THE TBI 100:
WHO WILL TOP TIME WARNER?
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The vision to create.
The resources to build.
The commitment to lead.
The Big Get Bigger

Time Warner is the biggest television company in the world. Again. In the last TBI 100 before the arrival of the phone companies, the American media conglomerate tops our exclusive survey. There's good news all around: TBI 100 companies posted annual growth of 10% during the period covered.

Cover illustration: Frank Langford

Strings Attached

ITC has had a checkered past, but under the leadership of experienced president and CEO Jules Haimovitz, the company is beefing up production and consolidating its solid position in distribution and licensing.

Bells, Buzzers And Bodies

Gameshows are moving with the times. Interactive and action-adventure formats are taking the place of low-budget, studio-based programs. Bye bye bells and whistles.

Screen Sex

Cynics labelled adult programming a product of the recession. Maybe so. Topless housewives and softcore films have been phased out at some stations. But alternative forms of erotic programming have taken their place.

DEPARTMENTS

Monitor

Elkabbach Gets To Work 8
Local State Of Emergency 8
TV Funds For Theatricals 9
Israel Breaks Cable Monopoly 9
Palestinian TV Delayed 10
All In The Game 10
BBC Opens Door To China 14
Japan Backs Fibre For Stations 15
Star And Wharf At Loggerheads 16
Conde's Out, But Who's In? 16
Breaking Down Chinese Walls 17
Turner Calls The Toon 17

EDITOR’S NOTE

What Me Worry? 2

PERSPECTIVE

Knocking Bell Heads Together 6

COMMENT

How Do You Define Safe Sex? 18

MARKET NEWS

What's New At Monte Carlo 50

ADVERTISING

Death By Digit 57

DATA

Euro-cablers Cross Red Line 58

HARD TECH

When Rights Are Wrong 64
What Me Worry?

An issue of immense importance is probably out there waiting to be commented on, a bull's-eye painted on its chest. But I'm worried this month. I'm worried about a few little things that taken together are still a few little things. If I were a CD-Rom, I'd know how to string them all together, make them all interact with each other, even play a song or two. But my brain is analog. I await the digital interface.

A) I'm worried about Silvio Berlusconi. As TBI went to press, he confirmed plans to run in the Italian general elections in March. Berlusconi's finally doing it; he's leaving television for the world of entertainment. Even if he wins, it can't last that long given the survival rate of the average Italian government. But how long can we afford to have him out of the business? Does this mean no lightning raids on Mip for Association for Commercial Television press conferences where nothing is said? I'd be less worried if I could confirm what I suspect: This is really just a cunning business move. Berlusconi is attempting the craftiest reverse takeover in tv history. The Rai networks should watch out.

B) I'm worried about multimedia metaphor madness. The digital super-highway is just about everybody's metaphor of choice. That's fair enough. It's got a nice ring to it. However, executives, politicos and consultants are now tripping over each other's tongues in the race to come up with the cutest embellishment on the theme. Already used: "road kill on the digital superhighway..." "exit ramp off of..." "traffic jam on the..." "rest stop near the..." "billboards along the..." This must end. None of us can take ten years of a metaphor run riot. It'd be worse than some massive hard disc-drive grinding computer virus. I'm already nostalgic for "the 500-channel universe."

C) I'm worried about Milia. The first edition of the Midem Organisation's new multimedia and illustrated book market was refreshing. Almost everyone admitted some amount of ignorance, a pleasant experience in an exhibition hall full of computers. The seminars were jammed. People were riding the learning curve. So what happens next? The goal with Milia is to create a market where book publishers, software authors and tv producers do deals to create new multimedia programming. It's sort of analogous to the role Mip and Mipcom now play in the co-production business. But active co-production discussions didn't come first. For years, the markets served the single function of giving distributors an exhibit hall where they could sell existing shows to broadcasters. What is there to sell at Milia? And to whom? The stands of the Turkish and Slovak book publishers were quiet. Of course, there may be a business in Slovak-English CD Roms. And maybe not. The Apple stand was full of people playing with the Newton, Apple's Personal Digital Assistant. In the end, a major computer maker is hardly going to use an international market to push product it can sell at Computer Shack. Exhibitors at next year's Milia will need to sell things. Or there'll be more to worry about.

The Editor
From the Producers of *KNOTS LANDING* and *HOMEFRONT*

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Starring

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STAR PERFORMERS

Cheers

The Young Indiana Jones Chronicles

Viper

Wings
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American show business has gone through some odd phases, but this is one of the weirdest. Look who the big impresarios are going to be as television enters its new interactive stage — telephone people.

Bell Heads, they call themselves, the ultra-square executives who were schooled in the monolithic Bell System (before the government broke up the monopoly) when telephone was just a performance of wires and switches whose most dramatic utterance was the busy signal.

These are the sons and daughters of Ma Bell, as AT&T used to be called when it controlled all telephones in the U.S. They were, and for the most part still are, bland, corporate types in three-piece business suits, but now they work for the seven cash rich regional phone companies that were created in the 1984 break-up.

And they are turning up all over the video landscape, because the telephone is no longer just the device you use to call your lady friend, bookie, or room service. It also connects to the home computer and the tv, and technology has figured out how to send movies down its wire to your living room.

Telephone is cable today, and cable is telephone. The two U.S. industries have jumped into bed with each other like lusty youth. Every month brings news of an acquisition, merger, buy-in or strategic alliance between the two, and it is never the cable operator who is doing the taking over.

The scorecard shows Bell Atlantic buying TCI for $30 billion; Southwest Bell entering into a $5 billion partnership with Cox Cable and buying the Hauser Communications Cable systems in the Washington D.C. area for $675 million; U.S. West investing $2 billion for a 25% share of Time Warner Cable; Bell South putting $1 billion into Prime Cable and another $1.5 billion into the QVC network's bid for Paramount Communications; and Nynex supporting Viacom's Paramount bid with $1.6 billion.

Pacific Telesis is going it alone with a $16 billion plan to establish an interactive fibre-optic network in California; and Ameritech Corp. has shied away from an affiliation until a court rules on its request to offer a cable service in its own midwestern territory using its own telephone lines.

Until opportunity knocked, the telcos were in a slow-growth business as providers of local phone services. But they have big money to put on the table, with combined annual revenues of about $100 billion, and in zealously expanding their markets they have the blessings of the Clinton Administration, which is avid for a national information superhighway built by private industry.

So the Bell Heads are entering the business of delivering movies, sporting events, interactive video games, gambling, computer software, news, and data to individual homes, on demand. Inevitably they will move into program ownership and production on the reasoning that consumers are drawn to shows and not technology. And anyway, everyone knows the big payoff is in software.

By law the telcos are common carriers, open-access media that may not control the messages sent over their lines. But cable has no such restrictions, and that's partly what prompts the mergers and alliances — that and the fact that cable, rebuilt with optical fibre and equipped with digital switching, can invade the telcos' own core business.

The telco people are good at customer service, billing, and making the wires work efficiently, the sorts of virtues nurtured in the Ma Bell ethos. But what instincts could they have honed for the selection, management, or creation of entertainment products? Show biz requires a bit of flair, after all.

Of course the telco people will enthrall the news and entertainment operations to professionals and not get directly involved themselves. But as experience has shown, no one can build a great news organization when higher management has no feel for journalism and is oriented to the bottom line.

As for the entertainment side, it is always affected by corporate climates. That's apparent to anyone who has followed the trials of CBS and NBC over the past dozen years, or saw what happened to Columbia Pictures in Coca-Cola's brief tenure as its owner. Creative thinking does not find stimulation in a strictly-business environment.

I am of course guilty of pre-judging. I tell myself that surely the Bell Heads are intelligent and well-meaning folk, but then I wonder what "meaning well" means to them. Getting the fastest possible return on all those billions invested would have to be the operative priority.

That's a fitting agenda for other kinds of business, but show business is not ordinary business. You can never budget a year in advance because success is always so unpredictable. It's just possible that the Bell Heads have dialled the wrong number.

What instincts could the telco people have honed for the selection, management or creation of entertainment products?

ANN-MARGRET

Nobody's Children

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Directed by DAVID WHEATLEY

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then, the united network has gained access to over 60% of Israeli homes. The court decided this move had succeeded in creating a monopoly, thus contravening the Israeli cable law aimed at creating and nurturing local channels.

Given until the end of March to change the structure, the director of the Israeli Cable Association, Yosef Lapid, did not take the ruling in the best of spirits: "It will not affect programming or subscriptions. We will carry on as before, and in the meantime, we will appeal to the Supreme Court."

In a separate case, the Cable Association has challenged Channel 2's advertising exclusivity in an attempt to have the rules banning advertising on cable lifted. Channel 2, which began broadcasting last November, is the country's first, and at present only, commercial tv outlet.

If advertising were to be allowed on cable, it would result in strong competition for Channel 2, whose ratings are not much higher than cable, despite having a larger audience potential. The court's recent decision, however, means that should the cable advertising rules be changed in the future, advertisers will have to use four small channels as opposed to a single large network.

by Barry Chamish — TEL AVIV

Palestinian TV Stations Delayed

The Israelis won't act until a peace deal is done

Proposals for the launch of two Palestinian owned-and-operated tv stations have been put on ice by the Israeli government.

Though the Ministry of Communications approved a Palestinian request to launch tv stations in mid-January, an unnamed ministry source told a daily newspaper: "We have no intention of granting any licenses until an overall peace agreement is reached."

The groundwork for the proposed stations, one for the West Bank and one for Gaza, was laid last November when the Palestine Liberation Organisation purchased studio equipment from Germany and transferred it to East Jerusalem. Shortly after that, 24 Palestinians arrived in Amman to take part in a technical course provided by Jordanian Television. The west has also been providing support: French public broadcaster France 2 is training dozens of Palestinians in administrative skills, while the EU has agreed to provide finance in the form of a $2.5 million fund.

As regards program production, fledgling ventures are already emerging. The Al-Kuds production company, formed by journalist Daoud Kutub and financed in part by the Swedish development fund Sidah, is preparing a news gathering and broadcasting team that will produce documentaries, current affairs and news programming.

Kutub has chosen as the core of his production crew, Palestinian cameramen, editors and soundmen who have gained invaluable experience working for foreign networks based in Israel.

The main reason Israel has been reluctant to issue licenses to the Palestinian stations is the fear that they will be used to encourage nationalist violence. Kutub scoffs at the notion: "We will not be like other Arab stations. Our news will not be devoted to honoring the president or the king, and we will not broadcast propaganda. Our aim is to concentrate on Palestinian affairs, partly because we cannot afford foreign correspondents. When we cover these affairs, it will be from every perspective, be it the PLO, Hamas or whatever."

Only one issue remains to be settled, but that is the issue of peace itself.

It's All In The Game, But Which One?

Author finds there is no such thing as a global gameshow

The world may indeed be getting smaller, but after studying 260 gameshow formats from 50 countries, communications scholar Anne Cooper-Chen concluded "global" television, at least as far as gameshows are concerned, doesn't exist and probably never will. That news will not comfort producers with an eye on the international market, but they could probably pick up some pointers from her analysis.

In her new book Games in the Global Village (published by Popular Press, Ohio), Cooper-Chen, director of the Centre for International Journalism at Ohio State University, defined four "cultural continents" -- Southeast Asia, Latin America, Equatorial and The West -- whose gameshows resemble each other. However, although similarities exist within these different "continents," there are also significant cultural differences.

For instance, unlike the low-budget gameshows broadcast in the U.S. during the day-

Aussie Rules and Dim Sum

Viewers in China many soon be able to tune into such televised delights as live Australian Rules Football and The Bush Tucker Man, following an agreement signed between the Chinese government and the Australian Broadcasting Corporation's satellite tv service, Australian Television International (ATVI). Under the agreement signed in Beijing, Central China TV (CCTV) and provincial Chinese stations will be able to access ATVI's output, while in return, the ABC will be able to tap into CCTV's programs for use on its domestic service.

Significantly, the agreement signed between the Chinese government and the Australian Broadcast Corporation's satellite tv, this provided credence to those arguing ideologically-driven rules were being lifted. Channel 2, which began broadcasting last November, is the country's first, and at present only, commercial tv outlet.

If advertising were to be allowed on cable, it would result in strong competition for Channel 2, whose ratings are not much higher than cable, despite having a larger audience potential. The court's recent decision, however, means that should the cable advertising rules be changed in the future, advertisers will have to use four small channels as opposed to a single large network.

by Barry Chamish — TEL AVIV
EXCELLENCE ACHIEVED.

NATIONAL GEOGRAPHIC TELEVISION
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FIVE OF THE WORLD’S GREAT FILM DIRECTORS have come together to create a one-hour artistic statement capturing a different facet of Russia in the 90’s. Each director brings their unique vision to this special project, which has never been attempted before.
US EVENTS
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period of unparalleled upheaval and transformation. Entertaining, imaginative and dramatic, these five hours together will convey a multi-angled perspective on an emerging Russia...and a new generation.
Wheel Of Fortune: Biggest selling gameshow

Here, gameshows tend to resemble quiz shows in which academic teams compete. Cooper said in these countries, the state-run broadcasters, schedule gameshows for educational purposes, and even countries with minimal production facilities produce gameshows.

In Latin America, by contrast, displays of intellect are not popular. Instead, gameshows tend to rely on surmounting physical obstacles — people have to run up an escalator backwards or catch eggs in a hat. The enormously popular 10-hour Brazilian show Program Silvio Santos interweaves variety acts with team games such as food fights and giant slingshot battles. The world’s most watched gameshow, Cooper noted, is the Chilean production Sabado Gigante. Airing in 18 Latin American countries, it features another staple of the Latin American gameshow, the corpulent and charismatic male host.

Western (North America, Western Europe, Australia) gameshow hosts are decidedly less charismatic. They facilitate the games rather than assume center stage. Productions are also characterized by their quicker pace and are structured so that viewers can play along at home. Popular programs like Jeopardy, The Price Is Right and Wheel Of Fortune let viewers try to guess the answer before the contestants.

Wheel Of Fortune, said Cooper-Chen, is the biggest selling gameshow format, now broadcast in 25 countries. She attributes the show’s success to its simplicity. “It’s just slow enough,” she said. “Almost anyone can get some of it.” However, even Wheel doesn’t translate everywhere.

