

TBI TELEVISION BUSINESS INTERNATIONAL

JULY/AUGUST 1995

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Archives: Reeling In The Years

UNAPIX INTERNATIONAL DELIVERS

PROGRAMMING FOR 1995



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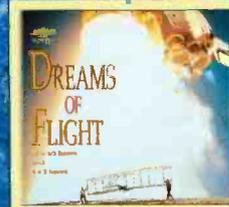
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with Bill Kurtis

52 Episodes



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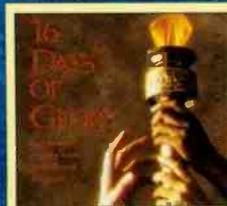
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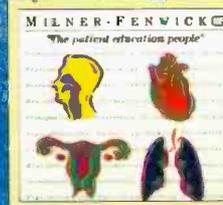
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Laurie COOKS LIGHT AND EASY

65 Half Hours



SIMPLY STYLE

with Leah Fe dan

60 Half Hours



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Big Scary Animals

Most people, if asked, will say tv channels are full of terrible, violent, over-sexed shows that are bad for their brains and worse for their children. Society gives television a terrible beating. Name a problem – illiteracy, violence, the breakdown of the family – and someone has tried to blame it on the box. Thirty years ago, sex and tv were bad for us. Now it's just tv, and I very much doubt tv will get the kind of revolution sex got. The press latches onto the bad, the ugly, the stupid on tv, leavening its coverage with the very occasional mention of something quality – the exception that proves their rule. Politicians criticize tv for biased news coverage, and more dangerously, attack it on moral grounds when there are votes to be won. Social crusaders spend entire lives sitting on couches looking for things they don't want to see.

I like television. I think tv still informs, illuminates, even educates, with programming its troika of critics may have convinced the general public vanished some time before the debut of color. Those critics would, for one, be surprised to learn the BBC increased natural history programming by 20% in the past two years, as we report in our cover story on wildlife production. The pubcaster's *Wildlife on One* autumn schedule will include *Alien Empire*, a innovative six-part series on insects that will use new cameras and computer technology to go right inside their world. Tv's critics will be further shocked when they hear that in the U.S., where tv supposedly has been turning into a vast wasteland since radio got pictures, NBC is airing *National Geographic Specials* again – for the first time in 20 years. Rival commercial network ABC is doing its own quarterly specials, *ABC's World of Discovery*. "ABC has been at it for seven years," says executive producer Dennis Kane. Viewers – knowledgeable about the naked skin shown on *NYPD Blue* down to the last square inch, courtesy of the crusaders, the politicians and the press – probably haven't read about that in the papers. On cable, Turner Broadcasting funds 60 hours a year of natural history programming, and the Discovery Channel single-handedly turned documentaries into a hot genre.

No doubt tv could use more quality. There isn't nearly enough to negate all of the critics' arguments. French producers can't get natural history on the air in primetime, except on Canal Plus, and Australia's commercial broadcasters flatly declare "documentaries are now an archaic program type in which viewers no longer show much interest." But both situations contain their own irony. The French are the first to complain when they can't sell shows overseas, yet are sidelined from participating in a genre that easily crosses borders by their own broadcasters. And the Australians are repeating, almost word-for-word, statements made by U.S. executives a decade ago. Like ABC and NBC, the Oz nets may find they're simply at the bottom of a cycle and it will soon make sense to again put on some of the good stuff.

The Editor

'ALCHEMIST Ph.C - THE ONLY ONE I'D TRUST WITH MY BABY'

