBC in the UK, Australia's Seven Network and on both KBS and MBC in South Korea. Conversely, music-based programs figure in the top five primetime slots of only a handful of channels in the survey, with

only one – the highly successful Indian commercial broadcaster Zee TV – rating music as its top program.

Comedy meanwhile scores the highest ratings in seven countries – including the U.S. (ABC and NBC), Philippines (ABS/CBN) and Belgium (BRTN). Humor doesn't travel well generally, though, although U.S. shows such as *Roseanne*, *Frasier* and *Home Improvement* have been successful in English-speaking countries and the wordless British series *Mr Bean* crops up in several places. *Home Improvement* features second in Australia's Seven Network top 5, and *Frasier* is the second favorite primetime show on South Africa's SABC (TV1).

Sports programming is a definite ratings winner, topping the pile in the Netherlands (RTL 5) and also featuring in the top five of Chile (Canal 13) and Finland (YLE).

Gameshows are also a popular genre, capturing the number one spot of Chile's Canal 13, Finland's YLE, and also featuring in the top 5 of a number of broadcasters, including Greece's ERT, India's Zee TV, Belgium's RTBF, Ireland's RTE and Japan's NHK and NTV.

Gameshows also make ideal format exports. *Don't Forget Your Toothbrush* debuted to mixed reviews on the U.K.'s Channel 4, but the format has been sold successfully the world over, enabling the show to occupy Danmarks Radio's second primetime spot.

A show that can capture the imagination can cross any border. Sci-fi series the *X-Files*, for instance, tops the bill on Spain's Tele 5, South Africa's SABC and is the only imported show to feature in the top five of TV2 in Norway. ■

TBI PRIMETIME SURVEY 95

Country	Channel	Hrs/Wk	Domestic Programs (%)	Imported Programs (%)	Top 5 Primetime Shows	Origin
Argentina	Artear - Canal 13	5 (pr/time)	65	35	Polladron (drama) Son de Diez (comedy) Los Machos (comedy) Gerente de Familia (comedy) Nueve Lunas (drama)	D D D D D
	Telefe - Canal 11	90	70	30	Hola Susana (entertainment) Grand E Pa (comedy) Un Hermano es un Hermano (comedy) Perla Negra (series) Micuñado (comedy)	D D D D D
Australia	ABC	168	58 (6-12pm)	42 (6-12pm)	Gay & Lesbian Mardi Gras (special)	D
					Budget 93	D
					Mr Bean (comedy)	I
					Mother & Son	D
Keeping Up Appearances (comedy)					I	
SBS	100	30	70	60 Seconds that Shook the World (documentary)	I	
				Mediterraneo (film)	I	
				Hitler's Secret Weapon (documentary)	I	
				SBS TV World News (news)	D	
Seven Network	168	52	48	Out of the Past (documentary)	I	
				Lois & Clark (drama)	I	
				Home Improvement (comedy)	I	
				Blue Heelers (drama)	D	
Nine Network	168	59	41	Fire (drama)	D	
				World's Greatest TV Commercials	D	
				Just Kidding (comedy)	D	
				60 Minutes (current affairs)	D	
Austria	ÖRF	2x168	42	58	Funnest Home Videos	D
					Getaway (infotainment)	D
					Looking Good (infotainment)	D
					Zeit im Bild (news)	D
					Bundesland (regional news)	D
Belgium	BRTN	63 (TV1) 47 (TV2)	60	40	Seitenblicke (current affairs)	D
					Argumente (talk show)	D
					Sportarena (sports)	D
					De Kampioenen (comedy)	D
					De Droomfabriek (light entertainment)	D
Belgium	RTBF	78 (RTBF1) 47 (RTBF2)	55	45	Onvoorziene Omstandigheden (light entertainment)	D
					Niet voor publicatie (series)	D
					Derrick (series)	I
					Journal Televisé (news)	D/I
					Double Sept (gameshow)	D
Brazil	Globo TV	145 (appx)	n/a	n/a	Ecran Témoin (talkshow)	D/I
					Bon Week-End (variety)	D
					Jardin Extraordinaire (documentary)	D/I
					Quatro Por Quatro (telenovela)	D
					Evening News (news)	D
Canada	CBC (French net)	126	88 (pr/time)	12 (pr/time)	Patria Minha (telenovela)	D
					Tropicaliente (telenovela)	D
					Fantastico (variety)	D
					Petite Vie - IA	D
	CTV	43.5	68	32	Scoop (series)	D
					A Nous Deux (series)	D
					Héritiers Duval	D
					Juste Pour Rire (comedy)	D
Chile	Canal 13	110 (appx)	38.2 (av)	61.8 (av)	E.R. (drama)	I
					America's Funniest Home Videos (comedy)	I
					Roseanne (comedy)	I
					Due South (action/comedy)	D
Chile	Canal 13	110 (appx)	38.2 (av)	61.8 (av)	CTV News (national newscast)	D
					Gran Juego de la Oca (gameshow)	I
					Football (sports)	I
					Testigo en Video	I
Chile	Canal 13	110 (appx)	38.2 (av)	61.8 (av)	Venga Conmigo	D
					Domingo en la Noche (music/special)	I

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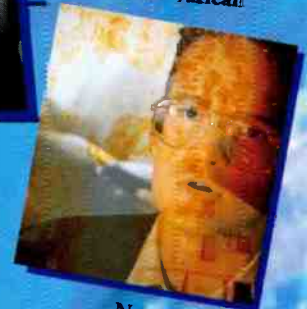
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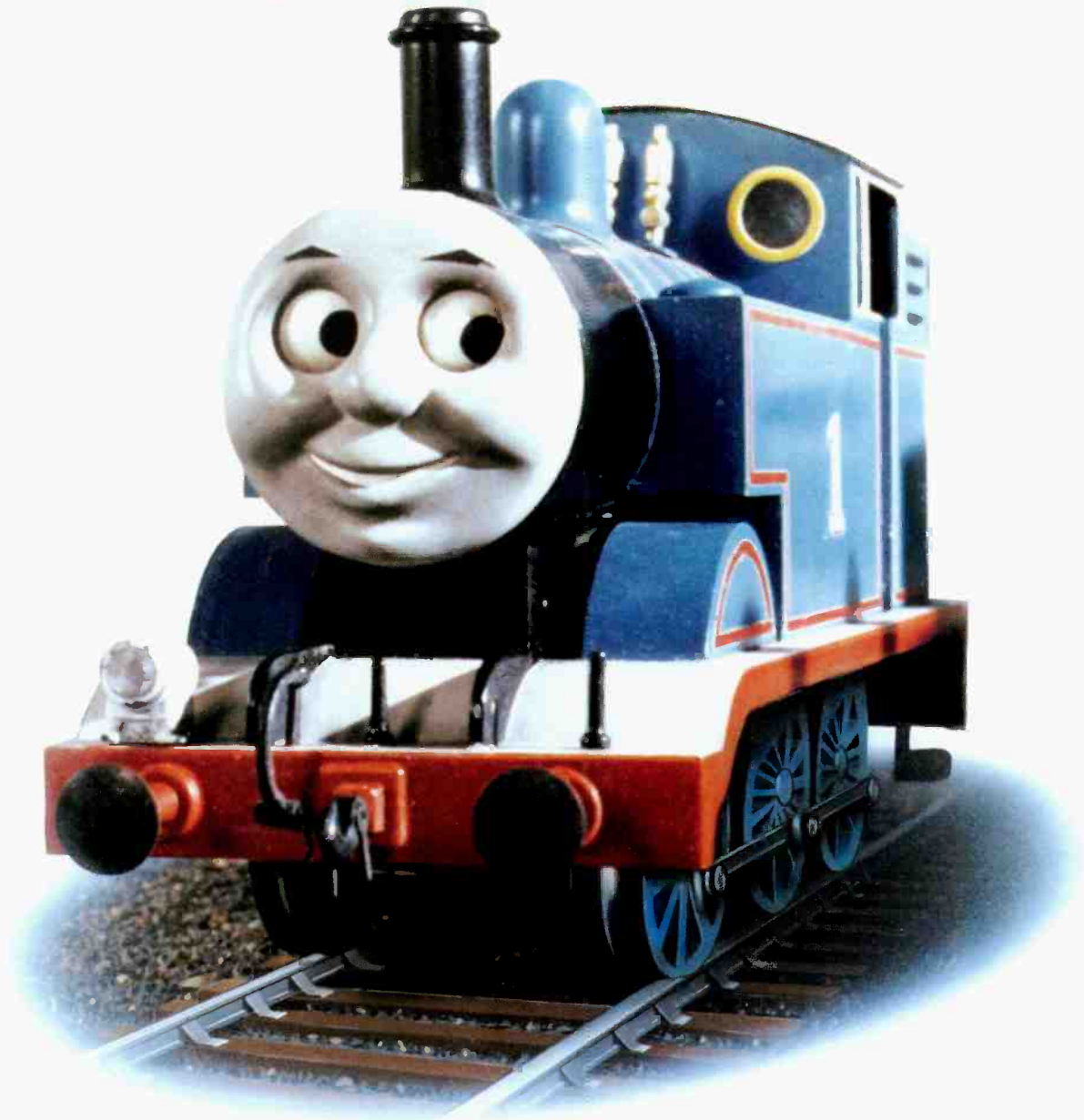
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TBI PRIMETIME SURVEY 95

Country	Channel	Hrs/Wk	Domestic Programs (%)	Imported Programs (%)	Top 5 Primetime Shows	Origin
Czech Republic	Czech TV	289	69	31	Le Petit Baigneur (film) Return to Eden (series) Great Waldo Pepper (film) Joachim (film/comedy) Nurses (film/comedy)	I I I D D
	Nova	134.19	47	53	The Emperor's Baker (film) Elementary School (film) The Inheritance (film) With You The World Is Fun (film) The End of Poets In Bohemia (film)	D D D D D
Denmark	Danmarks Radio	81	61	39	Newshour (news) Don't Forget Your Toothbrush (entertainment) When Was That (gameshow) Case Solved (reality) SportNews (sports)	D D D D D
	TV2	75-80	25	75	Seasons with the Royal Family (special) Jacob and Lotte in... (light entertainment) Monday's Opportunity (gameshow) The Reporters' Team (documentary) The Lift on 2 (infotainment)	I I I I I
	Kanal 2	168	26.12	73.88	Kanal 2 Rapporten (news) Glamour (series) Kanal 2's Jubilaeumsshow (special) Skjult Kamera (comedy) Cosby & Co (comedy)	D I D D I
Finland	YLE	98 (YLE1) 63 (YLE2)	57.5	42.5	This is Your Life (gameshow) News and Weather (news) Sports Review (sports) Finnish Book of Records (entertainment) Police TV (reality)	D D D D D
	MTV	93	55.6	44.4	Clean White Linen (series) Dating Game (entertainment) Keep Your Head Cool (comedy) Bold and Beautiful (series) Nine O'Clock News (news)	D D D I D
France	TF1	168	70	30	TV Movies Movies Shows - Entertainment Sports Reality Shows	D D/I D D D
	France 3	132 (appx)	76.5 (1)	23.5	Trading Places (film) Miss France (variety/special) Finale: Question Pour Un Champion (game show) Olympic Games Ice Dance (Sport) Cobra (film)	I D D D I
	Arte	70	30	70	Cinema on Mondays Sunday Theme Evening Transit (magazine) History documentary Fiction on Friday	I I D I I
Germany	ARD	130 (appx)	80	20	Tagesschau (news) Karneval in Köln (entertainment) Verskehen sie spap? (drama) Tatort (drama) Geld oder Liebe	D D D D D
	ZDF	105	84.35	15.65	Soccer USA '94 (sports) Heute (news) Wetten, dass (entertainment) Mainz bleibt Mainz (entertainment) Ein Fall für Zwei (serial)	D D D D D
	RTL Television	168	33(2)	38	100.000 DM Show Traumhochzeit Wie Bitte?! Explosiv - Das Magazin Dr Stefan Frank	D D D D D

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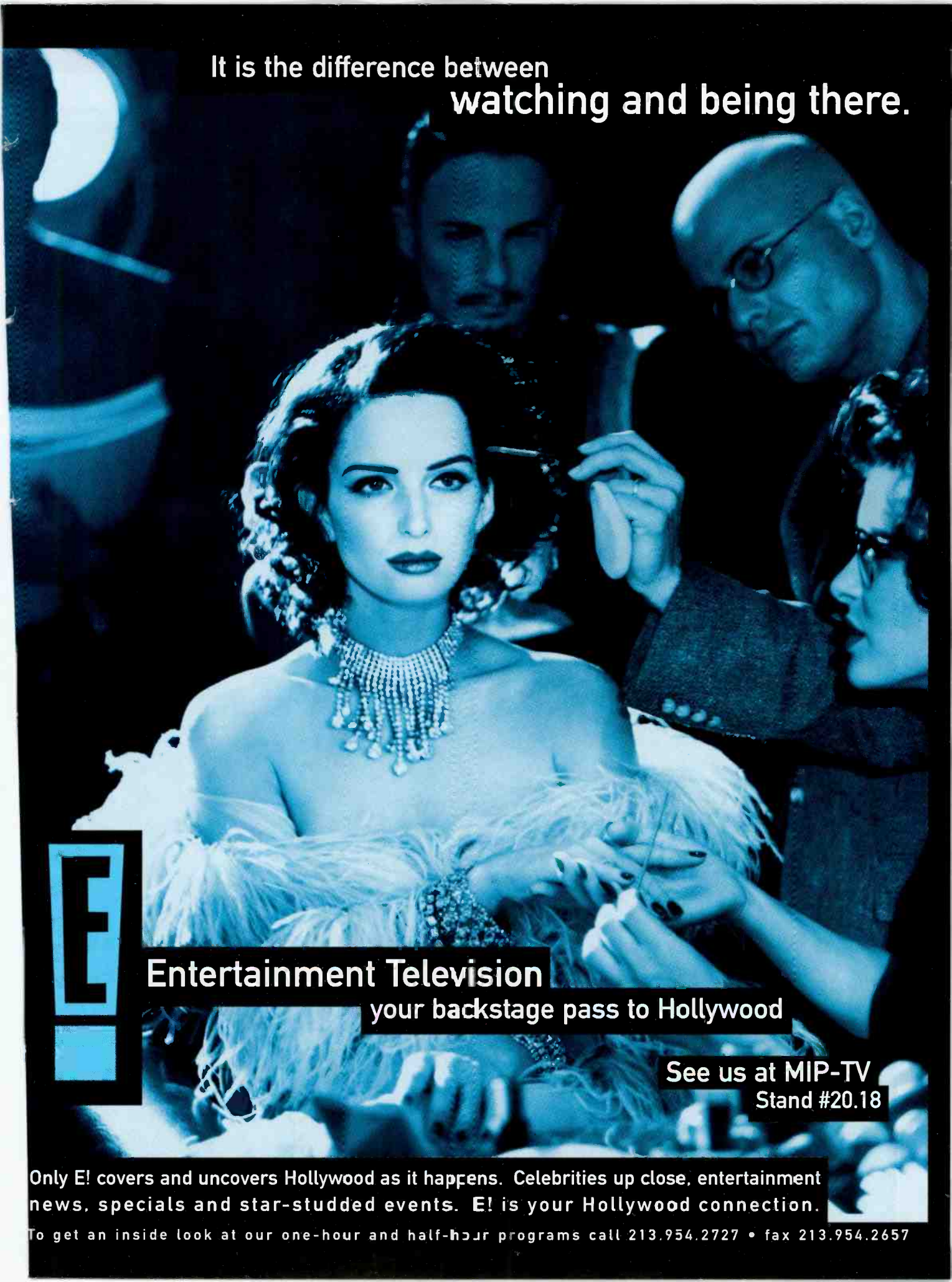
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TBI PRIMETIME SURVEY 95

Country	Channel	Hrs/Wk	Domestic Programs (%)	Imported Programs (%)	Top 5 Primetime Shows	Origin
	RTL 2	168	n/a	n/a	Dr Quinn - Medicine Woman (serial)	I
					World Wrestling Federation (sports)	I
					Die Reportage (documentary)	D
					Bitte Lächeln (light entertainment)	D
					Due South (serial)	I
	Pro 7	168	35	65	Doc Hollywood (feature film)	I
					Hell on Earth	I
					Viper	I
					Pro Sieben - News	D
					Highlander II (film)	I
Greece	ERT	98 (ET1) 98 (ET2) 77 (ET3)	n/a	n/a	Never On Sunday (film)	D
					Melina Merkouri - Portrait (documentary)	D
					Games Without Frontiers (gameshow)	D
					The Man With The Carnation (film)	D
					Patras Carnival (light entertainment)	D
	Antenna TV	168	60	40	Harry Klyn show	D
					Fantastico (variety)	D
					Them and Us (comedy)	D
					Pater Emon (comedy)	D
					Ciao Antenna (variety)	D
	Mega Channel	168	57.4	42.5	Love Sorry (sitcom)	D
					Bravo (entertainment)	D
Alla Kolpa (entertainment)					D	
Deka Mikri Mitsl (comedy)					D	
Beverly Hills 90210 (series)					I	
Hong Kong	ATV (World)	98	27.3	72.7	Terminator 2 - Judgement Day (film)	I
					ET - The Extra Terrestrial (film)	I
					The Longest Day (film)	I
					Hard Boiled	D
					Patton	I
	ATV (Home)	146	62	36	Hong Kong Today (current affairs)	D
					Sat/Sun Movies (film)	D
					Cruel Lover (drama)	D
					Oshin (drama)	I
					Has It All (entertainment)	D
	TVB (Jade)	167	65	35	Miss Hong Kong Pageant 1994 - Final (special)	D
					Fight Back to School II	D
					Miss Hong Kong Pageant 1994 - Semi Final (special)	D
					Tung Wah Charity Show	D
					Jade Solid Gold Best 10 Award Presentation 1993	D
	TVB (Pearl)	125	38.2	61.8	Home Alone 2: Lost in New York (film)	I
Basic Instinct (film)					I	
Total Recall (film)					I	
The Spy Who Loved Me (film)					I	
Double Impact (film)					I	
Hungary	MTV	190	61	24(3)	Neighbours (series)	D
					Dallas (series)	I
					Friderikusz-Show	D
					Honey, I Shrunk the Kids (film)	I
					Northern Exposure (series)	I
India	Doordarshan (DD1)	1021	96	4	Hindi Feature Films	D
					Chandrakanta (Hindi serial)	D
					Song & Dance Sequences from Hindi Films	D
					Tehkikat (serial)	D
					Alif Laila - based on Arabian Nights (Hindi serial)	D
	Doordarshan (DD2)	n/a	n/a	n/a	Shri Krishna (Hindi serial)	D
					Junoon - Obsession (Hindi serial)	D
					Imtihaan - Test (Hindi serial)	D
					Superhit Muquabla (gameshow)	D
					Kismet - Fate (Hindi serial)	D
	Zee TV	100 (appx)	95.5	4.5	Top Ten (music)	D
					Antakshari (gameshow)	D
					Tara (serial)	D
					Banegi Apni Baat (serial)	D
					Campus (serial)	D

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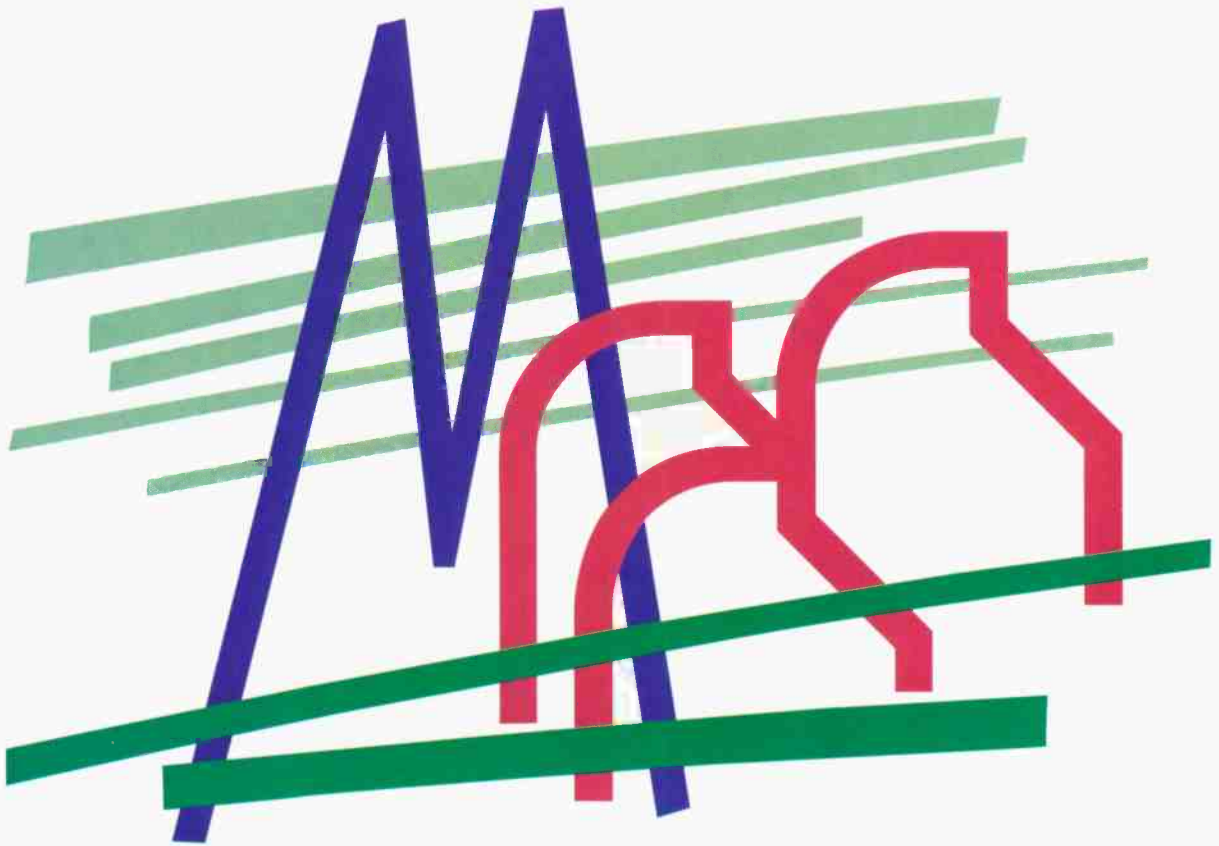
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TBI PRIMETIME SURVEY 95

Country	Channel	Hrs/Wk	Domestic Programs (%)	Imported Programs (%)	Top 5 Primetime Shows	Origin
Indonesia	SCTV	145	45	55	White Snake Legend	I
					Deru Debu	D
					Movie of the Week	D/I
					Opera Sabun Colek	D
					Project P	D
Ireland	RTE	193	49	51	Glenroe (series)	D
					Fair City (series)	D
					Late Late Show (talkshow)	D
					Winning Streak (gameshow)	D
					Kenny Live (talkshow)	D
Italy	RTI Spa	504	37.3 (pr/time)	62.1 (pr/time)	Champagne	D
					Paperissima	D
					Stranamore (reality)	I
					Striscia La Notizia	D
					Scherzi A Parte (variety)	D
Japan	NHK	266 (Terr) 332 (DBS)	83.9 (Terr) 40 (DBS)	6.1 (Terr) 60 (DBS)	Evening News at Seven (news)	D
					Yoshimune (drama)	D
					Japan Wants to Know (gameshow)	D
					Animal World (wildlife/natural history)	D
					NHK Special (documentary)	D
	TBS	152	92.9	7.1	Tokyo Friend Park II By Hiroshi Sekiguchi (gameshow)	D
					Broadcaster (weekly news show)	D
					Kamisan No Waruguchi II (drama)	D
					Mito Koumon (drama)	D
					Kamioka Ryutaro Ga Zubari (talkshow)	D
	Fuji TV	160 (approx)	95	5	For You (drama)	D
					Dragon Ball Z (animation)	D
					DownTown No Gottsu Ee Kanji (comedy)	D
					Kiteretsu Daihyakka (animation)	D
					Naruhodo The World (variety)	D
	NTV	151	99	1	Toukou-Tokuhou Oukoku (variety)	D
					Magical Zuno Power (gameshow)	D
					Waratte Yoroshiku (variety)	D
					Sekai Marumie Tokusobu (variety)	D
					Kinyou Roadshow (film)	D/I
TV Asahi	158	96	4	Comedy	D	
				Animation	D	
				Pop-music Show	D	
				Movie	I	
				News Show	D	
Korea (South)	KBS-TV 1	91.5	88.6	11.4	Missing You (drama)	D
					Jujubee Tree Bears Love (drama)	D
					Rescue 119 (reality)	D
					Class of Love (drama)	D
					Among People (documentary)	D
	KBS-TV 2	91.5	n/a	n/a	Blessed with Daughters (drama)	D
					Story of Pochongchun (drama)	D
					Han Myong Hoe (drama)	D
					Scene of Life (reality)	D
					Pops Top Ten (music)	D
	MBC	91.5	89	11	Wonderful Today (comedy)	D
					Police Story	D
					A Son's Lover (drama)	D
					Weekend Movie (film)	I
					Farm Diary (drama)	D
Malaysia	TV3	126	60	40	Kisah Benar (docu/drama)	D
					Pop Kuiz (music/gameshow)	D
					Pi Mai Pi Mai Tang Tu (comedy)	D
					Cereka Rama (tv movie)	D
					Cili Padi	D
Netherlands	NOS	229	72	28	Journal (news)	D
					Studio Sport (sports)	D
					Taxi (entertainment)	D
					Love Letters (gameshow)	D
					Oppassen (comedy)	D



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TBI PRIMETIME SURVEY 95

Country	Channel	Hrs/Wk	Domestic Programs (%)	Imported Programs (%)	Top 5 Primetime Shows	Origin
	RTL4	168	60	40	Bij Van Duin (entertainment)	D
					Sterrenplaybackshow (entertainment)	D
					Goede Tijden, Slechte Tijden (series)	D
					Vrouwenvleugel (drama)	D
					De Vakantleman (entertainment)	D
	RTL5	58	45	55	Holland v France Soccer (sports)	D
					Dead on Arrival (film)	I
					RTL Nieuws (current affairs)	D
					06.11 Weekend (reality)	D
					Breekijzer (reality)	D
New Zealand	TVNZ	129.35 (TV1) 168 (TV2)	26.3	73.7	Shortland Street (series)	D
					Holmes (news/current affairs)	D
					One Network News (news)	D
					Hypnotic World of Paul McKenna (entertainment)	I
					Blue Heelers (drama)	I
Norway	NRK	67	57	43	Rondo (entertainment)	D
					Mr Bean (comedy)	I
					Aeres Den Som Aeresbøe (infotainment)	D
					Norge Rundt (documentary)	D
					Refleks (documentary)	D
	TV2	100	52	48	X-Files (series)	I
					Mot i Brøstet (comedy)	D
					Riksørn	D
					Holmgang (talkshow)	D
					Lønning	D
	TVNorge	75 (appx)	40	60	Reisesjekken (entertainment)	D
					Super Quick (entertainment)	D
					Casino (entertainment)	D
					Wesenstund (entertainment)	D
					Reisesjekken (entertainment)	D
Philippines	ABS/CBN	134.5	85	15	Home Along da Riles (comedy)	D
					Regal Presents (film)	D
					Maala-ala Mo Kaya (drama)	D
					X-Men (animation)	I
					Power Rangers (action/series)	I
Poland	TVP	141 (TVP1) 121 (TVP2) 125 (TV Pol)	67.5	32.5	Feature Films & Series (eg. Jake and the Fat Man)	I
					Polish Zoo (entertainment)	D
					Blind Date (gameshow)	D
					Wheel of Fortune (gameshow)	D
					Charm of the Couples (gameshow)	D
	Polsat	112	35	65	Robocop (film)	I
					Wings (comedy)	I
					Love Boat (entertainment)	I
					Neighbours (series)	I
					Disco Relax (music)	D
Portugal	RTPi	80	100	n/a	Telejornal (news)	D
					Football (sports)	D
					Telenovela (series)	D
					Frou-Frou (talkshow)	D
					Nico D'Obra (comedy)	D
	TVI	100	40	60	Amigos Para Sempre (reality)	D
					Traços (comedy)	D
					Preco Da Paixas (series)	I
					Big Cinema	I
					Football (sports)	D
Russia	RTR	119	n/a	n/a	VESTI (news)	D
					Santa Barbara (series)	I
					Detective on Mondays (serial)	I
					You are a producer to yourself (entertainment)	D
					Maski Show	D
Singapore	Cable Vision	168	n/a	100	Drama	I
					Movie	I
					Variety	I
					Comedy	I
					News	I

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TBI PRIMETIME SURVEY 95

Country	Channel	Hrs/Wk	Domestic Programs (%)	Imported Programs (%)	Top 5 Primetime Shows	Origin
	TV Twelve	58.5	13	77	Sandiwara (Malay drama) English Premier League (sports) Asian Cinema (Mandarin film) Hiburan Minggu Ini (Malay film) Earthvisions (natural history/documentary)	D I I D I
Slovakia	STV	112 (STV1) 55 (STV2)	66 (STV1) 48.6 (STV2)	34 (SVT1) 51.4 (STV2)	Gala-Gala (talkshow) Matlock (series) Mayor of Casterbridge (drama) Globetrotter (gameshow) Repete (music)	D I I D D
South Africa	SABC (TV1)	168	65	35	X-Files (series) Frasier (comedy) News Jake and the Fat Man (series) Nanny	I I D I I
	M-Net	140.5	n/a	n/a	Narrow Margin (feature film) Dragon: The Bruce Lee Story (feature film) Last Action Hero (feature film) Teenage Mutant Ninja Turtles (entertainment) Visions of Murder (film/thriller)	I I I I I
Spain	Antena 3	168	51	49	Famacia de Guardia (series) Lo que Necesitas es el Amor (entertainment) Quién DE la Vez? (series) El Gran Juego de la Oca (gameshow) Hermanos de Leche (series)	D D D D D
	Tele 5	150	40	60	X Files (series) Las Noticias (news) Casa Para Dos (comedy) Cine El Trampolin (music/gameshow)	I D D I D
Sweden	SVT1	167.7(4)	68	32	Rederiet (series) Snoken (light entertainment) Mycket Nöje (entertainment) Lilla Magasinet (mixed magazine) Aktuellt (news & economic news)	D D D D D
	SVT2	n/a	n/a	n/a	På Spåret (variety) Rapport (news) Fleksnes fataliteter (comedy) Regionala Nyheter (regional news) Sportspegeln (sports)	D D I D D
	TV4	110	60	40	Fort Boyard (entertainment) Three Crowns (series) Dr Quinn - Medicine Woman (series) Bingolotto (gameshow) Reported Missing (series)	D D I D D
	TV1000	168	10	90	Swedish Movies Box Office Hits (US) Melrose Place Hilbur & Co Knockout Live!	D I I D I
Taiwan	CTS	146	84 (appx)	16 (appx)	Always Victory (variety) Tomb Figures of the Chin Dynasty (drama) Pop Songs Count Down (variety) Funny Stars Hit the Earth (variety) The Big Screen (films)	D D D D I
	Taiwan TV Ent	137	82	18	Primetime Drama Series Newscast Drama Series in Taiwanese Variety Show Drama Singles	D D D D D
Thailand	Bangkok Ent Co	140	81.9	18.1	Pao Boon Jin Si San Ban Teung Kartoon Hansa Muean Khon La Fark Fa Mea Noi	I D I D D

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TBI PRIMETIME SURVEY 95

Country	Channel	Hrs/Wk	Domestic Programs (%)	Imported Programs (%)	Top 5 Primetime Shows	Origin
	IBC	168	10	90	Dynasty (series) Sonic the Hedgehog (animation) Conan the Adventurer (animation) Time Trax (serial) Top Cops (serial)	I I I I I
Turkey	TRT1	168	72.6	27.4	Gülsen Abi (drama/comedy) Aksama Dogru (current affairs) Konser (music) Ates Hatti (new program) Riziko	D D D D D
	TRT-Int	130	98.7	1.3	Merhaba Avrupa (current affairs) Aksama Dogru (current affairs) Yasasin Sanat (arts) Tur 95 (gameshow) Gezelim Görelim (current affairs)	D D D D D
	AKS (Show TV)	140	45	55	Arena (news/reality) Sehnaz Tango (serial) 32 Co un (news) Show da Show (entertainment) Kabare (comedy)	D D D D D
UK	BBC1	126	73	27	Eastenders (drama) Neighbours (drama) Casualty (drama) National Lottery Live (entertainment) Antiques Roadshow (light entertainment)	D I D D D
	BBC2	125	73	27	Jeremy Clarkson's Motor World (light entertainment) The X-Files (drama) Bottom (comedy) Geoff Hamilton's Gardens (light entertainment) Steptoe and Son (vintage comedy)	D I D D D
	ITV	168	n/a	n/a	Coronation Street (series) Heartbeat (drama) You've Been Framed (light entertainment) London's Burning (drama) Emmerdale (drama)	D D D D D
	Channel 4	105	52	48	Brookside (series) Cutting Edge (documentary) Countdown (gameshow) Roseanne (comedy) The Real Holiday Show (light entertainment)	D D D I D
U.S.	ABC	22 (pr/time)	100	n/a	Home Improvement (comedy) Grace Under Fire (comedy) NFL Monday Night Football (sports) NYPD Blue (series) Roseanne (comedy)	D D D D D
	NBC	22 (pr/time)	100	n/a	Seinfeld (comedy) ER (series) Mad About You (comedy) Madman Of The People (series) Frasier (comedy)	D D D D D

- (1) Not including local/regional broadcasting figures
- (2) Program percentages exclude 29% information and sports.
- (3) Program percentages domestic figure includes: Repeats 11.5%, Commercials 3.5%
- (4) Program hours includes regional news

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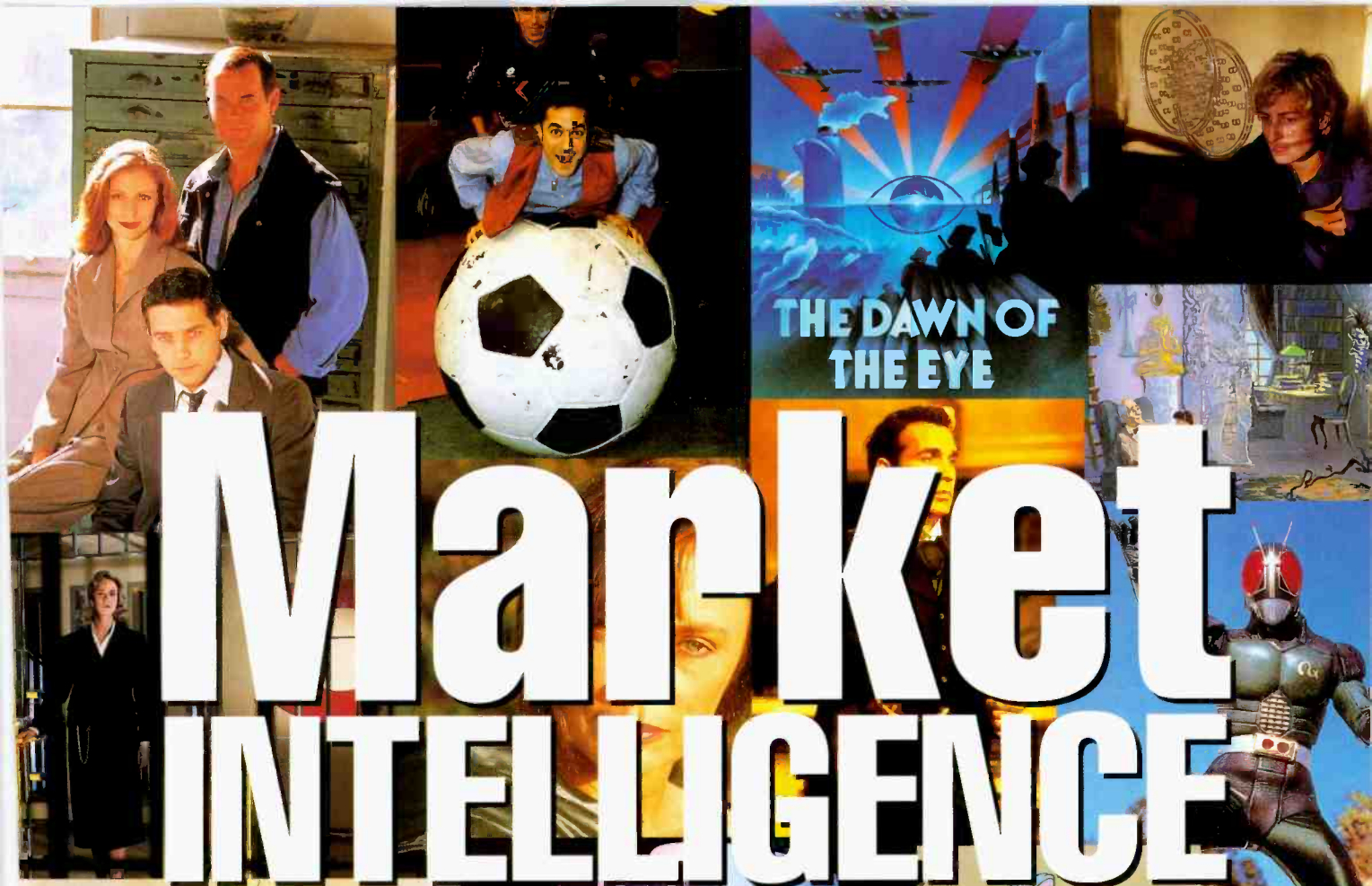
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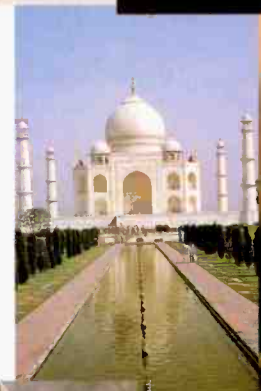
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MARKET NEWS

● Chicago independent **CineMusica** is producing the Cape Town Jazz and Heritage Festival, celebrating the first year of democracy in the Republic of South Africa. The five-day event, which starts Wednesday, April 26 through April 30, will feature a mixture of local and international artists including Branford Marsalis, Herbie Hancock, Buddy Guy and Hugh Masakela.