Because its format relies on letters, the show can’t work with Asian character-based languages.

Cooper-Chen said producers who distribute gameshow formats would have more success if they molded the format to the dominant features of each country’s indigenous gameshows. She suggested producers consider how the game is played, looking in particular at the length, local scheduling patterns and the nature of the host.

Asked to design a hypothetical game she believed would work worldwide, Cooper said the game should be verbal but, unlike Wheel Of Fortune, not involve letters. She would model it loosely on the Japanese primetime travel game Let’s Go The World, which includes segments shot on location. “Travel seems a good starting point,” she said, “because almost everywhere people are interested in somewhere else.”
In January, the Telecommunications Council, an advisory body to the Ministry of Posts and Telecommunications (MPT), proposed NHK and the five commercial networks change over from terrestrial transmission to a next-generation, fibre-optic system by the year 2010.

The object would be to create empty frequencies for use by mobile telephones, upgrade television broadcasting and lay the groundwork for new media businesses.

The MPT forecasts by 2010, new businesses using next-generation telecommunications networks will create a market worth ¥5.6 trillion ($504 billion). The multimedia market as a whole will be worth ¥123 trillion ($1.1 trillion), said the ministry.

Japanese broadcasters currently transmit programs from their key Tokyo stations to local broadcasters via NTT lines. The stations then beam them to viewers using 30 to 300 MHz frequencies. The MPT’s council is proposing stations carry their signals via fibre-optic cables leased from network operators.

Separately, the MPT is pushing ahead with its next-generation network pilot project in the Kansai Culture and Science Research City in Kyoto. Set to start in August and run for a period of three years, the ¥5 billion ($44.6 million) project will connect 300 homes and businesses to a fibre-optic tv and telecommunications network. Services will include tv, video telephones, tv conferences, home shopping and video-on-demand.

The ministry expects a total of 100 companies to participate in the project. Among the 45 telcos, broadcasters, electronics companies, trading houses and banks already signed on are NTT, Northern Telecom, NHK, Matsushita and Mitsui.

Next year, NTT will begin providing an experimental broadcasting and telecommunications service to another 100 households via fibre-optic cable. Services on offer will include video-on-demand and interactive games. Though NTT has not yet decided the site or duration of this experiment, the telco plans to spend ¥45 trillion ($402 billion) to connect every household and business in Japan to fibre-optic networks by 2010. The company hopes this decade’s multimedia experiments will give it the know-how needed to provide broadcasting and telecommunications services via the information superhighway.

Standing in the way of the NTT plan is a regulatory structure that separates the broadcasting and telecommunications sectors. The company is counting on regulators to change this structure by the time it begins providing full-scale multimedia services. Given recent MPT decisions to liberalize rules regarding the cable and satellite markets, the company’s expectations are likely to be fulfilled.

Foreign companies are also starting to emerge on the Japanese superhighway, including U.S. giants TCI and Nynex.
Star and Wharf Are Still At Loggerheads

Cable is refusing to carry the satellite broadcaster’s channels

Star TV may have changed ownership, but the bad blood still flows between the pan-Asian satellite broadcaster and Cable TV, the cable system owned by Wharf Holdings.

Observers were surprised by Wharf’s recent announcement it was going to court to determine if it is legally bound to take programming from the satellite-tv station. On the basis of a Hong Kong government directive signed in 1993, the operator of the colony’s cable system has to adhere to a must-carry clause which stipulates it broadcast up to four of Star TV’s subscription channels. The directive was designed as a compromise, allowing Star TV to run pay-tv channels without eroding the audience for cable.

Star TV and Wharf signed a memorandum of understanding to this effect shortly after Star was purchased last summer by Rupert Murdoch’s News Corp. for $525 million. The accord proved a contrast to the long-running animosity between Wharf Holdings and Star TV founder Li Ki-shing, chairman of Hutchison Whampoa.

However, having cut deals with U.S. companies ESPN and CNN, Cable TV managing director Stephen Ng soon began questioning Star TV’s claim to be the exclusive provider of English-language programming in the region. The negotiations continued right up to Cable TV’s launch on October 31 last year, but ended unresolved with Ng not only refusing to screen Star TV’s four new subscription channels, but also three of its free-to-air channels.

As the number of program providers serving southeast Asia grows, it is clear Ng wants complete freedom to choose programming. “We are not suing Star TV. All we are asking the court to do at this time is to determine if there are any existing legal obligations,” he said.

by Owen Hughes — Hong Kong

Conde’s Fall Puts Station On Market

The crisis at Banesto means a stake in Antena 3 is up for grabs

No obvious contenders are emerging as buyers for a stake in Spanish commercial-tv channel Antena 3, should the beleaguered Banco Español de Credito (Banesto) decide to divest of its majority stake. Following the fall of Banesto’s youthful president Mario Conde, the ownership of Spain’s leading private-tv channel is once again in doubt.

According to Eugenio Galdon, president of Multitel and former director of Spanish media conglomerate Prisa, investors from outside Spain are most likely to take a stake in Antena 3. He envisages a company such as RTL or Bertelsmann being brought in by Antonio Asensio, president of Grupo Zeta, Spain’s second largest media company and an Antena 3 shareholder. Prisa, which already owns 25% of Canal Plus España, is the only Spanish group with the resources to acquire a stake in Antena 3, but given Spain’s law on media ownership, such a move would “cause an absolute scandal,” said Galdon.

A consortium comprised of Banesto, Rupert Murdoch and Asensio was believed to control a 72% stake in the commercial broadcaster, following a boardroom coup in 1992. However, in the aftermath of the bank’s crisis – it was technically bankrupt – it emerged Banesto alone controlled 50% of the television station: 25% in direct shareholdings and a further 25% in shares mortgaged against a loan which has two years to run. Spanish law prevents a company from owning more than 25% of a tv station.

Sources in the new government-appointed crisis management team told Spanish daily newspapers the bank would be selling its media interests. Conde had political ambitions, and as his main motive for acquiring the broadcaster...
The Power of Television. Times Two.
Television Programming.

THE COMMISH

THE CRITIC

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THE LARRY SANDERS SHOW

MAD ABOUT YOU

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THEA

THE UPPER HAND

THE YOUNG AND THE RESTLESS

ZOO PROJECT*
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...Telefilms and Specials.
appears to have been political as opposed to financial, Antena 3 is an obvious cut back for a bank with a shaky balance sheet.

"I think it was one of the causes of bad management at Banesto," said Galdon. "I hope this will make banks approach participation in media with more caution."

The market for selling is not good. Berlusconi is already reported to want to reduce his 25% stake in private broadcaster Tele 5. Another 10% is held by Jacques Hachuel, close friend of Conde, leading to speculation Tele 5 may also be linked to Banesto.

by Justin Webster — BARCELONA

Breaking Down
The Chinese Walls

A new entertainment service is signing up stations and advertisers

Where Star TV is failing, others are queuing up to take its place. China Entertainment Television Broadcast (CETV) announced plans at the Natpe convention for a 24-hour satellite-delivered, Mandarin-language service targeted at China. The new channel will launch January 1995, broadcasting via the Apstar 1 satellite.

The brainchild of Hong Kong businessman Robert Chua and run through his company, Robert Chua Productions, CETV has resources of $100 million raised via venture capital funds in Hong Kong. Chua holds a 30% stake in the new channel, with most of the rest owned by what he described as "Chinese partners." Between 5% and 10% of the company has been earmarked for an as yet to be found other partner, probably from the West, who could bring to the channel "experience and influence."

Chua was attending Natpe to source programming for the new channel. He has been working in China since 1979, when he reached a media agreement with Guandong television. Since then, he has been involved with both program distribution and production and is probably best known in Asia for the hit Enjoy Yourself Tonight, a show he created for Hong Kong’s TVB.

CETV has already secured agreements for terrestrial and cable distribution to about 35% of China, including all the major cities. Star TV’s distribution has been hampered by a ban on satellite dishes in China that was introduced in October of last year, soon after Rupert Murdoch bought a controlling stake in the satellite broadcaster from the Li family. Chua said his approach differs from Star’s: "We have created a lot of goodwill through a sincere friendship with China."

CETV will acquire 50% of its programming from western distributors, another 30% in Asia (including China) and will produce 20% in-house, including Enjoy Yourself China, a show based on Chua’s original TVB hit. The schedule will be 100% light entertainment — what Chua describes as "total entertainment" — and will not include news programming.

The Chinese are very receptive to foreign programs, but Chua said there is a greater need to "create great programs for China." Whereas other channels targeting the region are run by business executives with television experience, Chua said he is "the only CEO with production experience in creating successful programs for Chinese markets."

The CETV business plan forecasts operating profit in the third year, with the channel’s only revenues coming, at the start at least, from advertising. Chua plans to take advantage of the new compression technologies. "We will go to four channels when the technology becomes available," he said.

by Paul Nicholson — MIAMI

Turner Calls The Toon

The media mogul completes the entertainment puzzle in Asia

Turner Broadcasting System filled in another piece of the global jigsaw when it announced the launch of an entertainment service for the Asia-Pacific region at Natpe. The 24-hour Cartoon Network/TNT format currently building audiences in Europe is scheduled to begin broadcasting an encrypted signal in July from the Apstar-1 satellite, migrating to Apstar-2 in 1995. Initially broadcasting in English, some dayparts will be subtitled and dubbed into Mandarin and Thai, with other language segments to be added in the future. The Cartoon Network will air 14 hours per day followed by TNT for 10 hours. Like its sister Latin American and European networks, the Asian version will be predominantly programmed from Ted Turner’s Hanna-Barbera and MGM libraries.

Separately, Telemundo Group and Reuters Television told a news conference they’ve agreed in principle to launch a 24-hour Spanish language news channel. Called TeleNoticias, the channel will be transmitted via cable and satellite to 19 Latin American countries as well as the U.S. and Spain. Programming will consist of news, sports, business and weather in rotating half-hour blocks.
How Do You Define Safe Sex?

The discussion of sex on tv has less to do with the problems of sex than with the problems some people have with television.
Under the leadership of Robert Halmi, Sr. and Robert Halmi, Jr., RHI Entertainment, Inc. is today the largest producer of movies and miniseries in the U.S. television industry.

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20 x 1 hr.

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"...looks and sounds great... an immediate smash"
The Gazette

FIPA D'OR '94
Best Series & Serials

GOLD MEDAL
Drama Series
The New York Festivals '93
11 x 1 hr.
Ten percent growth boosted the world's 100 largest tv companies, reports Nick Bell. Time Warner is still lodged at number one in the TBI 100. But how much longer now the telcos are in the race?

Double digit growth is not a thing of the past. The one hundred companies that made it into the TBI 100 this year posted a 10% rate of growth in television revenues, compared to 6% the previous year.

The three fastest climbers came from different parts of the industry. U.S. producer and distributor Spelling Entertainment (No. 79) more than doubled sales. Spanish commercial channel Antena 3, still riding the wave of deregulation in its second year of operation, surged into the ranking at number 84 with sales up 75%. Satellite tv company British Sky Broadcasting (No. 45) overtook all but one of the ITV channels on the back of a 63% increase in revenues. BSkyB is set to become the dominant player in the UK market within a few years.

Time Warner holds the number one spot again, the second year running that
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<th>Country</th>
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<th>TV Revenues As Percent Of Total Revenues</th>
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<td>Change</td>
<td>TV Revenues As Percent Of Total Revenues</td>
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<td>BRTN</td>
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<td>$180</td>
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<td>73%</td>
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<td>Canada</td>
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<tr>
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<td>TVNZ</td>
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<td>New Zealand</td>
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<tr>
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<td>RTBF</td>
<td>95</td>
<td>Belgium</td>
<td>$176</td>
<td>10%</td>
<td>70%</td>
</tr>
<tr>
<td>98</td>
<td>HTV</td>
<td>87=</td>
<td>UK</td>
<td>$176</td>
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<td>88%</td>
</tr>
<tr>
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<td>Scottish</td>
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<td>UK</td>
<td>$173</td>
<td>10%</td>
<td>93%</td>
</tr>
<tr>
<td>100</td>
<td>Media General</td>
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<td>USA</td>
<td>$170</td>
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<td>24%</td>
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### Top 20 Private Broadcasters And Programmers

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<th>Broadcaster</th>
<th>TV Revenues (millions)</th>
<th>Activities</th>
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<td>1</td>
<td>Capital Cities/ABC</td>
<td>$4,025</td>
<td>ABC network, stations &amp; ESPN cable</td>
</tr>
<tr>
<td>2</td>
<td>GE/NBC</td>
<td>$3,363</td>
<td>network &amp; stations</td>
</tr>
<tr>
<td>3</td>
<td>Time Warner</td>
<td>$3,409</td>
<td>studio, HBO &amp; Cinemax</td>
</tr>
<tr>
<td>4</td>
<td>CBS</td>
<td>$3,260</td>
<td>network &amp; stations</td>
</tr>
<tr>
<td>5</td>
<td>Fininvest</td>
<td>$2,611</td>
<td>three networks &amp; programming</td>
</tr>
<tr>
<td>6</td>
<td>Fuji Television</td>
<td>$2,163</td>
<td>network</td>
</tr>
<tr>
<td>7</td>
<td>News Corp.</td>
<td>$1,690</td>
<td>Fox network, stations &amp; studio</td>
</tr>
<tr>
<td>8</td>
<td>Turner Broadcasting</td>
<td>$1,650</td>
<td>Cable networks, production &amp; distribution</td>
</tr>
<tr>
<td>9</td>
<td>Tokyo Bostg. System</td>
<td>$1,632</td>
<td>network</td>
</tr>
<tr>
<td>10</td>
<td>Nippon TV</td>
<td>$1,600</td>
<td>network</td>
</tr>
<tr>
<td>11</td>
<td>CLT</td>
<td>$1,494</td>
<td>RTL &amp; other European Channels</td>
</tr>
<tr>
<td>12</td>
<td>Viacom</td>
<td>$1,420</td>
<td>cable networks &amp; production</td>
</tr>
<tr>
<td>13</td>
<td>Canal Plus</td>
<td>$1,355</td>
<td>French pay-tv channel</td>
</tr>
<tr>
<td>14</td>
<td>Asahi National Bostg.</td>
<td>$1,328</td>
<td>network</td>
</tr>
<tr>
<td>15</td>
<td>Paramount</td>
<td>$1,240</td>
<td>broadcasting &amp; studio</td>
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<tr>
<td>16</td>
<td>TF1</td>
<td>$1,197</td>
<td>French commercial channel</td>
</tr>
<tr>
<td>17</td>
<td>QVC</td>
<td>$1,071</td>
<td>home shopping channel</td>
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<tr>
<td>18</td>
<td>Home Shopping Network</td>
<td>$1,053</td>
<td>second largest private German channel</td>
</tr>
<tr>
<td>19</td>
<td>Sat1</td>
<td>$973</td>
<td>Mexican networks</td>
</tr>
<tr>
<td>20</td>
<td>Grupo Televisa</td>
<td>$973</td>
<td>Mexican networks</td>
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* excludes revenues from cable systems