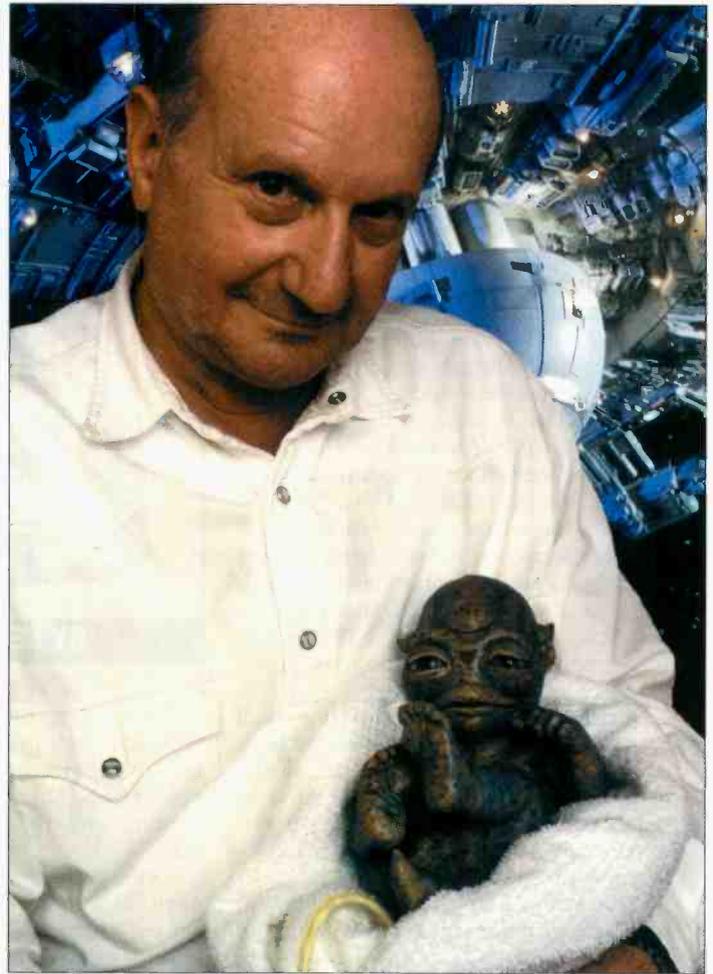
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I read somewhere recently about a survey taken 100 years ago in which experts were asked to predict the most significant technology of the 20th Century. Most of them said – would you believe – the Monorail.

Radio, telephone, television, motion pictures, the automobile and the airplane were all in stages of infancy in 1895, but obviously the forecasters didn't take any of them seriously.

Today's experts would not be so far off the mark. All the cards are face-up on the table, everything from the CD-Rom to virtual reality, with scores of interactive and transactional devices and systems in between.

With such a groaning board of proven technologies, the central question in forecasting change is not whether but when. And the more intriguing questions may be which and who.

Only the naive would ask why.

In the U.S. (which for the moment is where), the 1990 forecasts on the building of the new fibre optic infrastructure were a bit optimistic. A frantic race between the telcos and the cable operators was supposed to have been at fever pitch by now, but cable can't seem to get in gear, and the telcos, after breaking fast from the starting-line, have slowed to a trot while reappraising the hardware.

Mainly what happened is that Wall Street fell out of love with cable, after a heavy 20-year romance, and cut off the flow of investment capital needed to rewire for mega-channel interactive systems – cable's best great hope for explosive growth.

The Street's disenchantment began with the government's reregulation of cable in 1992 in response to a din of consumer complaints. The industry had brought this misery upon itself when it behaved as a greedy monopoly after being deregulated in the Bush Administration. Between 1986 and 1992, cable rates grew three times faster than inflation.

Cable systems were not only punished with new rules that served to freeze their rates for basic service but, even worse, were forced to rebate 17% of a year's revenues to their subscribers.

In the race to build the infrastructure, cable can't seem to get in gear, and the telcos have slowed to a trot while reappraising the hardware

Slow Progress To The Next Century



BY LES BROWN

As a result, the industry's aggregate cash flow dropped by more than \$3 billion over three years, and cable stocks plummeted. After two decades of steady surging growth, cable has smacked a wall.

Once cable was shackled by government, its sources of finance became concerned also with the looming competition for cable's audience – not only from the telcos but also from the growing DTH market, and so-called wireless cable.

Nor does it help cable's quest for capital that a recent study by the Morgan Stanley brokerage house predicts that when all the super systems are built, the telcos will get half the cable business.

So if one were forecasting today, the answer to the which would tilt to the telcos. They appear to have everything in their favor, including annual revenues of

around \$100 billion, or five times that of the cable industry.