● **Itel** is launching a children's animation catalog of over 35 hours of programs. The UK-based distributor, jointly owned by HBO and MAI Broadcasting, has built up most of its kids catalog over the past year. Latest addition is the output of Rabbit Ears, the U.S. family entertainment producer which Itel started handling at Monte Carlo under a five-year deal. Also on offer are new series from British studio Cosgrove Hall, HBO family series *Happily Ever After*, and *The Wind In The Willows* and *The Snow Queen* from Martin Gates Productions.

● *The Sea Dogs* are launching their beat-up old freighter the Jolly Rover in search of worldwide sales at Mip. Co-produced by France's *Caméras Continentales* and Canada's **Ciné Groupe**, which is handling worldwide sales, *Sea Dogs* stands at 13 half-hour episodes action-packed with swashbuckling pirates, phantom ships, sea devils and wild jungle beasts.

● **Discovery Enterprises Worldwide** is launching *Carrier*:

Fortress At Sea, the first of a slate of seven films from the U.S. cable network in 1995. The two-hour documentary, narrated by Martin Sheen, was filmed on board the U.S. Navy vessel U.S.S. Carl Vinson.

Hip And Sexy Pitch For Cop Show

SOUTHERN Star will unveil a strong line-up of animation, tv movies, action drama and documentaries at Mip TV.

Known as Australia's quiet achiever, Southern Star has attracted an impressive stable of producer partners, and this year's slate extends across all three commercial nets as well as the ABC.

Southern Star/Xanadu's award-winning series *Police Rescue*, a co-production with the BBC and the ABC, has transformed actor Gary Sweet into a national star. "We've used action to illuminate character," said Xanadu's Sandra Levy. Sweet has continued his links with SS/Xanadu as the unruly Sergeant Cody in a six-part series for the Seven Network. "Cody – both the program and the character – is very hip, sexy, urban and gritty," said Levy.

The Nine Network has commissioned *Water Rats*, another police series that takes its name from Sydney's water cops whose beat is the harbour. *Water Rats* is produced by Hal McElroy/SS who will also pre-sell *Birdie*, a series of three telemovies starring Sigrid Thornton as a private detective.

Since 1973, SS has built up a library of over 3,000 animated series and specials through production and acquisition.



Cody: Sexy, urban and gritty

Sebastien Tests Format Market

MAGIC TV, the production company owned by French tv star Patrick Sebastien, is coming to market for the first time with the aim of securing overseas format sales for some of its most successful French shows.

One of the hottest, *The Big Bluff*, scored a record 70% market share for TF1 in a Saturday night slot, and the format has already sold to the UK and Canada. Like a second show, *Super nanas*, *super mecs*, *The Big Bluff* features tv celebrity contestants while a third, *Super nana*, is a competition open to women between 25 and 35 years of age.

In *Les vieux de la vieille*, two teams of celebrities compete. One team is made up of four men and the other of four women.

Sportrait is a new concept of Sebastien's that has not gone on the air yet. The idea is that sporting personalities rarely open up to journalists. Thus, in this hour-long program one sports personality interviews another about their life and the things they feel strongly about.

Magic TV produces three monthly 90-minute shows on TF1's Saturday evenings that all achieve market shares above 40%.

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● The *Adventure Stories* of children's author Enid Blyton will be filmed in a "multi-million dollar" series co-produced by British independent **Cloud 9** and Luxembourg commercial broadcaster **CLT**. Filming of the 24 x 30 minute series starts in New Zealand, in association with Kotuku Productions, this month. The series will also launch Cloud 9's distribution arm, Cumulus, which will handle the series worldwide except for continental Europe, which will go through CLT Distribution.

● The new drama from British screenwriter Lynda La Plante, creator of *Prime Suspect*, is a gritty series about a female prison governor. Distributed by **Yorkshire Tyne Tees International**, *The*



Governor (above) stars Janet McTeer and is available as a 102 minute film plus five 52-minute episodes or as seven 52-minute episodes. *Paparazzo*, a tv movie starring Nick Berry and Fay Masterson, will also be available at Mip.

● Two new shows from **Portfolio Film & Television** take a light-hearted look at the work of waitresses and the relationship between people and their cars. *Waitress* and *Behind The Wheel* (1 hour) head the Toronto distrib-



utor's slate of documentaries, which is completed by *Resolute Bay Stories*, filmed in a village 1500 kms from the North Pole, and *Longshots*, about six former street kids turned video autobiographers.

Rai Looking For Co-Pro Partners

ITALY'S Rai and its distribution arm Sacis will be represented at Mip by a team of 20, led by Giampaolo Sodano.

A former director of Rai Due, Sodano is president of Sacis and was recently appointed to head the pubcaster's acquisition, production and co-production of fiction. After his appointment, Sodano announced a plan – still to be approved by the Rai board – to invest \$900 million over three years in building up Rai's library. Of this amount, \$320 million will be spent on acquiring or co-producing foreign programs with a further \$111 million on European product.

However, at Mip '95, Sodano will mainly be looking for partners for a slate of 4-5 drama series, which are currently in early stages of planning.

Sacis will offer the seventh episode in its

internationally-renowned Mafia series, *La Piovra* 7 (The Octopus), its most successful fiction program worldwide. The latest 6x90-minute drama was co-produced by Rai Uno, Iduna Film, Germany's ZDF, and France's Anabase and France 2. Sacis is also looking to sell new formats including family quiz show *Luna Park*, new operas, tv movies and miniseries. They include a two-hour version of *Mis-sus* starring Iain Glenn, tv movie *Time Limit On Life*, starring Anna Galliena, and 2x90-minute thriller starring Marcello Mastroianni, *How Long Till Daylight*.

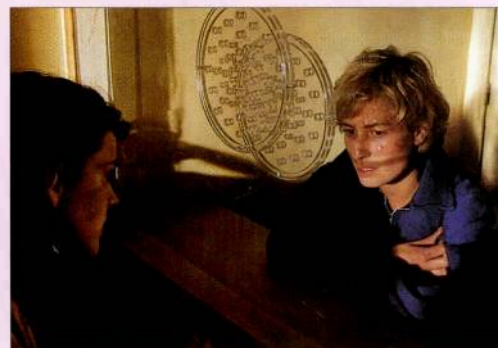
Sacis is still waiting to know whether it will be sold to private investors. The decision of Rai's former board to privatize the distribution arm has not yet been confirmed by the current board – all talks with interested candidates have been "frozen," Sacis said.

M6 Dreams For New Producers

TRUE-to-life drama *Cauchemar d'une mère* (A Mother's Nightmare) from French broadcaster M6 won a silver nymph at Monte Carlo for the star actress and attracted four million viewers when it was aired on February 22.

Based on the story of a mother's battle for custody of her daughter with her estranged husband, the 90-minute drama is part of a series of six films which aim to give young producers and actors exposure to a mass audience in primetime. Co-produced with Capadrama, *Cauchemar d'une mère* has already sold to several countries at prices comparable to U.S. tv movies, said M6.

Other new product at Mip from M6 are 40-episode sitcom *Père Au Pair*, for which producer Gaumont is developing a U.S. format,



Cauchemar d'une mère: Drama from M6

and *Saga Classe Mannequin*, a 4x90 minute spin-off from the successful series.

Talking The Talk

ETHAN Podell won't even describe his latest international sales innovation as a "format deal." He sells "know-how."

Podell is the executive vice president of Multimedia Enterprises, the international programming arm of Multimedia Entertainment. In addition to licensing its successful talk shows (*Donabue*, *Sally Jessy Raphael*, and *Jerry Springer*, among them), Multimedia has begun to sell show concepts.

The company finds a local partner savvy about non-fiction tv and together they develop an American-style talker. Multimedia acts like a "management consultant," according to Podell. "You're giving them know-how. The

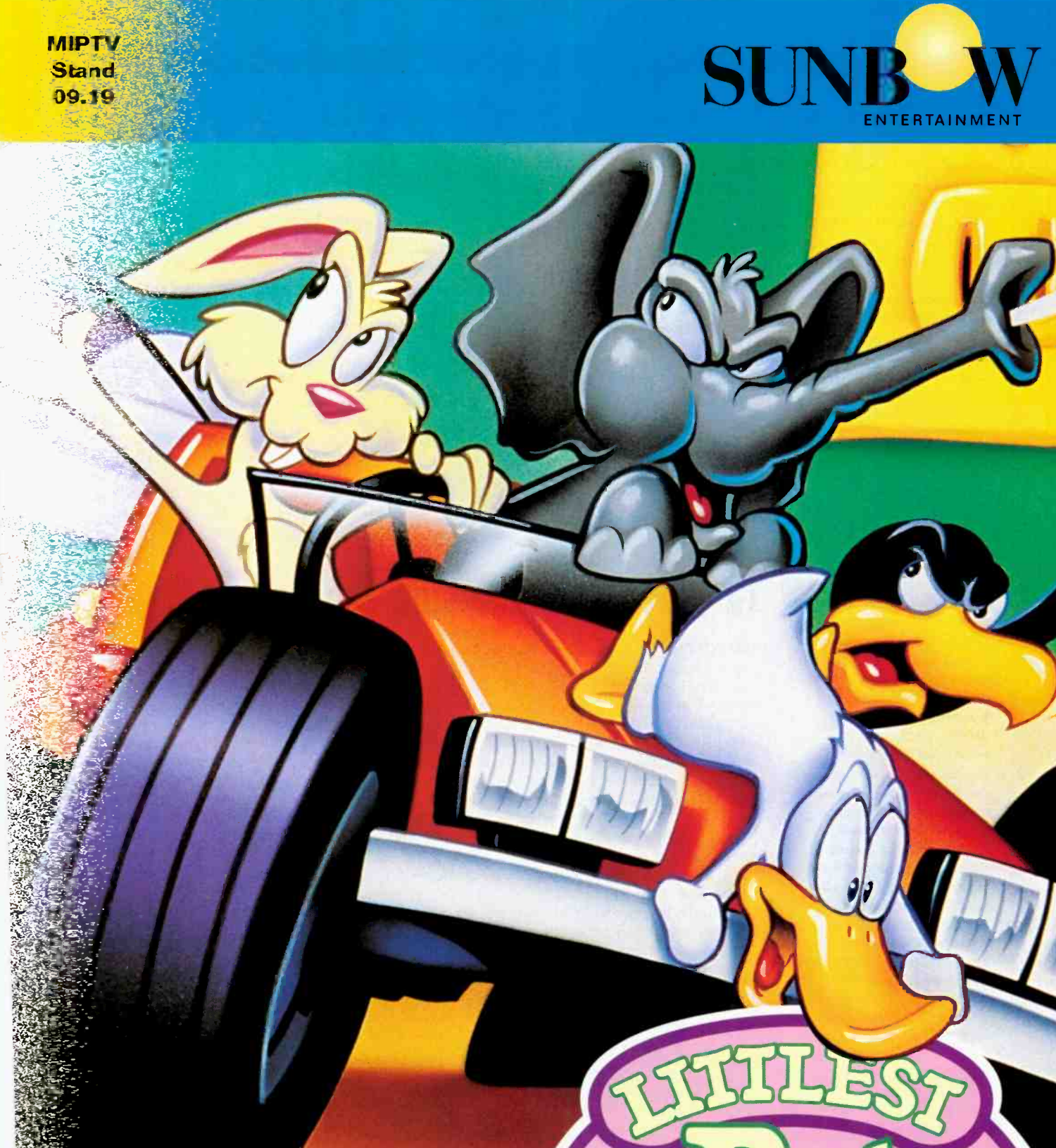
only thing we try to clone is the major elements of the production process."

Since 1993, Multimedia has forged deals of this kind in over half a dozen countries, helping to create series on air in the UK, Germany and Israel. The company has also produced talk show pilots in Malaysia, France, Italy and Spain, and is currently producing a pilot in India.

Before entering into these agreements in any market, Multimedia makes a determination that it is not fertile soil for its existing product. Podell contends that "you can make more money as a local partner than you can selling reruns of American talk shows."

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● French audience research company **Médiametrie** and counterparts from other key European markets will present the main trends of tv viewing in 14 European countries focusing on the performance of U.S. and domestically-produced fiction.

● Full production will begin this Spring on 13 episodes of *Little Bear*, the animated series produced by **Nelvana** at its Toronto headquarters. *Little Bear* (below) will premiere on Nickelodeon,



along with *Rupert*, another of Nelvana's series, as part of Nick JR; and on CBC Television in the CBC Playground slot, this Fall.

● *Automobiles* is a 30-hour series on the history of man's four-wheeled friend available from Rockville, Maryland, distributor **Network Enterprises Inc.** The series made its debut on A&E's The History Channel on January 1 and each episode examines the development of an individual make of car from the Model T Ford to the Porsche 911.

● **Channel 4 International** leads with the UK pubcaster's spring drama series *The Politician's Wife* and documentary series *The Wild West*, *Naked News* and *Holylands*. C4's drama stars Juliet



Stevenson (above) as a woman betrayed by her husband in a three-hour drama made by independent Producer's Films. *The*

Taking The Highlander Road

FRANCE'S Gaumont Television, looking to follow up the success of its live action and animated series *Highlander*, comes to Mip having just been given the order to make pilots for two drama series from U.S. networks CBS and NBC.

The two projects are *Beck*, a sitcom where the main character is a 13-year-old, non-conformist teen, and *Club Paradise*, a drama series exploring



the lives, loves and feuds of the staff at a holiday resort.

Gaumont's Marla Ginsburg, *Beck's* writer Dan Palladino and director Terry Hughes are executive producing the pilot, which will be filmed in Los Angeles by Gaumont and CBS Entertainment Productions. *Club Paradise* is a co-production with NBC Productions and is being written by Brad Buckner and Eugenie Ross-Leming, whose credits include *Scarecrow and Mrs King*.

Highlander, The Series (left) has just been renewed for a fourth season in the U.S. and has sold to over 50 territories while the animated version airs on USA Network and has sold to several countries including the UK, Spain, Portugal and Hong Kong.

Grundy Offers Mission Top Secret II

GRUNDY International Distribution is launching the second series of its children's adventure series *Mission Top Secret*. The \$8 million series is being filmed in seven countries with co-production partners SABC, Coral Europa (Spain), NDR and NDR International (Germany) and Channel 10 (Australia). Each partner has distribution in its own market with Grundy handling the rest of the world.

Available in 24x30 minute or 6x120 minute formats, *Mission Top Secret II* follows the adventures of a group of children battling to avert threats to the environment and treasures of the past.

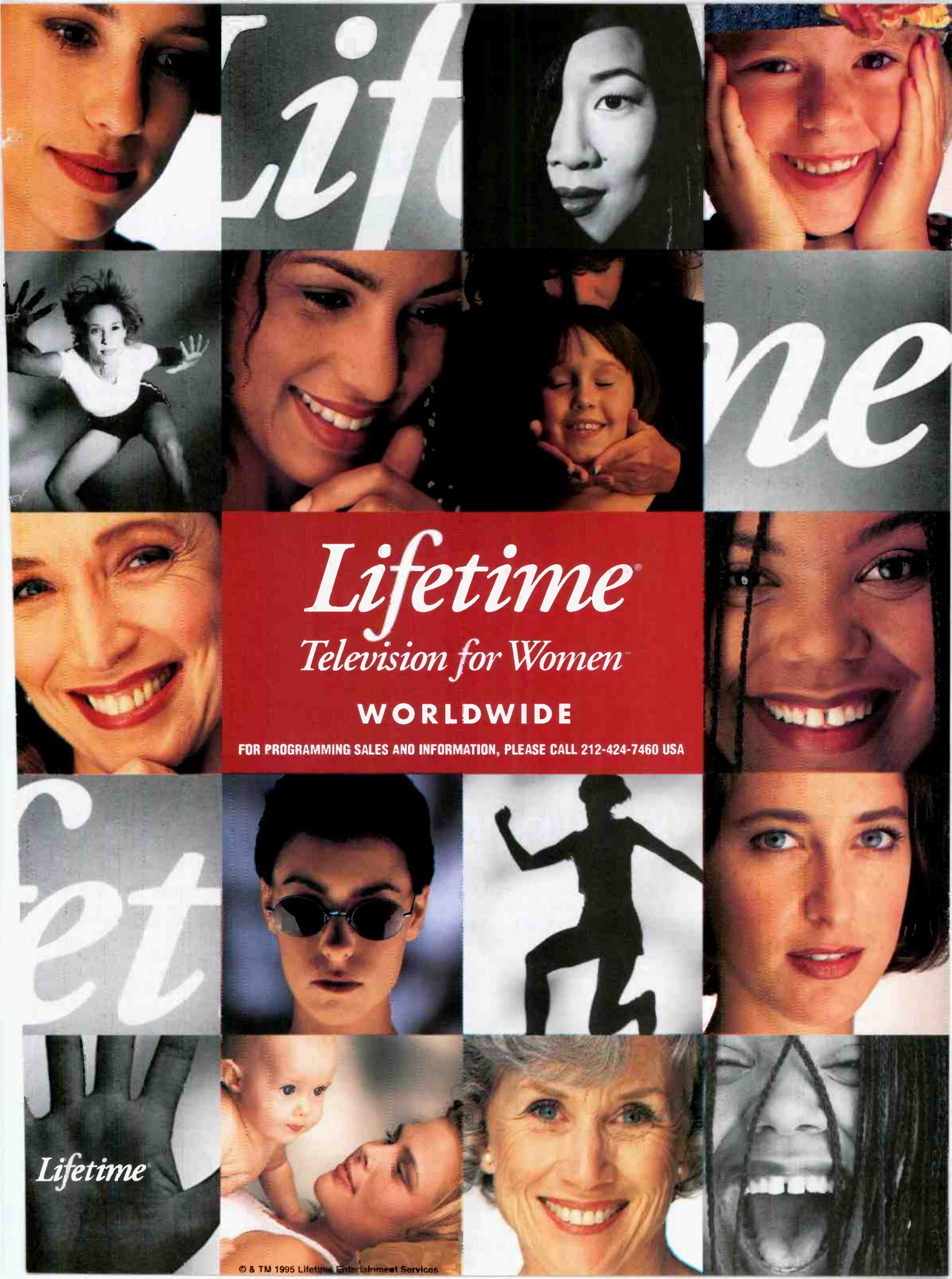
Grundy is meanwhile developing its presence in European production, where it has wholly-owned subsidiaries in France and the

UK and a joint venture with Ufa in Germany.

Mike Murphy, executive vice-president drama, Europe, said Grundy was waiting to confirm an order for 270 episodes of a daily soap opera from Italy's Rai. The series is set in an apartment block in Naples and will be filmed at Rai's studios in the city.

In Germany, Grundy is extending its joint venture with Ufa to include hour-long dramas and is developing three daily series with broadcasters. "We can achieve high production values at much lower cost than is currently being achieved," said Murphy, who said that by shooting five half-hour episodes a week, Grundy can achieve budgets of \$400,000-480,000 an hour rather than \$600,000-720,000.





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Wild West, set to air on PBS this spring, was produced by Ric Burns, one of the writers behind *The Civil War*, and Lisa Ades. *Naked News*, co-produced with A&E, lifts the lid on the American news media, while *Holylands*, co-produced with Discovery, portrays some of the people caught up in the Arab/Israeli conflict.

● Included on INI's slate this market is *Martin & Lewis: their Golden Age of Comedy*, including *Dean & Jerry at the Movies*; *Jerry Lewis Total Filmmaker* and *Special Birth of the Team*. Also available: *International Family Classics - vols I II*, a series of animated movies.

● Unicef will be promoting its fourth *International Children's Day of Broadcasting* at Mip as well as an array of home-grown programming – public service announcements, documentaries, films and rights to special programs – to help broadcasters mark the day. Major forces in international broadcasting such as Turner Broadcasting System, Monitor Radio, Nickelodeon, USA Network, China Central Television, BBC World Service, The Australian Broadcasting Corp., CBC, ZDF and Star TV will join stations from over 145 industrialized and developing countries around the world who have pledged support for this day.

● Alliance Communications Corporation continues the detective drama series theme of its CBS network hit *Due South* with new series *Taking The Falls*. Set in the picturesque surroundings of Niagara Falls, *Taking The Falls* is a comedy action format series in 13 one-hour parts. The Canadian indie is also launching two new tv movies – *Rugged Gold*, about a woman forced to come to terms with the Arctic wilderness, and *Frostfire*, a suspenser about a young Inuit boy.

● Pilot Films and Productions will be looking for participants for their Pilot scheme – The Programme for the International Launch of Television – at Mip 1995 as well as distributing three Pilot products: *Lonely Planet*, *A Short History of the World* and *Central Express*.

Sunbow Lines Up \$25m Slate



Puzzle Place: Wrapping up children's buyers

SUNBOW Entertainment comes to Mip with 65 30-minute episodes of pre-school series *Puzzle Place*. The show, which started airing on PBS at the end of January, signals a changed emphasis on high-quality programming, according to Jane Smith, newly appointed senior vice president, sales.

Smith's appointment – she was formerly with UK distributor Hit – was accompanied by

the announcement of a record \$25 million in production commitments for 1995 and the pledge of a dramatic increase in international distribution and co-production activity.

Perhaps best known for shows with a strong merchandising link like *My Little Pony*, *Transformers* and *GI Joe*, Sunbow was until recently partly owned by U.S. toy manufacturer Hasbro. Smith said that although merchandising-related shows remain prominent in the catalog – Sunbow has new series of *GI Joe* and *My Little Pony Tales* at the market – it is going to produce more “programming which is independent of the Hasbro link.” Smith added that Sunbow hoped that it would ultimately be regarded as “one of the key suppliers” of children's programming.

Court TV's International Runner

WITH the OJ Simpson trial unfolding on tv screens across the world, more people than ever before are seeing American justice in the process of being done. But for Court TV, the cable network which is acting as the pool broadcaster for the world's media, the publicity generated by the trial has its good and bad points.

“The Simpson case is the worst thing and the best thing that could happen to us,” said Steven Brill, president and CEO of Court TV. “The worst because it's much too sensational, outside the court it's a media circus. The best because what goes on inside the court is serious and dignified.”

Brill is emphatic that far from capitalizing on public voyeurism, Court TV serves a valid journalistic purpose, contrasting its coverage with that of tabloid tv news shows. Unlike the slick, staged action of court dramas, the reality

is often raw and “un-television-like,” said Brill, though compulsive viewing.

Court TV is co-producing a weekly summary of the trial with the BBC, which recently extended its initial eight week order. The program, distributed worldwide by Itel, has sold to TV3 in Scandinavia and NNTV in South Africa. Once the outcome is known, Court TV plans to make a four-part series on the trial.

The U.S. network, which includes Liberty Media, Time Warner and NBC among its backers, reaches 18 million cable homes and is on target to break even half a year ahead of schedule in 1996.

Brill envisages an international roll-out, and has already had conversations with potential partners in the UK about launching the network there, although he thinks it will be at least another two years before the cameras are allowed into British courts.

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● **King World International** will be at Mip with *Rolanda*, the talk show for which it has concluded new licensing agreements with several international outlets including New Zealand (Sky TV) Australia (XYZ Entertainment), Thailand (U TV) and the BBC (Bermuda Broadcasting Corporation), bringing the total number of territories up to 73.

● **MGM/UA Telecommunications Group** is offering two major series: its new 44-hour update of the classic *Outer Limits* and action/reality half-hour *LAPD*, in 196 episodes. Two original movies made for pay network Showtime are also on show: *Convict Cowboy*, starring Jon Voight and Kyle Chandler, and the second in The Sketch Artist series of murder mysteries. Upcoming features and the massive MGM/UA catalog of theatrical movies and tv product complete the offer.

● Now in its 30th year, **Sandy Frank Entertainment** has closed its first U.S. network deal after three decades of pure syndication. In co-production with 4 Point Entertainment, SFE sold NBC *The Other Side*, a daytime, one-hour strip on the paranormal. **SFE** also has a Mip debut. *The Shtips*, a new animated series about a good-deed family, will be launched as a half-hour series.

● *Chicago Hope*, *The Five Mrs Buchanans*, the eponymously titled talk show *Gordon Elliott* and *This is the NFL* kick off **Twentieth Century Fox's** slate this Mip. *Chicago Hope* shows the trauma and stress of hospital life, while the half-hour comedy *The Five Mrs Buchanans* is a droll exploration of the rocky relationship between mothers and the women their sons marry. *This is the NFL* gives a behind the scenes perspective to the headline sporting action.

● **Coral Pictures Corp.** will be looking for international distribution for the telenovelas: *EI Desafio* (*Defiance*); *Amores de fin de Siglo* (*Love at the end of an Era*); *Pura Sangre* (*Untamed Hearts*); *De Oro Puro* (*Of Pure Gold*) and *Alejandra* at Mip '95. The documentary series *Expedition* takes viewers to South Amer-

Portman Revives Global Ambitions

BRITISH independent Portman Entertainment Group is reviving its distribution arm at Mip TV after splitting from the Team group earlier in the year. As part of Team, Portman's distribution was handled by Primetime, which is still representing some of Portman's catalog.

As well as reviving its own distribution arm, Global, at Mip TV, Portman is showing *September*, a miniseries based on a Rosamunde Pilcher novel co-produced with Hannibal, and *Blackwater Trail*, a tv movie co-produced with Channel 10 Australia.

Portman director John Hall said it is producing seven tv movies and two miniseries this year with a variety of worldwide partners. They include the big-budget feature *Virtual Hero* and tv series *Master Keaton* with Japan's Monolith and new series and tv movies in development with broadcasters in Australia and New Zealand. *Blackwater Trail* is the third of six tv movies Portman is co-producing with Channel 10.

Portman is opening a production subsidiary in Australia later this year to develop projects in the Asia Pacific region and will also be looking to acquire distribution rights for Australian product. Hall said Portman will act as a "third party" financier as well as funding its



September: Jacqueline Bisset stars in mini

own productions.

"Distribution is so important. It really is the motor that drives the business," said Hall, who added that Portman had felt it lost "a critical part of the viability and profitability" in allocating distribution to another company.

4Kids Eyes Brazil And Oz For Gameshow

IN order to sell *Quest for the Dragon Star*, its live action martial arts series for teens, 4Kids Productions is discussing segment-sharing format deals with potential buyers. The arrangement is not quite an outright license nor a homegrown format deal.

Brian Lacey, international sales consultant for 4Kids, the production arm of licensing and merchandising company Leisure Concepts, said that the series has been sold to Mexico's Televisa and many territories in Asia as well as being cleared in 80% of the U.S. syndication market.

But in Australia and Brazil, Lacey is discussing a modular or segment-sharing format arrangement. If the deals are completed, the broadcasters would use the U.S. format: three competitive matches, a martial arts demonstration, and a martial arts personality profile in each episode. They will also use some U.S.-produced segments and some locally-pro-

duced. That would enable a partner in Brazil to emphasize their local martial art, capoeira and feature local hosts. These segments may also end up in the version of the series seen in the U.S. and overseas.

The segments-sharing idea came about after broadcasters told Lacey that they liked the concept but needed to tailor certain aspects to their own market. The arrangement wouldn't work in all markets, said Lacey, because many broadcasters can't match the production values of the U.S. series.

For international broadcasters, the modular format means that for an outlay of between \$75,000 and \$100,000 per episode, they can have a show with a local look and production value of \$275,000-\$300,000. For 4Kids Productions, the modular format may mean the difference between a presence in the local market, combined with promotional and scheduling benefits, and no presence at all.

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● A raft of telefilms, series, and specials will be found on **Columbia Tristar's** stand this market. Based on the Universal Press comic strip, *You Can With Beakman*, *Beakman's World* uses comedy and state-of-the-art visuals to educate youngsters about the world around them, while *The Commish* (86x60) features a tough yet compassionate police officer whose unorthodox style makes him a community favorite.

● *Amsterdam*, a satirical two-hour tv drama based on Kurt Vonnegut's short story of the same name will be presented for international distribution at Mip courtesy of **Atlantis Releasing**.

Also available: drama series *Liberty Street*; tv movie *Harrison Bergeron*; historical drama *The War Between Us*, and the murder mystery *The Man in the Attic*.

● **Tepuy Films** brings to Mip three Novelas: *Maria Bonita*, shot in exotic Caribbean locations; *En Cuerpo Ajeno*, a story of love beyond the limits of life and *Las Aguas Mansas*, a turmoil of passion, seduction and vengeance. Tepuy also has a mini-series in ten parts, *Los Pecados De Ines De Hinojosa*, set in a time when to be a woman was considered a sin by itself.

● Merchandising rights for the award-winning musical sitcom *Eric's World* will be available for the first time at Mip from **Cambium Releasing**. Along with a series of teen dramas including *The Writing on the Wall* and *Boys Will be Boys*; and for kids: *50 Simple Things Kids Can Do To Save The Earth* and the *Adventures of Nilus the Sandman*, including the latest special, *Monsters in the Closet*.

● A handsome and attractive fortune hunter is looking for a willing victim to make some easy money. His latest victim becomes his obsession but proves to be his downfall... and so runs the plot of *Por Amarte Tanto* (*All For Love*), one of the many novelas available from **Venevision International**.

● **RTC RadioTelevisao Comer-**

Spielberg Special From Worldvision

STEVEN Spielberg receives the AFI's Lifetime Achievement Award in a two-hour special produced by NBC, available at Mip TV from Worldvision. Hosted by Tom Hanks, the awards special includes footage from Spielberg's work. It has already sold to the BBC, Channel 10 in Australia and CFTO in Canada.

Continuing the award theme, Worldvision also has the *1995 Soul Train Music Awards*. In addition, the Spelling-owned distributor is offering the 26-episode late-night comedy show *Tim Stack* and following its recent appointment by Tribune Entertainment to han-

dle its worldwide distribution, talk shows *Geraldo* (780 hours) and *Charles Perez* (260 hours).

Bert Cohen, president and CEO of Worldvision, said it would also be looking to acquire European product for distribution in the U.S. and will bring production vp Karen Miller to Cannes. "(We want) to see what kind of productions we can bring back to the U.S.," said Cohen. He added that Worldvision is still considering the opportunity of using its massive library to launch new program services in Europe.

Primetime's Geo Association

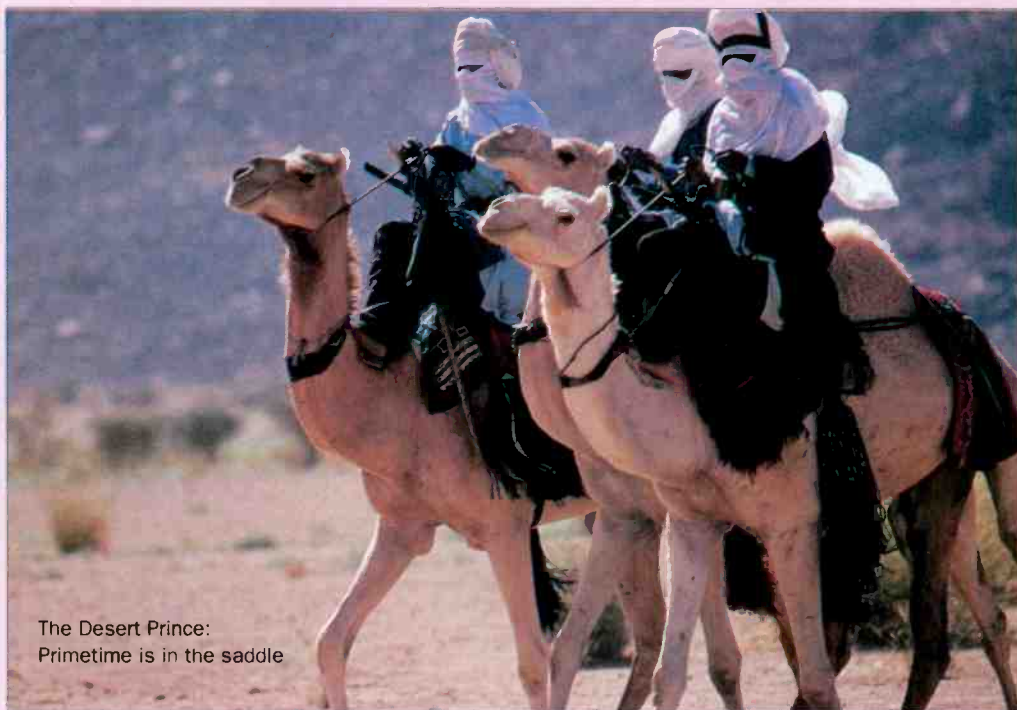
NEW to the catalog of UK distributor Primetime Television Associates is *The World of Geo*, a series of natural history documentaries available initially in six 52-minute programs. Co-produced by Germany's Ufa Non-Fiction with Canal Plus, ZDF and the Discovery Channel, the series is closely linked with Geo magazine, published by Ufa sister company Gruner and Jahr in three European countries, Japan and South Korea.