### Top 25 Public Broadcasters

<table>
<thead>
<tr>
<th>Rank</th>
<th>Broadcasters</th>
<th>Revenues (millions)</th>
<th>License Fee/ Govt. Support (millions)</th>
<th>% Support</th>
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<tbody>
<tr>
<td>1</td>
<td>NHK</td>
<td>$4,075</td>
<td>$4,171</td>
<td>97%</td>
</tr>
<tr>
<td>2</td>
<td>ARD</td>
<td>$3,100</td>
<td>$2,790</td>
<td>90%</td>
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<td>3</td>
<td>Rai</td>
<td>$2,416</td>
<td>$1,450</td>
<td>60%</td>
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<tr>
<td>4</td>
<td>BBC</td>
<td>$2,397</td>
<td>$2,397</td>
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</tr>
<tr>
<td>5</td>
<td>ZDF</td>
<td>$1,398</td>
<td>$797</td>
<td>57%</td>
</tr>
<tr>
<td>6</td>
<td>RTVE</td>
<td>$880</td>
<td>$792</td>
<td>90%</td>
</tr>
<tr>
<td>7</td>
<td>France 3</td>
<td>$786</td>
<td>$556</td>
<td>71%</td>
</tr>
<tr>
<td>8</td>
<td>France 2</td>
<td>$761</td>
<td>$541</td>
<td>71%</td>
</tr>
<tr>
<td>9</td>
<td>CBC</td>
<td>$625</td>
<td>$515</td>
<td>71%</td>
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<tr>
<td>10</td>
<td>Orf</td>
<td>$614</td>
<td>$252</td>
<td>41%</td>
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<tr>
<td>11</td>
<td>Munhwa Bostg. Co.</td>
<td>$456</td>
<td>$0</td>
<td>0%</td>
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<tr>
<td>12</td>
<td>KBS TV</td>
<td>$409</td>
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<td>13</td>
<td>YLE</td>
<td>$364</td>
<td>$364</td>
<td>100%</td>
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<tr>
<td>14</td>
<td>NOS</td>
<td>$355</td>
<td>$256</td>
<td>72%</td>
</tr>
<tr>
<td>15</td>
<td>SVT</td>
<td>$317</td>
<td>$317</td>
<td>100%</td>
</tr>
<tr>
<td>16</td>
<td>TV de Catalunya</td>
<td>$227</td>
<td>$37</td>
<td>16%</td>
</tr>
<tr>
<td>17</td>
<td>Doordarshan</td>
<td>$300</td>
<td>$150</td>
<td>50%</td>
</tr>
<tr>
<td>18</td>
<td>RTP</td>
<td>$287</td>
<td>$43</td>
<td>15%</td>
</tr>
<tr>
<td>19</td>
<td>ABC</td>
<td>$254</td>
<td>$193</td>
<td>76%</td>
</tr>
<tr>
<td>20</td>
<td>Danmarks Radio</td>
<td>$246</td>
<td>$216</td>
<td>88%</td>
</tr>
<tr>
<td>21</td>
<td>NRK</td>
<td>$245</td>
<td>$245</td>
<td>100%</td>
</tr>
<tr>
<td>22</td>
<td>SABC</td>
<td>$184</td>
<td>$53</td>
<td>29%</td>
</tr>
<tr>
<td>23</td>
<td>TVNZ</td>
<td>$176</td>
<td>$14</td>
<td>8%</td>
</tr>
<tr>
<td>24</td>
<td>BRTN</td>
<td>$180</td>
<td>$136</td>
<td>75%</td>
</tr>
<tr>
<td>25</td>
<td>RTBF</td>
<td>$176</td>
<td>$128</td>
<td>73%</td>
</tr>
</tbody>
</table>

Total: $16,598

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Continued on page 28

Television Business International March 1994

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the U.S. conglomerate has headed TBI's list of the top 100 companies as measured by television revenues only. Time Warner consolidated its lead with growth in tv revenues of 18%, against second-place NHK's 8% growth. The world's most complete media company, with a major presence in publishing, music, film and tv production, programming and cable, Time Warner looks immovable from the top position. Its enormous debt is being gradually brought under control - the company made profits of $86 million after losses of $99 million in 1991 because of interest payments - and the chance of a break-up to pair down borrowing has been markedly reduced.

Last year, Time Warner found a strategic partner to take a stake in its Time Warner Entertainment subsidiary - comprised of Warner Bros., HBO and Time Warner Cable - alongside Japanese investors Toshiba and Itochu, who each already had stakes of 6.25%.

US West paid $2.5 billion for a 12.5% stake to become the first of the U.S. regional telephone companies to ally itself with a cable operator or program provider. The two companies intend to travel together down the information superhighway: US West has cash and expertise in telephone networks; Time Warner has everything else. The only thing that could possibly knock Time Warner from the top of the TBI 100 over the next few years would be a full-blown merger like that of Bell Atlantic-Tele-Communications Inc., and that would still depend on the companies' actual revenues in the television sector.

Europe is again the hottest area on the list, adding two percentage points to its share of TBI 100 global revenues. At $30 billion, compared to $26 billion in 1991, the continent accounts for 34% of TBI 100 sales, versus 41% for the U.S.

The opportunities for broadcasting unleashed by satellite and cable, especially in opening up pay-tv, are driving Europe's ascent, although the effects of deregulation are still apparent. Next year will see the entry onto the list of Luxembourg-based Societe Europeenne des Satellites (SES), operator of the Astra satellite system, which beams channels into 47 million homes in 22 countries. SES just missed out this year with revenues of $165 million. The pay-tv service Canal Plus Espana, even closer, rocketed ahead 137% to $169 million.

The on-going structural change in
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TO SERVE THE QUEEN, TO KILL THE FLOWER, TO PULL THE STRINGS, WITHIN THEIR POWER.

THE HOUSE OF WINDSOR
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A satirical sitcom revealing life at Buckingham Palace and featuring the latest royal news stories.

DANDELION DEAD
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MICHAEL KITCHEN, SARAH MILES and DAVID THEWLIS star in a true murder story of the 1920s, rich in intrigue and black humour.
Winners, Losers And Left Out

The Newcomers

Spelling and Antena 3 crash the party

Spelling Entertainment (No. 79), the L.A.-based producer of Beverly Hills, 90210 and Melrose Place, has had a busy three years. Since 1989, it has invested more than $150 million in acquiring new programming, including the purchase of the domestic tv rights to 150 films in Carolco's library (the Rambo trilogy and Terminator 2: Judgement Day).

The company now has the rights to over 4,000 hours of programming available for the U.S. market and more than 12,000 hours for the international market. International distribution is handled by Workvision Enterprises, the former distribution arm of ABC, which was acquired by Spelling in 1989.

Spelling's presence in the market place was further boosted at the beginning of last year when Blockbuster Entertainment, the largest video chain in the world with over 3,000 stores, acquired a majority shareholding. Blockbuster also controls Republic Pictures, and in a surprise move announced a merger with Viacom (No. 21) at the beginning of this year. If Paramount (No. 21) also becomes a part of the group, the three companies would rank seventh in the TBI 100.

Making its debut at number 84, Antena 3 is following in the footsteps of Tele 5 (No. 78), a fellow Spanish commercial tv channel that made the list last year. Both stations were born out of Spanish deregulation and are now locked in a battle for ratings, with Antena 3 recently taking the lead with an audience share of 24%.

In 1988, the Spanish government enacted a law that led to the establishment of three private national networks. The licenses were awarded to Antena 3, Canal Plus España and Tele 5.

The law stipulated a maximum shareholding of 25% for any single investor. Count Godo, a Spanish newspaper proprietor, was the leading shareholder in Antena 3, but was ousted in June 1992 in a boardroom coup. Another press baron, Antonio Ansensio, led a coalition that took control. With allegations that Zeta, run by Ansensio, and the bank Banesto together control 72%, there could be changes in Antena 3's ownership, particularly now that Mario Conde has been forced out at troubled Banesto.

Antena 3's rating success has been due to the current owners abandoning the channel's up-market ambitions - extensive news and current affairs coverage - and adopting an entertainment-led schedule.

The Also-rans

Canal Plus España and SES nearly made the grade

Canal Plus España, launched in September 1990, became profitable last year and narrowly missed out on the TBI 100 with revenues of $169 million. Broadcasting a terrestrial signal under a ten-year license from the Spanish government, the channel's leading investors are Canal Plus (No. 19) in France and the Spanish media group Prisa, each with 25% shareholdings, the maximum allowed. Subscribers numbered 559,000 at the end of 1992, up from 278,000 a year before, and a place in next year's TBI 100 is assured as the channel approaches the 800,000 level.

The German pay-tv channel Premiere, which is also a Canal Plus venture, together with Bertelsmann (No. 48) and the Kirch Group (No. 40), is likely to follow a year later. It achieved 554,000 subscribers and revenues just under $100 million. Its subscribers now number 750,000.

Société Européenne des Satellites (SES), with revenues of $165 million, also just missed out. Last year, it launched its third satellite, and with all the transponders taken up, revenues should register growth of about 30% to catapult it into the rankings - the first satellite company to make the grade.

The first independent European tv producers could also make an appearance in next year's TBI 100. At the end of last year, the Dutch production companies John de Mol and Joop van den Ende announced they were merging into a company with projected revenues of $250 million. Over half of Endemol's business will be generated internationally, primarily in Germany, thanks to the growth of channels like RTL.

The Losers

Bankruptcy and loss of license push some out

La Cinq, the French commercial channel that had ambitions to snatch the mantle of market leader from TF1 (No. 23), filed for bankruptcy and is now consigned to the history books. Pinelands, the bottom-ranked company last year, was acquired by 90th placed A.H. Belo.

Across the channel in the UK, two ITV companies, Thames and TVS, are making their final appearances in the TBI 100. Both lost their regional broadcasting franchises when they were auctioned in 1991. Thames, which has valuable programming assets and stakes in two satellite channels, was absorbed by Pearson, a UK media conglomerate with a minority shareholding in BSkyB. TVS was acquired by U.S. cable programmer IFE, which was keen to get its hands on MTM, the TVS subsidiary famed for Hill Street Blues.
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Machu Picchu
The Kremlin

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Statue of Liberty
The Eiffel Tower
Stonehenge
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Hagia Sophia
Borobudur
The Taj Mahal
Mount Rushmore
Great Wall of China


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Fax: +510 866 9262

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Tel: +44 81 742 2002
Fax: +44 81 995 7871
Europe is highlighted by the continuing retreat of the public broadcasters. At one time they completely controlled the airwaves over Europe, and although ARD, Rai and BBC all make the top ten of the TBI 100, their overall importance is diminishing. In fact, with spectrum scarcity becoming a thing of the past, their very raison d'être - to protect against an unaccountable private company having an economic and opinion-forming monopoly - is being questioned. The market-distorting support the public broadcasters receive from governments, be it in the form of license fees or grants, is a diminishing proportion of European TV revenues: in 1991 it was 40%, while in this survey it is down to 36%.

In marked contrast, the U.S. has no significant public finance flowing into television, whereas subscription revenue from cable operators and programmers amounts to 42% of its $37 billion TBI 100 industry revenues—a marginal increase on last year's 41%. Unlike last year, when the advertising-supported channels had a torrid time in the recession, this year's figures show healthy growth across all sectors of the industry, with Capital Cities/ABC (No. 3) the only company to register a drop.

The six Japanese networks account for a 13% share of revenues - the same as last year - but if the two U.S. studio-owning electronics companies are included, the share increases to 15%. The Japanese have by far the largest concentration of ownership, with their TBI 100 entrants averaging $1.7 billion in size, compared to $1.2 billion for the U.S., $750 million for Europe, and $425 million for the rest of the world.

News Corp. (No. 13) is the biggest TBI 100 company from outside Japan, the U.S. and Europe, though its television interests lie primarily in the U.S. Grupo Televisa (No. 29), which was floated on the U.S. stock market two years ago, follows with revenues nudging $1 billion. Privately-held Brazilian company Rede Globo (No. 31) is next largest, followed by the Canadian public broadcaster CBC (No. 38).

Outside Japan, Asia's small representation is disappointing, with the two South Korean broadcasters, Munhwah (No. 51) and KBC (No. 56), the largest. However, Star TV, the pan-Asian satellite service broadcast from Hong Kong, has been the catalyst for massive interest by Western media companies in this huge market. News Corp. swooped in to buy a controlling interest in Star right from under the nose of UK conglomerate Pearson, and the likes of HBO, ESPN and CNN are all targeting the region.

Meanwhile, a strategic goal for the U.S. regional phone companies is to muscle their way into the TV business, and so, onto the TBI 100. Bell Atlantic is set to make an appearance in the top three after its announced merger with TCI; Southwestern Bell is tying up with Cox Enterprises' (No. 27) cable subsidiary, and US West now owns 12.5% of Time Warner Entertainment.
The award-winning series is now complete! Introduce your audiences to the giants of jazz history in 10 fascinating installments:

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- Sarah Vaughan — The Divine One
- Thelonious Monk — American Composer
- The World According to John Coltrane
- Ray Charles — The Genius of Soul
- Satchmo — The Life of Louis Armstrong
- Lady Day — The Many Faces of Billie Holiday
- Count Basie — Swingin' the Blues
- Bluesland — A Portrait in American Music

10 x 60'
A coproduction of Toby Byron/Multiprises in association with TaurusFilm, VideoArts and Thirteen/WNET
British tv impresario Lew Grade had no inkling in 1958 that a little venture he started with the Jack Wrather Organization in America would get kicked around as much as it has. The Independent Television Corp. was set up for the simple task of selling programs overseas. Later, after Grade bought up the whole company, it continued with a basic mandate: get shows on the air on both sides of the Atlantic. That it did, winning British and American timeslots for such classics as The Saint, Secret Agent and The Prisoner.