And with no-one chasing them after all, they can be leisurely and circumspect in rebuilding optical fibre.

But help is on the way for cable. The same arm of government that hobbled the industry a few years ago has stirred the pot again. Congress has produced its long-awaited telecommunications bill that is spectacular for its permissiveness with all the industries concerned.

Essentially it would knock down all regulatory barriers that separated the industries – cable, the regional phone companies, and the long-distance providers – and allow each to invade the other's turf.

It also allows for liberal media cross-ownership, permitting single companies to own cable, tv and radio stations, and newspapers in the same market.

Cable would be free of rate regulation again, able to charge subscribers whatever the traffic will bear. And that same Morgan Stanley study predicts that cable will steal away 25% of the telephone business, which in dollar terms exceeds what cable gets from its television service today.

Wall Street loves unregulated businesses and may smile on cable again, especially since it is an industry that is given to swift action on the frontier. Wall Street also loves mergers, and there is bound to be another wave of media conglomeraton after the bill is signed into law.

All this serves to illustrate how revolutionary change comes about in the modern capitalist world. Technology may be the engine, but business is the driving force and investment capital the fuel.

For better or worse, everything is in motion to fulfill the forecast that interactive and transactional media will make the big difference early on in the 21st century.

The Monorail revolution may have to wait another hundred years. 

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MONITOR

ASIA

MGM Goes Gold With New Channel

The Hollywood major will beam a brand name network to Asia

MGM/UA Telecommunications Group, the international distribution, co-production and new business development unit of U.S. studio MGM/UA, is stepping up its efforts in the race to launch satellite channels. MGM last month announced plans to create a 24-hour, encrypted Asian satellite channel called MGM Gold, as an equity partnership with Indonesian company Asia Media Management.

According to William Wells, senior vice president/Australasia, MGM Gold is aiming for an early 1996 launch and will probably debut first in Indonesia as part of the Indovision DTH package which, currently broadcasting in analog off Palapa B2P, also includes HBO Asia, The Discovery Channel, ESPN, CNNI and TNT/Cartoon Network.

Wells said the service will be subtitled but will not be programmed specifically for the Indonesian market. Although he wouldn't disclose specific satellite deals, Wells said MGM is looking for distribution in the rest of southeast Asia. "We will look at each market individually

and take into account all the dynamics... India is definitely part of the plan. Other possibilities are Thailand, Hong Kong, the Philippines and Taiwan."

As regards the huge mainland Chinese market, he said it has a lot of potential, "but we will be concentrating our efforts on markets where there are more immediate opportunities." In Taiwan, MGM is in discussions with a number of companies including Po Hsin Entertainment, distributor of the Disney Channel.

Although most of the MGM library up to 1986 was sold off to Turner, MGM Gold will be able to draw on 1500 film titles from MGM post-1986, United Artists, and Cannon back catalog, including *Some Like It Hot*, *One Flew Over The Cuckoo's Nest* and *Annie Hall*. Most terrestrial broadcasters in the region buy first-run feature films from the studio, not the classics which will form the basis of the schedule. In addition, MGM Gold will program blocks of children's and animated programming, drawing on its libraries of over 2,500 hours of tv product, and some original production.

Although MGM Gold will be different from movie service HBO Asia, its reliance on classic movies will place it in competition with Turner's TNT/Cartoon Network. "Turner is closer to what we are trying to do," agreed Wells.

The partnership with Asia Media Management, he explained, will "have a great degree of helpfulness in terms of distribution, local market expertise and programming."

Asia Media Management's core business is the development and distribution of satellite-delivered entertainment services. It was formed by executives from both Asia and North America. One of its principles, Peter Gontha, is a senior executive at Indonesia's giant Bimantara Citra group, which is run by President Suharto's second son Bambang Trihatmodjo and has extensive tv and telecoms holdings in the archipelago.