Subjects featured in the first series include *Fire Mountains*, about Javanese volcanoes, *The Desert Prince*, about the Tuareg people and the Sahara desert, and *Forest Dreams*, which penetrates the dense rainforests of

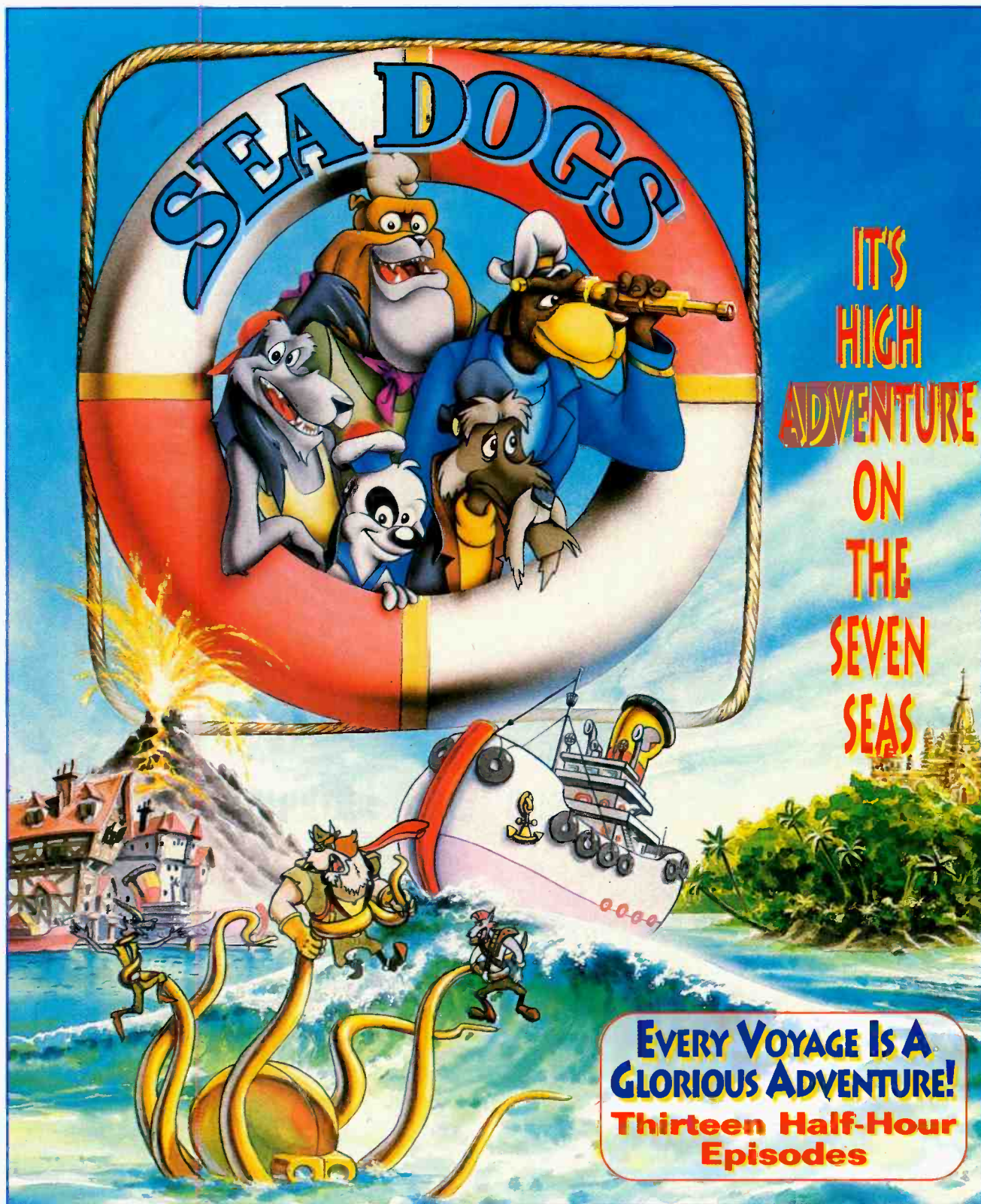
French Guiana. Each episode is budgeted at around \$500,000, according to Ufa's Berthil Le Claire.

Primetime TV is handling worldwide distribution in markets not represented by the co-production partners.

Richard Price, chairman of Primetime (it dropped the RTPA from its name this year) said that it was currently handling work by 170 producers worldwide. In the UK, Primetime was instrumental in setting up the Team joint venture between independent producers and two venture capital investors. Price said he expected to "increase the scope" of Team later this year, without revealing details.



The Desert Prince:
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cial, the commercial arm of RTP, Portugal's national television station, has decided to test its international appeal and will present six telenovelas: *Passarelle*, *Ashes*, *The People's Banker*, *Hot Summer*, *In a Peace of Angels* and the brand new *Different Ways*; as well as the feature film comedy, *Just a Normal Life* and the tv film *The Death of the Prince*.

● New from **Canamedia** are a host of programs: docudrama, *Curse Of The Lost Gold Mine*; adventure cooking series, *Galley Chefs*; two documentaries, *Everest - Climb For Hope* and *Threads of Hope*; tv movie, *The King Of Friday Night*; pre-school exercise series *Free To Fly* and the sports series, *Gary Cooper's Fishing Diary*.

● The one-hour animated musical *People*, produced by Lightyear Entertainment, in association with The Disney Channel and the Bertelsmann Music Group will be **NBD's** Mip launch project. Based on the international best-selling picture book by Caldecott Medalist Peter Spier, *People* (below) is due for launch on the



Disney Channel in October 1995 after which it will be broadcast in virtually every country of the world as an official part of the United Nations 50th Anniversary Celebration.

● Showcased at Mip 95 by **CBS Broadcast International**: *Buffalo Girls*, *Calamity Jane* and a host of legendary eccentrics live through the last days of the dying Old West; *A Streetcar Named Desire*, tv adaptation of the internationally renowned play; *Under One Roof*, focusing on a middle-class African-American family settling after a life of globe-trotting in the military; *In the Shadow of Evil*, a two-hour suspense thriller starring Treat Williams and *The*

More Power To The Rangers

THERE is still no sign of the *Power Rangers* phenomenon dying out, with a third season on offer from Saban at Mip TV and new imitations appearing at almost every market. Stan Golden, president of Saban International, said that markets where the series did not register an instant success have gradually taken off. "There's no sign of a downturn."

The 22 new episodes begin airing on the Fox Network in September and Golden expects the launch of 20th Century Fox's feature film over the summer to give further impetus to the show's worldwide success.

The new series on show at Mip are *Masked Rider*, a co-production with Japan's Toei Animation, animated series *Eagle Riders* and *Tenko and the Guardians of Magic*, featuring a female magician as the lead character in a show which Saban believes will have a strong appeal to girls. *Tenko* has already been sold to 80% of the U.S. first-run syndication market.

Golden said Saban will also be in discussion with possible co-production partners for two new animated series – *Oliver Twist* and *The Why Why Family*. French partners have already signed up for both series. Both shows will go into production this spring for delivery in fall 1996.



Masked Rider: On show at Mip

Bart Simpson Has A Japanese Cousin

KNOWN for its animated programs based on western children's classics, Nippon Animation has long been active in the international tv industry both as a co-producer and seller.

But since the huge success of *Power Rangers*, which is based on a long-running Japanese live-action series, the company has noticed a shift in the attitude of foreign buyers toward its product. "Everyone used to say that typical Japanese animation would never work in the United States, but now many people want to see what we have to offer," said the Tokyo-based animation company's international sales and promotion general manager, Masao Kurosu.

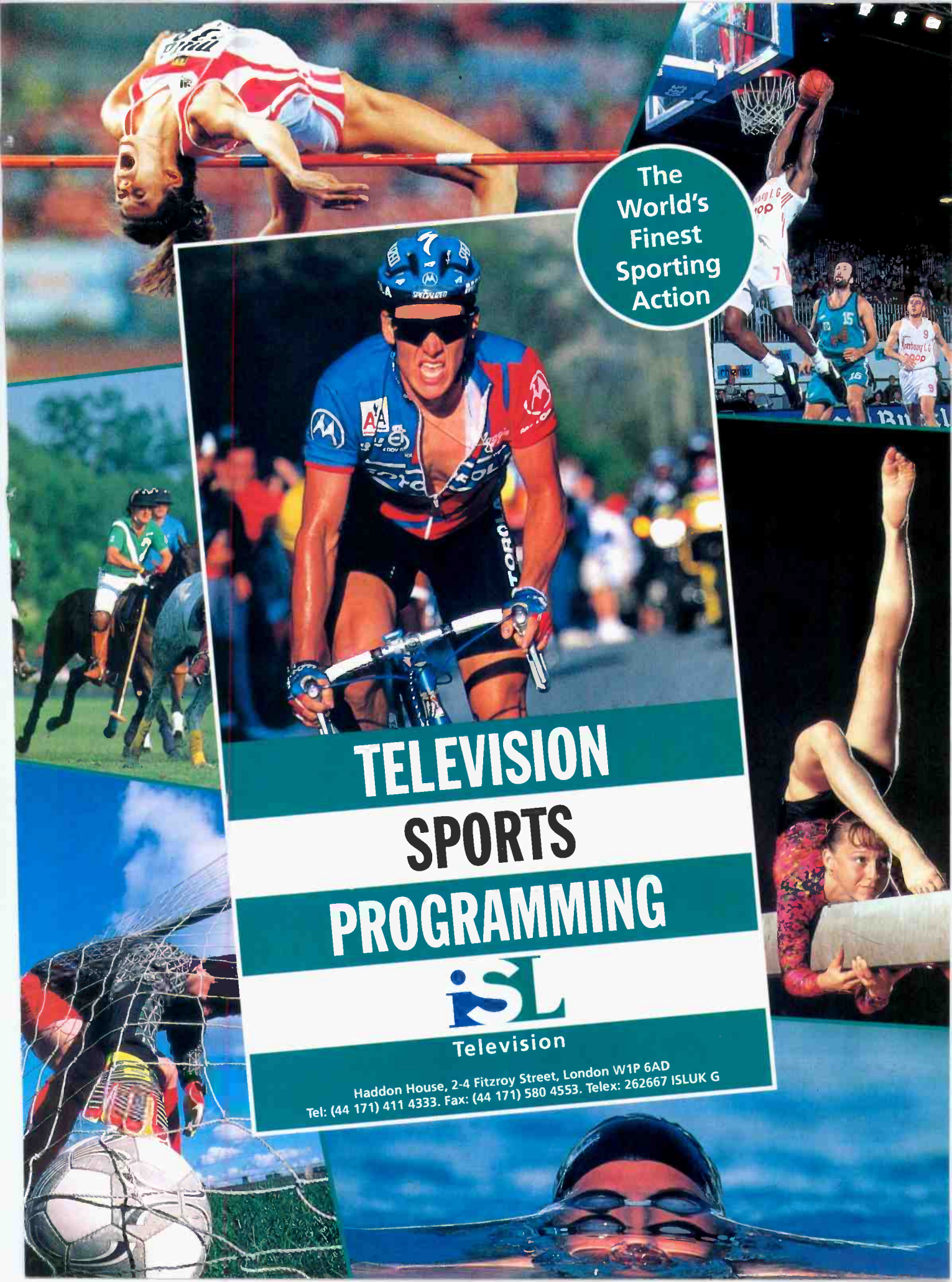
What the company has to offer is a catalog of 88 animation titles, including both TV shows and feature films. Among the jewels of the collection is *Chibi Maruko Chan*, a show that, in its first three-year run starting in 1990, became one of the most popular animated shows in the history of Japanese television, reaching as high as 39.9% in the ratings, and generating nearly \$1 billion in merchandising revenue.

Described as a Japanese cousin to Bart

Simpson, the nine-year-old girl who is the series heroine may have had a tart tongue, but millions of Japanese viewers found her honesty funny and refreshing. Now Nippon Animation is betting that, despite the show's Japanese look and content, foreign viewers will as well. "Children up to about the age of ten have the same feelings all over the world," said Kurosu. "When we tested two episodes of the show with children in Canada, they liked it. Now all we have to do is show producers and distributors in the U.S. and Canada why it was a hit in Japan – and why it can be a hit in their countries as well."

Some have already been sold. *Chibi Maruko Chan* is currently airing on pan-Asian network Star TV and doing so well that, after buying the first 65 episodes, Star decided to take the entire 142. Viewers in Japan can't get enough of the show, either; a second series that debuted in January of this year on Fuji TV is pulling in market shares of 25%.

"It's a show whose appeal crosses generations," said Kurosu. "Everyone from pre-schoolers to grandparents can find something in it to identify with and enjoy."



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Ed Sullivan Show in 130 specially edited episodes. Also new this year: *The Best of Dr Seuss*; *Van Cliburn, Concert Pianist*; and *CBS Soap Breaks*.

● An Aardvark, some wild and wooly monsters and a little girl with corkscrew curls and a red dress star in **Cinar's** three new Children's features; *Arthur*, *Wimzie's House* and *The Little Lulu Show*. All of which will be available at Mip along with *Bonjour Timothy*, *Million Dollar Babies*, the *Busy World of Richard Scarry* and *Are You Afraid Of The Dark?*

● **CNDP - Centre National De Documentation Pédagogique** - will feature: *A Choice of Landscape*, showing the regions of the world through the eyes of a child; a range of short documentaries for children including: *How does it grow and How does it work*; and *The Audiovisual Encyclopedia of Science and Technology*, a set of short films to aid the discovery and understanding of the world around us.

● Take a working actress with a stop-start career and an eccentric extended family, including two daughters and two ex-hus-



bands, and you have *Cybill*, the 30-minute comedy series from **Paramount International Television**. Also available: new series *Marker* (pictured) and three hour-long dramas: *The Marshal*, *The Watcher* and *Star Trek: Voyager* (with two-hour pilot).

● **Box Top Entertainment** brings three new music events to Mip this year: *The Rolling Stones - Live Broadcast from Europe: Summer 1995*; *Live At The Joint* - top music artists celebrate the opening of the Hard Rock Hotel, Las Vegas; and *Rock Over Europe*, the hottest international

Sailor Moon The Focus For Toei

NOT long ago action animation in Japan was strictly boy's stuff. Then came Toei Animation with *Sailor Moon* and her gang of schoolgirls-turned-superheros. Soon after *Sailor Moon* debuted on the TV Asahi network in March 1992, girls from all over the country were tuning in - and making the show a widely-discussed social phenomenon.

Today the show's successor, *Sailor Moon R*, is still pulling down high ratings and generating billions of yen for the 250 companies that make *Sailor Moon* products. Having sold *Sailor Moon* to most of Asia as well as to France, Spain, Italy and English-speaking rights to DIC Entertainment, Toei Animation is now taking aim at the rest of the world.

"*Sailor Moon* is the second-highest rated animated show in France, after *Dragonball Z*, another of our shows," said Toei Animation

international department manager Katsuoki Yamamoto. "This proves that the program's appeal is not limited to Japan. We are making *Sailor Moon* the focus of our marketing effort at Mip TV."



Sailor Moon: Social phenomenon

Fininvest To Be Selective

IT'S been a busy year for Silvio Berlusconi, but for his media group Fininvest it's going to be pretty much the same Mip as last year.

International acquisition executive Guido Pugnetti said he expected 1995 to be slow for the Milan-based group.

"We already have long-time deals with several majors, including Fox and Columbia, and we are not looking for anything in particular at this market," Pugnetti said.

"We are also trying to exploit our library as much and as well as we can. Now it is not as large as it used to be, but it's still sufficient," he said.

Pugnetti, who will be at Mip together with

Fininvest's director of acquisitions Daniele Lorenzano did not rule out "very selective program purchases." Certainly not tv series, but more probably tv movies.

New programs offered to international buyers include the 4 x 100-minute mini-series *The Great Fire*, a co-production by Titanus for Fininvest's Mediaset distribution unit, Beta Taurus, Falcon and France 2. *The Great Fire* stars Carol Alt in an adaptation of Tolstoy's masterpiece *Anna Karenina*.

Mediaset will also offer the fourth part of the highly successful fable *The Cave of the Golden Rose*, a 2 x 100-minute mini-series co-produced with Beta Taurus.

Warming Hearts With Mumfie

TORONTO-based Catalyst Entertainment and UK partner the Britt Allcroft group scored their first U.S. hit with the packaged kids' show *Shining Time Station*. This market Catalyst will be offering Britt Allcroft's latest animated show, the *Magic Adventures Of Mumfie*, with a sale to the Fox Network already tied up.

Mumfie is a musical for the family based on the adventures of a small elephant which its producers promise will "cheer the spirit and touch the soul." The series, in 13 11-minute parts, has also sold to the ITV Network in the UK but the rest of the world rights are available from Catalyst.

The recent acquisition of the Phoenix Animation studio in Toronto, which is currently

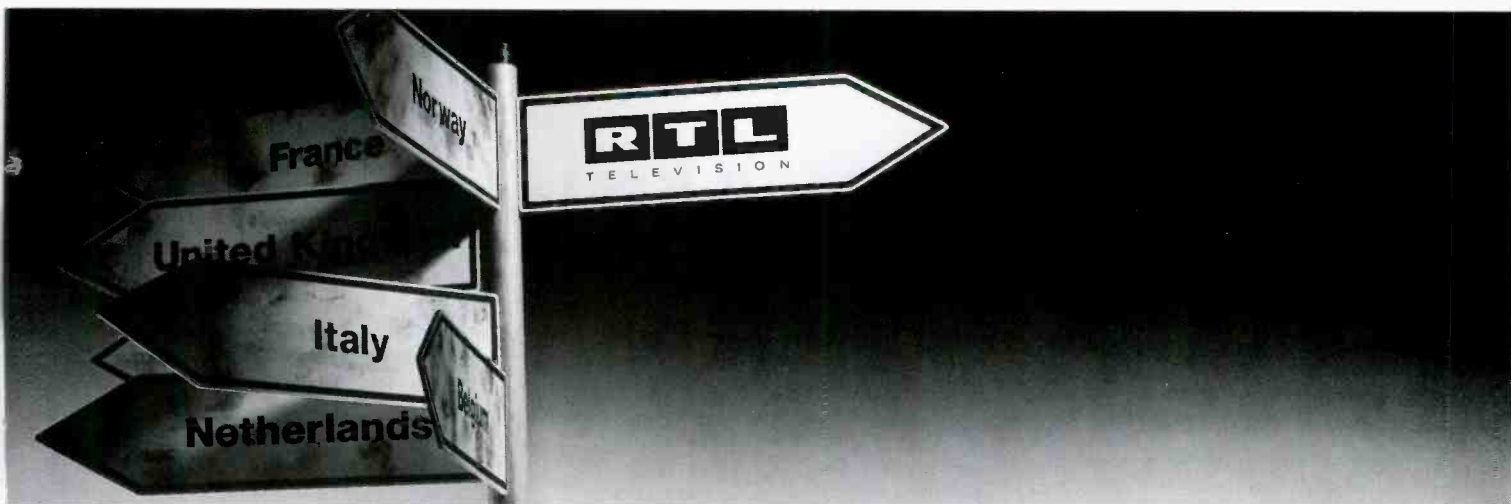
working on a *Mumfie* Christmas special for Fox, is the latest addition to the fast-expanding Catalyst's activities.

The purchase, by Catalyst and the Britt Allcroft group, will give the animation studio a "worldwide profile" and increase Phoenix's commitment to expand its in-house projects, said Michael Heffernon, recently appointed as v-p of production and creative development at Catalyst.

The Britt Allcroft group acquired an equity stake in Catalyst last year.

Four *Shining Time Station* primetime family movies, filmed in Toronto and featuring Ed Begley Jr and Jack Klugman, will also be on offer at Mip.

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touring artists perform from multiple European locations.

- **MTV: Music Television** will bring its new animated property *MTV Oddities* to Mip '95. It includes two animated series *The Head*, the story of an ordinary guy named Jim and the alien who has set up house inside his head; and *The Maxx*, which chronicles the tale of a homeless superhero for the '90s, who alternately inhabits a bleak urban landscape and a bizarre dream world. Also making its debut is *Sandblast*, MTV's first sports competition.

- Primetime drama is highlighted in the raft of programs on show from UK distributor

Granada/LWT International. New shows include the latest in the *Prime Suspect* series starring Helen Mirren, now weighing in at nine 104 minute episodes, *Band Of Gold*, a 6x52 minute series currently airing on the ITV Network, and *Johnny And The Dead*, a 95-minute comic drama starring George Baker and Brian Blessed. The company's team is headed by Nadine Nohr, newly promoted to director of sales.

- Four new features and kids series *Mighty Machines* are on offer from Montreal, Canada-based **Malofilm** this market. In 12 half hours, *Mighty Machines* features live footage, music and sound effects to explain how things work. Features from Malofilm include the award-winning *A Wind From Wyoming* about the complicated romantic life of an 17-year-old girl.

- A harrowing drama set in Ireland during the great famine of the 1840s, *The Hanging Gale*, heads the offering from **BBC Worldwide**. The series (4x50 minutes or 2x90 minutes) stars the four McGann brothers in the leading roles. Costume drama *The Buccaneers*, based on an Edith Wharton novel, and documentary series *The Private Life Of Plants*, presented by David Attenborough, are also available from the pubcaster's distribution arm.

- **E! Entertainment Television** will offer *The World's Most Beautiful Women* and *The World's*

Paragon Buys Half Of Lacewood

PARAGON International has marked its shift into children's programming by agreeing to acquire a 50% stake in Ottawa animation house Lacewood Productions for U.S.\$2.3 million. Paragon, which has been Lacewood's distributor for eight years, has an option to buy up to 100% of the shares at a later date.

Paragon will launch Lacewood's new show *Happy Birthday Bunnymkins*, which is based on Royal Doulton pottery characters, at Mip.

Other products on Lacewood's slate this Mip include *Legends of the Land*, a development with CBC; *Matthew and the Midnight Adventures*; and the as-yet-unnamed *Teddy Bear Specials*, sequels to *Teddy Bear's Picnic* and *Teddy Bear's Christmas*.

According to Richard Borchiver, president and COO, Paragon Entertainment Corporation: "There will be no obvious difference at Mip because we have distributed Lacewood product for many years, but there will be differences behind the scenes." Notably he means an almost three-fold increase in product mostly funded by Paragon: "Over the next 18 months we (Lacewood) expect to have a slate of \$37.5 million," he said.

Paragon currently produces the PBS series *Lamb Chops* as well as *Kratts Creatures*. "Paragon is going to get aggressive over the next few years," added Borchiver. "It is going to go beyond the Canadian borders to distribute U.S. product."

Globo Int'l Offers Kids' Show

GLOBO International is putting its latest domestic success story *The Hot Dog Channel* up for international distribution at Mip '95. The kid's program segment is already a success in Brazil where it has been available for almost three years. The show, set in a tv station run by dogs and presented by dogs, can be adapted to most formats, according to Roberto Filippelli, European director, Globo International.

The show has already caught some broadcasters' attention. "We have some interest in western Europe from both public and private broadcasters," said Filippelli.

The Brazilian broadcaster has already latched on to the merchandising opportunities of the *Hot Dog Channel*. More than 150 products have been licensed, including children's magazines, records, and even toothbrushes, said Filippelli, adding that the company is also willing to sell some of the merchandising

rights abroad. *Tropicaliente*, a telenovela based on a Brazilian fishing community, is also on the Globo stand.



On The Lookout For Docu Producers

INTERNATIONAL Broadcast Network (IBN) wants to hear from independent producers with program treatments, according to vice president Kim Thomas. Fresh from its parent company IVN's restructuring, the U.S. producer/distributor has ambitious plans to diversify from travel and inflight programming into mainstream documentary and arts production.

"We are interested in working with everyone and anyone," said Thomas. "We just want to put across the message across that we're going to be at Mip looking for deals and are willing to talk to anyone who has something

that may interest us."

IBN will be debuting a raft of new programming at the market including three documentary series: *Great Wonders of the World*, a \$2.4 million series produced by IBN for Readers Digest; *Gospel According to Jesus*; and *Great Gardens of England*.

IBN is also in the market for pre-sales and co-production opportunities for its six half-hour (or three one-hour) natural history series *First Breath in the Cradle of the Seas*, and the historical documentary *The Race for the Last Frontiers*.

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The Strange World of Planet X Women from the Prehistoric Planet
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Most *Eligible Bachelors* at Mip. For the fifth consecutive year, E! will cover the Cannes film festival and produce its two annual specials about the event: *E! Goes to Cannes* and *Sex on the Riviera*.

● From Canada's largest source of wildlife programming, **Ellis Enterprises**, come 13 new episodes in the award-winning series – *Profiles of Nature, Series VI* and for the younger viewer *Mother Nature: Tales of Discovery* featuring the stories of specific animals or wilderness areas, as told by the fictional voice of *Mother Nature*. New documentary releases also include *Profiles of Nature Specials, Spirit Sands* and *Wild Canada*.

● **MM Multimedia** presents a new catalog of 20 new features from up-and-coming Iberian directors, titled *Spanish Cinema*. The principal titles are: *Alas De Mariposa (Butterfly Wing)*, *Dame Lume (Burn Me)* and *Jardines Colgantes (Hanging Gardens)*.

Also at Mip, in production stage, is Estudios Rojo Sanz's adult, animated series *Luca Torelli is Torpedo* and in pre-production stage, from the same studio, animated children's series *The Perez Mouse Factory*.

● Available from **NBA Properties Inc** in an edited, one-hour format, or as full-length live or tape telecasts, is *NBA Games*, with packages including the 1995 McDonald's Championship from London, England, as well as the 1996 All Star Games and the 1996 Finals.

● **France Television Distribution** will be attending Mip with a selection of new programs in four specific genres: tv movies: *The Architect's Widow* and *A Page of Love*; documentaries: *The Lama Child, Return to Kham, Once upon a time...the Amsterdam Island besieged by cows and Writers*; children's: *Nighty Night, Children*; and specials: *The Candeloro Story* and *Les Films Lumière*.

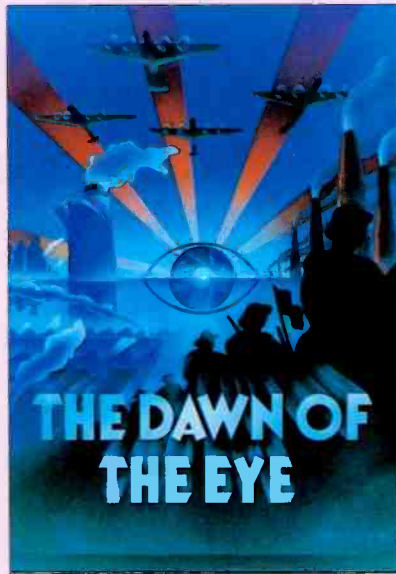
● With Sydney named as the venue for the Olympics in the year 2000, **ABC TV** has commissioned a series of seven programs under the banner *SPIRIT 2000*. The programs will follow a

All-Seeing Eyes

TELEVISION news is the subject of the *Dawn of the Eye*, the largest-ever co-production between the BBC and CBC.

The six-part series is a chronological history of the industry through the evolution of television newscasts to the satellite age. The series starts shooting in June, is scheduled for broadcast in 1996 and will be available in Canadian, British and American versions, pending final agreement with a potential third partner – a U.S. company. Two editorial teams in Toronto and London are working on the series, which will feature some of the pre-eminent historians in the field.

Under the terms of agreement, the BBC,



which will be negotiating possible pre-sales at Mip, has rights outside North America and CBC within it. A plan that CBC is happy with, because "unlike some broadcasters, it is not a priority for us to distribute everything we produce, which makes us ideal partners for co-productions," said Thomas Howe, senior director of international sales, co-productions and acquisition.

Co-productions will figure more in CBC's strategy as a means to stretch funds further: "In the government's new budget, CBC received a considerable cut in allocation. It could be as serious as 25% of the budget, C\$350 over the next three years," added Howe.

Bohbot's Building Blocks

BOHBOT International's push into Europe is gathering pace. Although the U.S. children's syndicator only launched aggressively into the international distribution marketplace by opening a Paris office less than a year ago, already it is establishing itself as a powerful force. This Mip it is making two new series, *Enchanted Camelot* and *Skysurfer Strike Force*, available for the first time, as well as adding *A.J.'s Time Travellers* to its catalog.

To date Bohbot has been particularly noted for its strength in children's programming in the U.S. where it is currently syndicating two blocks of children's programming. A block targeted predominantly at girls aged 4-11 airs on Saturday mornings, and is made up of *A.J.'s Time Travellers*, *Enchanted Camelot*, *Gadget Girl* and *Sonic*. A Sunday morning 8am to 10am block, aimed at boys, is made up of *Double Dragon*, *Ultra Force*, *Sky Surfer* and *Street Sharks*.

Internationally Bohbot has not been in a position to sell all these shows as rights were held by other distributors; however, with *Enchanted Camelot*, *Skysurfer* and *A.J.'s Time Travellers*, the company is building a strong line-up internationally. Nadia Nardonnet, senior vice president and managing director of Bohbot International, said: "The objective in the long term is to be able to place a block...Certainly next year we will put every-

thing in a block. A lot of channels are interested but there will possibly be only one amazing adventure block."

The development of the "girls" shows is something Bohbot is keen to promote. For some time there has been a feeling in the U.S. that young girls wanted something that was not all action and adventure. *Enchanted Camelot* focuses around three female heroines and has as its main theme what Bohbot describes as "the empowerment of women."



A. J.'s Time Travellers: On the block

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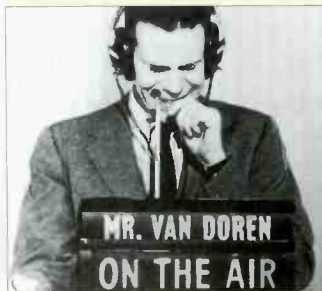
group of young athletes as they prepare to compete in the ultimate sporting challenge.

● New from **Alpa** for Mip TV, unusual or traditional, America never ceases to amaze...*American Stories - Catch the Spirit* - in 57 three-minute factual segments. Also new 5 documentaries: *Festivals Around The World, Trucks In USA, De Leclerc Au Leclerc, L'Aeropostale (Postale Aviation) and Paris, History of the Seine and its Bridges*; a documentary/how-to program *Cat Breeds* and the how-to show *Taking Care of my Dog*.

● **Hearst Entertainment** offers three features based on true stories: *Choices of the Heart: The Margaret Sanger Story, Dancing in the Dark and Living the Lie*; and to prove that fiction fantasy makes adventure, three animated strips: *The New Adventures of Flash Gordon, The Magical Adventures of Quasimodo and Phantom 2040*.

● **TV Ontario** presents the one-hour documentary *The Centre of Her Storms* at Mip. Also in the documentary genre comes *Have You Heard the Word*; in children's programming: *Bookmice, Shamrocks and Shilalees and Bisou*; in youth ages 9-14: *Les Voyages Électroniques de Numérique* and musically: *Guitare en Mains*.

● The 1950s gameshow scandals, subject of the recent Robert Redford feature *Quiz Show*, is the subject of a new documentary from WGBH-TV Boston available from public television distributor **Tapestry International**. The documentary, *The Quiz Show Scandal*, part of the station's *The Ameri-*



can Experience series, lifts the lid on the rigging of gameshows like *The \$64,000 Question* and includes interviews with produc-

India's UTV To Build On Murdoch Link

THE latest addition to the Asian interests of Rupert Murdoch is a stake in Indian production and post-production company United Television (UTV). The rapidly-expanding company is showcasing a number of its productions at UK distributor Suman Film's stand during Mip.

Founded in 1990, UTV produced over 700 hours of television programming last year alone. Recently it entered into a strategic alliance with News Corp's Twentieth Century Fox which has taken a 49% stake in the company.

UTV already produces *India Business Week* for the Murdoch-owned Star TV's general

entertainment channel Star Plus, in addition to *Bol Bollywood*, a magazine show set to debut on the channel soon.

Myleeta Aga, UTV business development executive, said the News Corp deal isn't exclusive, indeed most of the productions UTV makes are sold as barter deals to public broadcaster Doordarshan. "We would like to combine the resources of the west with our own experience of production in India to produce lower-cost, higher quality programming for global markets," said Aga. Productions available at Mip will include 260 episodes of *Shanti*, India's first stripped soap opera and 104x30 minutes of gameshow *Metro Dhamaka*.

Dramatic Times For BetaFilm

GERMANY'S BetaFilm will have the usual bulging catalog of German series, U.S. series for which it owns European rights, and co-productions, on offer.

The Kirch group company has achieved domestic success with *Rex, A Cop's Best Friend*, a series about a cop and a dog which averages 8.9 million viewers in Germany, and will be looking for further international sales for the show at Mip as well as pre-sales for the second season, currently shooting. BetaFilm is also selling *Joseph*, the fifth in a series of the Old Testament, and will be pre-selling *Moses* which has just started production. *A Woman's Way*, a domestic winter hit last year, is also up for distribution.

BetaFilm will also be pushing its co-production with All American, *BayWatch Nights*, for which it has the continental European dis-

tribution rights. BetaFilm has also bought the continental European rights for *Land's End*, the Skyvision Entertainment and Fred Dryer Productions all-action adventure series about a cop turned private detective.

Junior, Beta's kids arm, has its own stand at Mip. Launched two years ago, among its raft of programs are two new shows: *Rimba's Island*, a pre-school educational show for which Beta is hosting a Mip workshop to explain the principles behind the series, and *Cro*, a collaboration between the Children's Television Workshop and Film Roman featuring woolly mammoths, bumbling neanderthals and a kid called Cro.

Beta is assisted by a new member of the sales team this Mip: a touch screen service that lets clients view trailers and obtain info on recent productions.

Competition Hots Up Taiwan

BUYERS from all three Taiwanese terrestrial channels - Chinese Television System, China Television Company and Taiwan Television Enterprise - will be attending this year's Mip as competition fuels demand for ratings-driven product.

Although foreign programming only constitutes between 20-25% of broadcasters' schedules and even then is generally shown in off-peak hours, all three are looking to pick up similar fare such as miniseries, series, feature films and variety.

"We are being hit from underground and outer space," said Taiwan Television Enterprise's sales and acquisition chief Michael Hsiang, referring to competition from Taiwan's

rampant, but recently legalised cable industry and the Asian region's plethora of satellite channels, all targeting the island's relatively well-developed ad market. Hsiang said the fiercest competition is coming from HBO Asia, Star TV's Chinese Channel and Star Plus, and TVB's Superstation.

The Chinese Channel and TVBS have increased viewership in Taiwan largely as a result of their commitment to locally-produced Chinese product, however.

The long-term effect of the competitive climate for the terrestrial channels may well be a move away from the standard U.S., Europe and Japanese acquisitions towards Asia-originated and produced shows.

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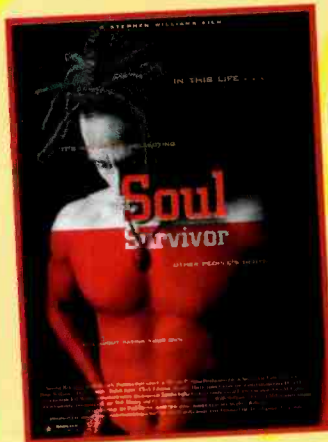
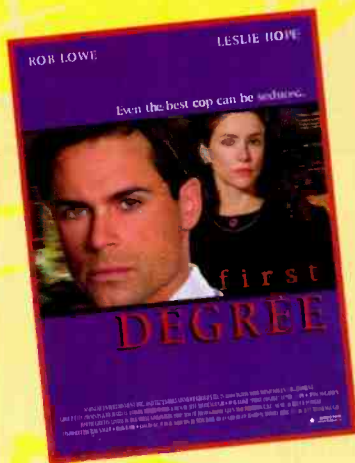
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ers and contestants speaking out for the first time in 30 years.