Now, 35 years after its founding, ITC Entertainment Group is a classic good news-bad news story. The good news is it has the programming – 10,000 hours of it – that will be the life-blood of the digital fiber and co-axial arteries of the future. The bad news is the company has been restructured so many times in the past decade that some still think the company is in trouble – a perception that could choke off the oxygen of ideas and deals ITC needs to expand.

Jules Haimovitz, the experienced tv executive brought in as president and CEO last year, agreed ITC “has never lost the onus of a troubled company since 1981.” The reputation dates from the reign of Australian Robert Holmes à Court, who purchased the company from Grade in 1982. “Obviously when Holmes à Court bought the company and started divesting a great deal of the assets,” Haimovitz said, “the assumption was it was troubled, ailing.”

Developments over the next ten years didn’t help. Holmes à Court got caught in the 1987 crash and sold the company off to fellow Australian Alan Bond, who continued selling off chunks – and not for the best prices. Michael Jackson bought ATV Music for $35 million – a steal, said Haimovitz, when compared with the prices such assets have commanded recently. A year after Bond got hold of ITC, Montagu Private Equity bought out the company for $125 million, leaving executives Jerry Leider and Chris Gorog in charge. Management was brought under one roof in L.A., and New York and London were downgraded to regional offices. Leider soon departed, then Gorog was replaced last year as president-CEO by Haimovitz, who had been president and chief operating officer of Spelling Entertainment.

The dizzying changes at ITC left everybody confused. But Haimovitz said he is now in a position to “re-establish it as a vital company within the entertainment community.” In that campaign, he has the backing of Hong Kong & Shanghai Bank, one of the world’s largest banks, which owns Montagu Private Equity through the UK’s Midland Bank.

A company with 10,000 hours of programming, including gems like The Thunderbirds and The Saint, already has the building blocks for a major comeback. The new management team’s job was to see what it had and where to go with it. Explained Haimovitz, “We found we had a very large library of product – British and European in nature – that had been under-exploited, and an organizational structure that wasn’t really
focused on exploiting that library, but was really focused on producing low-
budget genre films."

The new CEO put a three-pronged strategy in place: Programming distribution was re-focused and improved, the highly lucrative licensing business given its own corporate focus and production in tv and film expanded to projects that will enhance the library.

Focusing distribution was an important goal for a company that brings in two-thirds of its revenues and profits from overseas. Haimovitz began a comprehensive inventory to find out what those 10,000 hours were, and where they had been sold. This gave members of the sales force, headed up by international tv senior executive vice president James Marrinan, data on what was available and assisted them in setting budgets. Haimovitz said he also moved to get the sales team involved in the selection of new product.

"Since his (Haimovitz's) arrival at ITC the pace has increased two-fold," said Marrinan. "We are back to where the company was when I joined, with U.S. network movies, miniseries and series. Competition in distribution between independents is so strong that we needed an edge with producers. Money was not enough by itself to get producers. Jules has a track record of working with leading producers and since he arrived (at ITC) he stepped forward and made commitments with producers."

It was in U.S. domestic syndication that Haimovitz found ITC had its biggest problem. "People were allowed to cherry-pick windows," he said. The domestic operation is now being pushed to boost sales to cable networks, as well as cash sales to broadcasters, in an overall effort to exploit ITC rights in the U.S. In 1993, ITC added a domestic home video division under Valley Kouznetz, executive vice president and general manager. Fox handles physical distribution and the first titles went out in May.

Licensing is a huge business. Anyone who has had a hit kid's show with toy tie-ins will know that. No company knows it better than ITC, following re-broadcasts of the 1960s Gerry Anderson series Thunderbirds on BBC2. Nostalgic parents watched along with their kids, who went nuts for all five Thunderbird ships and anything else to do with the series. Retail sales of Thunderbirds merchandise topped $350 million in the UK, with licensees scoring in virtually every consumer product category. BBC2 later added the Anderson series Stingray and Captain Scarlet and the Mysterons to the schedule.

ITC only gets a cut of that $350 million, of course, but with some observers predicting the company's licensing revenues now exceeds its international tv sales, it's no small change. No wonder Haimovitz moved in mid-January to create ITC Licensing, a division to handle worldwide merchandising representation for all the company's programming, with Stella Green, an ITC legal and business affairs executive, at the helm as vice president, worldwide licensing. Under Green, ITC Licensing will work in the areas of toys and games, publishing, audio and video, children's apparel, gifts and stationary, school supplies and domestic goods. The division will also handle licensing of ITC tv and movie clips and music publishing rights.

"The establishment of ITC Licensing reflects our commitment to furthering the company's assets in all areas in the most effective and efficient manner possible," said Haimovitz. "The future will add more high-profile film and television properties to our extensive inventory of classic entertainment, creating a virtually unlimited range of licensing opportunities worldwide."

ITC Licensing's first big deal was an agreement with Tyco, making that company worldwide master toy licensee for Thunderbirds, Stingray, Captain Scarlet and Joe 90. The deal comes as ITC, following Thunderbirds' success in the UK and other countries, is about to relaunch the series in the mother of all toy markets, the United States. Tyco unveiled its line for the U.S. at the Toy Fair in February.

Noted Green, "Tyco is a global toy
industry leader and **Thunderbirds** is a major licensing property and we look forward to a successful partnership... (A global deal) works best because Tyco is one of a very small number of companies that can truly work worldwide in the toy business, and they've been an excellent partner so far in the territories we've worked with them. Being able to work with them on a worldwide basis gives them a great deal of flexibility to move stock around to take advantage of broadcast opportunities.

What goes best with a re-focused distribution operation and new licensing division? New programming. And Haimovitz intends to create big-ticket film and tv product because that's the only way to build up the value of the library.

Topping the list (though still in early development), and likely to make the merchandising community salivate even further, is a live-action feature based on **Thunderbirds**. Director Renny Harlin, the action director who helmed **Cliffhanger**, has expressed interest. ITC owns the rights and a script for a prequel to **Prizzi’s Honor** called **Prizzi’s Family**, and among other titles in the library, is also looking at theatrical remakes of **The Prisoner** and **Secret Agent** (**Danger Man**). Other ITC titles could be turned into features, as could the 400 to 500 unproduced scripts sitting on its shelves. The company even owns a Tom Stoppard play.

"All this development is being built on product and rights we currently own," said Haimovitz. "That's where our principal development thrust will be, so really we won't look to acquire books and things to establish a development infrastructure here."

ITC also has a couple of films from the last regime to release, including *Fear of the Black Hat*, a satirical look at rap music à la *This Is Spinal Tap*’s treatment of hard metal.

Development of new projects is the responsibility of Michael Birnbaum, ITC Entertainment senior vice president and an executive Haimovitz brought into the company from Spelling. In addition to feature film development, production and acquisition, Birnbaum also handles strategic management of the company’s operations in tv, film and home video production and distribution.

ITC’s first step in gearing up for tv production was to set up Gerber/ITC Productions with well-known tv producer David Gerber (*Policy Story, That’s My Mama, Thirtysomething, Inherit The Wind*, among others). And the first project out of that venture is **Royce**, a spy-thriller starring James Belushi and made for Showtime and ABC. ITC also controls worldwide rights to **Second Chances**, a romantic mystery series from Latham Lechowick Productions that debuted on CBS as a two-hour movie and is now running as a one-hour series on Thursday nights. At Natpe this year, the company brought several movie packages its weekly sports highlights show *The George Michael Sports Machine* and *MotorWeek*, a PBS automotive series making its debut in syndication this year.

ITC is even moving into programming areas that haven't been traditional for the company, including gameshows with *You Don’t Say*, which is being made for a U.S. network.

In theory, all ITC network tv production will go through Gerber/ITC. "There have been no disagreements," Haimovitz said. "But there are certain types of product (Gerber) is less known for." Haimovitz stands ready to talk to other producers about tv projects.

A natural production market for ITC is the UK, where many of the company’s shows have a large and nostalgic following. Birnbaum suggested the company could capitalize on that by seeking to make series for the BBC or ITV. "We primarily see ourselves as a distributor," said Birnbaum. "We feel that we add value or provide service to any production."

That said, Haimovitz is not convinced international co-production is a profitable way to go. "If I really understood it, I guess I’d do it. Anytime you try to bring into a development process more than one buyer, you complicate the process of making a program."

In future, ITC will push into home video sell-through in the U.S. and the creation of cable networks elsewhere. Plans for a satellite and cable network in the most natural market, the UK, have been stymied by the issue of residuals to be paid to union talent. But Haimovitz, who ran the entertainment and cable network arms at Viacom before joining Spelling, plans to use his experience in the cable programming business to get services launched. Also for the future, Birnbaum said, are interactive games based on **Thunderbirds** and **The Prisoner**.

The tremendous value of programming libraries has been lit up in neon in recent months as those building the distribution systems of the future – cable operators and phone companies – sought out access to vast quantities of programming for their new superhighways. "The plethora of opportunities," said Haimovitz, "means that every piece of product should be working somewhere."

But the recent round of mega-deals could mean it’s the right time for Montagu Private Equity to cash out its holding in ITC, selling to a company that must have access to such assets. In his interview with TBI, Haimovitz said the venture capitalists were quite pleased with their investment and are content to let it keep appreciating. "At some point, like any other investor – myself included, when I buy a stock and I sell a stock so I’ll make a profit – I would guess that at a propitious time the bank will sell its stock and take its profits."
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Bells, Buzzers And Bodies

The Devil's Track: Play it down the phone line

Gameshows are being forced to play at a new level. Fingers on the buzzers are being replaced by feet on the starting line as the gameshow regenerates itself. Costs are rising, but the new shows attract younger viewers, as Sarah Walker reports

No-one ever went broke underestimating popular taste. Many have even made a good living out of exploiting it. Gameshows, often the mirror of public taste, have built a reputation as being cheap to produce, available in great volume and attractive to mass audiences. Stripped across the week, they can build to be as popular as sitcoms and soaps. But there is a sea-change in the gameshow business. Gameshow-crazy new channels that built their audiences and revenues around bells and buzzers are finding they now need snappier programming to sharpen schedules. Studio-based panels of people answering questions to move along electronic scoreboards are out of vogue. Taking their place are more active, multiple camera shoots, where participants run, jump and even physically battle with each other. Gameshows are moving with the times. Action-adventure is not an exaggeration.

Not only has the style of gameshows been changing, but so has the center of gameshow production. While in the past the world looked to the U.S. for its gameshow lessons, an explosion in the numbers of channels broadcasting in Europe has fuelled the need for the genre to regenerate itself, and Europeans have had to be their own creatives in this respect. While the giant shows like King World's Wheel Of Fortune and Jeopardy still dominate in U.S. domestic syndication, and provide the financial model many other producers and distributors dream of emulating, old-style gameshow production has dropped off stateside. Producers have focussed instead on making and promoting other types of shows, particularly reality shows.

The gameshow ball may have been temporarily dropped in the U.S. and...
picked up by the Europeans, but signs are that the Americans want it back and are prepared to run with it harder than ever. At Natpe the Americans were adapting to the change, with several new shows coming on to the syndication market.

The European providers of gameshow formats, such as Dutch-based Endemol (the company formed out of the recent merger of gameshow specialists (E Entertainment and John De Mol Productions) and the UK's Action Time (with its association of production affiliates across Europe in the Action Group) are unlikely to be too fazed. Increasingly, they have developed their own shows or acquired formats within Europe to adapt in their own markets. Such has been the drop-off of new gameshow production in the U.S., that European gameshow specialists are accomplishing the ultimate role reversal, by selling their formats into the U.S. market. Action Time, said chief executive Stephen Leahy, has just concluded U.S. network deals for two of its formats, Cluedo and Lose A Million.

While U.S. distributors such as King World, Fremantle and Mark Goodson Productions continue successfully to market the traditional, bells-and-buzzers studio-based gameshows at home and abroad, the new shows that have made the biggest mark on the market of late have deviated from that format.

Hedy van Bochove, head of acquisitions at Endemol, identified two key trends: "Game shows are moving more towards people-oriented shows such as The Honeymoon Quiz, Stars In Their Eyes and All You Need Is Love. Interactive elements are increasingly being introduced into new productions. We are hoping to acquire the format of Talking Telephone Numbers from the UK's Celador."

The changing face of the gameshow has prompted producers to spice up old shows. Mark Goodson Productions has developed a new version of The Price Is Right to run later in the evening. The new show's look has been revamped in an attempt to appeal to the younger-skewing market, as opposed to the older audience that watches traditional gameshows. Its success has prompted the Samuel Goldwyn Company to create more of the same. A new 26x30 minute spin-off series called Camp Gladiators is already in the works. Aimed at the children's market, Camp Gladiators will combine entertainment with education and information and has already cleared 15 of the top 25 U.S. markets.

As with most successful genres, Gladiators has spawned a host of imitators. All Americin Television, distributor of the action-adventure series Acapulco H.E.A.T and Baywatch, has developed an outdoor-action-adventure gameshow called BeachQuest. Available for fall 1994, BeachQuest will showcase young amateur athletes competing in unusual events at beaches throughout the U.S.

According to Paul Siegal, All American's executive vice president of programming, the initial series of 26x30 minutes, sold on an all-barter basis, has already got clearances in the top 10 markets and Siegal is hopeful 80% of the U.S. will be cleared by September. Aimed at the 12-34 age group, Siegal said the show will fit a Saturday/Sunday primetime slot, ideally scheduled after sports coverage.

Siegal said All American has had queries for format rights from Germany and Spain and has concluded sales of the original U.S. production to some Far East countries. With budgets of about $150,000 per episode, Siegal said inter-
national sales were not of paramount importance and would not be a deciding factor as to whether the series goes forward or not. "The U.S. sales will cover the cost of production, and any additional dollars made from international will be incremental," he said.