MGM Gold is expected to be only the first of many branded channels for the studio. The company already holds significant interests in CineCanal in Latin America, Telecine in Brazil, two OptusVision movie channels in Australia, and a stake in Japan's Star Channel.

by Sarah Walker — HONG KONG



Some Like It Hot: Part of the MGM Gold mine

TAIWAN

Fourth Network Free Of Government Ties

**People's Broadcasting beat
two others for a national license**

Taiwan has licensed a fourth national terrestrial network, breaking the three-decade old monopoly held by government-controlled broadcast media. The People's Broadcasting Corporation won the license, beating out two other contenders, Asia-Pacific Television Co., which has strong ties to the ruling Kuomintang (KMT) party, and Harvest Television, which is affiliated with the local arm of Hong Kong terrestrial broadcaster TVB.

Taiwan's three existing terrestrial broadcasters are each partly controlled by an arm of the government: The provincial government owns 49% of Taiwan Television, the defense ministry 36% of Chinese Television System and the KMT 68% of Chinese Television Co. One of People's Broadcasting Corp.'s selling points was that it is not affiliated with any political party through direct ownership, although many of its top management are members of the opposition party, the Democratic Progressive Party. Its ownership structure is made up of about 4,000 shareholders.

The channel is due to begin test broadcasts in a year, and full commercial broadcasts in two years. A spokesperson for the channel said it is too early to start talking specifically about programming plans, but added the channel will aim to provide independent, unbiased news coverage and more shows in the local Taiwanese dialect.

The new channel's license agreement stipulates that "entertainment programming should not constitute more than 55% of the weekly total broadcasting time and newscasts and news programs no less than 15%."

Currently the Taiwanese tv ad pie - worth over \$1 billion in 1994 - is equally split between the three terrestrial stations, with cable limited to a 3% to 5% share. Ogilvy and Mather's Taiwanese media director Choo Chi Han said there is enough revenue to support a fourth channel, providing it differentiates its programming.

Competition for ad dollars in the Taiwanese market is only going to increase. Plans are afoot for the government to issue licenses for another national terrestrial broadcaster, plus several regional ones. This year, licenses will finally be awarded to the country's 100-odd cable operators currently operating under temporary licenses.

Choo Chi Han said total cable ratings now account for up to 35% of the audience share, with

the most popular channels being Star TV's Chinese Channel and TVB's TVBS and TVB Gold. While there is no monitoring of advertising on cable at present, its 60% penetration rate means it is starting to impinge on the terrestrial networks' ratings. Soon, it will start winning over their clients.

by Sarah Walker - HONG KONG

SINGAPORE

In Satellite Race, TCS Speaks Mandarin

**The Singapore broadcaster will put
its service on PanAmSat 2**

State-owned Television Corporation of Singapore (TCS) is to launch a Mandarin-language satellite channel in October, broadcasting from PanAmSat's PAS-2 satellite.

The channel, aptly dubbed TCS Satellite Channel, will be digitally compressed, using an unspecified MPEG 2 system. Initially, it will broadcast 18 hours a day, repeating a six-hour schedule three times. It is targeted at the major Chinese markets of mainland China, Taiwan, Hong Kong and Malaysia.

According to TCS chief executive officer Lee Cheok Yew, the broadcaster is currently looking to appoint a distributor in Taiwan, while in Hong Kong it is likely the channel will go with Wharf Cable. In mainland China, distribution could be via both terrestrial and cable outlets, while opportunities are being explored in Malaysia.

During year one, the channel's schedule will be comprised of Chinese drama, tv movies and variety shows culled from TCS's extensive library. The satellite network will also air new material produced for the broadcaster's terrestrial channels. During year two, the channel will probably begin original productions.

TCS is one of the largest producers of Mandarin language programming in the world, producing over 3,000 hours a year of Chinese drama, tv movies, documentaries and variety shows which are sold all over Asia. But to avoid complicated rights issues, programming has been held back from Star TV to keep the pan-Asian window free. And, Lee said, "selling to the terrestrials helps promote familiarity." He expects the channel's major competitors to be Star TV's Chinese Channel and TVBI's Mandarin Channels.