● Take a penalty shot against a famous soccer goalie, in a stadium complete with cheering fans and dancing girls in *The Goal Show*, the interactive soccer



game show available from **SPI international**. Also in the sports arena, SPI is offering a package of 32 half hours of sports bloopers specials including: *Bob Uecker*

New Name, New Cable Channel

BRITISH distributor The TV Sales Company will be ringing the changes at Mip with a new name. The company will now be known as SelecTV International, a move designed to reflect the link with parent group SelecTV Plc. SelecTV International continues to be run by managing director Nick Witkowski, who founded the distribution arm within SelecTV in 1990, and will continue to represent the group's catalog of drama and comedy programs from its own production subsidiaries Alomo, WitzEnd and Clement La Frenais Productions.

Kicking off the Mip slate is *Shine On Harvey Moon*, a series of 12 episodes set in London in the Coronation Year of 1953. Also new is *Hearts and Minds*, a mini-series from Jimmy McGovern, the award-winning creator of



Birds of a Feather: Flying into cable

Granada/LWT's *Cracker*, as well as a third series of *Good Night Sweetheart* which is currently achieving audiences of 13.5 million on BBC1.

SelecTV International will take on the mantle of acquisitions for a cable channel also called SelecTV, which makes its UK debut in May with a launch schedule of

300 hours of programs from the company's production subsidiaries as well as programs from Yorkshire and Central Television.

SelecTV chief executive Alan McKeown, also revealed that SelecTV had been in talks with "all the major American cable operators" with a view to starting an "Anglophile" channel for the U.S. market. This, he said, would be a "very niche channel" and different to the UK version.

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Hanna-Barbera's Quest Takes Shape

TURNER'S rehabilitation of Hanna-Barbera now looks to be nearing completion. This Mip sees the official launch of its new animated television series *Jonny Quest*. Based on the 1960s hit series, *The Adventures of Jonny Quest*, the show will have a worldwide rollout in the Fall of next year. In the U.S. it will launch on all three Turner services with a minimum of 21 plays a week – exact details of the scheduling have still to be worked out.

The launch of *Jonny Quest* is the first indication of a new production strategy within Hanna-Barbera designed to make the best use of the company's brands. "What we've done is narrow the focus of the studio... We are selecting one major character a year and developing it. In 1996 it will be *Jonny Quest*. In 1997 it will be *The Jetsons*," said Jed Simmons, executive vice president

of Hanna-Barbera Cartoons.

Simmons believes that the strategy of taking a library and selling it en masse to a broadcaster is not one that works for a company that wants to make the most of its properties. "To succeed in kids tv you need on-air exposure," said Simmons.



Jonny Quest: Off drawing-board

To this end Simmons is relocating from Los Angeles to establish an office for Hanna-Barbera in London. "We want to work closely with broadcasters to get Hanna-Barbera characters on-air. One way is to create a block with a local host who deals with local issues and can introduce Hanna-Barbera shows within that block," said Simmons.

Simmons will be working with Turner offices, agents and sub-licencees around the world (though particularly in Europe and Asia).

er's *Wacky World of sports*, *Sports Comedy Around the World*, *The Lighter Side of Sports* and a series of *Funniest Pranks* specials covering baseball, football and basketball.

● With delivery of the series *Unforgettable Romances* set for Fall 1995, **The Multimedia Group of Canada** has a special preview available for screening at Mip. So you too can capture the inside true story of this century's hottest romances, from first blush to resolution. Featured couples include Marilyn Monroe and Joe DiMaggio, Ingrid Bergman and Roberto Rossellini, Laurence Olivier and Vivian Leigh.

● Coming in 30-minute packages from **Transtel** are: *Medical Report*; *Geo - the face of our Earth*; *Life on the Land*; *Cologne Jazz House IV*; *Mole and his friends*; and *Little Cartoon Festival*. In 15-minute packages are: *Farming and Ecology*; *stores management* and *Great Moments in*

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Science and Technology; in short six-minute bites are *An ABC of Democracy*. Also available, the two-hour *Celebrating Haydn* (with *Peter Ustinov*) profile and 13 episodes of the hour-long *Airport* series.

● *The Volkswagen Film & Video Edition*, a collection of 50 films about motorsports, travelogs, documentaries, ecology and technology is exclusively presented worldwide by **penta tv Germany**. The collection includes a new 49 minute documentary film charting the development of the 16-cylinder-Grand Prix-racing car, designed in 1933 by Professor Ferdinand Porsche - *The Silver Arrows From Zwickau*.

● *Aaahh!!! Real Monsters* is the



MTM Opens Finance Fund

MTM INTERNATIONAL is on the prowl for more product to expand its international distribution business. Particularly targeting drama series, tv movies and children's series, it is looking to provide top-up financing for productions outside the U.S. in return for worldwide distribution rights. Typically MTM is looking to provide between \$200,000 and \$300,000 of finance per project.

"We would like to supplement what we have available in our catalog by about six tv movies a year, a one-hour action-adventure series and a children's series," said Greg Phillips, vice president and director of sales for MTM International. MTM will invest in projects that are already part-financed but have not reached a level where they can comfortably go into production.

"Ideally we want a broadcaster attachment,"



Phillips: Selling, not producing

said Phillips. "We don't want to be developing things ourselves. We don't want to tell a producer how to cut or light. If we like the script and the people our business will be to sell it."

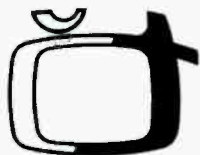
Key to Phillips' criteria for investing in projects will be quality, but the project does not have to be a "family" show. MTM is owned by U.S.-based International Family Entertainment Inc which owns and operates The Family Channel both in the U.S. and overseas. To date, the focus of MTM's international distribution has been around family-oriented shows.

At Mip TV, MTM is offering the miniseries Rosamunde Pilcher's bestselling novel *September* (also available from Portman), 50 newly-colored episodes of 1960s cult classic *Peter Gunn*, and two newly completed tv movies; *Dad, The Angel & Me and Tad*.

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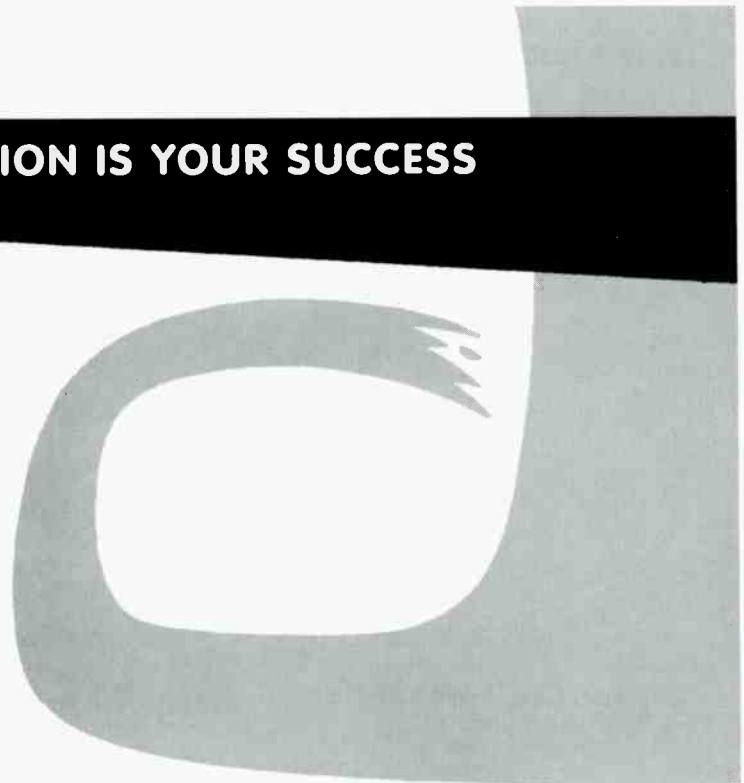
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Rigel Rides Interactive Gameshow Wave

RIGEL, with Durrant Fox Productions, is launching an interactive tv gameshow called *Yo-Yo*. Connecting a live studio audience with gameshow contestants playing from their own telephones at home, *Yo Yo* has been developed by two Israeli producers, Yitvek Ginsberg and Ehud Blieberg.

The half-hour show builds through three game stages to find an eventual winner. The contestants at home have to choose one game from four at the first stage. They then begin a journey by navigating via their telephone key pad. The obstacles on that journey are dictated, in part, by the actions of the studio audience. For example, the contestant may be finding a path through a jungle. A member of the audience may throw a ball

through a basketball hoop which then throws objects at the contestant who, using the key pad, can call up a weapon for protection.

The second stage of the game is a more difficult variation of the first stage. The final stage sees the surviving contestants navigating through a maze.

John Laing, Rigel's U.S.-based sales consultant, said the computer video game graphics that appear on-screen have gone a long way beyond the jagged image computer graphics that characterized early computer game-based tv shows, taking interactive tv to a new level.

Yo Yo is now piloting in Israel, and the format and technology has been sold into Scandinavia as well as to a production company in the Far East.

latest addition to U.S. cable network **Nickelodeon's** animation catalog. The 13 x 24 minute show takes kids to the garage dump to meet the foul-smelling Krum, a socially-refined monstrosity from Cernobyl and Ickis - "shy, small, furry and cute - for a monster."

● **Spiderman**, the world-renowned superhero, will battle a new supply of colorful supervillains in 65 all-new, state-of-the-art animated half-hour episodes, brought to you by **New World Entertainment**. Along with the explosive combination of two animated half hours featuring the action packed adventures of the futuristic mercenary *Iron Man*, and the super-human crime fighters the *Fantastic Four* in *Marvel Action Hour*

● **Republic Pictures International** present new for international home video *Live Nude Girls* - a comedy of lives, friendships and sexual fantasies; *Night of the Scarecrow* - a horror of unholy vengeance and *Once Upon a Time...When we were Colored* - a bittersweet drama about love, community and racial segregation. Also on offer, two television specials for video: *Beverly Hills: 90210 Christmas Special* and *Love Thy Neighbor: The Baddest and the Best of Melrose Place*.

● Marriage, divorce, children, manners and emotion equal comedy when **Antena 3 Televisión** bring to Mip, in that genre: *Por Fin Solos*, *Canguros*, *Hermanos De Leche*, *Compuesta Y Sin Novio* and *Quien Da La Vez*; and Spain's most universal bandit makes romantic adventure in *El Regreso De Una Leyenda: Curro Jiménez*.

● Swedish independent **Trash TV** has developed its own brand of real-time computer animation with *Hilbur & Co*, a long-running kids' show for TV1000. Trash, which claims to have developed a unique expertise in combining computer-generated graphics with live action, will display examples of its work at the Palais. Hilbur is created by filming an

actor wearing sensor pads connected to his body which are used to move a computer-designed character. A live actor filmed in a studio set interacts with the Hilbur actor, who stands just off screen, following the movements on monitors.

● Roll up, roll up for Selbo Film Productions' *Circus Around the World*, a 13-part series featuring exciting world famous circuses from around the globe. Available from **Fox Lorber Associates**, the series features: Moscow Circus on Ice, The Chinese State Circus and Circus Mondial of Spain.

● Animation production company **Encore Enterprises Inc's** *The Chucklewood Critters* will be showcased at Mip by the international rights holders, Daro Film Distribution of Monaco.

● *Fred*, an animated soap for adults, highlights the slate of **King Rollo Distribution** which also has several new projects in various stages of development. At the market the company will be seeking co-production partners and offering investment opportunities for *Fred*, based on the best-selling books and cards.

● **Rysher Entertainment** has lined up *Off Duty*, an action series starring Don Johnson, drama comedy *Live Shot*, set in the frenzied world of local tv news, and a slate of motion pictures for launch at Mip 95. In *Off Duty*, Johnson plays a detective forced to take on odd-jobs to keep up with the alimony payments. The series is expected to debut on CBS this fall. *Live Shot*, set in LA, was created and will be produced by Dan Guntzman and Steve Marshall. Rysher's film offer includes murder-mystery *Widow's Kiss* and political thriller *Nowhere Man*.

● **Desclez Productions** launches the international sales of *Little Star*, its newest children's animated series. Set in the future, *Little Star*, available in 156, 15-minute segments, introduces pre-schoolers to a fun and fantasy-filled universe of charac-

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ters on board the space station, Mimosa, travelling through deep space on a mission of discovery. Desclez is also in active pre-production on the animated series *Turtle Island*.

● Pre-school series *Mr Men*, produced by Le DAF Studios, is offered internationally by **Marathon International** (excluding France and French-speaking territories, UK and the U.S.) The pre-school series is being offered as 104, five-minute episodes, with a 13 minute version planned for the U.S.

● Hot on the heels of **PM Entertainment** produced feature film, *Bigfoot The Unforgettable Encounter*, comes *The Adventures Of The Mighty Bigfoot*, PM Entertainment's first animated television series, the first hour of which will debut at Mip. A full slate of motion pictures are also available including the two all new action-packed stunt-filled films, *Last Man Standing* and *The Power Within*; and for sci-

ACI Boosts Output

TWO and a half years ago ACI International launched as the distribution arm of a collection of Hollywood independent producers, noted for their creativity and an ability to produce commercial tv movies to budget. The producers' intention was to retain more of their distribution revenue themselves rather than give up substantial sums to third party distributors. There was also a need to open up new avenues of funding for production.

A year ago the company finished up with 12 tv movies. This year, according to Brian Harris, managing director of ACI International, will "undoubtedly be our best year yet in terms of volume and mix of output." With close to 30 tv movies and miniseries, with average budgets of between \$3.2 million to \$3.5 million, ACI has more than doubled output and speed of production. It is a pace that Harris doesn't expect to slow as the company also begins to increase the amount of co-production finance it is attracting.

The extra volume has also seen ACI extend beyond its traditional production base in Los Angeles. This year there have been 17 tv

movies and a miniseries from LA, the rest have been shot around the world including three of *A Mind to Kill* in Singapore.

Harris says a key reason for the growth in ACI's output has been the ability of the producers to get projects

commissioned in the U.S. that have kept clear of what he calls "social issue pictures" and so appeal across international boundaries and cultures. "There is a distinctiveness about our output that distinguishes us," said Harris.

High on the Mip TV slate of tv movies from ACI are *The Lies Boys Tell*, *Mortal Fear*, *Midwest Obsession*, *West Side Waltz* and *Free Fall*.



Mortal Fear: High on the slate

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ence-fiction fans the action flic *Hologram Man*.

● The tales of Toad, Rat and Badger and their lives along the river bank unfold in the \$9 million Carlton UK Television and **Hit Entertainment** co-production of *The Wind in the Willows*, to be launched at Mip, along with the best-selling sequel, *The Willows in Winter*.

● **Cinequanon Pictures International** at Mip offers thrills, comedy, action and romance with a list of titles including: *Desperate Measures*, *Kissing Miranda*, *Legions of the Night*, *Home is where the heart is*, *Hits*, and *Inside Out*; and for family entertainment, the adventure story *My Little Hero*.

● The perfect hunting trip turns bloody when the hunters become the hunted and a lush wilderness becomes one man's deadly *Dominion*, in this feature from **Prism Pictures**. Other products include the features, *Sleepstalker* and *Decoy*; a series of tv features with a romantic theme, *Romance Theater*; and the series' *Dark Horse* and *Someday I Wanna Be...*

● **Central Programming Company** presents the hilarious adventures of *Robinson Sucroe*; the six incarnations of *Stefano*; and the strange preferences of *The Ketchup Vampires*. Meanwhile, *Latin Legends* examines the role of Latin fighters in 20th century professional boxing.

● Among the new titles added to an expanded **Canal+ Distribution** catalog are: the animation packages: *The Neverending Story*, *The Oz Kids* and *MOT*; the documentaries: *Mike Tyson, 100 Years of Sex On The Silver Screen* and *Earthquakes* and the drama series *Liz: The Elizabeth Taylor Story* and *Mourir D'Amour*. Also new to Canal+ Distribution are the television rights to a number of feature films from the DEG catalogs such as *The Graduate*, *Carnal Knowledge*, *King Kong*, *Escape From New York* and the Cerito catalog of classic films starring Jean-Paul Belmondo.

● Available for distribution from Germany's **Igelfilm** are *The Circus Lions*, a 45-minute animation for kids which has already sold to 15 territories, *Letters To Katja*, about a Finnish photographer return to her roots, and *Phoolan Devi - Rebellion Of A Woman Bandit*, a film about the life of India's "bandit queen." Representing the Hamburg company at Mip for the first time is distribution manager Jutta Krenz.

● **GRB Entertainment** will have a catalog of factual series, specials, documentaries and light entertainment and short subjects including its two major series for Discovery Channel: *World Of Wonder* and *Movie Magic*. Also on the showbiz theme, GRB will show *World's Most Dangerous Stunts*, made for Fox, and two 60-minute specials for ABC, *The Ultimate Stuntman* and *The World's Greatest Stunts*.

● **Live International** offer for the first time, for home video only, the animation series: *Hello Kitty* and *Phantom 2040* in 26; *Speed Racer* in 65 and *Teenage Mutant Ninja Turtles* in more than 100 half-hour episodes. Live is also promoting *Paula Abdul's Get Up and Dance* original dancercise program and a library of feature films and programs

available for television and home video distribution in selected territories.

● Six new programs and a new season of *Road to Avonlea* lead **Sullivan Entertainment International's** Mip line-up. Newly acquired programming consists of three two-hour movies: *Harmony Cats*,



Cyberteens in Love (pictured above) and *The Circle Game*; a miniseries, *Eye Level*, and a one-hour drama, *Ladies in Waiting*. The company is also pre-selling its new project, *Franny and Rosetta*, a tv movie heading into production this spring.

● **Trimark Television** launches a slate of feature motion pictures for international distribution at Mip. Included in the line-up are the thrillers: *Separate Lives*, *Love is a Gun*, *Spitfire* and *Payback*; the moving dramas: *Love and a .45* and *Running Free*; the action adventure, *Hong Kong '97*.

● *No Future Without A Past*, a prize-winning documentary by Dutch indie producer Rob Hof, is available from **Radio Netherlands Television**. The program follows a theatre company touring Croatian refugee camps and improvising its shows from the fears and dreams of the children in the camps.

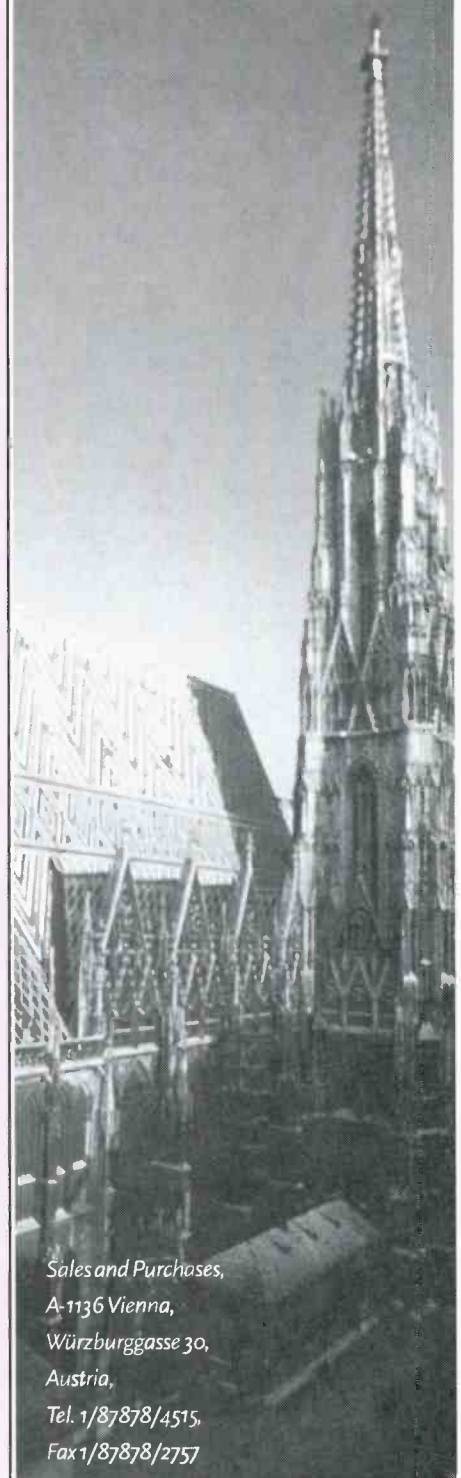
● UK distributor **Link Entertainment** is handling worldwide tv and video distribution for both World Productions' brand new animated series *Caribou Kitchen*, due to be launched to the UK pre-school audience on the ITV network early this summer; and the new Hibbert Ralph Entertainment half-hour special *The Forgotten Toys*, scheduled for a UK premiere at Christmas '95.

● **Dic Entertainment** is launching a total of 250 half-hours of new animated programming this market, including three series airing on the ABC network, a miniseries airing on Fox Children's Network and four properties aimed at the U.S. syndication market. *What A Mess*, co-developed with the UK's Link Entertainment, premieres in a prime kid's slot on ABC this fall; *Bump In The Night* and *Madeline* are also airing on the network. DIC is producing animated series *Siegfried and Roy* for Fox, while new series *Street Sharks*, *Ultraforce* and *Sailor Moon* go into syndication this Fall.

● **World International Network (WIN)** is launching three major new tv movies: *If Someone Had Known*, about a murder in a small Southern town, *Texas Justice*, a true story of lust, love, blood and money, and *Between Love and Honor* - a detective infiltrates a Mafia family, only to fall in love with the godfather's god-daughter.

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MIP STAND 21·01

MIP TV Program Price Guide

The market for television programs worldwide is strong, though prices are not rising fast. New competition in certain markets has led to a general strengthening of prices across the board but broadcasters are realistic about the top end of what they can afford.

Far Eastern, Latin American and Eastern European markets are active but still have not reached their full potential.

A lot of negotiation is taking place

over shorter license periods but with a less than proportional drop in price. Many broadcasters are concerned they may have acquired too much in previous years and so want to run stock down.

Prices listed are for commercial hours, equivalent to a running time of about 50 minutes, and cover programming ranging from children's and documentaries to miniseries. Films originally made for theatrical release are not

included. Amounts quoted are for those attainable by producers/distributors who live outside the listed country. Obviously local producers will generally get higher prices. With an increasing amount of product coming to market and broadcasters looking to maintain greater control of program acquisition costs, it is difficult to predict pricing trends, but distributors can expect some bulk buying to be price rather than quality led. [E]

		\$ Lower	\$ Higher			\$ Lower	\$ Higher			\$ Lower	\$ Higher
NORTH AMERICA											
Canada	CBC English	12 000	100 000	Turkey		1 500	4 000	Jordan		600	800
	CBC French	10 000	25 000	UK	BBC/ITV	20 000	120 000	Kuwait		1 000	1 200
	CTV	10 000	60 000		Channel 4	15 000	70 000	Lebanon		300	900
U.S.	Main network	100 000	3m		Satellite	4 000	70 000	Malta		100	300
	Pay cable	35 000	1.5m		Cable	2 000	4 000	Qatar		600	875
	Basic cable	10 000	250 000	EASTERN EUROPE				Saudi Arabia		1 500	2 000
	PBS network	35 000	100 000	Albania		200	300	Syria		400	650
	Syndication	20 000	120 000	Bulgaria		500	800	Yemen (North or South)		500	1 500
CENTRAL & SOUTH AMERICA											
Argentina		1 500	7 000	Czechoslovakia		600	2 000	AFRICA			
Bolivia		200	600	Hungary		800	1 000	Algeria		250	750
Brazil		2 500	14 000	Poland		750	1 500	Angola		200	600
Chile		800	5 000	Romania		700	1 000	Bophuthatswana		500	700
Colombia		2 500	6 500	ČIS		800	4 000	Egypt		1 000	1 200
Costa Rica		500	1 500	Ex-Yugoslavia		800	1 500	Ethiopia		200	600
Ecuador		1 000	2 200	ASIA & THE FAR EAST				Gabon		200	750
El Salvador		400	630	Bangladesh		200	400	Kenya		250	750
Guatemala		330	450	Brunei		250	* 500	Mauritius		175	200
Honduras		200	430	China		1 500	5 000	Morocco		400	650
Mexico		1 000	10 000	Hong Kong		600	4 000	Namibia		400	500
Nicaragua		140	350	India		1 000	3 500	Nigeria		1 000	2 000
Panama		300	800	Indonesia		700	1 500	Seychelles		125	200
Paraguay		140	500	Japan	NHK	15 000	50 000	South Africa		4 000	10 000
Peru		700	1 500		Commercial	25 000	120 000	Swaziland		100	200
Uruguay		500	1 000	South Korea		750	1 500	Tunisia		500	700
Venezuela		2 000	7 000	Macau		250	500	Zambia		200	300
WESTERN EUROPE											
Austria		3 500	8 000	Malaysia*		1 000	2 000	Zimbabwe		200	250
Belgium		3 000	6 500	Pakistan		600	1 000	CARIBBEAN			
Denmark		2 500	5 000	Philippines		1 000	1 700	Aruba		80	100
Finland		2 500	5 500	Singapore		300	1 500	Bahamas		200	250
France		8 000	65 000	Sri Lanka		300	500	Barbados		200	250
Germany		15 000	90 000	Taiwan		600	2 500	Bermuda		100	200
Gibraltar			200	Thailand		600	3 000	Cuba		400	450
Greece		2 000	4 000	OCEANIA				Dominican Republic		200	600
Iceland		800	1 200	Australia	ABC	11 000	45 000	Haiti		100	200
Ireland		1 500	2 000		Commercial	20 000	100 000	Jamaica		100	200
Italy		10 000	55 000	New Zealand		1 500	6 000	Netherlands Antilles		100	200
Luxembourg		1 300	4 000	MIDDLE EAST				Puerto Rico		1 500	7 000
Netherlands		4 000	9 000	Abu Dhabi		500	875	St Maarten		100	120
Norway		1 700	5 000	Bahrain		500	650	Trinidad and Tobago		300	400
Portugal		2 500	4 000	Cyprus		250	300	* If telecast prior to Singapore			
Spain		8 000	30 000	Dubai		600	1 000	© Television Business International			
Sweden		3 000	8 000	Iran		750	1 500				
Switzerland		2 500	5 000	Iraq		800	1 000				
				Israel		800	2 200				

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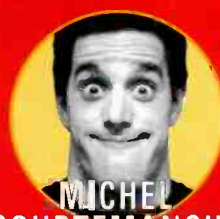
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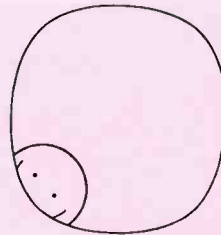
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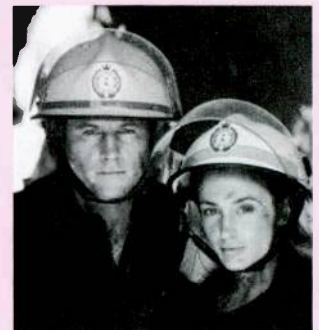
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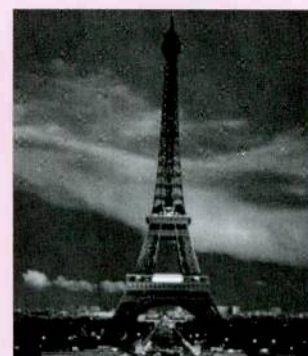
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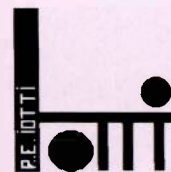
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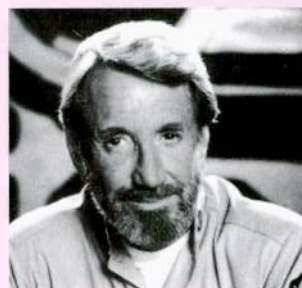
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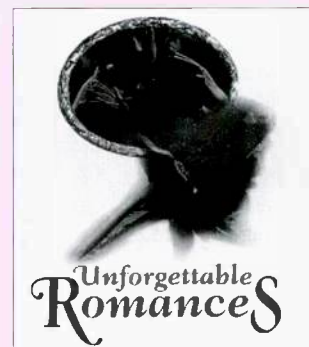
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Once upon a time

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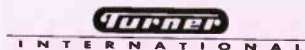
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UNICEF



The International Day of
Broadcasting 1995



CD-i 'In the Wake of Captain
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THE BUYERS' GUIDE TO PROGRAMS AT MIPTV

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
ACTION/ADVENTURE							
Dead End	13x60 mins	•		•	RTVE	New	15.20
Delta Force	26 hours	•	•	•	Harmony Gold	New	727
El Regreso de una Leyenda	13x60 mins				Antena 3 Television	New	08.28
Extreme	7x60 mins	•			MCA TV International	New	11.02/13.01
Flipper	26 hours				Samuel Goldwyn Co	Return	01.12
Gulliver's Travels	4 hours				Hallmark Entertainment	New	22.01
Hollywood Madam	1x90 mins				Kushner Locke Intl	Return	03.06
Jake & the Kid	13x60 mins	•		•	Nelvana Enterprises	New	H4.23
The Marshal	13x60 mins	•			Paramount	New	
Murder On The Iditarod Trail	format 120 mins	•		•	World International Network		
Nancy Drew & Hardy Boys	26x30 mins	•		•	Nelvana Enterprises	New	H4.23
The Pagemaster	75 mins 36 secs	•	•	•	Turner International	New	07.02/09.01
Police Rescue - series 4	22x60 mins	•			Southern Star	New	H4.36
	(total 65 hrs)						
SeaQuest DSV	2x120/ 42x60 mins	•			MCA TV International	Return	11.02/13.01
Sliders	1x120/8x60 mins	•			MCA TV International	New	11.02/13.01
Timewarrior Feature Films	6x120 mins				Kushner Locke Intl	New	03.06
White Dwarf	2 hours				Hallmark Entertainment	New	22.01
ADULT							
A Seat on the Board	format rights available				Action Time	New	G3.28
Agenda 21	13x30 mins	•		•	Worldwide Television News	New	02.40
Cover Me	1x94 mins	•		•	Playboy Entertainment Group	New	
The Judge Who Loved The Murderer	1x90 mins	•	•	•	Atlas International		07.39
Playboy Celebrity Centerfolds Patti Davis	1x60 mins	•		•	Playboy Entertainment Group	New	
Playtime	1x90 mins	•		•	Playboy Entertainment Group	New	
Romancing Sarah	1x92 mins	•		•	Playboy Entertainment Group	New	
Roving Report	52x30 mins	•			Worldwide Television News	New	02.40
ANIMATION							
Aaahh!! Real Monsters	13x24 mins	•			Nickleodeon		05.20/07.19
The Adventures of Huckleberry Finn	1x50 mins	•			Southern Star	New	H4.36
Aesop's Fables	3x30 mins	•		•	Jade Animation Int'l	New	
Alex And Alexis	26x26 mins	•	•	•	M.S. International	New	G3.39
Alfred J. Kwak	52x24 mins	•		•	Telescreen Distribution	Return	05.36
The Amazimals	52x3 mins	•		•	Ravensburger	New	08.39
Around the World in 80 Days	16x30 mins	•		•	Southern Star	New	H4.36
Baby Crockett	13x3 mins	•	•	•	M.S. International	New	G3.39
Bamboo Bears	52x24 mins	•		•	Telescreen Distribution	Return	05.36
Beavis and Butt-Head	60x30 mins	•		•	MTV	Return	05.20/07.19
Billy The Cat	26x26 mins	•	•	•	Eva Distribution	New	12.15
Boorin	52x30 mins	•		•	Jade Animation Int'l	New	
Boorin	30x50 mins	•		•	Nippon Animation	New	06.11
The Bots' Master	40x26 mins	•		•	C&D	Return	10.11
The Broca Street Tales	13x13 mins	•		•	Tele Images		14.08
Britt Allcroft's Magic Adventures of Mumfie	13x11 mins	•			Catalyst Distribution	New	C1.03
B.R.U.N.O. the Kid	65x30 mins	•			Film Roman	New	
Budgie The Little Helicopter	13x22/ 26x11 mins	•			Westinghouse Broadcasting Intl		03.17
Budgie The Little Helicopter	13x30 mins				Fred Wolf	Return	03.17
Casshan: Robot Hunter	4x30 mins	•	•	•	Harmony Gold	Return	727
Charlie Rivel	52x1 mins	•	•	•	Romagosa International	New	H4.35
Chib Maruko Chan	Xx30 mins	•		•	Nippon Animation	New	06.11
Cinderella	26 episodes	•		•	Mondo TV	New	C1.02
Comet in Moominland	1x74 mins		•		Telescreen Distribution	Return	05.36

MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Costa	100x5 mins	*		*	P.M.M.P.	Return	G3.17
Cro	21x30 mins	*		*	CTW	Return	07.11
Dick Dead Eye	1x80 mins	*		*	Westinghouse Broadcasting Int'l		03.17
Dinky Di's	26x26 mins	*	*	*	M.S. International		G3.39
Dinobabies	13x30 mins	*		*	Westinghouse	Return	03.17
Disaster Family	26x13 mins	*	*	*	Eva Distribution	Return	12.15
Dogtanian in One for all and all for One	1x75 mins	*		*	BRB	New	15.26/17.21
Don Quixote of La Mancha	39x26 mins	*	*	*	Romagosa International	New/Return	H4.35
The Etorangers	39 episodes	*		*	Mitsubishi Corporation	New	
Film Roman Presents...Animated Classic Showcase	12x60 mins	*		*	Film Roman	Return	
Flitze Firetooth	26x26 mins	*		*	Julian R Film	New	11.24
Foofur	26x26 mins	*	*	*	M.S. International	Return	G3.39
Fred	26x5 mins	*	*	*	King Rollo Distribution	New	03.01
Gentlemen of Titipu	1x60 mins	*		*	Southern Star	New	H4.36
Gogs	7x5 mins	*		*	S4C International	Return	11.32
Gomaespuma	13x26 mins	*		*	MM Multimedia	New	H4.35
Goo Goo Gadget	26x30 mins	*		*	DIC Ent. L.P.	New	03.20
Guru Guru	30x50 mins	*		*	Nippon Animation	New	06.11
Happily Ever After	13x22 mins	*		*	Itel	New	02.02
Happy Birthday Bunnykins	1x30 mins	*		*	Paragon International	New	03.02
Happy Ness, The Secret of The Loch	13x26 mins	*		*	C&D	New	10.11
Help!	104x30 mins	*		*	NTV	New	22.14/24.11
Hoyt 'n Andy's Sportsbender	13x30 mins	*	*	*	HIT	New	02.17
Inspector Mouse	26x26 mins	*		*	P.M.M.P.	In production	G3.17
IRIA	6 episodes	*	*	*	Mitsubishi Corporation	New	
Ithogoud	26x30 mins	*		*	CLT	New	H4.17
Izzy the Hero?	2x30 mins	*		*	Film Roman	New	
Jesus, A Kingdom Without Frontiers	26 episodes	*		*	Mondo TV	New	C1.02
Jonny Quest	65x30 mins	*		*	Turner International	New	07.02/09.01
The Karaoke Kid	20 episodes	*		*	Mitsubishi Corporation	New	
Karate Kids/Gold Tooth	2x30 mins	*		*	Catalyst Distribution	New	C1.03
King Arthur & The Knights of Justice	26x26 mins	*		*	C&D	Return	10.11
King Arthur & The Square Knights of the Round Table	39x30 mins	*		*	Southern Star	New	H4.36
The Legend of Snow White	52 episodes	*		*	Mondo TV	New	C1.02
The Legend of Zorro	52 episodes	*		*	Mondo TV	New	C1.02
Little Bear	13x30 mins	*		*	Nelvana Enterprises	New	H4.23
The Little Flying Bears	39x25 mins	*		*	Cine Groupe	Return	10.35
Littlest Pet Shop	40x26 mins	*		*	C&D	New	10.11
Luca Torelli is Torpedo	26x26 mins	*		*	MM Multimedia	New	H4.35
Lurchi's Adventures	26x26 mins	*		*	Julian R Film	New	11.24
Luzie Tawcht Unter	1x10 mins	*	*	*	King Rollo Distribution	New	03.01
The Magic Mill	26x26 mins	*		*	Julian R Film	New	11.24
The Magical Adventures of Quasimodo	26x30 mins	*		*	Hearst Entertainment	New	05.11
Maisie Go Round	13x10 mins	*	*	*	King Rollo Distribution	New	03.01
The Mask	26x30mins	*		*	Turner International	New	07.02/09.01
Meme Y El Sr. Bobo	26x25 mins	*		*	RTVE	New	15.20
Mole and his Friends	6x28 mins	*		*	TransTel	New	17.16
Moomin	78x24 mins	*		*	Telescreen Distribution	Return	05.36
Mort & Phil	26x30 mins	*		*	Jade Animation Int'l	New	
Mr Men and Little Miss	104x5 mins	*		*	Marathon International	New	02.37
MTV Oddities "The Head"	13x30 mins	*		*	MTV	New	05.20/07.19
MTV Oddities "The Maxx"	7x30 mins	*		*	MTV	New	05.20/07.19
Musti	59x6 mins	*	*	*	M.S. International	New	G3.39
Nappy, The Green Warrior	13x3 mins	*		*	MM Multimedia	New	H4.35
Nature Knows Best	6x13 mins	*	*	*	Eva Distribution	New	12.15
Never Ending Story	26x30 mins	*		*	Nelvana Enterprises	New	H4.23
The New Adventures of Felix the Cat	13x30 mins	*		*	Film Roman	New	
The New Adventures of Flash Gordon	26x30 mins	*		*	Hearst Entertainment	New	05.11
The New Adventures of Speed Racer	13x30 mins	*		*	Fred Wolf	Return	03.17
Nick and Noel	1x30 mins	*		*	Film Roman	New	
No Comment	40x30 secs	*	*	*	Czech Television-Telexport	New	01.07
Norman's Ark	13x15 mins	*	*	*	HIT	New	02.17
Once Upon A Time...The Americas	26x26 mins	*		*	Procidis		10.22
Once Upon A Time...The Discoverers	26x26 mins	*		*	Procidis		10.22
Once Upon A Time...Life	26x26 mins	*		*	Procidis		10.22
Once Upon A Time...Man	26x26 mins	*		*	Procidis		10.22

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[As of March 15. Subject to change.]