For producers of studio-based gameshows who are looking at budgets ranging from an incredibly low $8,000 to a maximum of $150,000, international sales are not essential. "The international market is important, but we never go into production on a show unless we can make a profit in first run," said Jonathan Goodson, president of Mark Goodson Productions. For the producers and distributors of action-adventure gameshows, however, costs of $250,000 plus an episode make international sales imperative.

For Twentieth Television International, which is distributing one-hour science-fiction action game Scavengers, the international market is more important than the domestic.

The show, in which four contestants led by a team leader must negotiate a predetermined series of adventure hazards to find valuable salvaged items, is being co-produced in association with the UK's Carlton Television, Italy's Silvio Berlusconi Communications, Germany's Telemunchen, Spain's Antena 3 and Scandinavia's Nordisk Film. "We were looking to find a format that would work globally but could also be turned into indigenous versions," said Doug Schwalbe, Twentieth Television's vice president, marketing and co-production.

Using a permanent, multi-million dollar set in the UK, each co-production partner will make its own local version of the show, tailored to whatever length, time period and demographic appeal is most suited to its needs. For example, Carlton will be making 13x1 hour shows, whereas Antena 3 will be producing 26x90 minute versions.

Twentieth reckons Scavengers is the first time a gameshow has been developed with international partners and without being dependent on an initial U.S. network or syndication deal, although Schwalbe confirmed discussions are underway with several possible U.S. partners.

Scavengers also opens up previously unexplored possibilities for international sales. If the cost of the production is prohibitively high for a single broadcaster, it is feasible for several broadcasters from different countries to collaborate and produce a single version that would be culturally and linguistically suited for each of their territories.

The fact that several different language versions of the same show will exist means there will also be greater opportunities for the sale of ready-made series, as opposed to formats. Countries that otherwise wouldn't have been happy buying a finished U.S. or UK version, will be able to choose the production closest to their culture. "A Finnish version may well be more suitable for, say, the Baltic States," said Schwalbe. "It is going to be interesting to see whether the smaller territories buy the U.S. or European versions."

While the success of Gladiators has ensured the U.S. has received a profile as the most prolific producer of this new type of gameshow, the Europeans have not been left behind. French gameshow specialist JAC's action-adventure gameshow Fort Boyard first aired on French public broadcaster France 2 in 1990. Since then, the company has done format deals for the show in the UK, Scandinavia, Canada, the Netherlands, Belgium and Germany. Pilots have also been developed for the Italian and U.S. markets. Like Scavengers, Fort Boyard has a fixed set - the production is filmed on a real fort in the west of France. Broadcasters wanting to adapt the for-
mass production either in terms of cost-effectiveness or production time. These shows are more difficult to produce because you have to keep thinking up new ideas," he said. "The pilot may be good, but what about episode 1? Eventually you will run out of steam."

While Boyd conceded the traditional gameshow is dropping off in prime time, he said this is not the case during daytime hours. In addition, he said, the new territories that are emerging with fledgling broadcasters are hungry for cheap product. "Some territories have still got five or six years of life remaining down. Fill. Fill. Fill!"

Action Time's Leahy doesn't agree. "Just because a territory is developing or a broadcaster is new, it doesn't mean that they will want to broadcast old-fashioned shows. When a country's population first starts buying TV sets, they don't automatically go back to the beginning and buy a black-and-white set. They want to plug into modern equipment and modern shows."

Next step for the gameshow genre is to embrace interactivity. The first moves are being made now. Action Time is, said Leahy, increasingly introducing interactive elements into its shows. It has developed a gameshow called The Big Bang with the Family Channel, in which two contestants, each based in their own home, compete at video games using a touchtone phone to work the controls. Paramount is also launching a version in the U.S. The show costs less than $8,000 to produce, said Leahy, because it only requires a small set and a single host.

JAC is also producing and developing a number of interactive game shows. It produces the French version of the Danish interactive show Hugo and is currently developing another interactive gameshow called The Devil's Track, which, like The Big Bang, can be operated down the telephone.

Interactivity has to be the future for the gameshow genre; it is an obvious extension and a small technological step now for viewers who have chosen to watch a show to also choose whether they want to play or not. Come on down... [End]
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SPECIAL REPORT: ADULT TV

Take It ALL Off

Japan

Eros once reigned on Japanese late night tv. In the early 1980s, shows such as 11 P.M. regularly featured bare-breasted models and on-the-scene reports from Japan’s thriving sex industry. Now, reports Mark Schilling, late night viewers are more likely to see sports roundups, news shows and infotainment programs. 11 P.M. and most of its imitators have long left the scene.

One survivor is TV Tokyo’s Gilgamesh Night, which airs at 1:15 am on Sunday mornings. Hosted by Kyosei Iwamoto and Ai Iijima, the show offers its audience erotic skits, interviews with scantily clad porno stars and information about the latest video and movie releases. Two and a half years after its debut, it gets ratings in the 6 to 7 range, numbers the TV Tokyo programming department considers “quite good for the time period.” The show, however, has evolved since its debut. “It started out as an infotainment program, but because most of the viewers are young males, we gradually changed the contents to reflect their interests,” said spokeswoman Reiho Moji.

Global Report: Topless housewives and softcore films are tactical weapons in the programming arsenal. A quick strike can bring instant ratings success. That’s why new stations favor adult tv, using it to win press attention and audiences when other programming would be prohibitive. But what of the staying power of skin and sex?

Why aren’t the other nets pursuing the same audience with similar programs? TBS programming department manager Koji Sugawara said the network does not make or broadcast adult fare “as a basic policy.” “It would damage our image,” he explained. “Also, the Ministry of Posts and Telecommunications advises networks not to show such programs. People who want that kind of thing can get it from videos. We don’t have to use the public airways for it. I think most of the other networks feel the same way.”

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be an advisor, it is not a censor; the Japanese tv industry is self regulating. The broadcasting standards of the National Association of Commercial Broadcasters say that "matters relating to sex shall be expressed in such ways as not to cause feelings of unpleasantness or consternation" and that "in displaying or expressing a part of the body, caution shall be exercised so as not to arouse feelings of indecency or obscenity." Interpretation is up to the individual network, and more often, the program producer or director.

Despite the frowns of the regulators and criticism from its broadcasting peers, TV Tokyo is determined to stand behind Gilgamesh Night. "The show is getting more popular," said Moji. "Also, late night shows on the networks are starting to move in the same direction. I think the reason is the recession. Videos cost money, but television is free."

**Italy**

Italian television is often associated with anarchy and chaos, but when it comes to adult programs, limits are stricter than many might expect. Cecilia Zecchinelli writes Italian laws, including tv regulations passed in 1990, say channels cannot air movies and other programs forbidden to those below 18 years of age.

If stations violate the rules, as sometimes happens, a judge will order the program pulled and impose sanctions on the offending broadcaster. For this reason, major broadcasters prefer to play it straight, while smaller channels are more likely to take chances in order to gain larger audiences.

Public broadcaster Rai is the most careful, and only Rai3, the most intellectual and experimental of the three public channels, will sometimes broadcast movies with erotic content. When Rai3 showed the Japanese movies Sex and Zen and Tokyo Decadence, Rai3 director Angelo Gugliolmi was later forced to apologize to his audience.

Fininvest, well known in Italy and abroad for its tits and spaghetti style, in reality dares only a little more, and always in the softcore area. Currently, Italia 1 airs the weekly Playboy Show, while the balance of erotic programming on the network consists of half-naked girls - wearing very small bikinis - usually on gameshows and variety shows.

For local stations, things are a bit different. In the 1970s, Pinna (Prima Antenna Nord Italia), a small local channel in the Turin region, aired Midnight Playboy, a program that showed housewives doing a strip tease. Despite its very small audience, the show caused a scandal and was taken off the air. But Pinna has begun a trend: Midnight Playboy was followed in later years by other shows, often with very low budgets and short production lives. Among these, the most successful was Colpo Grosso (Tutti Frutti), started in 1987 on Italia 7, a Milan-based station. Housewives, taxi drivers and students took part in the program, playing roulette and undressing themselves when they lost. After initial success - the format was sold to many countries - Colpo Grosso lost its appeal and Italia 7 is now re-running old shows.

The same channel more recently aired Vizi privati e pubbliche virtù (Private vices and public virtues), which featured erotic videotapes produced by viewers in their homes. The program is now in re-runs. Other small channels have tried similar shows, though none are airing now.

In recent years, several different operators have tried to get hardcore services on the air. Most never appeared or failed in just a few weeks, though recent developments indicate things could change.

Rome and Milan already have access to adult services via multichannel microwave distribution systems (MMDS). Last January, Superstar began operating in the area around Rome, transmitting X-rated movies at night. Sister channel Supervideo, launched in Milan last year, shows the same kind of programs at night, and sports and normal films in the day.
ing the rights to hardcore films and editing to convert them to softcore. Today Sat1 airs the long-running series Schülinämädchen Report (Schoolgirl Report), made-in-Germany productions dating back to 1977, British-produced erotic magazine Electric Blue, as well as the German opus Bademeister Report (Pool Attendant).

Most of Première's erotic films are from the U.S. "Aside from straightforward softcore films," said Première's newly appointed program director Jochen Kröhne, "we also produce our own monthly Ladies Night show and do erotic specials. For example, in January, we showed Japanese erotic films, and in March, the Emmanuelle series is scheduled."

But as the novelty of tv porn has waned among viewers, both RTL and Sat1 have rethought their programming policies vis-a-vis softcore.

As a first step, RTL has stopped all erotic programs on Saturday nights, limiting the genre to late slots on Friday and Sunday. According to Robert Florin, RTL's editor of films and series from the U.S.: "We're getting away from the lederhosen image in favor of good quality erotic." RTL currently airs its Happy Playboy Hour, which comprises Eden and Playboy Late Night, to give the channel's softcore more class. "Good quality erotic forms part of our general entertainment program," said Florin.

Sat1 spokesman Peter Strahlendorf said the channel is no longer acquiring erotic films. "In the next few years, we predict that hardcore adult channels will appear, either on pay tv or pay-per-view. Our decision to phase out erotic films is based on our view of the future when the audience will prefer hardcore. They will get what they want in special channels, but we will not be going in that direction. Our programming is aimed at the whole public."

While RTL shot to public attention with its screening of erotic shows, sister channel RTL2 will not be using the same tactic, instead focusing on family programming, said RTL2 chief Gerhard Zeiler. His sentiments are shared with his closest commercial rivals Pro7 and KabelKanal, neither of which have or are planning erotic films in their programming line-ups.

United Kingdom

Adult programming may have ceased to be a novelty in Europe, but in the UK it never really got the chance to get started. Pay service The Adult Channel is on cable, and, Sarah Walker writes, it is a no-no for the terrestrial channels to air soft porn or eroticism for titillation's sake.

This means that when something slightly risqué is broadcast, such as the BBC's Lady Chatterley's Lover or Carlton Television's info-edu-tainment series The Good Sex Guide, it becomes a big topic in newspaper columns, and generally boosts ratings. Produced by UK-based independent Prospect Pictures, The Good Sex Guide, which dealt with the facts and figures, methods and mechanics and taboos of sex, garnered a rating of 10 million in a 10:40 pm timeslot and will be back on ITV in the fall for another seven-week run.

It's not that the British are adverse to watching bare bums or sex on their television screens, they just have a problem admitting it, unlike their European counterparts.

The most up-front of the British terrestrial broadcasters is undoubtedly Channel 4. With a remit to serve minority interests and tastes, Channel 4 has seen fit to broadcast several shows and themed weekends that deal with sex and relationships in a frank manner.

These have included the three late-night series Sex Talk, Love Talk and Men Talk, during which subjects covered included Men and Seduction (The Casanova Complex), Men and Sexual Fantasies (Please, Please Me) and Women Bite Back.

The UK's Independent Television Commission (ITC) stipulates that 18-rated films should be shown after 10 pm and that R18-rated films shouldn't be transmitted at all, although a definition of what exactly constitutes an R18-rated film isn't offered. In fact, the ITC is vague on what exactly it deems is acceptable. According to the ITC code of practice, "Representation of sexual intercourse should be reserved until after 9 pm. Exceptions to this rule may be allowed in the case of nature films, programs with a serious educational purpose, or where the representation is non-graphic..."

"Even though there are no set guidelines for adult programming, even though they don't say you can show this act or you can't show that act, you have to be careful in making your own judgement," said Adult Channel program manager Jeremy Yates "They do have the power to take your license away."

Broadcasting via Astra 1C from midnight to 4 am seven days a week, The Adult Channel is subject to the same rules as the terrestrial stations, though Yates doesn't think this should be the case and has had several requests from viewers wanting to see more explicit material. "Bearing in mind the times we are broadcast and the fact that a separate smart card is needed in order to view us, that makes us pretty child proof, and our audience, as discerning adults, should be able to see more if they want."

Yates said The Adult Channel shows full-frontal nudity scenes but doesn't plan to show hardcore, which he defines as scenes showing sexual penetration. The Adult Channel gets half its programming from Europe, particularly from the UK, Germany, France and Italy, and half from the U.S. The channel has also started producing its own product, which last year included a series, National Miss Wet T-Shirt Competition, and two one-offs, Male Review Of The Year and Male Rear Of The Year. Yates said the channel is looking to commission or co-produce adult dramas or comedies.
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Adult tv can be as varied as sex itself. Alternative forms include talk shows, reality series, gameshows and thrillers. Barbara Bliss Osborn reports


Well, not quite. But you might get Playboy's Secret Confessions and Fantasies, a new kind of adult show that combines a traditional tv format with adult themes.

Adult programming isn't just triple-X porno flicks anymore. Alternative sex programming is becoming a whole genre that includes test-your-knowledge gameshows, bare-all talk shows, confess-all reality series, steamy primetime soaps and anthology dramas, and titillating (but always educating) documentaries. How big the market for this product will become remains to be seen. What's certain is that adult tv pulls strong ratings and sells well.