Lee said the TCS Satellite Channel is likely to be "the first of a few" for the broadcaster. Also in the pipeline is an English-language network, targeted at the expat community and Asian coun-

ISRAEL LICENSES SHOP TV

Israeli authorities have awarded a license to operate the country's first tv shopping channel to the KED consortium. KED, backed by Israel's largest conglomerate, Kial, film company Golan-Globus, ad agency Dahaf and bookstore chain Steimatsky, saw off three other bids including one backed by Coca-Cola and the Home Shopping Network. Called the Shopping Channel, the new outlet will be broadcast via cable and will reach a potential 70% of the national audience. The channel will broadcast 24 hours a day in Hebrew, with half an hour a day in Arabic.

tries where there is a large English-speaking population, such as India. Since TCS's Channel 5 is broadcast in English, the company also controls a big library of English-language programming which it intends to build on. Lee said English-language production amounts to more than 2,000 hours a year, but "will soon match the Chinese language output."

by Sarah Walker — HONG KONG

AUSTRALIA

Seven Switching Sides In Cable Battle

Seven signed for Optus Vision, but new chairman unhappy about it

Which Australian tv network is backing which cable service? It's hard to say because things keep changing from month to month.

Network Seven followed Network Nine in opting for a stake in Optus Vision, the cable company controlled by telecommunications carrier Optus and Continental Cablevision of the U.S. Optus Vision plans to deliver tv, telephony and other interactive services over a cable network.

Seven's decision to provide programs on an exclusive basis to Optus Vision was a major setback for Foxtel — a joint cable tv venture between

Rupert Murdoch's News Corp. and state-owned Telstra. Foxtel, in turn, has an exclusive program delivery deal as well as equity in Australis, the microwave and satellite pay-tv programmer in which Telecommunications Inc. holds a major share.

However, changes in Network Seven's ownership during the following two months have now altered the balance of power on the board. Kerry Stokes, a regional tv and newspaper proprietor, has snapped up a 20% share, taken over as chairman, and made it quite clear that he disapproves of the Optus Vision agreement. Further, the key Seven personnel who delivered

the cable deal, including managing director Bob Campbell, have departed.

In taking control of Seven, Stokes has denied he is acting as an "associate" of News Corp. In the past, he has received financial support from the media giant and he is still a partner with News Corp.'s director Ken Cowley in another venture. Given these links, the broadcasting authority has decided to investigate whether News Corp., which is limited to a 15% share in Seven, has breached the cross-media or foreign control rules.

Optus Vision, meanwhile, is crowing about a sports programming line-up that will see Seven deliver exclusive cable rights to the Atlanta and Sydney Olympics and popular Australian Rules football. In addition, Kerry Packer's Nine has promised rights to Rugby League, while ESPN will provide exclusive offshore sports.

With the battleground shifting to sports, Murdoch has harnessed his buying power to try to create an alternative Super League for Rugby League and a southern hemisphere Rugby Union competition. Foxtel also has exclusive rights to deliver Premier Sports, a pay channel jointly owned by Australis and TCI/Prime. Program networks such as BBC World have signed up exclusively with Foxtel, though CNN and Discovery are holding out for non-exclusive delivery.

The communications minister, Michael Lee, has said the two cable companies can control access to their networks until at least 1997.

As the rivals rush to roll out their networks for an end of year launch, footie fans face the prospect of connecting to Optus Vision for Ozzie Rules and Foxtel for Rugby Union. Rugby League followers face a more uncertain choice because Murdoch's plans for a Super League competition have landed up in court and split League players and their clubs.