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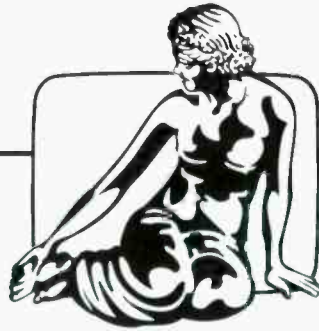
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MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Once Upon A Time...Space	26x26 mins	•		•	Procidis		10.22
People	1x54 mins	•			NBD	New	22.13
Phantom 2040	33x30 mins	•		•	Hearst Entertainment	New	05.11
Picasso's Place	13x30 mins				Kushner Locke Intl	New	03.06
The Prince of Atlantis	13x30 mins	•		•	Westinghouse Broadcasting Int'l		03.17
The Prince of Atlantis	26x24 mins	•		•	Ravensburger	New	08.39
Professor Panda	180x3 mins	•		•	IMSI/VCTV	New	G3.39
Quasimodo	26x26 mins	•		•	Tele Images		14.08
Quid and the Gang	32x25 mins	•		•	Cine Groupe	Return	10.35
Rabbit Ears	3 x series/ 2 x special	•			Itel	New	02.02
Robinson Sucroe	26x24 mins	•		•	Ravensburger	New	08.39
Romeo & Black Brothers	30x50 mins	•		•	Nippon Animation	New	06.11
Rosy Dock	1x10 mins	•	•	•	Film Australia	New	06.23
Rupert	52x30 mins	•		•	Nelvana Enterprises	New	H4.23
Sandokan	1x75 mins	•		•	BRB	New	15.26/17.21
Santa & The Desert Children	1x26 mins	•	•	•	Eva Distribution	New	12.15
Santa & The Magician	1x26 mins	•	•	•	Eva Distribution	New	12.15
Sea Dogs	13x25 mins	•		•	Cine Groupe	New	10.35
Seabert	26x26 mins	•	•	•	M.S. International	Return	G3.39
Secret Weapon	1x73 mins	•	•	•	Nordisk Film TV-Distrib	New	04.06
Sharky & Georges	52x25 mins	•		•	Cine Groupe	Return	10.35
Short Programmes for Children	90x3-5 mins	•	•	•	CNDP	New	G3.41
The Shtips	Xx30 mins	•			Sandy Frank Entertainment	New	09.12
Siegfried & Roy	65x30 mins				DIC Ent. L.P.	New	03.20
Simba the King Lion	52 episodes	•		•	Mondo TV	New	C1.02
Skeleton Warriors	13x30 mins	•			Westinghouse Broadcasting Int'l		03.17
Snorks	65x26 mins	•	•	•	M.S. International	Return	G3.39
Soul Mates/Gift of Light	Xx26 mins	•			ITF	New	13.20/15.19
Spot's Magical Christmas	1x10 mins	•	•	•	King Rollo Distribution	New	03.01
Star Street	26x24 mins	•		•	Telescreen Distributing	Return	05.36
Street Sharks	13x30 mins				DIC Ent. L.P.	New	03.20
Tobias Lotz and his Lion	26x5 mins	•		•	Ravensburger	New	08.39
Toysters	13x30 mins	•		•	Jade Animation Int'l	New	
Transylvania Pet Shop	26x24 mins	•		•	Ravensburger	New	08.39
Transylvania Pet Shop	26x26 mins	•		•	P.M.M.P.	New	G3.17
The True Adventures of Professor Thompson	26x26 mins	•		•	MM Multimedia	Return	H4.35
Tugs	13x20 mins	•			Primetime	New	23.02
Turbo-Charged Thunderbirds	13x30 mins	•			Polygram		H4.12
The Twelve Gifts	1x30 mins	•			Southern Star	New	H4.36
The Web	6x5 mins	•	•	•	Film Australia	New	06.23
What a Mess	26x30 mins				DIC Ent. L.P.	New	03.20
Willi Wuhlmouse Takes A Trip Around The World	26x30 mins	•		•	Jade Animation Int'l	New	
Willi Wuhlmouse Takes A Trip Around The World	426x25 mins	•		•	IMSI	Return	G3.39
Willy Fog in: Around the World in 80 days	3x75 mins	•		•	BRB	New	15.26/17.21
The Wind in the Willows/The Wind in Winter	6x30 mins/ 2 features	•	•	•	HIT	New	02.17
Yamato Takeru	30x37 mins	•		•	Nippon Animation	Return	06.11
Zoe	40x26 mins	•		•	P.M.M.P.	In production	G3.17
Zoe and Charlie	26x5 mins	•		•	Cine Groupe	Return	10.35
ARTS							
Don Giovanni	1 episode	•		•	NVC Arts	New	01.05
Flags of the Fante Coast	1x52 mins	•		•	RM Associates	New	06.21
Icons of 20th Century Design	100x10 mins	•		•	RM Associates	New	06.21
Inspired By Bach, Yo-Yo Ma	6x60 mins	•			Rhombus International	New	13.20
Romeo and Juliet	1 episode	•		•	NVC Arts	New	01.05
Satie And Suzanne	1x55 mins	•			Rhombus International	New	13.20
Shadows And Light	1x70 mins	•			Rhombus International	Return	13.20
Sunday Arts & Entertainment	30 episodes	•			CBC Intl Sales	New	04.34/06.33



FESTIVAL DE TELEVISION DE MONTE-CARLO

Président: S.A.S. le Prince Héritaire Albert

**THE MONTE-CARLO TELEVISION FESTIVAL AND MARKET
CONGRATULATES THE 1995 GOLD NYMPH WINNERS**

TELEVISION FILMS

“PAT AND MARGARET”

BBC, UNITED KINGDOM

Directed by Gavin Millar

Starring Julie Walters and Victoria Wood

MINI-SERIES

“RADETZKYMARSCH”

ORF, AUSTRIA

Directed by Axel Corti

Starring Max von Sydow, Charlotte Rampling and Claude Rich

NEWS REPORTS

“JOHANNESBURG RIOTS”

CBC, CANADA

NEWS FEATURES

“YAN’AN YELLOW SOIL”

NHK, JAPAN



**THE 1996 MONTE-CARLO TELEVISION MARKET
MONDAY, FEBRUARY 12 - THURSDAY, FEBRUARY 15, 1996
LOEWS HOTEL**

*THE CLOSING GALA WILL TAKE PLACE ON THURSDAY, FEBRUARY 15, 1996
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PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
CHILDREN'S/YOUTH							
The Adventure's of Dodo	65x5 mins	•		•	Worldwide Television News	New	02.40
The Adventure's of Oliver Twist	26x30 mins	•		•	Saban	New	21.14/23.11
Allegra's Window	40x26 mins	•			Nickleodeon		05.20/07.19
Amazing Animals	13x13 mins	•		•	NTV	New	22.14/24.11
Anna Banana	26x30/ 52x15 mins	•		•	The Multimedia Group of Canada	Return	00.01
Aneta	6x26 mins	•	•	•	Czech Television-Telexport	New	01.07
Animals Of The Bible	1x30 mins	•	•	•	Adler Media	New	16.25
Bananas In Pyjamas	40x30 mins	•			ABC International	New	02.41
Brill III	10x15 mins	•		•	YTTI	New	A0.01
Bump in the Night	55 episodes	•			DIC Ent. L.P.	New	03.20
Eagle Riders	65x30 mins	•		•	Saban	New	21.14/23.11
Earthworks III	13x30 mins	•		•	Worldwide Television News	New	02.40
Eye TV	26x24 mins	•		•	Worldwide Television News	New	02.40
The Forest Rangers	104x30 mins	•			Oasis Pictures	New	00.01
Francine Pascal's Sweet Valley High	44x30 mins	•		•	Saban	New	21.14/23.11
Fun Song Factory	1x65 mins	•		•	King Rollo Distribution	New	03.01
Geokids	6x26 mins	•		•	NGTV	Return	02.02
Glad Rags	13x30 mins	•			Beyond Distribution	New	H4.09
Gladiators 2000	26x30 mins	•			Samuel Goldwyn Co	Return	01.12
Gogo's Adventures - English	39x5.5 mins	•			Beyond Distribution	New	H4.09
Grounding Marsh	26x30 mins	•			Portfolio Films	Return	13.20
Gullah Gullah Island	38x26 mins	•			Nickleodeon		05.20/07.19
Halfway Across The Galaxy And Turn Left	28x30 mins	•		•	Eaton Films	Return	08.24
Hot Dog Channel		•			Globo TV Network Brazil	New	13.13
The Intrepids	52x26 mins	•		•	Marathon International	New	02.37
Jelly Bean Jungle	26x30 mins	•		•	All American Fremantle Intl	New	12.14/H4.21
Junglies	13x5 mins	•		•	Chatsworth Television	Return	07.30
Just William	6x30 mins	•			BBC Worldwide Television	New	17.02/19.01
Kids Love Trains	1x30 mins	•	•	•	Adler Media	New	16.25
The Kidsongs	56/21x30 mins	•		•	Westinghouse Broadcasting Int'l		03.17
Life's Little Lessons	Xx26 mins	•		•	ITF	New	13.20/15.19
Lift Off	78x26 mins	•			ACTF	Return	04.26/06.27
Little Rascals-Colourized	71 episodes	•			King World Intl	New	C1.07
Little Rascals Xmas Special	1x30 mins	•			King World Intl	New	C1.07
Marie Rose	2x66 mins	•	•	•	Czech Television-Telexport	New	01.07
Masked Rider	26x30 mins	•		•	Saban	New	21.14/23.11
Once Upon A Hamster	26x30 mins	•		•	Paragon International	New	03.02
Open Sesame II	52x30 mins	•			CTW	Return	07.11
Really Wild Animals	14x21 mins	•		•	NGTV	Return	02.02
Rosie & Jim	25x10 mins	•		•	Jane Balfour	New	05.25
Round The Twist	26x24 mins	•			ACTF	Return	04.26/06.27
Ryan Giggs Soccer Skills	6x30 mins	•		•	Chrysalis Distribution	New to Mip	01.13
Saban's VR Troopers	92x30 mins	•		•	Saban	New	21.14/23.11
Sesame Street	130x60 mins	•			CTW	Return	07.11
Sky Trackers Series	26x24 mins	•			ACTF	Return	04.26/06.27
Take Off	26x30 mins	•		•	Canamedia	New (13)	00.01
Tenko and the Guardians of the Magic	26x30 mins	•		•	Saban	New	21.14/23.11
Tom & Tim	26x5 mins	•		•	Chatsworth Television	New	07.30
The WhyWhy Family	130x3.5 mins	•		•	Saban	New	21.14/23.11
William's Wish Wellington	13x5 mins	•			BBC Worldwide Television	New	17.02/19.01
Winners	14x48 mins	•			ACTF	Return	04.26/06.27

COMEDY

A B'Stard... Exposed	1x30 mins	•		•	SelectV International	New	07.25
A Heartbeat Away	6 hours	•			SPI International	New	H4.20
The Baldy Man	6x30 mins	•			Polygram		H4.12
Best of the Blues Brothers	1x60 mins	•			Broadway Video Entertainment	Return	63.02
Birds of a Feather	72x30 mins	•		•	SelectV International	Return	07.25
Bob Morrison Show	26x30 mins	•		•	MTM Intl	Return	01.02
Canguros	78x30 mins	•			Antena 3 Television	Return	08.28
Carrot's Commercial Breakdown - 4	1x60 mins	•			NBD	New	22.13
Comedy at Club 54	101x30 mins	•			Oasis Pictures	New	00.01
Compuesta y Sin Novio	13x60 mins	•			Antena 3 Television	Return	08.28
Crumbs 3	1x85 mins	•	•	•	Nordisk Film TV-Distrib	New	04.06

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MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Cybill	13x30 mins	•			Paramount	New	
Der Bewegte Mann	1x93 mins	•	•	•	Atlas International		07.39
The Diez Family	131x60 mins	•			Artear	New	11.05
Frasier	48x30 mins	•			Paramount	Return	
Friends	24x60 mins	•			Warner Bros. International Television Distribution	New	B1.00
Funny Girls	13x30 mins	•			Catalyst Distribution	New	C1.03
Goodnight Sweetheart	16x30 mins	•		•	SelecTV International	Return	07.25
Grace Under Fire	47x30 mins	•		•	The Fremantle Corporation	Return	05.19
Growing Up	49x60 mins	•			Artear	New	11.05
Happy Nest	Xx25 mins	•			Endemol Entertainment	Return	H4.32
Harmony Cats	1x120 mins	•	•	•	Sullivan Entertainment	New	14.19
Head of the Household	66x60 mins	•			Artear	New	11.05
Hermanos De Leche	78x30 mins	•			Antena 3 Television	Return	08.28
The High Life	6x30 mins	•			BBC Worldwide Television	New	17.02/19.01
Hope & Gloria	13x30 mins	•			Warner Bros. International Television Distribution	New	B1.00
i Por Fin Solos!	14x60 mins	•			Antena 3 Television	New	08.28
Just for Laughs	12x26/ 6x55 mins	•		•	Rozon Inc.	Return	08.36/10.35
The Kids in the Hall	110x30 mins	•		•	Broadway Video Entertainment	Return	63.02
Life, Liberty and Laughter	6x60 mins	•			Catalyst Distribution	New	C1.03
Live Nude Girls	1x94 mins	•			Republic Pictures International	New	14.16/16.13
Macho Men	39x60 mins	•			Artear	New	11.05
Men of the World	12x30 mins	•		•	SelecTV International	Return	07.25
Michel Courtemanche Specials	2x60 mins	•	•	•	Rozon Inc.	Return	08.36/10.35
The Mrs Merton Show	6x25 mins	•			Granada LWT International	New	A0.15
My Brother & Me	13x26 mins	•			Nickleodeon		05.20/07.19
The New Red Green Show	96x30 mins	•			Oasis Pictures	New	00.01
Pepa Y Pepe	26x30 mins	•		•	RTVE	New	15.20
The Real Me		•	•	•	Rozon Inc.	New	08.36/10.35
Revenge of the Stars	50x8-10 mins	•	•	•	Rozon Inc.	Return	08.36/10.35
Saturday Night Live	130x30/200x60/400x90 mins	•			Broadway Video Entertainment	New	63.02
SCTV	185x30 mins	•			Catalyst Distribution	Return	C1.03
The Sunshine Boys	2 hours	•			Hallmark Entertainment	New	22.01
Super Dave	52x30 mins	•			Unapix International	New	05.01
Supermarket	Xx25 mins	•			Endemol Entertainment	New	H4.32
Surprise Surprise	350x8-10 mins	•	•	•	Rozon Inc.	Return	08.36/10.35
Tracey Ullman: Takes on New York	1x60 mins	•		•	SelecTV International	Return	07.25
Villarriba - Villabajo	26x60 mins	•		•	RTVE	New	15.20
Weird TV	26 episodes	•			Unapix International	New	05.01

CURRENT AFFAIRS

American Journal	1x30 mins				King World Intl	New	C1.07
An ABC of Democracy	13x6 mins	•			TransTel	New	17.16
Inside Edition	1x30 mins				King World Intl	New	C1.07

DOCUMENTARIES

A Narrow Sea	1x26 mins	•			Macmillan Media	New	
A Walk on the Wet Side	3x30 mins	•	•	•	RNTV	Return	18.19
Accidental Empires	3x50 mins	•		•	RM Associates	New	06.21
Acorn: The Nature Nut	13x24 mins	•		•	Great North Releasing	Return	00.01
Adventures of the Old West	1x60 mins	•			IBN	New	G3.49
Air & Space Smithsonian Magazine Presents Dreams of Flight	13x30 mins	•		•	Unapix International	Return	05.01
Al Filo De Lo Imposible	70x30 mins	•		•	RTVE	Return	15.20
America's Revolutionary War	6x46 mins	•			Discovery Enterprises Worldwide	Return	G3.13
Anatomy of Love	240 mins	•		•	Turner International	New	07.02/09.01
Angels	1x50 mins	•	•	•	TSI Switzerland	New	12.29
As Long as the Rivers Flow	5x60 mins	•		•	Great North Releasing	Return	00.01
Assault On Manaslu	1x55 mins	•	•	•	Adler Media	Return	16.25
Behind The Wheel	1x30 mins	•			Portfolio Films	New	13.20
Betrayal	1x52 mins	•			SVT	New	26.08
Biological Pest Control	1x49 mins	•			MICO	New	07.01
The Birding Show	13x24 mins	•		•	Great North Releasing	New	00.01

MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Break the Silence	1x30 mins	•			King World Intl	New	C1.07
British Rail Journeys	10x50 mins	•	•	•	Adler Media	New	16.25
Camp Memories	1x60 mins	•			Itel	New	02.02
Carriers: Fortress At Sea	1x120 mins	•			Discovery Enterprises Worldwide	New	G3.13
Carrier's Caribbean	12x15 mins				IBN	New	G3.49
Charlie White's Fishing Machine	26x24 mins	•	•	•	Great North Releasing	Return	00.01
Chechnya - Tales of a War	1x28 mins	•			YLE	New	07.34
Children Of The War	1x50 mins	•	•	•	S4C International	New	11.32
Cinema Europe: The Other Hollywood	6x60 mins	•			DLT Entertainment UK	New	20.11
Clive Barker's A-Z of Horror	6x30 mins	•			BBC Worldwide Television	New	17.02/19.01
The Cordobas Routes	8x30 mins	•	•	•	Chrysalis Distribution	Return	01.13
Court TV	50+x60 mins	•			Itel	New	02.02
Delta Force	1x52 mins	•	•	•	Jane Balfour	New	05.25
The Desert Is No Lady	1x52 mins	•			Arts Council Films	New	05.30
Detection & Prevention of Child Abuse	1x20 mins	•	•	•	SR Programs Intl	New	12.20
Digging Up the T-Rex	1x60 mins	•			Catalyst Distribution	New	C1.03
Discovering Women	6x52 mins	•	•	•	Jane Balfour	New	05.25
Diyarbakier - I Am Ashamed Of Being A Lawyer	1x89 mins	•			igelfilm	New	10.14
Don't Tell Daddy - Irma's Story	1x59 mins	•			YLE	New	07.34
Driving Passion	190 mins	•		•	Turner International	New	07.02/09.01
Earth Quest	10x60 mins	•			IBN	Return	G3.49
Earthscape - Lifestyle & Wildlife	234x4-12 mins	•	•	•	The Multimedia Group of Canada	New	00.01
Enigma Earth	29x52/27x45 min	•	•	•	ZDF Entertainment	New/Return	21.02/23.01
The Executioners	1x78 mins	•			Itel	New	02.02
Expedition	39 hours	•			Coral Pictures	Return	
Extraordinary People	4x26 mins	•	•	•	Chatsworth Television	Return	07.30
Flesh and Blood: The Hammer of Heritage Horror	2 hours	•	•	•	Harmony Gold	Return	727
Fire, Ice and Sea - Smithsonian Specials	various	•	•	•	Unapix International	New	05.01
The Fishing	14x26 mins	•	•	•	MM Multimedia	New	H4.35
Flight Over The Equator	1x90 mins	•			Discovery Enterprises Worldwide	New	G3.13
The Flying Vet	6x30/1x60 mins	•			ABC International	New	02.41
The Forbidden City	1x70 mins	•			Discovery Enterprises Worldwide	Return	G3.13
The Forgotten Past	6x55 mins	•	•	•	BRB	New	15.26/17.21
French Writers	8x13 mins	•	•	•	CNDP	New	G3.41
From Lisbon With Love	1x50 mins	•	•	•	RTC	New	04.12
From Spirit to Spirit	13x24 mins	•	•	•	Great North Releasing	Return	00.01
The Future of Aging	4x45 mins	•			ORF	New	21.01
Great Gardens of England	1x60 mins	•			IBN	New	G3.49
The Great Indian Railway	1x52 mins	•	•	•	Itel	New	02.02
Great Wonders of the World	3x60 mins	•			IBN	New	G3.49
The Greatest Flight	1x52 mins	•	•	•	Itel	New	02.02
The Hand of Stalin	3x59 mins	•	•	•	Great North Releasing	Return	00.01
Hemingway in Cuba	1x30 mins	•			Harmony Gold	New	727
Hiroshima	1x75 mins	•	•	•	Tele Images		14.08
Hitler's Death: The Final Report	1x50 mins	•			Itel	New	02.02
Hollywood Vice	1x60 mins	•	•	•	CTE	New	20.02
The Heritage Guide To Great Britain	7x60 mins	•	•	•	Beckmann Communications	New	04.05
Holylands	3x60 mins	•			Channel 4 International	New	03.34/05.33
Hongkong/Manila	2x45/1x45 mins	•			ORF	New	21.01
Hotel Continental	1x50 mins	•	•	•	TSI Switzerland	New	12.29
How To Be A Champion	39x15 mins	•	•	•	MM Multimedia	Return	H4.35
Hunters & Gatherers	1x60 mins	•			Portfolio Films	Return	13.20
Hunting the Dragon	1x52 mins	•	•	•	MICO	New	07.01
Hieronimus Bosch's The Temptations of Saint Anton - "God Allows The Devils To Tempt Angels"	1x55 mins	•	•	•	RTC	New	04.12
In Situ - an audiovisual encyclopedia of science and technology	300 episodes	•	•	•	CNDP	New	G3.41
Images of Nature	70x5 mins	•	•	•	CNDP	Return	G3.41
Indico	6x60 mins	•	•	•	RTVE	Return	15.20
Intercity Urban Scenes	15x30 mins	•			ORF	New	21.01
Investigators of the Last Frontier	13x24 mins	•	•	•	Great North Releasing	Return	00.01

MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Isabel Allende	1x52 mins	•		•	Amaya Distribution	In production	10.24
James Dean	1x60 mins	•			NBD	New	22.13
Ken Loach	1x38 mins	•		•	Amaya Distribution	New	10.24
The King is Dead! Long Live the King!	1x50 mins	•		•	igelfilm	New	10.14
Landscapes of the World	12x15 mins	•	•	•	CNDP	Return	G3.41
The Last of the Czars	3x46 mins	•			Discovery Enterprises Worldwide	New	G3.13
Life at the Edge	1x52 mins	•		•	Itel	New	02.02
Life of Borromini	1x50 mins	•	•	•	TSI Switzerland	New	12.29
Lillehammer '94: 16 Days of Glory/ Barcelona '92: 16 Days of Glory	each 1x180 mins	•			Unapix International	Return	05.01
Lost Civilisations	10x60 mins	•			Itel	New	02.02
The Machiguenga	1x49 mins	•			MICO	New	07.01
Madagascar	2x48 mins	•		•	Amaya Distribution	New	10.24
The Making of the Three Tenors	1 episode	•			NVC Arts	New	01.05
Man's Quest into Nature	40x60 mins	•			Artear	New	11.05
Match Point	1x26 mins	•			Macmillan Media	New	
Meghalaya	1x49 mins	•		•	MICO	New	07.01
Metropolis	6x29 mins	•		•	Jane Balfour	New	05.25
Muhammad Ali The Whole Story	6 epsodes	•		•	Mitsubishi Corporation	New	
My Partners, My People	13x24 mins	•		•	Great North Releasing	Return	00.01
Naked News	4x60 mins				Channel 4 International	New	03.34/05.33
The Nature of Things the Damned	96 episodes	•			CBC Intl Sales	New	04.34/06.33
Network First: Dealing With Hit Men	1x52 mins	•		•	YTTI	New	A0.01
Network First: Escape From Tibet	1x52 mins	•		•	YTTI	New	A0.01
Network First: Small Miracles	1x52 mins	•		•	YTTI	New	A0.01
Niagara's Gold	1x47 mins	•		•	Film Australia	New	06.23
Night Shift	1x26 mins	•			Macmillan Media	New	
Nile: River of Gods	1x90 mins	•			Discovery Enterprises Worldwide	New	G3.13
Not Too Young To Die	1x52 mins	•			SVT	Return	26.08
Pacifica - Tales From The South Seas	13x30 mins	•			Dandelion Distribution	Return	H4.05
Paleoworld	13x25 mins	•		•	Discovery Enterprises Worldwide	Return	G3.13
Placido Domingo	1x90 mins	•		•	Amaya Distribution	New	10.24
Predatory Birds In Danger: The Lesser Kestrel	1x28 mins	•		•	MM Multimedia	New	H4.35
Prehistoric Cultures	2x45/1x60 mins	•			ORF	New	21.01
On the Loose... In Wildest Africa	13x30 mins	•			Catalyst Distribution	New	C1.03
Reel Truths	4x30 mins	•		•	S4C International	New	11.32
Resolute Bay Stories	1x42 mins	•			Portfolio Films	New	13.20
Russia's Last Tsar	1x52 mins	•		•	Itel	New	02.02
Safari: Ocean Adventures	13x24 mins	•		•	Great North Releasing	Return	00.01
Salvaged Lives	60/90 mins	•		•	Tele Images		14.08
Saramago	1x55 mins	•		•	RTC	New	04.12
Satan Is Calling Me	1x23 mins	•			YLE	New	07.34
Secret Lives	3x60 mins				Channel 4 International	New	03.34/05.33
Seekers of the Lost Treasure	4 episodes	•			Discovery Enterprises Worldwide	New	G3.13
SF Moma	1x50 mins	•	•	•	TSI Switzerland	New	12.29
Shadipur	1x28 mins	•			SVT	New	26.08
The Sixth Sense	1x45 mins	•			ORF	New	21.01
Skin Deep	1x26 mins	•			Macmillan Media	New	
Smithsonian World	12x60 mins	•			Unapix International	New	05.01
The Solar System	4x30 mins	•		•	Julian R Film	New	11.24
The Soul of Stax	1x52 mins	•			Arts Council Films	New	05.30
The Space Shuttle	1x100 mins	•		•	Discovery Enterprises Worldwide	Return	G3.13
Strange Landscape	5x50 mins	•			BBC Worldwide Television	New	17.02/19.01
Sugar Slaves	1x55 mins	•		•	Film Australia	New	06.23
TaxiCab Confessions	1x60 mins	•			Itel	New	02.02
Threshold Of The Stars: The Life of Dr Werner von Braun	1x45 mins	•	•	•	Adler Media	Return	16.25
Trail Blazers	5x15 mins	•		•	S4C International	New	11.32
Trails into Science	13x12 mins	•	•	•	RNTV	Return	18.19
The Treasure of the 'San Diego'	1x52 mins	•		•	Amaya Distribution	New	10.24
The Troubleshooters	1x52 mins	•			Granada LWT International	New	A0.15
Under the Spell of the Orient	1x52	•	•	•	RNTV	New	18.19

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
The Unforgiving Sea	1x30/1x50 mins	•	•	•	RNTV	New	18.19
Vietnam - 20 Years Later	1x50 mins	•			YLE	New	07.34
Vincent Price: My Life and Crimes	1x60 mins	•	•	•	Harmony Gold	Return	727
Voyage Through Indo-China	2x56 mins	•		•	MICO	New	07.01
W5 International	26x48 mins	•		•	Great North Releasing	Return	00.01
Waitress	1x30 mins	•			Portfolio Films	New	13.20
We were The Babies Without Futures	1x52 mins	•			SVT	Return	26.08
Why We Fight	20x120 mins	•			Catalyst Distribution	New	C1.03
The Wild West	6x60 mins				Channel 4 International	New	03.34/05.33
Women of Islam	3x90 mins	•			Pathe TV	Return	08.05

DRAMA

A Stranger in Town	1x94 mins	•		•	Hearst Entertainment	New	05.11
Action Pack	20x120 mins	•			MCA TV International	New	11.02/13.01
Amelia Earhart	120 mins	•		•	Turner International	New	07.02/09.01
Armed and Innocent	1x94 mins				Republic Pictures International TV	New	24.14
Band of Gold	6x52 mins	•			Granada LWT International	New	A0.15
Bare Essentials					Republic Pictures International TV	New	24.14
Baywatch Nights	22x60 mins	•		•	All American Fremantle Intl	New	12.14/H4.21
Baywatch VI	22x60 mins	•		•	The Fremantle Corporation	New	05.19
Before Sunrise	101 mins	•			Turner International	New	07.02/09.01
Betrayed: A Story of Three Women	1x94 mins	•		•	Hearst Entertainment	New	05.11
Between Love and Honor	format 120 mins	•		•	World International Network		
The Blood of Others	6 hours				SPI International	New	H4.20
Blue Heelers	104x60 mins	•			Southern Star	Return	H4.36
Bizet's Dream	1x60 mins	•		•	The Multimedia Group of Canada	Return	00.01
Bramwell	7x60 mins	•		•	CTE	New	20.02
The Buccaneers	6x50/4x50 mins	•			BBC Worldwide Television	New	17.02/19.01
Butterbox Babies	1x120 mins	•	•	•	Sullivan Entertainment	New	14.19
Cagney & Lacey: The Return	1x120 mins	•			MTM Intl	Return	01.02
Cagney & Lacey: Together Again	1x120 mins	•		•	MTM Intl	Return	01.02
Catherine Cookson's The Gambling Man	3x52 mins	•		•	YTTI	New	A0.01
Catherine Cookson's The Glass Virgin	3x52 mins	•		•	YTTI	New	A0.01
Children of the Dust	4 hours				Hallmark Entertainment	New	22.01
Chiller	5x52 mins	•		•	YTTI	New	A0.01
Christy	21x60 mins	•		•	MTM Intl	Return	01.02
Choices of the Heart: The Margaret Sanger Story	1x94 mins	•		•	Hearst Entertainment	New	05.11
The Circle Game	1x120 mins	•	•	•	Sullivan Entertainment	New	14.19
Conviction of Kitty Dodd	1x94 mins				Republic Pictures International TV	New	24.14
Crocodile Shoes	7x52 mins	•		•	Chrysalis Distribution	New to Mip	01.13
Dancing in the Dark	1x94 mins	•		•	Hearst Entertainment	New	05.11
Dangerous Lady	2x120 mins	•		•	CTE	New	20.02
The Daughter of the Puma	1x88 mins	•	•	•	Nordisk Film TV-Distrib	New	04.06
Deadly Invasion	format 120 mins	•		•	World International Network		
Dr Markus Merthin - Gynaecologist	1x90/11x46 mins	•		•	ZDF Entertainment	New	21.02/23.01
Earth 2	1x120/ 20x60 mins	•			MCA TV International	New	11.02/13.01
Earthsearch	10x60 mins	•		•	Pro-International	New	G3.53
Ed McBain's 87th Precinct	1x94 mins	•		•	Hearst Entertainment	New	05.11
ER	24x60 mins/ 2 hr MOW	•			Warner Bros. International Television Distribution	New	B1.00
Final Appeal	1x94 mins				Republic Pictures International TV	New	24.14
Fire	13x60 mins	•			Beyond Distribution	New	H4.09
The Flying Camel	1x92 mins	•		•	igelfilm	New	10.14
Franny and Rosetta	1x120 mins	•	•	•	Sullivan Entertainment	New	14.19
Frontiers	1x120/5x60 mins	•		•	CTE	New	20.02
Ghostwriter	7x30 mins	•			CTW	Return	07.11
The Governor	1x102/5x52 mins	•		•	YTTI	New	A0.01
The Great Defender	8x60 mins	•			Warner Bros. International Television Distribution	New	B1.00
Hearts and Minds	4x60 mins	•		•	SelectTV International	New	07.25