Playboy, which produces much of its programming for the company's own pay-per-view service, began putting a little sexual spice into an ordinary tv format back in 1990 with the music video program Hot Rocks. Since then, the company has given a sex spin to a lot of genres. Eden, for instance, is an erotic soap. Playboy spokesman Jim Nagle compares it to Dallas but distinguishes Eden from its network forebear. "When Dallas steams up, the bedroom door is shut. With Playboy, the bedroom door stays open."

Playboy's less-than-traditional approach has even produced Who's On Top, a new 30-minute talk show that lets men and women represent their gender's point of view, supplemented by expert commentary. Playboy is also producing a new sex-based game show, Playboy's Love and Sex Test, several magazine shows, a half-hour dramatic anthology series Inside/Out, and news bites, movie reviews, short films, comedy bits and a video version of Playboy Magazine's Advisor column.

Most of Playboy's new adult tv programs have been sold overseas; only the magazine shows don't travel well. Nagle said Playboy was considering selling Who's On Top as a format in which a co-production partner would use the show's topics but plug in local experts. Already, Playboy's Love and Sex Test is being used as a format by RTL. Ultimately, however, it may make more sense for Playboy to hold on to some of its programming, as the company may launch a Playboy Europe service.

The other famous name in the U.S. adult publishing business is Penthouse. It got into the tv business at the end of 1990 to produce video cassettes, and the company is just beginning to turn its attention to production for broadcast and cable. Currently, Penthouse is developing...
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two dramatic series it expects to have on the market next fall. Andrew Blake's Dream Trips is a 30-minute anthology series about a professor who develops a virtual reality machine that allows people to take erotic VR adventures. The second, Canterbury Tales, is an episodic series by Matt Ferro, managing director of General Media Entertainment, described as an erotic Northern Exposure. Penthouse plans to cut three versions of each series: a home video version (hot), a premium-cable version (warm), and a basic-cable version (cool). All three will be sold overseas depending on restrictions and taste.

"There are only two brand name competitors and we're one of them," Ferro said. "The Penthouse name is like the Good Housekeeping seal of approval. Penthouse has no plans to develop other adult formats. We don't want to flood the market. We would rather have people foaming at the mouth for our product!"

At Penthouse, the hope is to make director Andrew Blake a bigger name than Zalman King. Producer/director/writer King established his reputation in 1986 with the feature 9 1/2 Weeks. Since then, he has produced and/or directed several features as well as the Showtime series Zalman King's Red Shoe Diaries. Although Showtime will not release ratings, the company's publicity material indicates Red Shoe Diaries is the most popular series in Showtime history. The 30-minute anthology explores the erotic experiences and fantasies of women through their secret diaries. Rafael Eisenman, King's business partner and the director of the series, attributed its popularity to the lack of "serious adult entertainment" available to audiences. "Most movies that deal with sex and passion are called erotic thrillers," said Eisenman. "That means that if somebody is sexual, something bad is going to happen. People want to celebrate sexuality. That's what we do."

Budgets of $600,000 and up, which mean high production values and actors who can act, help. Red Shoe Diaries was originally produced as a feature film and the Showtime series spin-off is not the only example of successful erotic features becoming adult series. After the success of the Emmanuelle films, 21st Century Films decided to put Emmanuelle: The TV Series into production. Howard Kohn, director of international finance, reported the seven, 90-minute episodes have been sold worldwide. The company is currently in Chapter 11, however, and no immediate plans exist to develop additional episodes or new adult series.

One-off event programs are finding an audience both in the U.S. and overseas. A year and a half ago, Bruder Releasing Inc. began distributing 150 event programs like Miss Nude World, lingerie shows, and bikini and wet T-shirt contests. BRI president Mark Bruder said the bikini contests and similar programs are examples of "kinder, gentler programming" of a sexual kind. They are one step up, he said, from the erotic thrillers, which are often at odds with "community standards," the two dreaded words inscribed in the U.S. Supreme Court decision that regulates obscenity. BRI's programs are "a little more romantic," Bruder said. "They arouse, but they're socially acceptable. They're cute, sexy, fun for normal people to watch."

Domestically, BRI distributes to cable, particularly pay per view. Internationally, the appetite for skin varies from country to country. In the UK and Taiwan, "you give them soft romantic. No nudity," he said. In Scandinavia, France, Germany and the Benelux countries, the material can be "harder." Generally speaking, Bruder said, the more nudity, the better the product sells.

Jean Ovrum, president of Trident Releasing, which handles international distribution for Bruder subsidiary Cable Entertainment Distribution, said she has found new interest in adult programs around the world. Countries like the UK are lifting restrictions, she explained, and in India, satellite channels may circumvent them.

Adult themes are also being used to perk up that often ponderous format, the documentary. Since late 1990, HBO has intermittently aired late-night programs in a popular series called Reel Sex. The one-hour segments are produced in a magazine style and feature on-the-street interviews from around the world. Just recently, HBO commissioned a one-off documentary, Talking Sex: Making Love in the 90s, 90-minutes of informal conversation with young men and women about sex in the age of AIDS.

Documentary how-tos will be the speciality of newly-formed production company Sinclair Productions. "What sets us apart," said executive vice president Alan B. Schwartz, "is that we are not part of the gratuitous sex business. We're not competing with Playboy and Penthouse." Schwartz's comments make clear the disdain with which much adult programming continues to be regarded in the U.S. and the obstacles to its presence on broadcast or cable. Indeed, despite strong ratings, HBO and Showtime give the programs little promotion.

Sinclair first got into production with successful home video series called The Better Sex Video Series, which was launched mid 1991. The first volume sold over half a million copies and has been re-edited in the UK for distribution there. Now the company plans to expand into production designed for broadcast and cable. The newest project, Speaking of Sex, is "the 20/20 of sex," said Schwartz. The one-hour magazine style program was originally produced as a home video, but Sinclair plans to market it in a format series. Sinclair will supply the elements, and buyers can produce their own wraparound and local segments.

Sinclair also hopes to sell the program to basic cable, still virgin territory for explicitly sexual TV. The company cut two versions of the show: a one-hour version for the European market and video sales, and a second, 35-minute, low-sex version. Sinclair president Alan Hecht believes the U.S. political and social climate has changed and he attributes that change to talk shows. "Celebrities are the most frequent topic on talk shows," he said. "Sex is second. There's a natural voyeurism that people have whether we like it or not."
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France Telecom
## The TBI Erotic

<table>
<thead>
<tr>
<th>Country</th>
<th>Channel</th>
<th>Restrictions imposed</th>
<th>Hours broadcast per week and timeslots</th>
<th>Genres</th>
<th>Top-rated adult program</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>Canal Plus</td>
<td>Broadcast after midnight, no children or animals</td>
<td>1.5 hours, The same film is broadcast on the first Saturday of every month and then re-scheduled another three times</td>
<td>Tv movies</td>
<td>—</td>
</tr>
<tr>
<td></td>
<td>Cine-Cinema</td>
<td>Broadcast after midnight, no children or animals</td>
<td>3 hours, Wednesday, Friday, Saturday</td>
<td>Tv movies</td>
<td>—</td>
</tr>
<tr>
<td></td>
<td>M6</td>
<td>No X-rated shows, only R-rated productions</td>
<td>Sunday, 11 pm, Wednesday and Friday, midnight</td>
<td>Magazines, tv movies</td>
<td>Emmanuelle</td>
</tr>
<tr>
<td><strong>Finland</strong></td>
<td>MTV</td>
<td>Only soft core material is allowed, although full frontal nudity is permitted</td>
<td>1 hour, Friday, 11 pm; Sunday, 11.20 pm</td>
<td>Tv movies, feature films, magazine shows</td>
<td>Playboy</td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td>RTL</td>
<td>16-rated films allowed after 10 pm, 18-rated films after 11 pm. No hard core permitted</td>
<td>4 hours, Friday after midnight, Saturday after 1 am, Sunday after 11 pm</td>
<td>Tv movies, quiz shows, series</td>
<td>Playboy’s Eden</td>
</tr>
<tr>
<td></td>
<td>Sat1</td>
<td>Broadcast after 11 pm, no full frontal nudity</td>
<td>4 hours, Friday and Saturday</td>
<td>Tv movies</td>
<td>—</td>
</tr>
<tr>
<td><strong>Japan</strong></td>
<td>TV Asahi</td>
<td>Pubic hair cannot be shown on tv. Anything else goes!</td>
<td>5 hours, Monday to Friday, 11.55 pm - 12.50 am</td>
<td>Information shows featuring strip bars, videos and sex toys</td>
<td>Tonite</td>
</tr>
<tr>
<td><strong>Netherlands</strong></td>
<td>Veronica</td>
<td>Broadcast after 9 pm, no hard core</td>
<td>25 minutes</td>
<td>Tv movies</td>
<td>Erotica</td>
</tr>
<tr>
<td><strong>Scandinavia</strong></td>
<td>TV1000</td>
<td>Programs have to pass the Swedish censor</td>
<td>6 hours, Monday, 12-2 am, Wednesday after 11 pm, Friday after 11 pm</td>
<td>Tv movies, feature films</td>
<td>—</td>
</tr>
<tr>
<td><strong>Sweden</strong></td>
<td>TV4</td>
<td>No specific restrictions</td>
<td>30 minutes, Friday 11.30-midnight</td>
<td>Series</td>
<td>Inside Out (35% share)</td>
</tr>
<tr>
<td><strong>Spain</strong></td>
<td>Antena 3</td>
<td>No specific restrictions</td>
<td>No particular amount</td>
<td>Tv movies</td>
<td>—</td>
</tr>
<tr>
<td><strong>UK</strong></td>
<td>BSkyB</td>
<td>S10 rated films can only be shown after 10 pm, S11 rated films with explicit content can be shown after 11 pm</td>
<td>4.5 hours, Broadcast on Sky Movies in the After Dark slot on Saturday and Wednesday evenings. An additional variable adult slot is also included.</td>
<td>Tv movies, feature films</td>
<td>—</td>
</tr>
</tbody>
</table>

Notes: The information in this chart has been compiled from questionnaires completed by broadcasters. If channels are omitted it is because of failure to return the survey forms.
YES, start my subscription to TBI

- £50 United Kingdom
- £55/$102 Europe
- £60/$110 Outside Europe
- $89 U.S.A.

Invoice me □
Cheque enclosed □
Charge my: □ Amex □ Visa □ Mastercard □ Diners

Account No. □□□□ Expiry Date □□□□

1 What best describes your business? (Tick one)
- 01 Commercial TV Station
- 02 Educational/Public/Non-Commercial
- 03 Network TV Station
- 04 Cable/Satellite System
- 05 Program Distributor/Producer
- 06 Agent
- 07 Unions/Associations
- 08 Government Broadcast/Telecommunications Authorities/Information Ministries
- 09 Consultant
- 10 Financial Institution/Investors/Brokers
- 11 Other (please specify)

2 What best describes your title? (Tick one)
- 01 Owner/Chairman/President
- 02 Director/Vice President
- 03 Corporate Executive/Manager
- 04 Creative Executive
- 05 Program Director/Program Buyer
- 06 Sales Executive
- 07 Purchasing Executive
- 08 Ad Agency Executive
- 09 Consultant
- 10 Public Relations/Publicity Executive
- 11 Other (Please specify)

3 What is your purchasing authority? (Tick one)
- 01 Recommend/Specify
- 02 Approve

NAME
TITLE
COMPANY
ADDRESS
COUNTRY
PHONE

NAME
TITLE
COMPANY
ADDRESS
COUNTRY
PHONE
### Programming Survey

<table>
<thead>
<tr>
<th>Number of adult hours imported each year</th>
<th>Adult programs purchased abroad</th>
<th>Main countries supplying adult programs</th>
<th>Main suppliers</th>
<th>Adult programs produced in-house or distributed internationally</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 hours</td>
<td>(a) 50% (b) 50%</td>
<td>France, U.S.</td>
<td>—</td>
<td>Le Journal Du Hard</td>
</tr>
<tr>
<td>—</td>
<td>(b) 100%</td>
<td>Shows are acquired from Alpha (French distributor) but can be French, English or U.S. in origin</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>—</td>
<td>(a) 70% (c) 30%</td>
<td>France, Italy, U.S.</td>
<td>—</td>
<td>Co-produced: Emmanuelle Red Shoe Diaries, Joy</td>
</tr>
<tr>
<td>50 hours</td>
<td>(a) 100%</td>
<td>U.S., France, Italy</td>
<td>Playboy, Vivid, Raspail, CPV</td>
<td>—</td>
</tr>
<tr>
<td>200 hours</td>
<td>—</td>
<td>U.S.</td>
<td>Playboy</td>
<td>Co-produced: Playboy’s Love and Sex Test, Tutti Frutti, Schloss Pompon Rouges</td>
</tr>
<tr>
<td>None</td>
<td>(b) 95% (c) 5%</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>20 hours</td>
<td>(a) 100%</td>
<td>U.S., France</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>75 hours</td>
<td>(a) 99%</td>
<td>U.S.</td>
<td>Bestseller (local distributor)</td>
<td>Tusen Och En Natt</td>
</tr>
<tr>
<td>26 hours</td>
<td>(a) 100%</td>
<td>U.S.</td>
<td>Playboy</td>
<td>—</td>
</tr>
<tr>
<td>—</td>
<td>(a) 10% (b) 90%</td>
<td>U.S., Spain</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>50 hours</td>
<td>(a) 85% (b) 15%</td>
<td>U.S., Europe, Australia</td>
<td>No main suppliers</td>
<td>—</td>
</tr>
</tbody>
</table>

The following broadcasters answered the questionnaire but do not broadcast any erotic programming: ABC (Australia), Seven Network (Australia), Nine Network (Australia), CTV (Canada), DR (Denmark), Kanal 2 (Denmark), YLE (Finland), Rai (Italy), Nippon TV Network (Japan), TBS (Japan), TVNZ (New Zealand), NRK (Norway), TV Norge (Norway), TV5 Nordic (Sweden).
**MARKET INTELLIGENCE**

**Cori Film Distributors** is bringing the erotic thriller *Fatal Past* to Monte Carlo this year. Also included on the company's slate are the romantic drama *The Long Shadow*, the political drama *White Rage* and the family-adventure feature *The Fifth Musketeer*. In addition, the four-part miniseries *A Tale From An Island* and the wildlife specials *Jack Hannahs Wildlife Series* will be screened.