by Liz Fell — SYDNEY

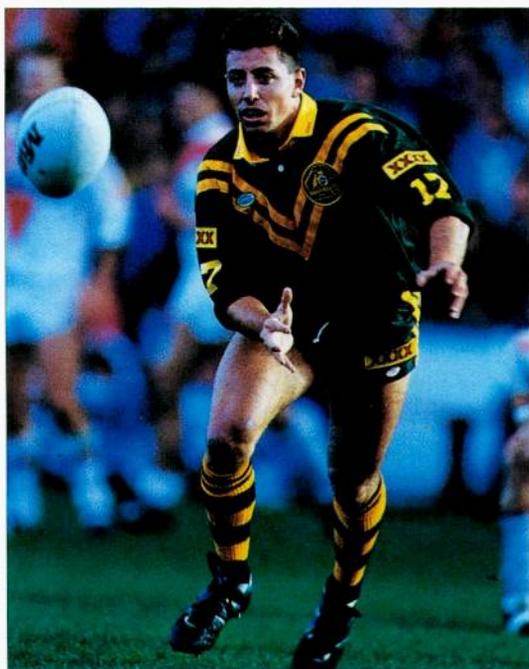
CANADA

U.S. Shows Prized By Canadian Nets

Big three find room for U.S. shows along with local hits in fall line-ups

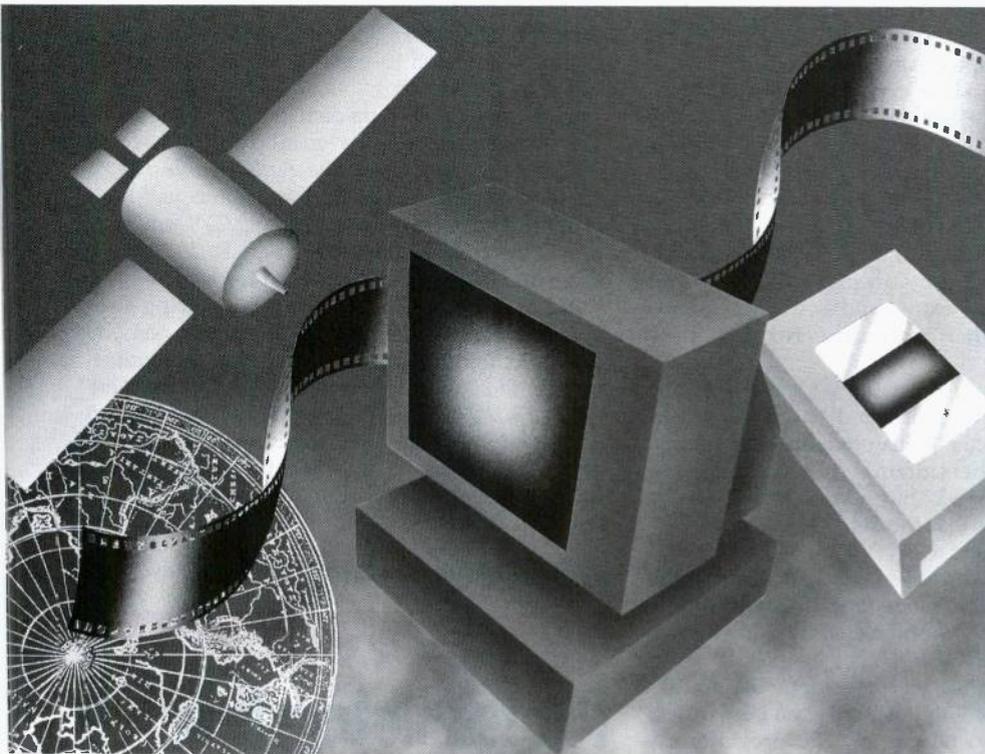
With one or two exceptions the fall programming line-up for Canadian networks, CBC, CTV and Global could best be described as no great changes, more of the same.

As far as CTV is concerned, its biggest programming story is the return of *Due South*. Produced by Alliance in conjunction with ABC and



Rugby League: A football for Aussie media moghuls?

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HUNGARY DEBATES NEW LAW

Hungary's parliament is debating a bill on radio and television which will aim to protect the independence of public service broadcasters from government interference. The bill calls for the establishment of bodies to protect freedom of speech, prevent communication monopolies and ensure a balanced information service. Hungarian Radio and Television (MTV) will operate as a public company and sell off the second of its two tv channels. According to Hungarian radio, culture minister Gabor Fodor said he did not expect full agreement with the government proposals but "hoped the most acceptable solution would be found in full debate."

CTV, *Due South* made programming history last year when it became the first Canadian-made series to crack U.S. network primetime. The show started off promisingly with a 17% audience share against NBC's sitcoms. Then it started to fall, battered by pre-emptions, finally to rest at a 13% share, which prompted ABC to cancel it.