MARKET INTELLIGENCE

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Heaven Help Us	9x50 mins	•			CLT	New	
Hercules	13x60 mins	•			MCA TV International	New	11.02/13.01
Home And Away	1650x30 mins	•		•	Primetime	Return	23.02
If Someone Had Known	format 120 mins	•		•	World Internatinal Network		
Johnny and the Dead	1x95 mins	•			Granada LWT International	New	A0.15
Jules Verne's Mysterious Island	22x60 mins	•		•	The Fremantle Corporation	New	05.19
Kaminsky	1x90 mins	•		•	igelfilm	Return	10.14
Kingfish (A Story of Huey P Long)	97 mins	•		•	Turner International	New	07.02/09.01
La Regenta	3x100/6x55 mins	•		•	RTVE	New	15.20
Liberty Street	11x30 mins	•			Atlantis Releasing	New	01.27
Louisiana	6 hours				SPI International	New	H4.20
Medical Centre West	Xx50 mins	•			Endemol Entertainment	Return	H4.32
Mission Top Secret II	24x30 mins	•		•	Grundy	New	02.24
New York Undercover	26x60 mins	•			MCA TV International	New	11.02/13.01
Night of the Scarecrow	1x94 mins				Republic Pictures International	New	14.16/16.13
The Nightwatch	1x105 mins	•	•	•	Nordisk Film TV-Distrib	New	04.06
Nine Moon	39x60 mins	•			Artear	New	11.05
Once Upon a Time... When We Were Colored	1x120 mins				Republic Pictures International	New	14.16/16.13
Paparazzo	1x75 mins	•		•	YTTI	New	A0.01
The Piano Lesson	2 hours				Hallmark Entertainment	New	22.01
Pie in the Sky	30x60 mins	•		•	SelecTV International	Return	07.25
Plain Clothes	26x60 mins	•	•	•	HIT	New	02.17
Pointman	22x60 mins/ 2 hr MOW	•			Warner Bros. Internarinal Television Distribution	New	B1.00
The Politician's Wife	3x60 mins	•		•	Channel 4 International	New	03.34/05.33
Prime Suspect	9x104 mins	•			Granada LWT International	New	A0.15
Robin's Hoods	22x50 mins	•			CLT	New	H4.17
Rough Edges	1x30 mins	•	•	•	Canamedia	New	00.01
Romantic Notions	1x120 mins	•	•	•	Paragon International	New	03.02
Rosa Roth - Love You To Death	1+4x88 mins	•	•	•	ZDF Entertainment	New	21.02/23.01
Rules of Engagement	1x60 mins	•		•	YTTI	New	A0.01
Second Chances	16x60 mins	•			Polygram		H4.12
Shadow of the Past	format 120 mins	•		•	World Internatinal Network		
Shine on Harvey Moon	12x30 mins	•		•	SelecTV International	New	07.25
The Silence of Adultery	1x94 mins	•		•	Hearst Entertainment	New	05.11
Sirens	22x60 mins	•		•	All American Fremantle Intl	Return	12.14/H4.21
Snoop	14x55 mins (appx)	•			SVT	New x8	26.08
Snowy River: The McGregor Saga	52x60 mins	•		•	MTM Intl	Return	01.02
Something to Cry About	1x24 mins	•			Oasis Pictures	New	00.01
Star Trek: Deep Space 9	72x60 mins	•			Paramount	Return	
Star Trek: Voyager	22x60 mins/ 120 mins pilot	•			Paramount	New	
Stolen Lives	12x60 mins	•		•	Grundy	Return	02.24
Sweet Valley High	44x30 mins	•			CLT/Saban	New/Return	H4.17
Tears Before Bedtime	4x50/2x90 mins	•			BBC Worldwide Television	New	17.02/19.01
Tekwar	18x60 mins	•			MCA TV International	New	11.02/13.01
Terror in the Shadows	1x94 mins	•		•	Hearst Entertainment	New	05.11
That Sunday	1x15 mins	•	•	•	Jane Balfour	New	05.25
Tim	2 hours				Hallmark Entertainment	New	22.01
To the Shores of Pa-Isch	1x93 mins	•		•	igelfilm	New	10.14
To Sleep With Danger	1x95 mins				Republic Pictures International TV	New	24.14
The Turnaround	1x90 mins	•		•	CTE	New	20.02
University Hospital	Xx60 mins	•			CLT	New	H4.17
Vanishing Son	13x60 mins	•			MCA TV International	New	11.02/13.01
The Way to Dusty Death	2x96 mins	•		•	CLT	New	H4.17
The Vet	13x50 mins	•			BBC Worldwide Television	New	17.02/19.01
Wall of Silence	1x90 mins	•		•	SelecTV International	Return	07.25
The Wanderer	22x60 mins	•			DLT Entertainment UK	New	20.11
White Goods	1x120 mins	•		•	SelecTV International	Return	07.25
The Wright Verdicts	7x60 mins	•			MCA TV International	New	11.02/13.01
You Decide (interactive)		•			Globo TV Network Brazil	Return	13.13
Zona de Risgo	78x60 mins	•			Artear	New	11.05
Zorn	3x60 mins	•	•	•	Nordisk Film TV-Distrib	New	04.06

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
EDUCATION							
English You Too	40x30 mins	•	•	•	M. S. International	New	G3.39
ISO 9000	6x26 mins	•		•	Julian R Film	New	11.24
Milner Fenwick Health Library	76 episodes	•			Unapix International	New	05.01
FEATURE FILMS							
Baby Face Nelson		•	•	•	Saban	New	21.14/23.11
Bankrobber	1x89 mins				Lumiere Pictures		B1.07
Blackwater Trail		•			Portman Entertainment	New	
Burn Me	1x98 mins	•	•	•	MM Multimedia	Return	H4.35
Butterfly Wings	1x108 mins	•	•	•	MM Multimedia	Return	H4.35
Crosswinds	1x95 mins	•		•	Pandora	Return	08.02
The Devil's Breath (El Aliento Del Diablo)	1x90 mins				Lumiere Pictures		B1.07
Hanging Gardens	1x112 mins	•	•	•	MM Multimedia	Return	H4.35
He Ain't Heavy		•	•	•	Saban	New	21.14/23.11
Heritage 2001	40/180 mins	•			Pandora	New	08.02
The House That Mary Bought	1x102 mins	•	•	•	Pandora	Return	08.02
Just A Normal Life	1x110 mins	•		•	RTC	New	04.12
Les Coeurs Brules	9x90 mins	•		•	Pandora	Return	08.02
Mona Must Die	1x91 mins	•	•	•	Cori Films	New	11.19
Ms Bear	1x90 mins	•	•	•	IMSI/VCTV	New	G3.39
The New Enemy	3x52 mins	•		•	Pandora	Return	08.02
Somebody to Love	1x94 mins				Lumiere Pictures		B1.07
Women's Battles	6x90 mins				SIE	Return	G3.12
Wrestling With God	1x78 mins	•		•	Westinghouse Broadcasting Int'l		03.17
GAMESHOWS							
Double Up		•	•	•	Westinghouse Broadcasting Int'l		03.17
EC Plays Lift Off	13x24 mins	•			ACTF	Return	04.26/06.27
Face The Music	Xx30 mins	•		•	Sandy Frank Entertainment	Return	09.12
Family Secret	format				PGC Television Inc	Return	C1.14
Gameshows for Local Production	various	•			All American Fremantle Intl	Return	12.14/H4.21
Go For Goal	30 mins pilot	•			IMSI/VCTV	New	G3.39
The Goal Show	300x30 mins	•			SPI International	New	H4.20
Hit the Jackpot	Xx35 mins	•			Endemol Entertainment	Return	H4.32
Hollywood Teasers	format/25 mins	•		•	IDEM	New	H4.06
Infatuation - UK	80x30 mins	•			Dandelion Distribution	New	H4.05
Keep Your Light On	Xx25 mins	•			Endemol Entertainment	New	H4.32
The Last Word	format/25 mins	•		•	IDEM	New	
Lingo	format/25 mins	•		•	IDEM	Return	
Lucky Lotto Live	Xx50 mins	•			Endemol Entertainment	Return	H4.32
Name That Tune	Xx30 mins	•		•	Sandy Frank Entertainment	Return	09.12
Popcorn	format				PGC Television	New	C1.14
Puzzle Quiz	Xx60 mins	•			Saraxa Group	New	G3.06
Risky Numbers	65x30 mins	•			CTW	Return	07.11
Small Talk	24x30 mins	•		•	Grundty	New	02.24
Vito's Game Over	30xX/60xX	•			Saraxa Group	Return	G3.06
What a Story	format				PGC Television	New	C1.14
LIGHT ENTERTAINMENT							
100 Years of Hollywood Westerns	1x92 mins	•			Box Top Entertainment	New	
1001 Pictures of Vienna	1x25 mins	•			ORF	New	21.01
American Gladiators	120 hrs				Samuel Goldwyn Co	Return	01.12
Andre	90 mins 36 secs	•	•	•	Turner International	New	07.02/09.01
Behind the Scores	200x30 mins	•			E! Entertainment	New	20.18
Beverly Hill 90210: Christmas Special	1x45 mins				Republic Pictures International	New	14.16/16.13
Bob Uecker's Wacky World of Sports	18x30 mins				SPI International	New	H4.20
Body Heat	format rights available				Action Time	Return	G3.28
Bon Appetit	format				PGC Television Inc	Return	C1.14
Burke's Backyard	60 mins ongoing	•			Beyond Distribution	New	H4.09
Circus Lights	13x56 mins	•			TransTel	New	17.16
Clive James in Nashville, Hong Kong	3x60 mins	•		•	Chrysalis Distribution	New	01.13
Buenos Aires							
The Crystal Maze (series 6)	14x60 mins	•		•	Chatsworth Television	New	07.30

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
E! Features	165x30 mins	•			E! Entertainment	New	20.18
E! NewsWeek Television	52x60/30 mins	•			E! Entertainment	New	20.18
E! Special Events	30/60/120 mins	•			E! Entertainment	New	20.18
Exploring Sex	13x30 mins	•	•	•	M.S. International	New	G3.39
Extreme Close Up	340x30 mins	•			E! Entertainment	New	20.18
Funniest Pranks	12 hours				SPI International	New	H4.20
Fye! For Your Entertainment	52x30 mins	•			E! Entertainment	New	20.18
Galley Chefs	13x30 mins				Canamedia	New	00.01
The Gossip Show	260x30 mins	•			E! Entertainment	New	20.18
Holiday	70x30/10x60 min	•		•	Pro-International	Return	G3.53
Home Video Clips	4000x20 to 200 secs				PGC Television Inc	Return	C1.14
Hollywood Spotlight	200+x30 mins	•	•	•	SR Programs Intl	Return	12.20
In Focus	76x60 mins	•			E! Entertainment	New	20.18
Independent Traveller's Guide	14x60 mins	•			Dandelion Distribution	New	H4.05
Lassie	592x30/1x60/ 17x90	•		•	Broadway Video	Return	63.02
The Lighter Side of Sports	13x30 mins				SPI International	New	H4.20
Live Premieres	4x60 mins	•			E! Entertainment	New	20.18
The London Comedy Festival	2x60 mins	•		•	Chrysalis Distribution	New	01.13
Love Thy Neighbor: The Baddest and the Best of Melrose Place	1x46 mins				Republic Pictures International	New	14.16/16.13
Mad Machine	50x1 mins	•	•	•	TSI Switzerland	New	12.29
Memory Masters	format rights available				Action Time	New	G3.28
Ooh La La	weekly x30 mins	•			Catalyst Distribution	Return	C1.03
Opera Light	4x60 mins	•		•	IMSI/VCTV	New	G3.39
Playboy Late Night TV	26x30 mins	•			Playboy Entertainment Group	New	
Q & E	26x30 mins	•			E! Entertainment	New	20.18
Sports Comedy Around The World	2x30 mins				SPI International	New	H4.20
Stick With Me, Kid	13x50 mins	•			CLT/Buena Vista	New	H4.17
Surprise Gardeners	format rights available				Action Time	New	G3.28
Travel Bug	format rights available				Action Time	New	G3.28
Travel Trails	26x30 mins	•			Dandelion Distribution	Return	H4.05
TV Masqué	Xx50 mins	•			Endemol Entertainment	New	H4.32
Videotours	20x30 mins	•			Alfred Haber	New	02.05
Wacky World International	1x60 mins				SPI International	New	H4.20
Watching You?!	Xx25/40 mins	•			Endemol Entertainment	New	H4.32
Wild West Showdown	26 hours				Samuel Goldwyn Co	Return	01.12
You Asked For It	1200x3-5 mins	•		•	Sandy Frank Entertainment	Return	09.12

MINISERIES

A Woman of Independent Means	6 hours	•			Polygram		H4.12
Airport	13x55 mins	•			TransTel	New	17.16
The Alsacians	4x90 mins	•		•	Pathe TV	New	08.05
Bride of Violence 2	3x100 mins	•		•	Mediaset	Return	06.24/08.23
Catherine the Great	4 hours				SIE	Return	G3.12
The Cave of the Golden Rose 4	2x100 mins	•		•	Mediaset	New	06.24/08.23
Charlemagne	5x55 /3x90 mins	•		•	Pathe TV	Return	08.05
Dazzle	4 hours	•			Multimedia Entertainment	Return	E3.09
The Dragon Ring	2x100 mins	•		•	Mediaset	New	06.24/08.23
Eye Level	6x30 mins	•	•	•	Sullivan Entertainment	New	14.19
Final Romance	5x55 mins	•		•	BRB	New	15.26/17.21
Finney	6x52 mins	•		•	Primetime	New	23.02
The Great Fire	4x100 mins	•		•	Mediaset	New	06.24/08.23
Hymn To Freedom	Xx60 mins	•		•	ITF	New	13.20/15.19
Jaina	8x90/16x45 mins	•			Pathe TV	New	08.05
Larry McMurtry's Streets of Laredo	6 hours				Hallmark Entertainment	Return	22.01
The Life of Charles Pathe (V'La L'Cinema)	104 mins/ 2x52 mins	•		•	Pathe TV	New	08.05
Liz: The Elizabeth Taylor Story	4 hours				SIE	New	G3.12
Love Can Build a Bridge	2x120 mins	•		•	ACI	New	H4.27
The Maharajah's Daughter	3x100 mins	•		•	Mediaset	New	06.24/08.23
Million Dollar Babies	4 hours				SIE	Return	G3.12
P.T. Barnum	3x46 mins	•			Discovery Enterprises Worldwide	New	G3.13
Savage Play	1x120/3x60 mins	•		•	Eaton Films	New	08.24
September	2xX mins	•			Portman Entertainment	New	
September	2x120 mins	•		•	MTM Intl	New	01.02

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
The Silk Dress	4x60 mins	•		•	S4C International	New	11.32
Then There Were Giants	1x103 mins				Kushner Locke Intl	Return	03.06
There Were Five Of Us	6x59 mins	•	•	•	Czech Television-Telexport	New	01.07
MUSIC							
The 1995 MTV Video Music Awards	1x180 mins			•	MTV	New	05.20/07.19
1996 38th Annual Grammy Awards	1x180 mins	•			Alfred Haber	New	02.05
1996 31st Annual Academy of Country Music Awards	1x180 mins	•			Alfred Haber	New	02.05
A Tribute to Marvin Gaye	1x90 mins	•			Polygram		H4.12
Broadway & Film Melodies	1x90 mins	•			ORF	New	21.01
Cararas, Domingo, Pavarotti, Mehta In Concert	1x120 mins	•			Box Top Entertainment	Return	
Celebrating Haydn	1x116 mins	•			TransTel	New	17.16
Chicago Blues Jam	13x52 mins	•			Beckmann Communications	New	04.05
Christmas In Vienna	3x52 mins	•			Primetime	New	23.02
Christmas With Jose Carreras	1x31 mins	•		•	Wienerworld	Return	05.32
Christmas With Luciano Pavarotti	1x52 mins	•		•	Wienerworld	Return	05.32
The Cream of Cream	1x60 mins	•		•	EuroArts	New	20.17/18.22
Dick Clark's Golden Greats	13x30 mins	•			Alfred Haber	New	02.05
Elvis His Greatest Performances 1955-1973	1x120 mins	•			Box Top Entertainment	New	
Europakonzert '95	1x100 mins/ Docux20 mins	•		•	EuroArts	New	20.17/18.22
Glinka's Ruslan And Lyudmila	1x180 mins	•		•	RM Associates	New	06.21
Golem - The Ecstasy of Expressionism	1x63 mins	•	•	•	Czech Television-Telexport	New	01.07
Gregorian Chants	1x45 mins	•		•	Wienerworld	Return	05.32
Guitarras	13x30 mins	•		•	RTVE	New	15.20
Hail! Bright Cecilia	1x45 mins	•			Arts Council Films	Return	05.30
The Life of Henry Purcell	1 episode	•		•	NVC Arts	New	01.05
John Fogerty and C C R	1x45 mins	•			YLE	New	07.34
Live At The Joint	1x90 mins	•			Box Top Entertainment	New	
Making Of The Three Tenors	1x60 mins	•			Box Top Entertainment	Return	
Martin Scorsese's Nothing But The Blues	1 episode	•			NVC Arts	New	01.05
Miriam Makeba	1x52 mins	•		•	RM Associates	New	06.21
Marvin Gaye Greatest Hits Live	1x55 mins	•		•	Wienerworld	Return	05.32
Music Maestro	12x52 mins	•	•	•	Beckmann Communications	Return	04.05
The Music Of Rudolphian Prague	1x40 mins	•	•	•	Czech Television-Telexport	New	01.07
Nabucco	1x60 mins	•			ORF	New	21.01
Natalie Cole's Untraditional Traditional Christmas	1x60 mins	•		•	EuroArts	New	20.17/18.22
New Morning Jazz Festival	14x110 mins	•		•	P.M.M.P.	New	G3.17
Night Music	44x60 mins	•			Broadway Video	Return	63.02
Placido Domingo, Latino	1x65 mins	•		•	RTVE	New	15.20
Restless Visions	1x44 mins	•	•	•	Czech Television-Telexport	New	01.07
Rock Over Europe	1x120 mins	•			Box Top Entertainment	New	
Rolling Stones 95	1x120 mins (appx)	•			Box Top Entertainment	New	
September Songs	1x85 mins	•		•	Rhombus International	Return	13.20
Sound on Film	4x30 mins	•			Arts Council Films	New	05.30
Take That Tape That	1x63 mins	•		•	Wienerworld	Return	05.32
Torero	1x59 mins	•		•	RTVE	New	15.20
Waldbühne '95	1x90 mins/ highlightsx60	•		•	EuroArts	New	20.17/18.22
The White Room	7x60 mins	•			NBD	New	22.13
REALITY							
All You Need is Love	Xx60 mins	•			Endemol Entertainment	Return	H4.32
Crash	48x25 mins	•		•	IDEM	Return	
Crocodile Hunter	10x60 mins	•		•	Pro-International	Return	G3.53
Guerilla Gardener	130x30 mins	•		•	Paragon Internaional	New	03.02
Hollywood 26	39x30 mins	•			Unapix International	New	05.01
In the Limelight	Xx50 mins	•			Endemol Entertainment	Return	H4.32
The New Explorers	52 episodes	•			Unapix International	Return	05.01
Prescription for Health	Xx26 mins	•			ITF	New	13.20/15.19
Taxi	26x50 mins	•		•	IDRA Global Entertainment	Return	H4.06
Ushuaia: Adventures of Nicolas Hulot	26x30 mins	•			Unapix International	New	05.01
Wars In Peace	12x26 mins	•	•	•	Beckmann Communications	Return	04.05

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
SERIES/TELENOVELAS							
Amazing Grace	6x60 mins	•			NBC International	New	B1.02
Amores De Fin De Siglo	In-production	•			Coral Pictures	New	
Antonella	165x60 mins	•			Artear	New	11.05
As Time Goes By (Series 1-4)	43x30 mins	•			DLT Entertainment UK	New	20.11
Au Nom Du Pere Et Du Fils	13x60 mins	•		•	CCH Distribution	Return	00.01
Beakman's World	65x30 mins	•			Columbia Tristar Intl		
Cara Sucia/Dirty Face	174x52 mins	•			Visión Europe	Return	12.19
The Challengers	104x26 mins	•		•	Marathon International	New	02.37
The Commish	86x60 mins/ 1x120 mins film	•			Columbia Tristar Intl		
Como tú Ninguna	150x52 mins	•			Visión Europe	New	12.19
The Cosby Mysteries	20x60 mins	•			Columbia Tristar Intl		
The Critic	23x30 mins	•			Columbia Tristar Intl		
Days Of Our Lives	7200+ episodes	•			Columbia Tristar Intl		
Deepwater Haven	26x26 mins	•		•	Marathon International	Return	02.37
Different Ways	130x45 mins	•			RTC	New	04.12
El Desaeio	In-production	•			Coral Pictures	New	
English You Too	40x30 mins	•	•	•	M.S. International	New	G3.39
Fera Ferida	140 hours	•			Globo TV Network Brazil	Return	13.13
Formula 1	13x60 mins	•		•	iBiD	Return	00.01
Gardener's Journal	127x30 mins	•			Oasis Pictures	New	00.01
Golden Dream	90 hours	•			Globo TV Network Brazil	Return	13.13
He Shoots, He Scores	39x60 mins	•		•	iBiD	Return	00.01
Harts of the West	15x60 mins	•			Kushner Locke Intl	Return	03.06
Inside the Vatican	6x60/2x120 2x96 mins	•		•	Multimedia Entertainment	Return	E3.09
Jet Set	39x60 mins	•		•	iBiD	Return	00.01
Ka Ina	150x52 mins	•			Visión Europe	New	12.19
Le Sorcier	11x60 mins	•		•	iBiD	New	00.01
Life a Plenty	146x25 mins	•	•	•	ZDF Entertainment	New	21.02/23.01
Lonesome Dove: The Series	21 hours	•			Hallmark Entertainment	Return	22.01
Loving	ongoingx30 mins	•		•	The Fremantle Corporation	Return	05.19
Marker	22x60 mins	•			Ufa	New	G3.23
Martha Stewart Living	57x30 mins	•			SPI International	New	H4.20
Merciless Land	15 hours	•			Globo TV Network Brazil	Return	13.13
Morena Clara	137x52 mins	•			Visión Europe	Return	12.19
Mysteries of the Ancient World	27 hours	•			Multimedia Entertainment	New	E3.09
Mysterious Tales	26x30 mins	•		•	Westinghouse Broadcasting Int'l	Return	03.17
NANO	195x60 mins	•			Artear	New	11.05
Neighbours	2300x30 mins	•		•	Grundy	Return	02.24
Out of the Blue	22x30 mins	•			SIE	Return	G3.12
Peligrosa/Dangerous Trap	150x52 mins	•			Visión Europe	New	12.19
Portrait of a Woman	10 hours	•			Globo TV Network Brazil	Return	13.13
Pura Sangre	150 hours	•			Coral Pictures	New	
Roller Coaster	219x60 mins	•			Artear	New	11.05
Secrets of the Sand	130 hours	•			Globo TV Network Brazil	Return	13.13
Shortland Street	700x30 mins	•		•	Grundy	Return	02.24
Sonoclips	52x30 mins	•			Coral Pictures	New	
Stories behind Stores	3x30 mins	•		•	RNTV	Return	18.19
Teen's Confessions	52x26 mins	•		•	Marathon International	New	02.37
Tropical Heat aka Sweating Bullets	65x60 mins	•			Kushner Locke Intl	Return	03.06
Tropicaliente	130 hours	•			Globo TV Network Brazil	New	13.13
Witness	47 episodes	•			CBC Intl Sales	New	04.34/06.33
SHORT PROGRAMS							
Kitchen Cut-Ups!	104x3 mins	•	•	•	SR Programs Intl	New	12.20
Off Your Trolley	15x5 mins	•			Macmillan Media	New	
Picture House	7x5 mins	•			Arts Council Films	New	05.30
Public Image	1x30 mins	•		•	Westinghouse	New	01.07
SPORTS							
1988 Asian Games	12 days	•			ISL	New	01.17
1995 Skins Game	150 mins	•			ESPN International	New	C1.09
Action Pak	6x60 mins	•			Canamedia	New	00.01
Andersen Consulting World Championship of Golf	various	•			ESPN International	New	C1.09

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Brazil's National Football League	120 mins	•			ESPN International	New	C1.09
The Extreme Games	various	•			ESPN International	New	C1.09
Extreme Sports	160x26	•	•	•	ISL	New	01.17
FIBA 1995-98 Basketball Series	24 events	•			ISL	New	01.17
FINA 1995 2nd Short Course Swimming World Championships	4 days	•			ISL	New	01.17
FIG 1995-98 World Gymnastics Calendar	8 events	•			ISL	New	01.17
Global Guts	39x30 mins	•			Nickleodeon		05.20/07.19
Heart of the People	1x50 mins	•	•	•	Jerusalem Capital Studios	New	14.20/16.17
Hockey Challenge	10x10 mins	•			Saraxa Group	New	G3.06
IAAF World Athletic Series 1996-99	23 events	•			ISL	New	01.17
Inside Skiing	31x30 mins	•			Canamedia	New	00.01
NBA Action	34x30 mins	•			NBA Properties Inc	New	C1.18
NBA Games	43+x60 mins	•			NBA Properties Inc	New	C1.18
NBA Highlights	38 episodes	•			NBA Properties Inc	New	C1.18
NBA Inside Stuff	52x30 mins	•			NBA Properties Inc	New	C1.18
NBA Specials	30-60 mins	•			NBA Properties Inc	New	C1.18
Sand Blast	50x30 mins	•		•	MTV	New	05.20/07.19
Sports Quiz	Xx60 mins	•			Saraxa Group	New	G3.06
Story of a Game of Basketball	12x26 mins	•			ISL	New	01.17
Thoroughbred World	18x30 mins	•	•	•	SR Programs Intl	New	12.20
UCI 1995-99 World Championship	20 events	•			ISL	New	01.17
UEFA European Championships 1996	31 matches	•			ISL	New	01.17
Watersport World	52x30 mins	•			Beckmann CommunicationS	Return	04.05
The World Championships in Table Tennis	various	•			ESPN International	New	C1.09
World Cup Collection (54,58,62,66,70,74,78,82,86,90,94)	11 films	•			ISL	New	
TALK SHOWS							
Charles Perez	260x60 mins				Worldvision Enter Inc.	New	24.02/26.01
Donahue	Xx60 mins	•			Multimedia Entertainment	Return	E3.09
Geraldo	780x60 mins				Worldvision Enter Inc.	New	24.02/26.01
Head of Our Times	15x30 mins	•			Dandelion Distribution	New	H4.05
Night Stand	26x60 mins				Worldvision Enter Inc.	New	24.02/26.01
The Peter Quarry Show	1x26 mins	•			ITF	New	13.20/15.19
Sally Jessy Raphael	Xx60 mins	•			Multimedia Entertainment	Return	E3.09
The Susan Powter Show	Xx30 mins	•			Multimedia Entertainment	Return	E3.09
Vanessa	Xx60 mins	•			Multimedia Entertainment	New	E3.09
Vito's Quest	Xx30xX mins	•			Saraxa Group	New	G3.06
TV MOVIES							
A Comedy of Private Lives	1x60 mins	•			Globo TV Network Brazil	Return	13.13
Alexander Nevsky	1x110 mins	•		•	EuroArts	New	20.17/18.22
At the Edge of Paradise	1x90 mins	•		•	Atlas International		07.39
Awake To Danger	1x120 mins	•		•	NBC International	New	B1.02
Captiva Island	1x90 mins	•		•	All American Fremantle Intl	New	12.14/H4.21
Children of the Dark	1x120 mins	•			Multimedia Entertainment	Return	E3.09
Christine 2	1x90 mins	•		•	Atlas International		07.39
Cody	6x90 mins	•			Southern Star	New	H4.36
Come Die With Me	1x120 mins	•			Ufa	New	G3.23
Curacao	1x120 mins	•			Alfred Haber	New	02.05
Dad, the Angel and Me	1x120 mins	•		•	MTM Intl	New	01.02
The Dance-Master	1x103 mins	•	•	•	Czech Television-Telexport	New	01.07
Dangerous Intentions	1x93 mins	•			Kushner Locke Intl	New	03.06
Danielle Steel's No Greater Love	1x120 mins	•		•	NBC International	New	B1.02
Danielle Steel's Vanished	1x120 mins	•		•	NBC International	New	B1.02
Deadly Whispers	1x120 mins	•		•	ACI	New	H4.27
Death of a Cheerleader	1x120 mins	•		•	ACI	New	H4.27
Devil's Island	1x92 mins	•			Cori Films	New	11.19
Face on the Milk Carton	1x120 mins	•		•	MTM Intl	New	01.02
Falling For You		•		•	Saban	New	21.14/23.11
The Feds	6x120 mins	•		•	Eaton Films	New	08.24
The Good King	1x120 mins	•		•	MTM Intl	Return	01.02
Good Old Boys	118 mins	•		•	Turner International	New	07.02/09.01
Halifax f.p	6x100 mins	•			Beyond Distribution	New	H4.09
Hard Evidence	1x120 mins	•		•	ACI	New	H4.27

PRODUCT TITLE	EPISODES	RIGHTS			DISTRIBUTOR	NEW OR RETURNING	STAND NO.
		TV	Theatrical	Video			
Harrison Bergeron	1x95 mins	•			Atlantis Releasing	New	01.27
Jack Reed: A Search For Justice	1x93 mins				Kushner Locke Intl	New	03.06
Jamila	1x87 mins	•	•	•	Cori Films	New	11.19
Lady Killer	1x93 mins				Kushner Locke Intl	New	03.06
The Lies Boys Tell	1x120 mins	•		•	ACI	New	H4.27
Lives Of Girls And Women	1x91 mins	•		•	Paragon Internaional	New	03.02
Luci & Desi: A Home Movie	1x111 mins	•		•	Westinghouse Broadcasting Int'l		03.17
The Man in the Attic	1x90 mins	•			Atlantis Releasing	New	01.27
The Man Next Door	1x120 mins	•		•	ACI	New	H4.27
The Night of Nights	1x90 mins	•			ORF	New	21.01
Not Our Son	1x120 mins	•			Multimedia Entertainment	New	E3.09
The Other Woman	1x120 mins	•		•	ACI	New	H4.27
Robin Cook's Mortal Fear	1x120 mins	•		•	ACI	New	H4.27
Rosamunde Pilcher Collection	2x5x90 mins	•	•	•	ZDF Entertainment	New/Return	21.02/23.01
Seduced and Betrayed	1x120 mins	•		•	ACI	New	H4.27
Shining Time Station Prime Time Family Movies	4x60 mins	•			Catalyst Distribution	New	C1.03
Singapore Sling	1x120 mins	•			Multimedia Entertainment	Return	E3.09
Star Command	1x120 mins	•	•	•	Ufa	New	G3.23
Tad	1x120 mins	•		•	MTM Intl	Return	01.02
Tonino and Toinette	1x90 mins	•			ORF	Return	21.01
Trio	1x63 mins	•	•	•	Czech Television-Telexport	New	01.07
The War Between Us	1x90 mins	•			Atlantis Releasing	New	01.27
Welcome to Paradise	1x120 mins	•		•	ACI	New	H4.27
Zeiram 2	1 episodes	•	•	•	Mitsubishi Corporation	New	
VARIETY/SPECIALS							
1995 Soul Train Music Awards	1x120 mins	•			Worldvision Enter. Inc	New	24.02/26.01
AFI Life Achievement Awards/Stephen Spielberg	1x120 mins	•			Worldvision Enter. Inc	New	24.02/26.01
Aidscare Aidscare	47 episodes	•			CBC Intl Sales	New	04.34/06.33
A Midsummer Night's Ice Dream	1x60 mins	•		•	The Multimedia Group of Canada	New	00.01
The Musical of the Year 1996: The Int'l Musical Contest		•			Sho International	New	
Around Claudia Schiffer	1x50 mins	•			CLT	New	H4.17
Brian Orser: Blame it on the Blues	48 episodes	•			CBC Intl Sales	New	04.34/06.33
Broadway Show Trilogy	3x120 mins	•			DLT Entertainment UK	New	20.11
Celebrities First Love	1x60 mins	•		•	The Fremantle Corporation	New	05.19
Paul McKenna's Hypnotic Superstars - 2	1x51 mins	•			NBD	New	22.13
The Planets	1x54 mins	•			Rhombus International	Return	13.20
Secrets Revealed	2x60 mins	•			DLT Entertainment UK	New	20.11
Unforgettable Romances	26x30 mins/ 13 hours	•		•	The Multimedia Group of Canada	New	00.01
WILDLIFE/NATURAL HISTORY/ENVIRONMENTAL							
Australia Wild III	4x30 mins	•			ABC International	New	02.41
Australia's Wild Secrets	13x30 mins	•	•	•	HIT	New	02.17
Classical Animal Tracks	20x3 mins	•			BBC Worldwide Television	New	17.02/19.01
Designer's Landscape	13x30 mins	•	•	•	SR Programs Intl	New	12.20
East Africa	13x28 mins	•	•	•	M.S. International	New	G3.39
Eye Witness II	13x30 mins	•		•	NTV	New	22.14/24.11
In The Wild	6x52 mins	•		•	Primetime	Return	23.02
Mother Nature Tales of Discovery	12x30 mins	•			Ellis	Return	03.20
National Geographic Television	20x60 mins	•			Itel	New	02.02
Nature Study Of One City	4x28 mins	•	•	•	Czech Television-Telexport	New	01.07
The Outdoor Gazette	100+x30 mins	•		•	Pro-International	Return	G3.53
Panda - The Giant Stirs	1x55 mins	•			Southern Star	New	H4.36
The Private Life of Plants	6x50 mins	•			BBC Worldwide Television	New	17.02/19.01
Profiles of Nature Series 6	13x30 mins	•		•	Ellis	New	03.20
Profiles of Nature Specials	27x60 mins	•		•	Ellis	Return	03.20
Quantum	35+x30 mins	•		•	Pro-International	Return	G3.53
Spirit Sands	1x30 mins	•		•	Ellis	New	03.20
Survival	8x60 mins	•			Itel	New	02.02
Untamed Africa	15x52 mins	•		•	Tele Images		14.08
Wild Canada	12x60 mins	•		•	Ellis	Return	03.20
Wings Over Serengeti	1x52 mins	•		•	Itel	New	02.02

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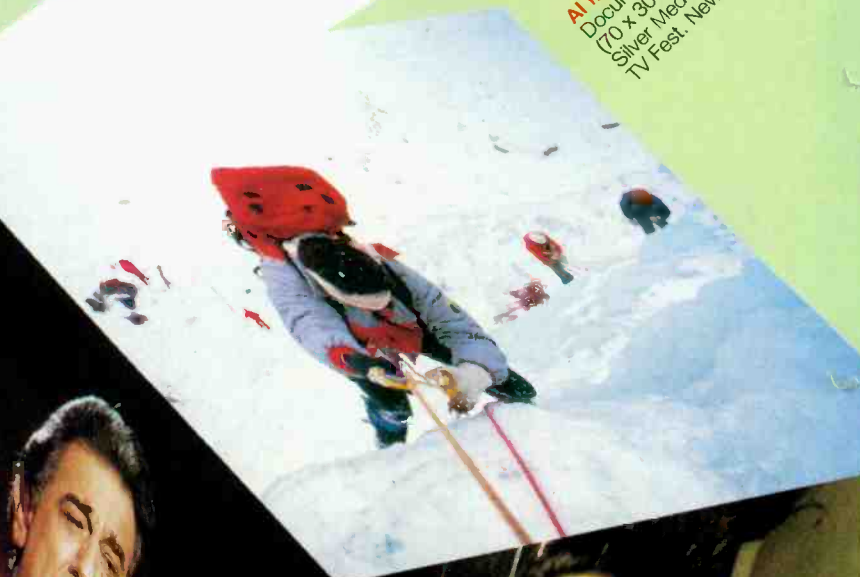
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Crunch Time

Spanish tv has reached saturation point, with 67% more spots aired last year than in 1990 and the average cost of a spot down to a quarter of what it was five years ago. Battle weary stations and advertisers are now swallowing some bitter pills to restore stability to the market. Beginning TBI's focus on Spain, Justin Webster analyzes the turbulent broadcast market



Pedro Almodovar's *Kika*: Reflecting on the mixed fortunes of Spain's tv business

At the root of the multiple problems facing conventional Spanish television, five years after the first private stations started to broadcast, is a simple truth. There is not enough advertising revenue to support all the television stations in the market. Viewers, advertisers, media sales organizations and even some of the heads

of the stations themselves are weary of the pitiless price war which has overloaded programming with commercials and sent rates plunging to dangerously low levels. The European directive on television, which imposes a maximum of 12 minutes of advertising an hour, or 20% of airtime, is systematically ignored.