**Sullivan Entertainment International** will screen the two-hour tv movie *Betrayal Of Innocence* as well as the miniseries *By Way Of The Stars* and all 65-episodes of the family series *Road To Avonlea*. *Anne Of Green Gables* and *Anne Of Green Gables (the sequel)* will also be sold.

**MGM International Television Distribution** is offering 40 half hours of the classic animated series *Pink Panther*, the Emmy-award winning drama *In The Heat Of The Night* and *Young Riders*, the saga of seven young adults who sign on with the Pony Express in the Dakota territory during the 1860s. Made for tv movies from MGM this market include *Fatal Memories*, *Miss America: Behind the Crown* and *In The Arms Of A Killer*.

Exhibiting at Natpe for the first time, **NBC Enterprises** president John Agoglia said he's confident NBC is only at the beginning of a production and distribution build up. "If the perception in the production community is that we will be moving more production in-house, as creative contracts expire, the creatives will come to us. The perception will drive the reality. We don't have to go out and steal talent," Agoglia said there are no production targets in terms of hours produced by the company. "We produce shows that test well, are advertiser friendly and get a fair opportunity to be put on-air," he said. "The show must work." NBC International also has 26 new hours of Danielle Steele programming and a new Patty Duke series that will likely air in the U.S. this autumn.

**Child's Play**

NEVER work with animals or children, unless they make a great show. MTM is debuting its family gameshow *Baby Races* at Monte Carlo, and MTM International president Greg Phillips is adamant it is the uncontrollability of the kids that makes the show. Already airing on *The Family Channel*, *Baby Races* pits young families with young children against each other for prizes. Phillips said he's looking to do format deals and sell the original U.S. shows. "We will offer the set, the games and the ideas which broadcasters can either use or develop their own." MTM is also selling a new format for the gameshow *Trivial Pursuit*, which will be available to the Australasian and the Pacific Rim territories for the first time.

Drama series *Boogie's Diner* is also coming on to the international market as production starts to crank up. Set in a real location in the U.S., a diner-cum-clothing store, *Boogie's Diner* went into syndication at Natpe for the first time. *Diner* is targeted as a teen transition show (a lead-in to news or the early evening schedule) and plans are afoot for 65x30 minute episodes, of which eight are already made.
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Interactive Animation

With interactivity a buzz word for the past few months, producers are trying to introduce interactive elements into their shows. French animation house C&D is no exception. International sales executive Donald Lawrie said C&D is developing an animation series called Samson with an unnamed U.S. network. The show will, he said, "include innovative, new interactive elements." Further discussions will be taking place at Monte Carlo. Two other new C&D series also in their early stages are the 26x26 episode The Real Adventures Of Aladdin And His Wonderful Lamp, being developed with European partners, and another proposed series called Carnimals.

Aside from the three new shows, C&D is taking its usual catalog to Monte Carlo, including Conan The Adventurer and The Bots Master – both available from C&D in a limited number of territories, including Latin America, Southeast Asia and Scandinavia – T-Rex, King Arthur And The Knights Of Justice and Twins Of Destiny.

AS the world slowly starts to realize more than talk is needed to tackle environmental problems, so World Environment News launches as the first environmental news service. Already offering broadcasters footage for use in magazine programs, the UK-based company will expand this to a 10-minute weekly news feed. The feed will focus on major international environment and development issues, said the service's Peter Sibley: "We will be making more powerful use of our network of journalists and crews. Already they shoot a lot for local broadcasters and sell us the international rights. Many are also involved in making conservation materials. We work closely alongside environmental agencies throughout the world."

Market as a complete environmental news service, a range of programs and production services will be provided. Broadcasters will be able to access material on a weekly subscription basis, commission packaged news and current affairs programs, buy in scripted news features or take rush delivery.

Unapix Pulls In Slavkin

DEBBIE Slavkin has folded her distribution company into Unapix and will herself take charge of a new educational division at the U.S.-based distributor. Slavkin, who went out on her own a year ago and primarily focused on selling educational and sports-based programs, said the move into Unapix was a logical step. "I will now be part of a big public corporation with more resources. We will be marketing and promoting the educational division." While Unapix already has some documentaries, including Shark Files, Slavkin will bring in 1,500 hours of educational programming. Most of her catalog comes from a group of six producers who work under the banner The Telecourse People and make educational programs for PBS in the U.S. The library of telecourses goes back to the early 1970s. Internationally, the greatest demand for these programs has come from developing countries. Currently in production is a 26x30 minute series titled Astronomy, as well as a 26x30 minute series called Living With Health.
Novelas are an extremely important programming option because they cross borders easily and appeal to a common demographic in each country. Broadcasters all over the world have recognized the price/value relationship of Novelas and have made Protele the undisputed world leader in the distribution of this exciting television format.

<table>
<thead>
<tr>
<th>Country</th>
<th>Title</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexico</td>
<td>TWO WOMEN, ONE PATH</td>
<td>42.1</td>
</tr>
<tr>
<td>Switzerland</td>
<td>WILD ROSA</td>
<td>30.9</td>
</tr>
<tr>
<td>Turkey</td>
<td>THE RICH ALSO CRY</td>
<td>45.9</td>
</tr>
<tr>
<td>Russia</td>
<td>SIMPLY MARIA</td>
<td>41.0</td>
</tr>
</tbody>
</table>

Come visit us in MONTE CARLO at the Loews hotel, screening room 3006, where we would like to screen with you five of our newest and most popular Novelas.

- SAVAGE HEART (CORAZON SALVAJE)
- LOOKING FOR A PARADISE (BUSCANDO EL PARAISO)
- TWO WOMEN, ONE PATH (DOS MUJERES, UN CAMINO)
- BEYOND THE BRIDGE (MAS ALLA DEL PUENTE)
- VALENTINA (VALENTINA)
hometown of Philadelphia and realize living close to their parents may not be such a good idea.

- **National Geographic Television** is presenting *The Lions Of Darkness* at Monte Carlo. This engrossing documentary offers an intriguing chronicle of three powerful male lions who make a new home for themselves in the Savuti region of Botswana.

- Topping **Genesis Entertainment's** slate is the series *Marvel Action Hour* featuring *The Fantastic Four* and *Iron Man* in separate back-to-back, half-hour programs. The series will debut in the autumn, joining Genesis' existing superhero series, *Biker Mice From Mars* (the maddest, baddest motorcycle-riding mice on earth). Specials available include *Adventures, Journeys and Archives*, a documentary covering nature, culture and customs; *Angola: Twenty Years Later*, a half-hour special profiling the people, cities and villages of the war-torn African nation, and *Gorbachev's Early Years*, a look at the formative days of Mikhail Gorbachev from the perspective of his childhood friends and neighbors.

- Foodies will love *Cuisine Passion*, a series presented by 27 young Swiss chefs who belong to the Association de Jeunes Restaurateurs d'Europe. Filmoption Internationale is offering the series, along with *One Arctic Summer*, a film that casts an appreciative eye over the wildlife that populates a roadless wilderness some 40-miles from Prudhoe Bay in Alaska. This deceptively barren region teems with life as the film follows the life cycle of the Arctic animals from the end of one winter until the start of another.

**Paragon Gets Real**

**CANADIAN** distributor Paragon International has widened its programming offerings to include more reality-based product. Among the new additions are two series from Skyvision: *Hearts Of Courage*, hosted by Alex Trebek, featuring stories about ordinary people undertaking courageous tasks, and *The Pet Connection*, a how-to magazine about pets.

Paragon is also gearing up for the launch of *Katie And Orbie*, a 13x30 minute animated series based on books by cartoonist Ben Wicks. The series is being produced by Ottawa-based Lacewood Productions, whose credits include *The Teddy Bears' Picnic and Tooth Fairy, Where Are You?*

In addition, president Isme Bennie said she will be pushing a second season of the 25x30 minute drama series *Ready Or Not*. The show centers on two pre-adolescent girls, Amanda and Busy, and tells a series of stories about their first-time experiences. Bennie said the show was well received at markets last year, selling into more than a dozen territories, including the UK, Germany and France.

**Grove Comes Out Of The Shade**

**ONE** of the surprises at the Natpe program market in Miami was the sudden move to prominence by Grove Television Enterprises. Recently refinanced by private investors to the tune of $4.5 million, the company has adopted an aggressive domestic strategy, picking up series like *Space Police* from UK producer Mentorn Films (24x1 hour) and *Tough Target* with Detective J.J. Bittenbinder (26x30 minutes). According to president Rich Grove, the new money and the ability to hire Roger Lefkon and Melvyn Smith to look after the company's production interests have given the company "the clout and expertise we needed to move on to a different level."

Grove will be represented internationally by Phil Howard, but Grove reckons within a year, international distribution will move in-house. In the meantime, international interest at Natpe was such that *Space Police* raised $10 million from international buyers in just one and a half days. In the U.S., the show is said to have cleared over 60% of the country. Budget for the show is $1.2 million per episode.

**Glittering Prizes**

**SPELLING** and Worldvision's focus on launching networks has not hampered the sister companies' ability to produce and distribute dramatic programming for domestic and international markets. Monte Carlo sees the launch of the Spelling Premiere Network. Consisting of two series, *Heaven Help Us* and *Robin's Hoods*, the shows are designed to attract women viewers in primetime. High gloss and style-conscious, they were shown to Latin American and Australasian buyers at Natpe, with their European launch saved for Monte Carlo, said Worldvision executive vice president and chief operating officer Bert Cohen. Worldvision has also brought back the one-hour police series *Burke's Law*. Again a glamor series, *Burke's Law* is returning with brand new episodes. "We're pleased at the extent of our product, which all taken together indicates a tremendous growth at Spelling Entertainment," said Cohen.
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TV SERIES
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### Channel 4 Looks Stateside

**CHANNEL** 4 International (C4I), the distribution arm of the UK broadcaster, will handle all sales of its program catalog to outlets in the U.S., taking over from distributor Devilier Donegan Enterprises. Colin Leventhal, managing director of C4I, said the broadcaster’s reputation as a supplier of alternative, niche product will enable it to differentiate itself from other UK broadcasters and distributors hawking product in the territory.

In 1993, revenues from sales to the U.S. accounted for approximately 25% of C4I’s turnover. Sales included episodes of the sitcom Desmond’s to Black Entertainment Television and the improvisation show *Whose Line Is It Anyway?* to Comedy Central.

C4I hopes the change will help stimulate co-production, pre-sales and format deals, which are already handled by the broadcaster. Recent pre-sales included *Armistead Maupin’s Tales Of The City* to American Playhouse, and the documentary series *From Beirut To Bosnia* was produced with The Discovery Channel. Discussions are underway with broadcasters for a further series of *Tales Of The City*. C4I is also looking for co-production partners for a 6x1 hour drama series based on the prize-winning novel *Sacred Hunger*.

### Fox Hunts International

**20TH Century Fox International Television** has developed a 26x1 hour reality series *Manhunter* for the international market. Based on America’s Most Wanted, *Manhunter* tracks down and catches international criminals by using photos, real video, re-enactments, interviews and personality profiles to get inside the criminal mind. The producers have worked closely with international law enforcement bodies to both bring criminals to justice as well as keep the stories accurate. The new shows will be available for broadcast in the summer of this year. John Walsh is the host.
What in all seriousness are we to make of a fast approaching future time when millions of viewers in many countries can access hundreds of channels? What prospects of survival for the old order?

The idea of being able to tune into hundreds of channels is at once appealing and disturbing. And, of those who appear to find the prospect more disturbing than appealing, the advertising community is a conspicuous group. In general, advertising representatives seem very apprehensive. Who would not be when city pundits cry that hundreds of channels is at once appealing and disturbing. And, of those who appear to find the prospect more disturbing than appealing, the advertising community is a conspicuous group. In general, advertising representatives seem very apprehensive. Who would not be when city pundits cry that hundreds of channels will fragment audiences, subscription revenues will soar, and advertisers will go to the wall unless they change their ways?

This column last month was deeply sceptical about the promised surge in subscription revenues. The fears of the advertising community are unfounded. I shall confine my proof to the conventional programming now shown on broadcast channels, and the revenues they generate.

The essential problem is that viewers will probably watch about as much television with a choice of five decent channels as with a choice of five hundred. Recognizing that channels with advertising generally require substantial national audience share (often more than 10%) in order to be profitable, we can only wonder at their chances on the digital superhighways of the future.

That said and all external factors being equal, I reckon advertising will remain an important source of revenue in the digital age, and both advertising spend and audience share will be concentrated on a few channels, even when there are a thousand to choose from. The bones of the argument are as follows:

1. Advertising has been the main source of financing television services for many years. Although subscription revenues worldwide are growing steadily, they have a huge distance to catch up. Even in a mature, conventional pay tv market like the U.S., advertising revenues greatly exceed total revenues from cable subscription. Moreover, the U.S. has the advantage of being far and away the world’s largest home producer of films and televised entertainment.

2. The construction of digital superhighways will require vast sums of investment. It strains credulity to believe that key players like Time Warner or TCI will let the advertising market go hang itself while they try and make mint out of pay-tv. They have too much to gain by maximizing both revenue streams, and much too much to lose by turning their backs on advertising.

3. The majority of viewing is accounted for by items of topical or ephemeral interest, such as news, sports, soaps, quiz shows, comedies, reality shows, etc. Apart from sports, there is little evidence of the public being willing to pay directly for the topical and ephemeral, except as a basic service charge. They depend on advertising or the license fee.

4. Wherever competition for advertising spend is given a free rein, markets are mostly able to sustain only one or two key players, and rarely three or more, who account for the lion’s share of audiences and advertising income. This holds true regardless of channel capacity.

5. The digital future of hundreds of channels will nonetheless materialize because a few channels supported by advertising can co-exist with hundreds of pay-on-demand channels. This is simply because pay-on-demand channels will require tiny audiences, and hence audience share in order to be profitable. First, their overheads need will be very low. Second, their revenue returns per person per hour watched are likely to be high by comparison with non-pay channels. To illustrate this, the hidden cost of free television in Western Europe must be in the order of 10 cents per person per hour viewed, about half of it concealed in advertising, and half in annual license fee payments. By contrast, the cost of videotape rental. Our nearest equivalent to pay-on-demand probably works out at closer to one dollar per hour. Supposing digital pay-on-demand channels to be the same, it follows they will earn as much as advertising channels with only one tenth of their audience share.