In Canada, the show regularly attracted large audiences in the 1.8 million range and sometimes rose up to over 2 million viewers. "*Due South* is the programming story of the year for us," said Gail Morrell, CTV programming director. "It did so well we just couldn't let it go."

To keep *Due South* running, Telefilm Canada, CTV, Alliance and the Cable Production Fund have all committed extra funds. Alliance is also shopping for another American network to carry the show.

Not so sweet has been the endgame for *Tekwar*. Produced by Atlantis and based on novels by Captain Kirk actor William Shatner, the futuristic cops and robbers drama once again started high (on USA Network) but fizzled. Atlantis said a slim hope remains that the series, shown on CTV in Canada, will resurface.

One of the peculiarities of Canadian programming acquisition and scheduling is simulcasting — broadcasting a U.S. network show at the same time as the U.S. network.

According to CBC vice-president of English-language programming Jim Byrd, "the best way to understand it is to take a specific program, say *Fresh Prince of Bel Air*, that is broadcast at the same time as it is on an American network. On the CBC it might get 1.2 million viewers, but it is worth more to advertisers because it has the bonus of 300,000 more viewers tuning in to the American network on cable."

This bonus audience leads Canadian programming buyers to pay 10-15% more for U.S. network shows they can simulcast.

Global spokesman David Hamilton said the network went after CBS-produced sitcom *Caroline in the City* because "we knew there would be a hole and because it would give us back to back simulcasts on Thursday night. If we were outbid there was a chance a good part of our audience would go to the competition after *Seinfeld*. You have to look at the flow patterns."

Keeping up its tradition of showing perhaps the most U.S. network

shows of all Canadian broadcasters, Global is showing eight new American series to reach its simulcast total of 14 hours. As well as *Caroline*, they include *J.A.G.* and *Murder One*. It's introducing two new Canadian one-hour series, *Jake & The Kid* and *Traders*, and taking *The Outer Limits* from pay-television to network status, to use as a lead-in to the *X-Files*.

In terms of new Canadian programming, CTV is offering a one hour comedy-drama from Alliance called *Taking The Falls*, *Homestyle*, a half-hour of practical advice and three half-hour shows aimed at the youth market. CTV will also broadcast U.S. series *If Not For You*, *Hudson Street*, and *The Bold and the Beautiful*.

Pubcaster the CBC will be introducing four new Canadian series and will move a comedy showcase, *Comics*, from late night into primetime. As well, the CBC will broadcast *Talk 16* and *Central Park West*. Battered by budget cuts and an ever-changing mandate, CBC is filling airtime with a vast number of international co-productions and dozens of Canadian specials, movies and documentaries.

by Noel Meyer — MONTREAL

PROGRAMMING

Pilots Piloting New Series On To Air

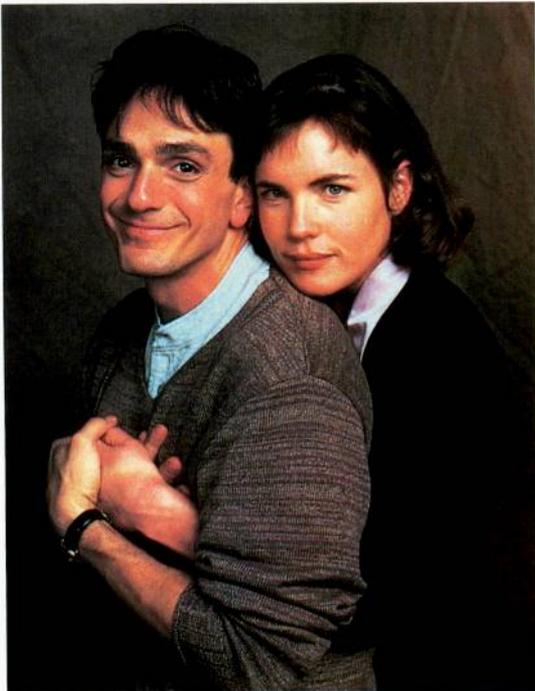
Training in the ways of Hollywood is now a hit with European networks

Pilots, the script development scheme backed by the European Union, is making headway with broadcasters in its third year of operation and is in talks with Finnish and Flemish television about launching similar workshops on site.