At the beginning of March, the government fined both Antena 3 and Telecinco \$78,000 each for having infringed the regulations fifteen times between 14 July and 31 August. But what fine will it impose on Antena 3, judged to have broken the rules again in December, but this time no less than 265 times?

In 1994 Spanish stations broadcast more than 900,000 commercials – that is, 39% more than in 1993 and 67% more than in 1990, according to a report by *Iniciativa de Medios*. The channel which was most saturated was Telecinco, with a total of 55,035 minutes of ads, followed by Antena 3 with 54,049 minutes, TVE1 with 20,624 minutes and La 2 with 20,000 minutes. The battle for revenues has had a seriously detrimental effect on the finances of private stations which cannot, like pay-tv channel Canal Plus España (the third private channel to be awarded a license in 1989), count on subscription revenue from their viewers.

"Advertising is worth a price, which should be paid by the advertiser. Everything which breaks this golden rule of competition damages everyone, including the advertisers," said Jesus de Polanco, owner and president of Spain's biggest media group Prisa, which is 25% shareholder and manager of Canal Plus España.

Even the advertisers are beginning to wonder how effective their commercials are amid the deluge of messages. In 1994 the average Spanish viewer, who watched tv for 210 minutes a day, would have seen 120 commercials, compared to

only 22 in 1989, before the private television channels started broadcasting. As a result of this increase, the price of an advertisement has dropped to a quarter of what it was in 1990. Both public and private television stations have stated their intention, because of this, to cut the number of commercials broadcast by 10% and raise prices by the same margin. "We are prepared to make the sacrifice which an increase in prices would bring, if this means we will improve effectiveness," said David Torrejon, director of the Spanish Association of Advertisers. "The present situation cannot carry on."

In response to the government's legal action, lawyers for Telecinco have appealed, calling for a meeting with the minister to decide on how to measure the amount of advertising. "To avoid, therefore, being surprised by the application of rules which to us seem unviable," said Santiago Muñoz, representing Telecinco.

The war for ratings has had a knock-on effect on audience measurement. Last May, six tv channels - Telecinco, TVE and four regional stations, Canal 9, Canal Sur, Telemadrid and Televisión Gallega - joined together to launch a new compa-

ny for measuring audiences in Spain to compete with the existing Sofres system.

After long delays, the contract was awarded to a consortium called Ecomat, composed of the British company Taylor Nelson AGB, the French ECO, AGB Italia, the U.S. company Nielsen and Gestion Universitas of the Complutense University of Madrid. From the beginning, Ecomat met with stiff criticism from Antena 3, Canal Plus España and the successful Catalan regional station, TV3, as well as various associations of advertisers who considered the creation of an additional system for measuring audiences useless and unjustified.

"With two systems of audience measurement, neither will be credible," said Bernardo Salazar, president of the Association of Media Buying Organizations, who pointed out that Jordi García Canda, the director-general of RTVE, justified the success of TVE's programs to parliament using Sofres figures even though he had complained about Sofres' reliability. José Viana, president of the National Association of Advertising Agencies, attributed the complaints of the six channels to political motives.

Still one of the main bones of contention are the revenues from advertising



Farmacia de Guardia: One of the successful shows that has relieved headaches at Antena 3

that go towards funding the two public channels, TVE1 and La 2. Though in steady decline over the last five years, RTVE's advertising revenues represented \$700 million in 1993, a hefty slice of the total advertising revenues available for Spanish television. This has been constantly denounced by the private television stations as unfair competition, first because they claimed RTVE was given preferential loans by the state, and since because it has received a small portion of its budget - mainly to cover its radio operations - in the form of direct subsidies.

But RTVE's finances have been caught in a downward spiral as the private stations have eaten into its audience share. In September last year, García Candau took the press by surprise by announcing unilaterally that RTVE would reduce its advertising revenues by 25% in 1995. This measure, he said, would help to "redefine the Spanish advertising market." Income from advertising would drop to \$534 million, out of total television ad revenue of \$1.6 billion in 1995.

The announcement came as a welcome lifeline to the beleaguered private stations, which both received it positively, if cautiously. "This could be a ray of hope for the panorama of Spanish television," said José Antonio Obies, head of public relations at Telecinco, but he still believed the measure was insufficient. "What is needed is a 100% reduction of advertising revenues at TVE: the less advertising (there is) on public tv, the more the market will have a chance to recuperate," he said. "It's fine for public money to fund public television as long as it is educative tv and not something else."

In their complaints, the proponents of eliminating unfair competition in the market also refer to the seven regional stations, which combined account for around 16% of the national audience, and receive a total of some \$3.9 billion a year in subsidies from the regional governments, though they too finance themselves partly from advertising revenues.

To achieve the 25% reduction in advertising revenues at RTVE, Candau is asking the government for a direct subsidy of \$900 million, four times bigger than the subsidy for 1994. This tranche of public money is partly aimed at stemming the losses forecast for 1995, estimated at \$700 million, while the rest will go to cover the non-profitable public services the broadcaster provides. In effect the state funds demanded by Can-



TVE chief García Candau wants \$900m to keep it afloat

dau will not reduce the accumulated debts of RTVE, but they will at least stop the debt mountain from growing further. On the positive side, the move will allow the public broadcaster to redefine its programming and devise a strategic plan to cover the next five years.

This plan was due to have been made public in January, but the new politically-appointed board of RTVE, the consultative body with power to veto Candau, was still debating it at the beginning of March. Five were appointed by the right-wing opposition Partido Popular, four by the governing Socialist Party and one each for the communist-led coalition Izquierda Unida and the Catalan and Basque nationalist parties. Although the negotiations over the plan for 1995-99 have been conducted in secret, the daily newspaper ABC published a leaked document which forecasts the total state subsidy for the period will have to be

\$5.7 billion. This is calculated on the basis that the two public channels will command an audience share of 36% until 1999. The total work force of RTVE would, according to the newspaper, be cut from 12,729 to 7,731 over the period.

But one of the Partido Popular members on the board, Jesús Sancho Rof, stated the plan does not remedy RTVE's financial problems and forecasted the total debt will rise to \$6.2 billion by the end of 1995. He also claims that the decision to cut advertising revenues is not so much a real financial strategy but rather a smokescreen to prevent the private television stations criticizing the public broadcaster. "It is a direct consequence of the loss of market share. In other words, it is due purely to market forces," he said.

For their part, private stations Telecinco and Antena 3 have not emerged unscathed from the battle for revenues over recent years. The crisis had the effect of forcing the resignation of the former executive director of Telecinco, Valerio Lazarov, who was replaced late last year by the Italian Maurizio Carlotti, a Fininvest executive.

Both private stations now claim to have overcome their problems, but not without having first flirted with disaster.

Fininvest's initial reaction to the losses building up at Telecinco was to look for a buyer. Morgan Stanley, the investment bank, was employed to offer 84% of the company, inspiring fierce criticism that Berlusconi had illegally taken control of the broadcaster, despite the Spanish law limiting an individual shareholder to a 25% stake. The 84% share was composed of Fininvest's 25% share, plus 25% held by a bank in Luxembourg, and other smaller stakes including 6.25% held by the Spanish charity La Once. After the names of various different suitors - including French channel TF1, a Spanish consortium led by the press group El Correo Español, and the Mexican broadcaster, Televisa (which made an offer rejected as being too low) - were mooted the negotiations were frozen. "Fininvest as well as the other shareholders have encountered a series of difficulties over selling their shares and it is now no longer a priority for them," said the president of Telecinco, Miguel Duran, in January.

In the absence of new investors, Telecinco has gone ahead with plans for a recapitalization, covered by the existing shareholders. In the first round of

Y Viva TV España	
Market share of Spanish national tv channels in 1994 (all individuals)	
TVE 1	27.6%
La 2	9.8%
Antena 3	25.7%
Telecinco	19.0%
Canal Plus	1.9%
Regional channels	15.7%
Others	0.8%

Source: Sofres AM

this plan, \$116 million is to be raised to help restructure the private broadcaster and stem losses.

After the turmoil provoked by the resignation of Lazarov, the unsuccessful search for a buyer and the drop in the audience share, calm seems finally to have returned.

Carlotti has managed to reach an agreement with the employees' representatives to avoid strikes while a viability plan is designed. Under present forecasts, and in line with Carlotti's slimmed-down model for the company, some 300 employees, out of the present total of 900, will be hired on new contracts.

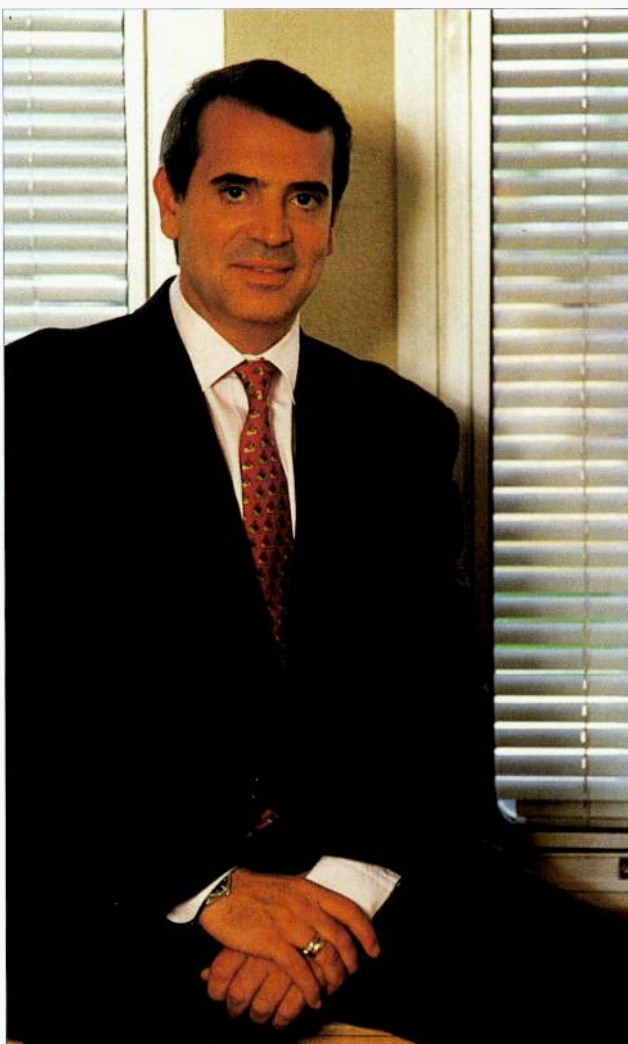
Claudio Noziglia, executive director of Publiespaña, the Fininvest company which sells Telecinco's advertising, forecast that it would be able to break-even in 1995. The \$330 million which Telecinco earned in advertising revenues last year accounted for 21% of the total television advertising market. "1994 was a very bad year for television," said the Italian executive, who estimated advertising fell by 6.2% overall in Spain compared to 1993. "We spend twice the amount we make in advertising on our programming."

"This is what has got to change. If we do not do something, if the government does not intervene to stop TVE and the regional stations from competing unfairly, if this is just about spending more money simply to lose it for good, I don't see how we can carry on."

But as proof of Fininvest's intentions to attempt to pull Telecinco back into the black, Noziglia also announced new programming designed to ensure Telecinco a 20% to 21% share of the market. "If we are capable of balancing the channel's budget, we could be the number three in share of the audience, but the leaders in profitability," he said.

Telecinco's competitor Antena 3 has been through an even longer struggle to get out of a difficult situation. Since the collapse of Banesto, the fourth largest Spanish bank, at the end of 1993, the bank's direct and indirect stakes in the channel (of 25% each) have been up for sale. The new owners of Banesto, Banco Santander, stated well in advance that they intended to sell all of Banesto's media interests.

The threat that this posed to the station's stability, however, seems to have been averted. In January, Antonio Asensio persuaded the bank to extend the deadline for the sale of part of the 25% direct stake for six months. The deal was struck shortly after Antena 3 reported a \$23 million profit for 1994 on turnover of



Asensio: Still in the bankers' good books

\$500 million. According to Asensio, these results and "an important technological development in the audiovisual sector" – probably a reference to cable in which banks are keen to invest – have persuaded Banesto to go slow on the sale of its stakes in the station.

For its part, Banesto said it did not want to destabilize the current management team. Among the buyers lined up to take some of Banesto's shares are the Spanish producer José Frade, which will pay for 5%, and Hollywood producer Arnon Milchan, who will buy 10%. Through Bankers Trust, the stakes had also been offered to the French station TF1, Germany's Bertelsmann, Compagnie Luxembourgeoise de Télédiffusion and Time Warner without success before Asensio found these buyers.

Though flexible over the time scale, Alfredo Saenz, the president of Banesto, has made it clear it will stick to the total price of \$200 million for both the 25%

direct stake and the loan which finances a 25% shareholding of Asensio's company, Renvir, in Antena 3.

Of all the tv stations the only one which is now experiencing untroubled growth is Canal Plus España. After choosing to launch a pay-tv service in the face of considerable scepticism, Canal Plus signed up its one millionth subscriber in January this year. Losses in 1991 were \$51 million but once the break-even was reached at around 650,000 subscribers, the profits have started to flood in: \$20 million in 1993, and an as-yet undisclosed but much larger figure for 1994. As well as being able to keep its distance from the fierce advertising war among the other channels, managing shareholder Prisa has been able to use the positive cash flow to expand into other areas such as film production and distribution.

Sogepaq, for example, is a Prisa subsidiary set up with the

stated objectives of contributing to the modernization of the film distribution and sales networks in Spain and opening new markets and business opportunities for Spanish producers.

These developments will give Canal Plus a head start, which it has shown itself keen to exploit, when it comes to new developments in television in Spain which promise to offer far greater opportunities for profit than the overcrowded conventional market.

While the key element in deciding whether or not the main broadcasters can survive in their present form is the outcome of the discussions among RTVE's board, all the tv stations are willing to suffer some lean years – and even in the case of Antena 3 and Telecinco sign up for unwanted Hispasat satellite channels – simply to stay in the running for far more substantial changes that will take place after the cable law is finally passed by the Spanish parliament. ■■■



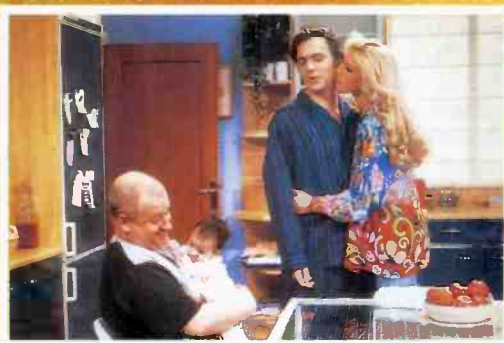
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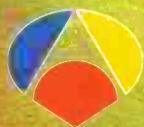


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Wire Services

Attempts to start a multi-channel market in Spain via direct-to-home satellite haven't been a success. The publication of a new law regulating cable tv has given investors renewed hope, writes Justin Webster

When the Spanish government finally published its long-awaited Telecommunications Law in December, reactions from the Spanish and foreign interests planning to play a role in developing the country's cable tv system were mixed.

After years of waiting, the various consortia already forming up can soon expect to implement their plans to cable Spain, thought to be a ripe market for pay-tv services which direct-to-home satellite has so far failed to exploit. Some of Spain's principal private utilities, such as power companies Sevillana de Electricidad and Iberdrola, major banks and international groups, such as US West and Time Warner, have taken up position.

The downside for would-be newcomers is the advantages the draft of the law gives to the state-controlled telephone operator, Telefónica, as well as the fact



Canal Plus España's Sevillanas celebrates flamenco

that some aspects of the new regulations remain unclear.

Richard Callahan, president of US West International, which has set up a joint venture with the Spanish company Multimedia Cable, is convinced the Spanish market will attract more outside investors as soon as the legal issues are clarified.

"If you look at the numbers and facts in television and communications in relation to Spain, and you add up the demographics and compare them to other places in the world and their potential, most people would conclude that this is an interesting place to do business," he said, adding that he knew of British, French and German groups ready to invest in the Spanish market.

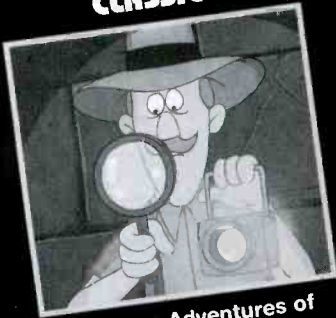
The same conclusion was reached by professionals in the sector present at a

cable tv conference in Madrid in February. Manuel Albanell, the executive director of Cable y TV Europa, the vehicle 49% owned by US West and Time Warner, complained of the government's delays in bringing in the law which he argued would satisfy an urgent demand. To rebuff the claim that the Spanish are not used to paying for television and will therefore be slow to adapt to cable tv, he pointed to the high expenditure by Spanish households on renting videos, compared to their European neighbors. According to Albanell's figures, the average Spanish household spends \$55 a year on video rental, equal to the sum spent by British households, but more than double that spent by the Germans, Dutch and Italians and three times that spent by the French.

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channel, Canal Plus España, has experienced a rapid growth, reaching a million subscribers five years after its launch, making it the third biggest pay-tv channel in Europe after Canal Plus France and BSkyB. Between 1992 and 1993, Canal Plus España moved from a loss of \$24 million to a profit of \$20 million. While it effectively lacks competition, the network's shareholders, including the Spanish multimedia group Prisa, are reaping rich rewards.

Eduardo Alonso, chief executive of TPS, the distributor of a package of five channels in Spain (Canal Hollywood, Tele 1, NBC, Discovery Channel and Panda Club) to 120 of the 500 local cable networks already existing, said it was obvious Spanish viewers are not satisfied with what is currently available.

Multitel, a company involved in many of the cable projects which have flourished since 1992 in anticipation of the law, claims 44% of Spaniards are either "fairly" or "very" interested in cable services and 35% would be willing to pay up to \$23 a month, roughly the amount the Canal Plus package now costs. Once the market is developed, it will have a turnover of between \$391 million and \$1.6 billion, according to Pedro Telleria, of the consultants Kermit. The total investment necessary, according to Cable y TV Europa, is \$4.7 billion.

Pushed into the background for the moment are the new satellite services, which have been heavily criticized by the parliamentary opposition over the last two years. In the middle of last year – faced with few alternatives – the private and public tv stations put aside their differences to form a company, Cotelsat, to market all five channels now broadcast via the state-owned satellite Hispasat as a single package.

So far it has been a resounding failure. The five channels on offer, Teledporte (TVE – sports), Canal Clasico (TVE – culture), TeleNoticias (news – Antena 3), Cinemania 2 (film – Canal Plus) and TeleSat 5 (children's programs – Telecinco), were to be sold as a package after they were encrypted on December 15.

With only 3,000 subscribers so far, Cotelsat still claims to have met its forecasts. "For 1995, we have put the number of individual subscribers at between 10,000 and 12,000," said Ramon Villot, Cotelsat's chief executive.

Cotelsat's package is sold at \$20 a month, plus a deposit of \$117 for the decoder. But residents' associations with communal antennas cannot fit it in with their other channels because Cotelsat uses Canal Plus's decoder, which was

designed for individual use.

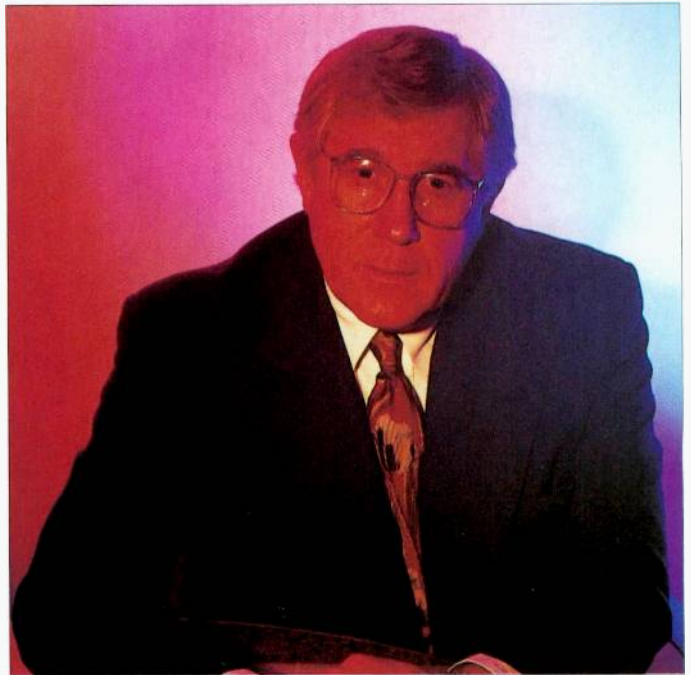
With the existing local cable companies there is a deadlock over the price. "We have had contacts with cable companies but we have got stuck over the question of money," said Villot, who said no deal has yet been signed with a cable company. The cable operators are not prepared to pay the \$12 per month per viewer Cotelsat is asking when they pay between \$3 and \$5 a month for foreign channels.

Luis Barca, president of AESDICA, the association of cable operators which groups together 33 different companies with 140,000 subscribers, said: "The impact on the network of cable operators is zero. This is principally because of the problems with the decoder and the price of the programs, which is out of proportion to their quality."

Before Hispasat was launched, both generalist private stations Antena 3 and Telecinco showed themselves to be extremely unenthusiastic over bidding for the Hispasat channels, as a single satellite channel in the new project is commercially almost useless, but both justified it as a necessary step towards cable. Canal Plus, which already had two channels on Astra, has emerged in the strongest position as Cotelsat has been obliged to use its decoder.

One of the first objectives of the new Telecommunications Law is to try and resolve the curious extra-legal situation of an existing, low-level cable business which groups together a total of some 991 separate companies that sprang up to satisfy the demand before the law was even drafted. Contradictions naturally occurred when a court in Granada ruled that cable was illegal in the region whereas a court in neighboring Seville, reached the opposite conclusion.

To try and put an end to the confusion, the new law divides the country into franchise areas of 20,000 people, which, according to the government, is the lowest threshold for a cable network



Richard Callahan: expects more outside investment

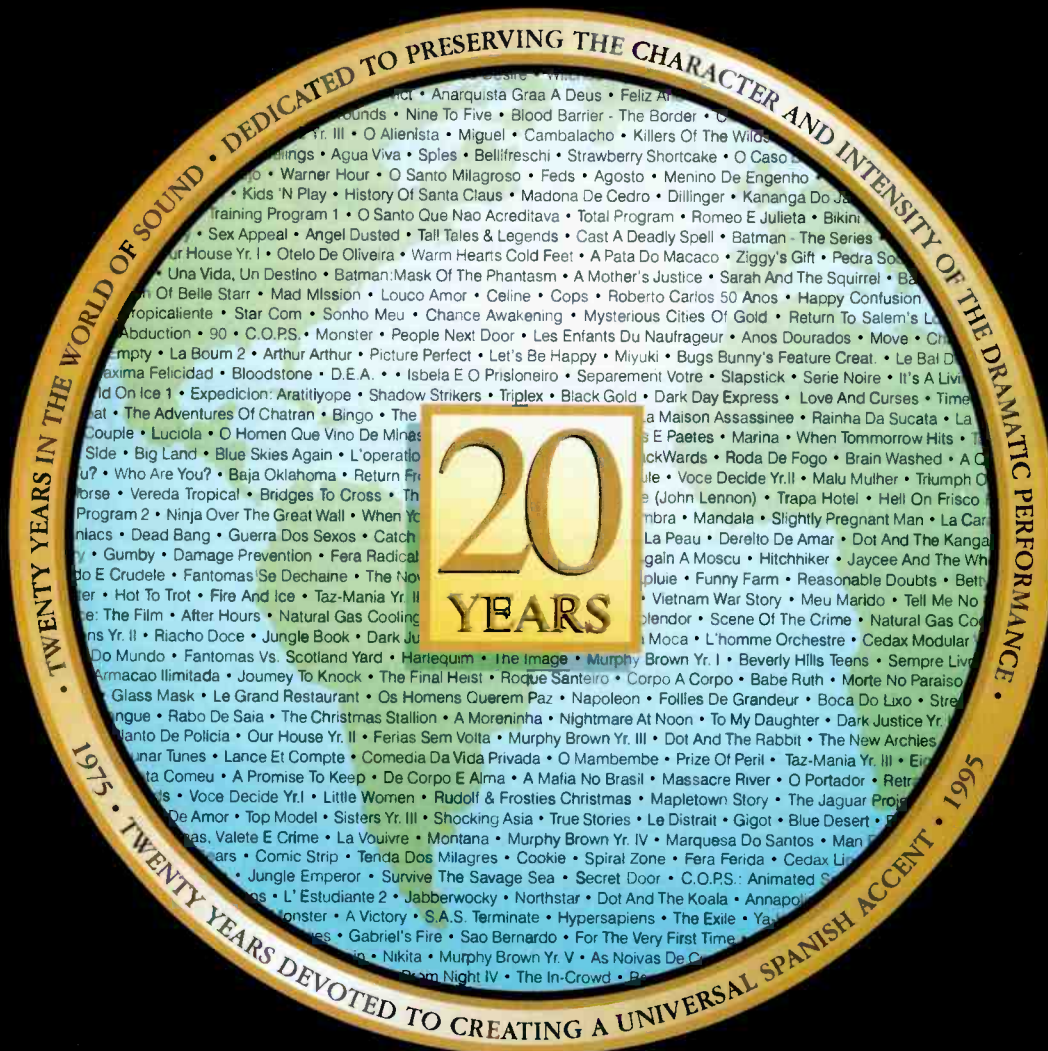
to be profitable. Towns with fewer than 20,000 inhabitants will have to group together with other centers to create such a critical mass.

In each area, there will be franchises for two operators. One will be a private operator selected from bids by the area's municipal governments. The second – and this is the most controversial aspect of the law – will give Telefónica the right to operate throughout all the areas in Spain if it chooses. The only concession to the pleas of US West, Multitel and others is that Telefónica can only start its operations six months after the private operator has been awarded the franchise. "In six months, no operator will be able to install a network with the same characteristics as Telefónica's," lamented Albanell.

Under debate at the same time is whether or not the private cable operators will be allowed to provide telephone services. As this would radically alter the architecture of the networks the operators would choose to install, it will have to be resolved before they start investing. So far the Spanish government has committed itself to liberalizing all telecommunications in 1998. So cable operators will be able to provide telephone services after that date no matter what happens. However, it is still not clear whether the cable and telephone franchise will begin simultaneously, as investors such as US West would like, when the cable law is approved.

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"The logic of free market competition should mean that a telephone operator can provide television services at the same time as private operators have the possibility to provide a telephone service," said Antonio Rodés, vice-president of AESDICA.

At the same time Telefónica will be allowed to enter into partnerships with other investors as long as it keeps a minimum of 51% of the operating company. It will therefore have the capacity to distribute the remaining 49% and reduce its own financial exposure. The two big beneficiaries of this arrangement are likely to be, ironically, Prisa, the owner of Canal Plus, and Antena 3 TV, the private station, which have already struck agreements to work with Telefónica in cable projects.

Not only are the potential private operators worried about the stranglehold Telefónica will have on the business, but so are producers. According to Ramón Gómez-Redondo, president of ANEPA, the association which groups together 32 audiovisual production companies, Telefónica may be tempted to move into program production as well. "We are worried that the same thing will happen in cable as is currently happening in television: that operators, such as Telefónica, will try to increase their income by creating "false" production companies directly or indirectly financed by themselves," he said.

To avoid operators resorting simply to the rebroadcasting of existing programs, Gómez-Redondo argues that the law should guarantee a percentage of independent European production, and this should be calculated in terms of the cost of the programs and not as a percentage of airtime. At the moment the law allows a cable operator to own program rights as well. "40% of the programming must come from a production company separate from the operator," said Alonso of TPS. "But up to what point is anyone the owner of his own programs?" he asked, signalling an area that the law should address.

Telefónica's own stated views are unlikely to put its competitors' worries to rest. "In the short term, pay-tv is the only guaranteed source of revenue for cable," said Carmen de Andres, president of Telefónica Multimedia Services, adding that the tendency towards thematic channels will lead to a segmentation of the market. As regards content, German Ramajo, president of Telefónica Multimedia Services said his company intended "to develop joint ventures and alliances with the aim of sharing the efforts and

income which this new market will generate."

In Telefónica's overall plan, the Spanish cable tv market will help give it a leg up to compete internationally, as its investments in Latin America are doing in telephone services. "Telefónica, in the long term, after being a Spanish company, will pass into the sphere of global international competition," said Ramajo. In this context, cable is "a natural extension of Telefonica's telecommunications."

Its television plans are defined as "flexible and varied." The second stage will be to introduce new products "which will be the key to the profitability

of cable services," according to de Andres. One important prospect is that existing software is largely in English, and the development of services in Spanish will enable Telefónica to export them to South America and the hispanophone market in the United States, where, according to de Andres, purchasing power is steadily on the rise.

For all its attractiveness as a national market in itself, even more interesting for multinational groups is Spain's position as a possible bridgehead for the distribution of television products to a worldwide population of 350 million Spanish speakers. **TEI**

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Sales Forte

Capitalizing on its traditional strengths in animation and telenovelas, Spanish distribution has borne the recession well, reports Marie Beardmore

As Spain emerges out of a long and painful economic recession, the Spanish tv distribution industry remains largely intact. It has survived by focusing on the traditional staples of animation and telenovelas. Spain is also home to a burgeoning film production and distribution industry, the corollary to an alliance of Spain's largest media groups spearheaded by Canal Plus España.

Animation, the mainstay of Spain's distribution industry, has nonetheless suffered from government inertia, according to Paco Rodriguez, managing director of independent distributor MM Multimedia. "Spain's delay in ratifying the Television Without Frontiers directive has allowed the U.S. majors like Fox, Columbia and Time Warner to suck the budgets of the television channels," said

Rodriguez.

Rodriguez said MM Multimedia might not have survived without international business. Indeed some players have gone to the wall: Ana and Aurau, Civite and Giro are just a few of the many distributors that have vanished from the market, mainly as a consequence of diversifying into theatrical and video distribution.

One company content to stay with tv distribution is Luk International, which specializes in acquiring programming for the Spanish market and is not interested in diversifying, according to vice president David Henden. The company deals mainly in animation and has recently sold the 400-episode Japanese cartoon series *Doraemon* to the regional channels represented by Forta.

It's difficult to overestimate the impor-

tance of animation to Spain's distribution industry. Barcelona-based D'Ocon Films has had major success with its series *The Fruitees*, a co-production with French company Télé Images and tv channels TF1 and TVE, which has been distributed to 80 countries as well as being taken up by Turner Broadcasting for carriage on the TNT/Cartoon Network. To maximize its coverage, D'Ocon uses agents to distribute its product. *Delfy and His Friends* was distributed by Revcom International across 50 countries and *Sylvan*, a co-production with Forta currently in production, is distributed internationally by INI Entertainment Group Inc.

Animation house BRB International prefers not to use agents for distribution, the exception being Ray Hampson in the UK. BRB nets 30% of its revenue from distributing its own slate of predominantly children's animation, a catalog of 13 animated series and seven tv movies, including the internationally successful *Around the World* and the pre-school series *Teo*. It is also enjoying success with its family-oriented comic book-based *Mort & Phil* which has pulled in ratings of 30 to 40% in Spain and is also doing well in Germany, where it is co-produced with RTL and known as *Clever and Smart*.

Latin America is a difficult market for BRB, said Ursula Noeth, head of international sales for BRB's animation catalog, because of the predominance of U.S. product. Mexico is still first choice when it comes to distribution in the region. Mexicans add a neutral, non-Castilian Spanish soundtrack which can then be distributed to other countries in the region. Many companies are able to double up on revenue in Mexico, selling to the pay-tv stations first and then on to terrestrial broadcasters, although the recent devaluation of the peso has caused problems. "Channels are hesitant to contract any series in dollars and are hesitant to buy at all," said Noeth.

Live action films and series are less easy to place. Rodriguez is scathing about some of the business methods employed by Spanish channels to find a home for their product: "They skew the



Jovenes Flamencos: One of 200 Spanish titles distributed by Sogepaq

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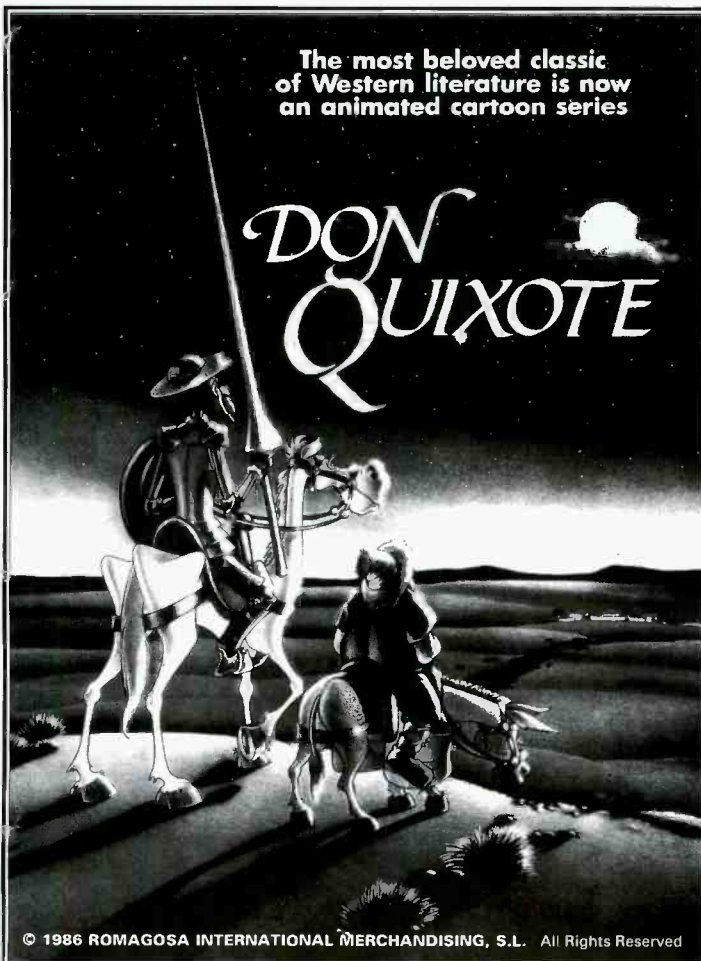
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Mort and Phil: Keeping BRB on the international map

market by giving the first few episodes of a series to a channel for free so they can see if they like it, or how it will work on the network. I cannot compete with such competition... I am not able to give away programs."

The Spanish distribution industry is continuously changing. Some companies have moved out of distribution while others have diversified into it as a natural way of consolidating their position in the media industry. Barcelona-based Imatco made the shift from being a distributor for Gaumont, SFP and InterCine TV to focus on co-production in the late 1980s. Meanwhile, ESCIMA, whose backers include Spanish producer Elias Querejeta, France's Lumière and Madrid-based SPP, moved into distribution in 1993 with a two-picture all-Spanish rights deal with Majestic Films International for *Damage* and *The Man Without A Face*.

Sideways shifts are also a feature of the market. Last October, Coral's former distributor Coral Europa became the distributor for Venevision and, still under the stewardship of Juan Julio Baena, is now known as Vision Europa. At the same time, Coral took the opportunity to open up its own office in Spain, EuroCoral, which is headed up by Karina Bruno.