But for want of further space, I might as well expand my arguments to cover channels with mixed funding from advertising and direct payments, or outline the future for different forms of pay television. I do not think they affect my basic arguments, except I have one big concern about the future of advertising in the digital age. If there is a threat, I do not think it comes from the new technology but from the possibility, voiced in some quarters, that brands may be losing their power to sell products. Should advertisers lose confidence in the effectiveness of brand advertising, then, maybe, the digital age will have a problem...
European Cablers Prepare To Cross The Red Line

A new report predicts that the European cable-tv industry will move firmly into a cash positive position during the last decade of the century. And not before time, cry industry and investors alike. Analysis by Jean-Luc Renaud

In 2002, 47.5 million of Western Europe's 178.2 million TV households will receive cable television. Cable tv viewers will spend ECU7.8 billion ($7 billion) on basic services and ECU2.8 billion ($2.5 billion) on premium channels. Cable tv operators will earmark ECU100 million ($90 million) for program provision.

These forecasts are made in the report Cable TV Communications in Europe 1993, released by London-based CIT Research. Produced annually, the 1993 version is the first that includes the Eastern European markets, as well as a cool-headed analysis of the issues of advanced network infrastructure (FITL, FTTC, FTTH), pay-per-view, video-on-demand, digital transmission, informa-

### Table 1: Cable Growth Projections For Western Europe

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<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TV households (m)</td>
<td>152.1</td>
<td>157.3</td>
<td>162.5</td>
<td>167.8</td>
<td>173.0</td>
<td>178.2</td>
</tr>
<tr>
<td>MATV households (m)</td>
<td>38.5</td>
<td>7.9</td>
<td>36.1</td>
<td>35.8</td>
<td>34.4</td>
<td>32.6</td>
</tr>
<tr>
<td>Cable households (m)</td>
<td>29.7</td>
<td>35.5</td>
<td>39.6</td>
<td>43.3</td>
<td>46.0</td>
<td>47.5</td>
</tr>
<tr>
<td>Cable penetration</td>
<td>20%</td>
<td>23%</td>
<td>24%</td>
<td>26%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Pay tv penetration of cable subscribers</td>
<td>6%</td>
<td>9%</td>
<td>12%</td>
<td>15%</td>
<td>17%</td>
<td>19%</td>
</tr>
</tbody>
</table>

### Table 2: CIT Analysis of Pay-per-view Potential In Selected European Countries

<table>
<thead>
<tr>
<th></th>
<th>Cable</th>
<th>DTH</th>
<th>Pay TV</th>
<th>Addressability</th>
<th>2-Way</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>10</td>
<td>7</td>
<td>10</td>
<td>5</td>
<td>3</td>
<td>35</td>
</tr>
<tr>
<td>Belgium</td>
<td>18</td>
<td>1</td>
<td>15</td>
<td>5</td>
<td>3</td>
<td>42</td>
</tr>
<tr>
<td>Finland</td>
<td>8</td>
<td>1</td>
<td>10</td>
<td>30</td>
<td>3</td>
<td>52</td>
</tr>
<tr>
<td>France</td>
<td>10</td>
<td>5</td>
<td>15</td>
<td>20</td>
<td>8</td>
<td>58</td>
</tr>
<tr>
<td>Germany</td>
<td>20</td>
<td>15</td>
<td>9</td>
<td>5</td>
<td>3</td>
<td>52</td>
</tr>
<tr>
<td>Greece</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Italy</td>
<td>0</td>
<td>3</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>18</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Netherlands</td>
<td>18</td>
<td>5</td>
<td>15</td>
<td>30</td>
<td>3</td>
<td>71</td>
</tr>
<tr>
<td>Norway</td>
<td>5</td>
<td>5</td>
<td>15</td>
<td>25</td>
<td>3</td>
<td>53</td>
</tr>
<tr>
<td>Portugal</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Spain</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>9</td>
</tr>
<tr>
<td>Sweden</td>
<td>15</td>
<td>7</td>
<td>15</td>
<td>30</td>
<td>3</td>
<td>70</td>
</tr>
<tr>
<td>Switzerland</td>
<td>15</td>
<td>2</td>
<td>15</td>
<td>5</td>
<td>3</td>
<td>40</td>
</tr>
<tr>
<td>UK</td>
<td>5</td>
<td>5</td>
<td>10</td>
<td>10</td>
<td>3</td>
<td>33</td>
</tr>
</tbody>
</table>

This table assigns a rating to each country for ppv potential. Points were awarded on the basis of the relative sizes of cable and DTH markets, how well pay tv is established, as well as the presence of addressability. Maximum points for each category: 20 for cable, 15 for DTH, 15 for pay tv, 40 for addressability and 10 for two-way capability.
A Telekom outside broadcast truck at a rowing competition on the Amsterdam Bosbaan.

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Ppv requires addressability and conditional access systems. But the number of addressable subscribers on cable networks in Europe is very low, and the number of networks with a return path capable of transmitting an impulse order is even lower

Every silver lining has a cloud — when pay tv revenues are netted out, retained revenues were ECU 3.46 billion ($3.1 billion), only marginally higher than total costs.

The fragmented nature of the cable industry, and the resulting difficulties facing would-be satellite programmers, is best illustrated by the average revenue per cable connection (table 3). In the absence of a satisfactory yield per cable subscriber, some cable operators have neither the resources nor the intention of paying satellite programmers for their signals. The end result in many countries is cable systems that charge a low subscription fee but provide few services.

So where next for European cable? The requirements are one or all of the following: increase subscribers (by extra build and/or marketing), charge existing subscribers more for more pay channels, or add on other supposedly high-yield services. Telephony is the name of the game in the UK, where liberal regulations exist, and MSOs and telcos are creeping into each others’ territory. CIT suspects neither side is prepared for the ensuing expense in technology and marketing that results from the belief that the grass is greener on the other side.

Modern, high-capacity cable networks combined with digital signalling techniques open the way to pay ppv, already in the commercial – but not very profitable – phase in the U.S. CIT reckons that advocates in Europe will be more realistic as regards ppv revenue potential.

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Télévision Suisse Romande
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Tel: (41-22) 708 85 99, Fax: (41-22) 781 52 49

**North American Representative:** John E. NATHAN
488 Madison Avenue, Suite 1710, New York, NY 10022
Tel: (1-212) 223-0044, Fax: (1-212) 223-4531
were awarded to each country on the basis of the relative sizes of cable and DTH markets, how well pay tv is established, as well as the presence of addressability. It is based on original research, but the weightings, and therefore the results, are necessarily subjective.

Operators in the UK, Belgium, France, the Netherlands, Sweden, Norway and Finland all expressed an interest in ppv when interviewed by CIT. The Germans were less interested.

While the opportunity to offer ppv services seems to fall safely within the remit of the European cable operators, this may not be the case with video-on-demand (VOD) services. This type of point-to-point service will have to be delivered to subscriber homes through switched networks. To date only the phone companies have that switching ability combined with comprehensive reach. And they are working hard on asymmetrical digital subscriber loop (ADSL) technology to download VHS-quality pictures down twisted-pair phone lines. CIT does not expect large-scale VOD to be commercially available in Europe generally until 2000.

As regards multimedia, the CIT analysts do not fall easily for the multimedia hype, and raise a number of serious political and commercial questions which crucially affect the future of cable tv in both the U.S. and Europe.

- who is permitted to build and operate networks offering such a wide range of voice, data and video services?
- what is the status of a provider of such services – is it an electronic publisher with constitutional rights to freedom of speech, or is it merely a transporter/carerrier, whose activities may be constrained by regulation?
- should there be more than one operator offering multimedia services in any one geographical area, and if so, should you restrict the number of wires that can be connected to a customer’s premises?
- do postal and telecom administrations retain a public service obligation to offer multimedia services on a nationwide basis?

Table 3: Estimated Revenues Of Major MSOs In Western Europe

<table>
<thead>
<tr>
<th>MSO</th>
<th>1992 Subscribers</th>
<th>1992 Revenue (ECUs)</th>
<th>1992 Revenues Per Subscriber (ECUs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DBP Telekom</td>
<td>11,823,000</td>
<td>1155.5</td>
<td>107.6</td>
</tr>
<tr>
<td>Finland</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HTV</td>
<td>176,800</td>
<td>11.5</td>
<td>67.3</td>
</tr>
<tr>
<td>Telecom Finland</td>
<td>122,547</td>
<td>8.3</td>
<td>68.6</td>
</tr>
<tr>
<td>Tampereen Tietoverkko</td>
<td>48,547</td>
<td>4.3</td>
<td>90.5</td>
</tr>
<tr>
<td>Netherlands</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NV CASEMA</td>
<td>750,000</td>
<td>58.5</td>
<td>79.1</td>
</tr>
<tr>
<td>NV EGD/BUCAI Groningen</td>
<td>275,000</td>
<td>25.6</td>
<td>92.7</td>
</tr>
<tr>
<td>KTA Amsterdam</td>
<td>370,000</td>
<td>22.7</td>
<td>61.5</td>
</tr>
<tr>
<td>GEB Rotterdam</td>
<td>249,000</td>
<td>19.8</td>
<td>80.0</td>
</tr>
<tr>
<td>United Kingdom*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TeleWest</td>
<td>146,377</td>
<td>37.3</td>
<td></td>
</tr>
<tr>
<td>Videotron</td>
<td>63,556</td>
<td>19.2</td>
<td></td>
</tr>
<tr>
<td>BCE/C&amp;W</td>
<td>72,811</td>
<td>18.6</td>
<td></td>
</tr>
<tr>
<td>Overc/Dx</td>
<td>48,486</td>
<td>16.8</td>
<td>362.7</td>
</tr>
<tr>
<td>Comcast</td>
<td>68,719</td>
<td>16.0</td>
<td></td>
</tr>
<tr>
<td>SouthWestern Bell/Cox</td>
<td>57,794</td>
<td>14.8</td>
<td></td>
</tr>
<tr>
<td>General Cable</td>
<td>62,268</td>
<td>9.1</td>
<td></td>
</tr>
<tr>
<td>NYNEX</td>
<td>34,485</td>
<td>7.5</td>
<td></td>
</tr>
<tr>
<td>* UK figures are for year ending March 31, 1993</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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ADULT MATERIAL
USER FRIENDLY
FULL COLOR
Multimedia: When Rights Is Patently Wrong

Compton's NewMedia won, then lost, now waits on a patent that could affect everyone in multimedia production

People who make and distribute TV programs are used to the idea of copyright being vested in the content of the final product: It's a concept at the very core of today's TV business. But how would they feel if someone suggested to them that the way a particular TV program is put together — by stringing together certain sequence of shots in a certain manner, or by using a particular kind of lighting for a particular type of scene — should also have rights attached to it?

This is the debate that is currently raging in the multimedia world, and it's the Chicago-based Tribune Company, the biggest owner of independent TV stations in the U.S., which has sparked the whole thing off.

Last year, Tribune acquired a company called Compton's NewMedia from Encyclopaedia Britannica. One of the principal reasons for the acquisition was that Compton's had been awarded a patent by the U.S. Patent Office for the software (in the computer sense) that enabled users of its CD Rom encyclopaedia to search the disk (although only Tribune knew this at the time). Trouble is, the patent didn't just apply to that particular title — it effectively applied to any retrieval system that used pictures, graphics or icons (anything but text) to cross-link bits of a database.

In fact, what Compton's had succeeded in doing was to pretty much patent the whole concept of multimedia. To return to the TV analogy we began with, the company had established rights not just to the contents of the disk, but to the way in which the bits of it were strung together — even though the techniques are in use by everyone else.

When the patent was published, and Compton's announced that it would be collecting royalties from anyone whose multimedia titles crossed over its boundaries, there was outrage from the multimedia development community, who bombarded the U.S. Patent Office with examples of "prior art" — that is, examples of multimedia applications which, it was claimed, had achieved what the Compton's disk had, but much earlier.

In an almost unheard of development, the Patent Office subsequently decided to "recall" Compton's patent for re-examination. What the outcome will be is anybody's guess, but the saga has a number of lessons for the TV industry.

The first is that as convergence brings the computer sector into collision with TV, the products born of this union will be infected with two competing notions of what rights are about. It is, for instance, quite possible to claim rights over the "look and feel" of a piece of computer software. A similar practice is not established in television.

The second is that multimedia is — at least as far as potential TV investors are concerned — a legal minefield, as Tribune has discovered to its cost.

The third is: don't make the mistake of thinking that none of this has anything to do with you. Multimedia lawyers say the Compton's patent is so broad that, if upheld, it will even apply to broadcast interactive television. If you haven't already, ring your lawyer now.

Bundespost Picks Its Partners

Merger madness is not just the province of the cable MSOs and regional phone companies. German state telephony operator DBP Telekom has just inked two cross-sector technology deals: one with Astra operator Societe Europeenne des Satellites (SES), and the other with German publisher ZDF and media giants Bertelsmann and Kirch Group.

The alliance with SES will take the form of a new company to promote the development of digital transmission technology in the areas of satellite and cable distribution for television and radio, as well as for interactive services. It will eventually mean DBP taking a stake in SES, too.

SES says that the deal means it will be able to use the fact that DBP operates most of Germany's cable systems to exploit a "return path" for future satellitedelivered pay-per-view services, among other things.

Under the second agreement, ZDF, Bertelsmann, Kirch Group and DBP are combining to launch a company that will offer pay-TV and interactive services — including encryption of programs, distribution of decoders for subscribers, and subscription advertising and billing.

The aim is said to be to prevent US-based technology gaining a foothold in this market.

What DBP brings to the party — apart from substantial technology know-how — is in-depth experience of subscriber billing, supported by a huge database that lists every telephone subscriber (and almost every cable household) in the country.

Given that DBP also entered into an alliance last year with AT&T and France Telecom, the company looks set to be one of 1994's biggest players in the European convergence stakes.
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The Discoveries Unlimited series was produced with top-line scriptwriters working with the best specialists in each field, thanks to the active collaboration of the Ministry of Science & Technology, the European Space Agency, and the CNRS.


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