Coral's catalog in Spain also consists of product from Radio Caracas Television (RCTV), as well as the slate of Children's Television Workshop, most notably *Sesame Street*. RTVE is currently producing the latest 130 episodes for 1997. Reflecting the increased international importance of telenovelas, EuroCoral is currently negotiating a number of sales to Germany, France and Greece, where the successful telenovela *La Dama de Rosa* is airing, said Bruno. The genre is also important to Vision Europa. Although Venevision's catalog also con-

tains other genres such as series, documentaries, musicals, comedies, and kids' programs, telenovelas *Peligrosa*, *Morena Clara*, *Cara Sucia* and *Maria Celeste* have all been sold internationally. The latest offering, *Ka Ina*, is currently in production and is set to debut at Mip.

Canal Plus España formed its Sogepaq venture essentially to counter the flood of

U.S. film imports in the Spanish market. Sogepaq has an annual budget of Ptas1 billion (\$7.8 million) at its disposal to buy up to 18 nationally-produced films for distribution in video, cinema, tv and external markets.

Sogepaq, Andrés Vincent Gómez's Iberoamericana Films (which has a minority shareholding in Sogepaq via rights-broking company IDEA) and Sogotel, the film production arm of Prisa, have collectively tied up Spanish film production and distribution.

Iberoamericana has a film-distribution deal in Spain via a co-distribution alliance with United International Pictures, while Sogepaq has teamed up with Polygram in a 50/50 venture, Sogepaq Distribution, to distribute theatrical films in Spain across all media.

Sogepaq is on target to be the biggest Spanish force in sales and rights with a catalog of approximately 1,500 films, 40% of which are Spanish, and the international rights to 200 Spanish titles including *Sevillanas*, which won both Silver and Golden Roses at Montreux, and *Jovenes Flamencos*, which has sold to most major territories. Despite this, only 20% of Sogepaq's business is in international tv distribution, as feature films are the company's bread and butter, but Kevin Williams, bought in three

years ago to head up Sogepaq's international division, said this could increase as Canal Plus España ups its tv production.

The grand alliance is less powerful outside Madrid, where the autonómicos broadcasters enjoy a large degree of financial support from regional governments. TV3 Catalunya, the foremost of the Forta channels, employed animation house BRB International last spring to distribute its non-film product; film distribution is handled by Lauren.

Monica Iglesias, who deals with the distribution of TV3's catalog for BRB, said she has had international success with three mime offerings – *Three Stars*, *Slastic* and *Exit* – a success she attributes to "no language problems and a universal slapstick humor." *Three Stars* has sold to RTL in Germany, SBS in Australia and TV3 in Scandinavia, while *Slastic* and *Exit* have sold as far afield as Greece, Switzerland and Indonesia, and is currently under negotiation elsewhere.

BRB also inked a distribution deal with Forta last year. So far it has only dealt with the \$5 million biographical



Torpedo by Multimedia: International sales were critical

series *The Young Picasso*, although BRB will handle more of Forta's slate if things go well, said Iglesias.

Meanwhile, Ikono handles the distribution for the regional channels Canal Sur Television in Seville and TeleMadrid and has had success with a range of local-flavored documentaries on travel, folklore and nature subjects. Sales executive Cedrik Volkman said that its most popular export is Flamenco dancing, which does well in Japan, although Ikono's best markets overall are France and the U.S. ■

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Rise And Fall

The fortunes of Portugal's former public service monopoly have taken a familiar downward turn since the launch of private competition. As Nuño Cintra Torres reports, newcomer SIC's success has been founded on the novelas of shareholder Rede Globo

After two and a half years on the air, Portugal's first privately-owned television channel has gradually narrowed the gap on the leading state-owned broadcaster.

On weekdays, SIC (Independent Communications Company) is already ahead of Portuguese Radio and Television (RTP)'s first channel, garnering an audience share of 41%. Only RTP's evening news bulletin, comedian Herman José – Portugal's first tv millionaire – and first division soccer are keeping the pubcaster ahead.

Back in October 1992, SIC, headed and majority-owned by former prime

minister and newspaper baron Francisco Pinto Balsemão, did not make an auspicious debut. SIC had won its 15-year license after a sometimes bitter three-way battle with TV1, a venture promoted by several former board members of RTP, and TVI (Independent Television), backed by the Catholic Church and the other winner of a license.

SIC presented itself as the "intelligent" choice, offering a quality alternative to RTP and challenging the 30-year-old state broadcaster head-on.

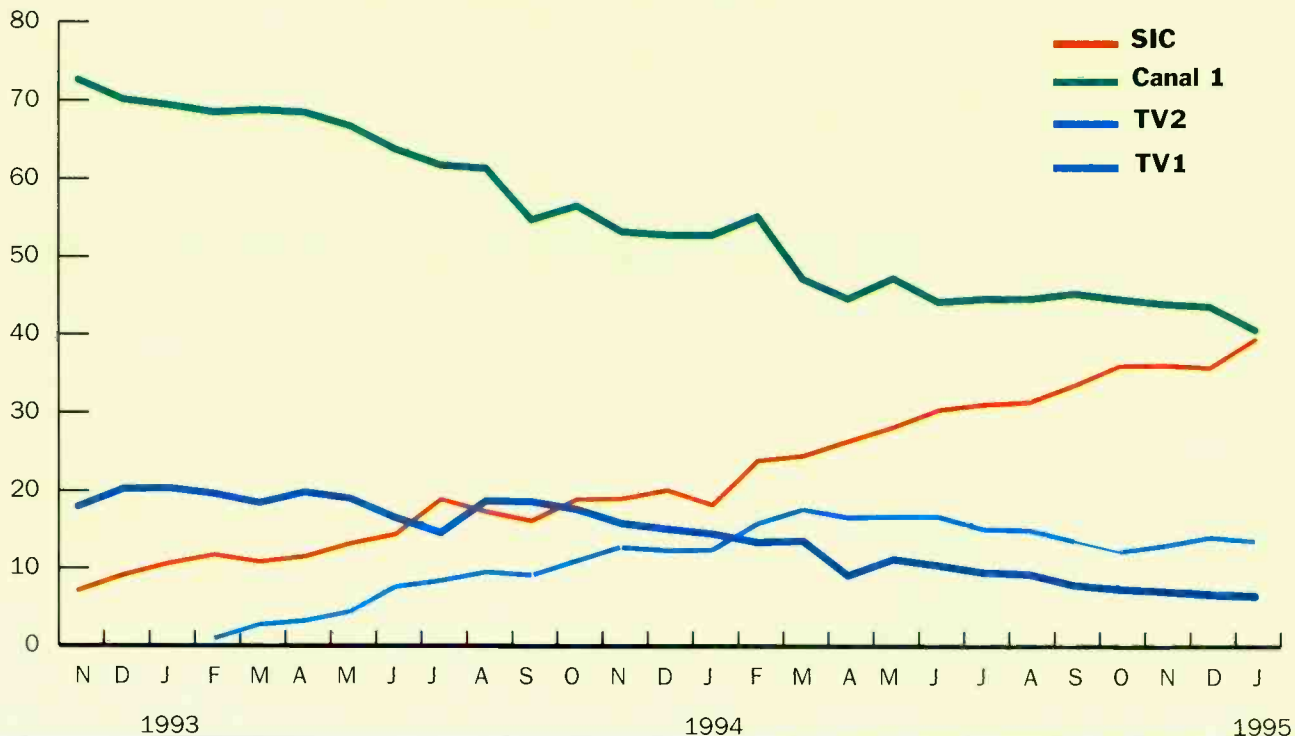
SIC's main news bulletin was scheduled to coincide with RTP's *Telejornal* at 8pm. Its major prime-time novela (soap

opera) was also up against RTP's. The head-on strategy didn't work: a majority of the audience continued to stay loyal to Canal 1 and RTP's revamped second channel TV2. SIC's market share stagnated in the region of 10%.

RTP had invested heavily in hundreds of recent films, buying everything available in the hope that it could sew up the market. Many films were never aired before the license expired. And crucially, Brazil's Globo still gave RTP first choice of its novelas even though Globo owned 15% of the new channel.

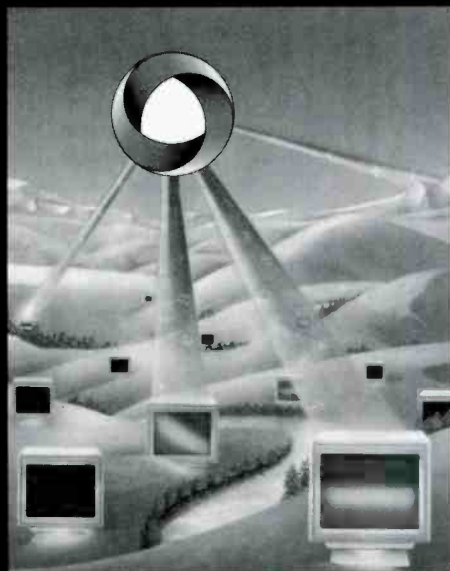
Eventually, SIC temporarily put its main news bulletin back half an hour

Portuguese National Audience Share



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Balsemão: Change in strategy paid off

and adopted a "tabloid" television format. There were increased amounts of popular news, an emphasis on crime and almost no international news.

Balsemão, who now admits that the original strategy was a mistake, threw himself into the channel, monitoring every percentage point fluctuation in the ratings battle with RTP. Very much a hands-on chairman, Balsemão knows his station's schedule by heart, every person working for him, and practically every detail of SIC's operations.

Sensing a new air of confidence at the station, Rede Globo, which holds a 15% stake in SIC – the maximum permitted for a non-European Union investor – cancelled RTP's first choice on novelas and transferred it to SIC. The shareholding in SIC has since proved to be Globo's most rewarding European investment yet.

The power of novelas soon had an impact on the ratings. Novelas play a hugely important role in Portuguese life. A session of Parliament was once postponed to enable members to watch the climax of one popular series. Brazilian clothing styles and speech have infiltrated suburban culture so that even the slang word for gossip, *fofoca*, has replaced the Portuguese *mexerico* or *intriga*.

SIC dutifully followed Globo's formula for success: one novela, followed by another novela, followed by the news, followed by two more novelas with some news flashes in between.

Despite the importance of the novelas, Portuguese-made programs play a role in prime-time schedules. Balsemão is proud of the fact that from 5pm to 11pm his station only speaks Portuguese.

SIC has scored several huge successes with home-made sitcoms and game



Carneiro: Looking for a partner for TVI

shows based on formats. While RTP and TVI stuck to established talent, SIC went out for a new generation of presenters. It struck gold with the young Catarina Furtado, the daughter of an old hand of RTP journalism, who presents a karaoke program called *Chuva de Estrelas* (Rain of Stars) based on an Endemol format. Soon there were copies at RTP and TVI. Later it was SIC's turn to copy RTP's adaptation of TFI's women's talkshow *Frou Frou*. But only SIC dared to show Playboy programs after midnight.

From January 1994 to January 1995, SIC has climbed the ratings ladder at a fast pace. All three of its rivals have suffered – including TVI, which reached a peak market share of 17% in March last year.

The chairman of TVI, Roberto Carneiro, recognizes that early mistakes were made, mistakes like huge investments in in-house variety shows with expensive foreign guest stars. These flops were instrumental in creating the idea that TVI could do nothing well despite its copious resources.

Carneiro points out that although the Charter of Principles of TVI states that TVI should "constantly affirm the principles and values of Christian humanism," this is not an obstacle to commercial success. TVI dares to broadcast films like *Taxi Driver* and is happy to ride on the waves of *Baywatch*.

TVI appears to need a miracle to break above the 20% barrier, which would be enough to take the channel into profit. As part of a drastic cost-reduction strategy, TVI is to reformat as a news and film-only channel and it is looking for a major European partner with access to film libraries and money. Carneiro is, in his own words, looking for "a steady and long-lasting marriage."

TVI appears to be ready to lose control of the majority of the shares, already in large part owned by British and American investment funds, but not the operational control of the station.

With an eye on the upcoming liberalization of telecommunications, Carneiro pointed to TVI's RETI joint venture with France Télécom and others. RETI owns TVI's transmitter network and plans to use it to carry telephone services as well as tv. The government considers this shareholding to be a breach of the tv license but has not acted against TVI.

The Portuguese economy did not help the birth of private television. As the new broadcasters were starting operations, the worst recession in 50 years took hold of the country.

All the forecasts made in 1992 for the growth of advertising expenditure were badly wrong. There was a sharp downturn and ad agencies do not see an end to the recession in spite of the government's optimistic forecasts for the second half of the year.

Within RTP there is widespread pessimism as it struggles to prevent a further erosion of its market share. It lost \$132 million in 1994, against SIC's declared losses of \$11 million a silimar deficit for TVI.

Neither SIC or TVI were able to recoup their investment but money seems to continue to pour into TVI's capital base, which is expected to increase from \$115 million to \$132 million while SIC's stays at \$87 million. SIC has 317 employees, TVI has 260, while RTP is now down to less than 3,000.

RTP received around \$46 million in state subsidies last year. Its costs include \$18 million a year for in-house productions, the cost of transmissions to the Azores and Madeira islands, worldwide satellite delivery of RTP International, and the cost of co-operation with the television stations of Portuguese-speaking African countries.

According to an RTP spokesman, there is not enough advertising revenue in the country to support three major companies and four channels. There is only room for two advertising-supported channels and one state-owned channel. RTP now regrets the government decision to scrap license fee payment.

As TVI retreats to a niche in the market and its shareholders hold their breath in the expectation of the upcoming liberalization of telecommunications, with RTP fighting the internal malaise and the very difficult financial situation, SIC seems to be well positioned to achieve the number one spot. **TEI**

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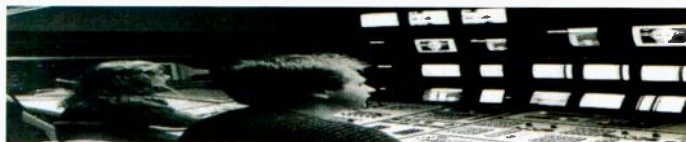
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The EU broadcasting directive is perhaps best known and least loved for its program quotas – or more specifically, Article 4, which mandates broadcasters reserve a majority of their schedules for European works within parameters defined by the article.

The fuss over the directive – Television Without Frontiers (TWF) – is about to blow up again as it comes up for its review five years after its adoption. The EU's DG X, which handles information, culture and communication, was entrusted with the task of reporting on TWF's implementation. It duly reported and proposed revisions, which are now the cause of so much argument.

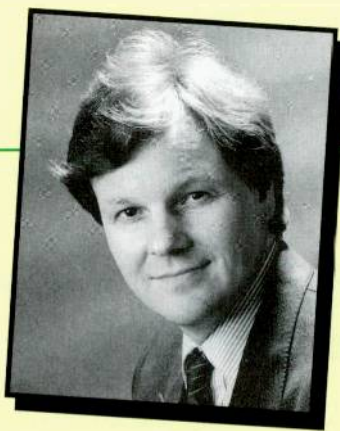
The current text of Article 4 is a compromise between the hardliners – above all, the French government and the French film industry – who wanted tough quotas, and the majority of softliners, who were against them. Hence, Article 4, which laid down the majority quota rule, simultaneously gave broadcasters a loophole by adding the wording “where practicable.”

This time, the French have dug their heels in. They insist that without tough quotas European broadcasters will be dumped on by U.S. product at about one-tenth of the price it costs to make their own programs. They argue that European culture is too sacrosanct to be abandoned to free market forces, and a combination of quotas and subsidies is needed over the next ten years for the European production industry to build sufficient strength to withstand this battering.

Others, like myself, may consider the pro-quota arguments to be specious and muddled about their cultural versus economic priorities, and think that more good may be done for European interests by easing current commercial restrictions on advertising and programming, especially in France.

Still, the hardliners have succeeded in getting DG X to propose toughening the quotas. But, it appears that other parties within the Commission take a softer view, and that is at least partly what is causing the present rumpus. Three other directorates all have an interest in the wording of changes. And they have

The Future Is All Mixed Up



BY TOBY SYFRET

Although TWF does not use the term “teleshopping” it defines it in Article 1 as “direct offers to the public for the sale, purchase or rental of products or for the provision of services in return for payment.” It decrees that services of this kind must observe the same content rules as advertising.

TWF was drafted before teleshopping had emerged as a serious reality, or the patent absurdity of mandating harmonizing rules on the basis of promotional content alone would have been obvious then: for, unlike broadcast advertising, which consists almost entirely of promotional messages, teleshopping combines promotions with retailing and distribution.

The absurdity is compounded if we examine the connections between teleshopping and VOD. Readers will observe that, under the definition espoused by TWF, VOD is simply a special case of teleshopping. If we follow the logic through and apply the advertising content rules to VOD, as we must to all teleshopping services, we are left to wonder which films will be allowed on VOD. Certainly, all those early Bette Davis films must contravene tobacco advertising legislation, and what of all those “shaken but not stirred” James Bond movies?

Drink and tobacco manufacturers may ruefully opine that televised programs have provided far more potent role models over the years for the increased consumption of their products than their own brand advertising.

Without seeking to voyage into these murky waters, let us simply leave it at this. Hardliners inside and outside DG X appear to be playing silly games with quotas. It is ridiculous to attempt to broaden the scope of a harmonizing directive on broadcasting to include interactive services. These have to be treated as a wholly separate issue from the start. Or TWF Mark 2 will be a real act of insanity. [E]

good reason, both on the subject of quotas and on a great deal else.

TWF Mark 1 excluded advanced interactive services from its purview. Under the proposed revisions, however, VOD film and entertainment services are in. Of course, time quotas cannot be set for VOD services as with broadcasting. Nor do the proposed revisions suggest them. Yet, neither do they say that Article 8 no longer applies. It states: “Where they consider it necessary for purposes of language policy, the Member States... may... lay down more detailed or stricter rules in particular on the basis of language criteria.”

There is worse to follow. In seeking to extend the scope of TWF to incorporate interactive services, DG X risks a real botch-up. This is particularly evident with teleshopping, which contains important implications for VOD.

In seeking to extend the scope of TWF to interactive services, DG X risks a real botch-up. Particularly with teleshopping

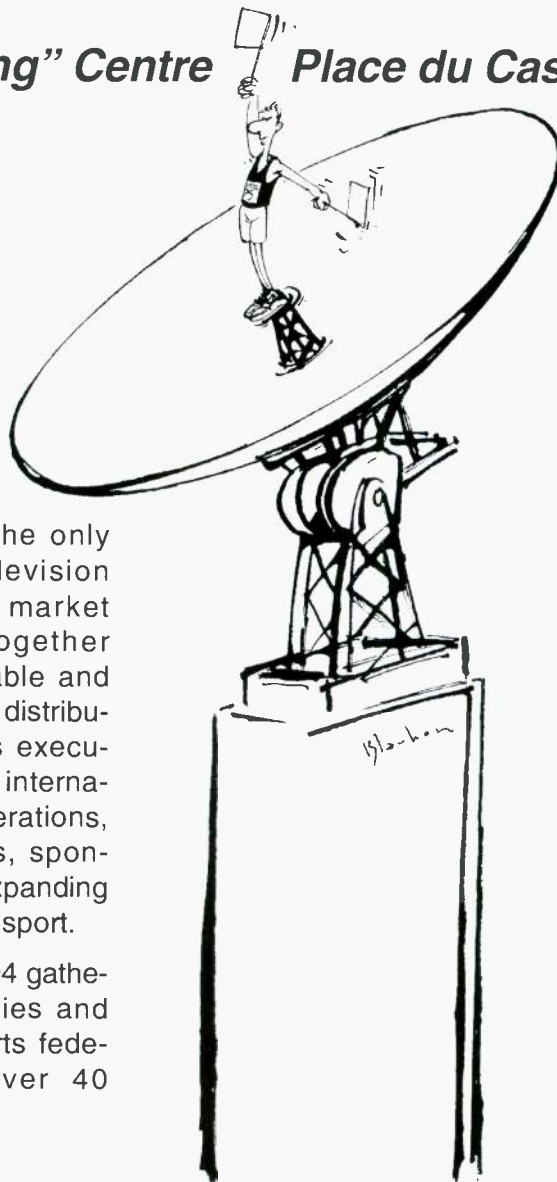
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As the debate over European quotas threatens to flare up anew, the strength of the European audiovisual industry once again becomes the center of attention. But a look at the top-rated programs in the six major European markets last year shows that only Hollywood films compete for the biggest audiences. And the growing commercial sector is increasingly producing drama that attracts audiences and keeps them. Tim Westcott studies the figures

The United States loomed larger than ever before on European television screens last year, dominating the lists of top-rated programs. But if that confirms your worst fears (or hopes) about American cultural imperialism, think again, because what we are talking about here is USA 94, the summer's world soccer championships.

USA 94 loomed so large, indeed, that coverage nearly monopolized the lists of top-ranked programs in the main mar-

kets of Europe. Add in the usual round of domestic league matches, friendly internationals and inter-club competitions and soccer is just about all there is. With the apparent exception of the UK and France (neither represented in USA 94), European viewers are soccer-crazy.

The Netherlands is the country which is most so, with the first 27 places in the rankings occupied by soccer or soccer-related programming. Italy's top seven programs were all USA 94 matches

(strangely, the Italian team's matches against Bulgaria and Mexico got more viewers than the final against Brazil) and the July 13 news bulletin on Rai 1 was the only program not entirely devoted to soccer – though this was at the climax of the championships.

To get a clearer picture, TBI's rankings published here exclude all but the top-rated soccer match, and only the top-rated edition of regular programs like news bulletins and series. With that

France

			rating
Olympics - Ice Skating	sport	Fr2	33.7
Pretty Woman	film	TF1	30.7
Olympics - Ice Skating	sport	TF1	30.7
Une nounou pas/autres	film	Fr2	27.5
The Longest Day	film	TF1	27.0
La Totale	film	TF1	26.4
L'Operation Corned Beef	film	TF1	26.2
Les Fugitifs	film	TF1	26.0
L'Institut	series	Fr2	25.7
Tir Groupe	film	TF1	25.5
Navarro	series	TF1	25.3
Robin Hood/Thieves	film	TF1	24.7
Total Recall	film	TF1	24.5
Julie Lescaut	series	TF1	24.2
Les Grosses Tetes	ent	TF1	24.0
An Innocent Man	film	TF1	23.4
Kindergarten Cop	film	TF1	23.0
Another 48 Hrs	film	TF1	23.0
Death Wish	film	TF1	22.9
Manon des Sources	film	Fr2	22.4

All individuals aged 15+
Source: Médiamat/Carat TV

Germany

			aud(m)
Ger v Bulg (USA 94)	sport	ZDF	20.06
Heute	news	ZDF	16.87
Wetten, Dass	gameshow	ZDF	16.74
Tagesschau	news	ARD	15.56
Mainz bleibt Mainz	ent	ZDF	13.63
Olympics Extra	sport	ARD	13.38
Ein Fall für Zwei	series	ZDF	13.14
Diese Drombuchs	series	ZDF	12.87
Karneval in Köln	ent	ARD	12.52
Kindergarten Cop	film	RTL	12.36
Derrick	series	ZDF	11.44
ARD Sport Extra	sport	ARD	11.37
Der Alte	series	ZDF	11.34
Mer Losse/Koelle	ent	ZDF	11.27
Verstehen sie Spass	ent	ARD	11.27
Tatort	series	ARD	11.02
Menschen 94	ent	ZDF	11.00
Anna Maria/Ihren Weg	series	Sat1	10.93
Olympic Ice Skating	sport	ZDF	10.76
Scarlett	miniseries	Sat1	10.81

All individuals aged 6+
Source: Gfk

Italy

			share
Italy vs Bulg (USA 94)	sport	Rai1	46.90
TG1	news	Rai1	33.29
San Remo Festival	special	Rai1	24.10
Ghost	film	Can5	23.28
Gran Premio/della TV	ent	Can5	22.07
Scommettiamo Che...?	ent	Rai1	20.56
Bucce di Banana	ent	Rai1	20.47
Carreras/Pavarotti	ent	Rai1	19.96
Stramore	ent	Can5	19.25
Basic Instinct	film	Can5	19.10
Amico Mio	series	Rai2	18.25
Scherzi a parte	ent	Can5	17.83
TG5	news	Can5	17.69
Braccio di ferro	political	Can5	17.34
Silence of the lambs	film	Can5	16.61
Paperissima Errori/TV	ent	Can5	16.24
Terminator 2	film	Can5	15.86
Le Comiche 2	film	Can5	15.81
Miss Italy 94	ent	Rai1	15.75
Miraggi	ent	Rai1	15.44

All individuals aged 4+
Source: AGB Italia

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artificial adjustment, some general observations can be made about the position of imported programs on European screens.

The six markets profiled here represent 55% of the 208 million of tv households in eastern and western Europe but 80% of the estimated \$19 billion European tv advertising market. These are markets that international distributors have to be in. But the top 20 are a long way from being dominated by U.S. programs. Not one imported series

Spain

			share
Germany v Spain (USA 94)	sport	TVE1	32.4
Pretty Woman	film	TVE1	25.7
Special Morancos	comedy	TVE1	23.4
Quien Sabé Donde	magazine	TVE1	21.3
Farmacia de Guardia	series	Ant3	21.2
Compuesta Sin Novio	series	Ant3	20.3
Home Alone	film	Tele5	20.3
Lo que /Es Amor	gameshow	Ant3	20.1
Ay Señor, Señor	series	Ant3	20.0
Elegir un amor	film	Ant3	18.7
Dead Calm	film	TVE1	17.4
Hermanos de Leche	series	Ant3	17.2
Difficil de Matar	film	TVE1	16.9
Tour de France	sport	TVE1	16.9
Lleno, por favor	series	Ant3	16.7
Telediario1	news	TVE1	16.6
Hijate	comedy	TVE1	16.5
La Maquina de verdad	reality	Tele5	16.4
Bravo Bravissimo	ent	Tele5	16.4
Batman	film	TVE1	16.2

All individuals aged 4+
Source: Sofres

big audiences. Locally-produced features are not much in evidence except in France, where five French *oeuvres* appear in the top 20, including *La Totale* (the film *True Lies* was based on).

In the UK, Australia's *Neighbours* was the only non-UK series to feature in the top 100 and the top 20 was dominated by home-grown soap operas and drama series. Indeed, the UK rankings illustrate how successful commercial network ITV has been in introducing new ratings-grabbing dramas

like *Heartbeat*, *Touch Of Frost* and *Cracker* to older established series like *Coronation Street*.

A similar picture emerges in Spain, where commercial network Antenna 3 is pulling in big audiences with its slate of drama series such as *Farmacia de Guardia* and *Compuesta sin Novio*. Pubcaster TVE has not been able to match its success in this department, while commercial rival Tele 5 does best with reality shows on an Italian model and films.

RTL, although it is overall market leader, scores only one place in the top 20, which is dominated by public broadcasters ARD and ZDF. Their viewing successes are primarily with the staples of sports, news and entertainment specials plus long-running detective series *Derrick* and *Tatort*. (Both also have loyal audiences on Dutch tv.) Sat1 dramas *Anna Maria* and the international co-pro of *Scarlett*, which both emanated from its parent Kirch group, attracted highly respectable ratings.


Special events were also well watched in Italy, with the annual San Remo music festival and a tv awards ceremony from Canale 5 near the top. Italian viewers seem not to have got the habit of watching drama series to the same extent as in other European countries.

In movie-going France, films account for many of the biggest audiences – although tv broadcasts are strictly

rationed by law. Nevertheless the sitcom *Une nounou pas comme les autres* and drama series *L'Instit* (The teacher) both scored highly for pubcaster France 2, while private channel TF1 had detective series *Navarro* and drama *Julie Lescaut* in the top 20.

Seven of the top 15 imported programs in the Netherlands were from the U.S., but German and British shows featured as well. None of the latter have been on the case as long as *Columbo*, however.

The objective of quotas – whether fair or foul – is of course to make European production stronger. One thing these figures show is that viewers still show little inclination to watch programs from other European countries. The bigger the ratings, the less likely a show is to travel. Perhaps the true measure of the strength of European producers will be when they can produce programs that do well in their own backyard. But U.S. product is still the only common denominator.

At this point we should add a cautionary note. Audience measurement bodies sometimes tend to be very tight-fisted about publication of viewing data, the gathering of which is generally funded by subscriptions from tv stations, ad agencies and advertisers. These figures were obtained in the public domain but they are normally available – plus the official imprimatur – from the measurement panels themselves, marketed internationally by Médiametrie. 

Netherlands

Top 15 imported programs (excluding films) 1994

			share
Eurovision Song Contest	ent	Ned3	27.3
Miss Universe 1994	ent	Ned2	15.7
Baywatch	series	RTL4	12.2
Bold & Beautiful	series	RTL4	11.2
Tatort	series	RTL4	11.1
Hollywood Women	doc	RTL4	11.0
Hunter	series	RTL4	10.4
Keeping Up Appearances	sitcom	Ned2	10.2
Mr Bean	comedy	Ned3	9.1
Columbo	series	RTL4	9.0
Full House	sitcom	RTL4	9.0
Beverly Hills	series	RTL4	8.9
Derrick	series	Ned2	8.8
Jake And The Fatman	series	RTL4	8.8
Paul McKenna			
Hypnosis Show	ent	Ned2	8.7

All individuals aged 13+
Source: Intomart/Carat Nederland

UK

			rating
Torvill & Dean	sport	BBC1	45.2
Olympic Icedance	sport	BBC1	38.7
National Lottery Live	gameshow	BBC1	37.9
Coronation Street	series	ITV	37.1
Eastenders	series	BBC1	36.3
Heartbeat	series	ITV	33.4
Casualty	series	BBC1	32.4
You've Been Framed	ent	ITV	31.9
London's Burning	series	ITV	31.6
Grand National 1994	sport	BBC1	31.5
The Bill	series	ITV	31.0
Soldier Soldier	series	ITV	30.6
Utterly Worst/Night	ent	ITV	29.2
Emmerdale	series	ITV	30.2
Grandstand	sports	BBC1	29.7
Touch Of Frost	series	ITV	29.8
Do It Yourself/Bean	comedy	ITV	29.5
It'll/Alright/Night	ent	ITV	29.2
Licence To Kill	film	ITV	28.9
Cracker	series	ITV	28.6

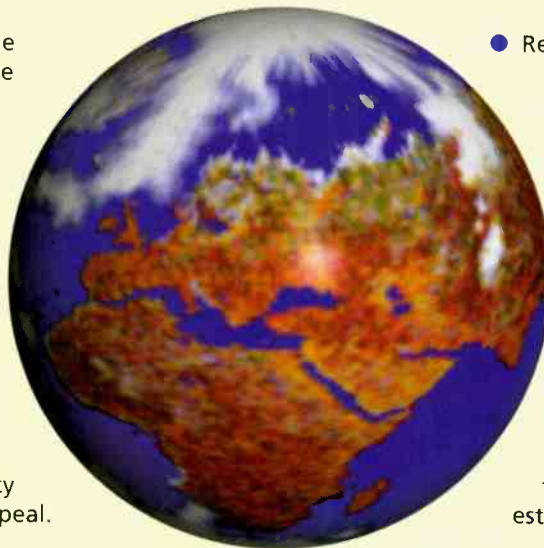
All individuals 4+
Source: Barb/David Graham & Associates

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Ten Million Decoders Set Alarm Bells Ringing

RBOCs move to create TV-via-telephone market in U.S. ... there's more to digital than black boxes

While others ponder the significance of Howard Stringer's move to head up Bell Atlantic, Nynex and PacTel's new "cyberstudio," this column is rather more interested in something that happened just a few days before it – the three RBOCs' request for proposals for four million digital set-top boxes to be supplied over the next five years for their proposed video dial-tone (VDT) networks.

In isolation, it would have seemed a mammoth order – but it closely followed the news that rival RBOC Ameritech had already awarded a \$400 million digital decoder contract to Scientific-Atlanta, the Georgia-based company's biggest-ever single deal. Ameritech says it aims to supply six million digital converters to its VDT customers by the end of the century.

All this is bad news for the cable operators, for two reasons. First, although not all the RBOCs have regulatory approval for their proposed commercial VDT networks, the signs are that the FCC will approve the various requests outstanding within a matter of weeks. Some tough conditions are likely to be imposed on the RBOCs to prevent them exploiting their dominant positions in the local telephony market.

Second, the FCC also seems prepared to allow the RBOCs to own the programming they transmit over their new VDT systems: previously, this had to come

from somewhere else – the cable operators being the most likely suppliers.

In the absence of any agreement between the Republicans and the Democrats on the text of a new telecommunications reform bill, the likelihood is that quite soon, the cable industry is going to find the RBOCs on its own turf, long before it is allowed to compete against them in the local telephony arena.

This is where Stringer's cyberstudio comes in. One part of it will provide original and acquired content to run over the VDT networks, but the other part – the technology division – will provide the specifications for creating, recording, compressing and transmitting the new product.

By pooling their technological resources, the three RBOCs are cleverly driving down the costs of creating the full-service infrastructure required for the transmission of this material, for there will now be just one standard specification common to all their VDT ventures. The muscle their combined buying power will bring to the negotiating table should ensure that high-end digital decoders are brought within an affordable range.

What will be interesting to see is who gets the set-top box contract: whichever supplier is chosen, it will be able to bring a lot of weight to bear in negotiations over what the new digital set-top box standard should be, something that is still a long

way from being resolved. The RBOCs insist they are looking for an "open" solution from whoever wins the order, so, whatever happens, the award is likely to boost the advent of cross-platform compatibility.

Encoding The Content

Digital decoders can't exist in isolation: they need to be preceded by an installed population of digital encoders to compress all that programming into digital form – as this column has pointed out before.

Broadcasters currently face something of a dilemma over which way to carry out the encoding, for there are two possible approaches. Programs can either be digitized offline and stored, magnetically or optically, ready for eventual transmission, or a digital encoder can simply be placed between the programmer's output signal and the satellite transponder, and the analog signals encoded in real time, online.

Of these two alternative methods of proceeding, the second is undoubtedly preferable. Consider the offline solution: a 24-hour movie channel broadcasting 365 days a year would, if it never repeated a movie, have to compress 8,760 hours of material. Currently, most commercial encoding bureaus would not perform this task in real time. It might take a whole day to encode one 100-minute movie.

Moreover, storing all

those hours of programming in an accessible digital format would be an expensive proposition – and in any case, if a digital broadcaster wants to transmit a live show, or take a live news feed from a remote location, offline digitization isn't an option.

Unfortunately, real-time encoders – particularly the MPEG-2 variety – don't come cheap. And MPEG-1 standard ones are unable to cope with a small percentage of program segments (usually because the action is changing too fast on-screen).

For these reasons, Nolan Daines, president and CEO of Divicom (which is owned by a consortium of French companies including Eurodec and Sagem) believes that what he calls the "content preparation" (offline) encoder is still set to address an expanding market. When offline bureaus digitize a program, they reprocess problem segments to make them look acceptable – one reason why they have to operate in less-than-real time.

But Divicom intends to solve that problem at the end of this year when it launches what it calls an "interactive" encoder. "The encoder will allow the computer to do 95% of it," said Daines. "The operator will watch it to see which scenes are unacceptable, will stop the machine, and simply increase the bit-rate." This will help to speed up the rate at which material is encoded offline. □

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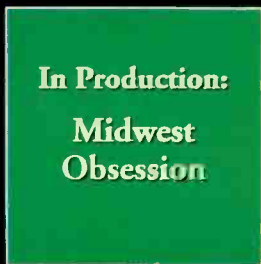
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