"More than half of the projects selected are applications that come from broadcasters or with broadcasters attached, compared with maybe two or three a few years ago," said Julian Friedmann, head of studies.

The ten teams attending this year's Pilots included one from Norway's NRK working on the adaptation of the best-selling philosophical tome *Sophie's World*, and one from Sweden's SVT aiming to take a long-running drama series, *High Seas*, in a new direction.

One past success from the program is the soap *Poble Nou* produced by Catalan station TV3, which in a modest but unprecedented way fulfilled the scheme's brief "to train European writers to write long-running series that can travel." Its audience ratings in Catalonia prompted Spanish channel Antena 3 to buy it, dub it into Span-



Touchstone's *If Not For You*; For CTV this Fall

ARD MULLS KIRCH DEAL

Representatives from ARD's supervisory board and the public network's acquisition arm Degeto, narrowly gave the nod to a DM35 million (\$25 million) package deal with film mogul Leo Kirch. In the controversial deal, ARD acquires the tv rights to 10 episodes of the international co-production, *The Bible*, as well as 29 German-Italian co-produced miniseries and tv movies. The vote resulted in a six to five vote in favor, with NDR managing director Jobst Plog among the naysayers. His WDR counterpart Friedrich Nowotny, who steps down on July 1, said he would leave the decision to his successor Fritz Pleitgen. Final approval depends on the broadcasting councils of four ARD members of the association's 11 tv corporations. A "heated political media debate" took place among the ARD and Degeto reps at the Potsdam meeting, questioning whether ARD should deal with the Kirch Group, which supplies product to commercial channels Sat1, Pro 7 and Kabel 1, as well as ARD's rival broadcaster ZDF. Kirch holds German-language territory broadcasting rights to some 15,000 films and over 50,000 hours of tv programming.

ish from Catalan and broadcast it nationally. SVT and Antena 3, which reworked a series called *Den Of Thieves*, are so far the other two broadcasters who have taken Pilots projects into production.

But European scriptwriters still have a long way to go before they will be able to make programs that can easily cross borders, according to the organizers. "They can be trained," said Friedmann, "but they need to be trained first to write series that travel further in their own market."

With that aim, Pilots this year brought in specialists John Wells, executive producer of Warner Bros. hospital drama *ER*, and Rob Ulin, executive producer of *Roseanne*. The program continues to emphasize the team-writing approach used on most U.S. series but rarely adopted in Europe.

A feasibility study surveying the views of more than 100 European broadcasters forms the basis of Pilots' plans to expand into a travelling workshop, partly to get over the problem of using only English with multilingual teams. Some 89% of broadcasters agreed that scriptwriters needed better training, and 74% said team writing skills were lacking.

In offering tailor-made seminars and more specialized groups, Pilots hopes to become less financially dependent on Brussels by earning back some of the money that funds it.

The new Media II program, which will radically reorganize and replace the Media 95 program that funds Pilot, will put a huge emphasis on distribution, rather than on development schemes like Pilots. However, Friedmann argued that Media will miss the boat if it directs the lion's share of its funds to European distribution. "We have to change the emphasis onto development. The script for *Four Weddings and a Funeral* had 17 drafts. This, rather than distribution, is the priority."

by Justin Webster - SITGES, SPAIN

CENTRAL EUROPE

CME Seeks Profits In New Markets

The investment firm is backing stations in Romania and Slovenia

TV Nova, the Czech tv station that was one of the first commercial channels to get off the ground in eastern Europe, took less than a year to turn a profit. Central European Media Enterprises (CME), the U.S. investment company with a majority stake in Nova, will need a bit more time to wring profits out of other start-ups.

A string of deals announced by the company this year demonstrates CME is, if nothing else, dedicated to its strategy of becoming a driving force in the so-far sluggish development of commercial tv in the former Eastern Bloc.

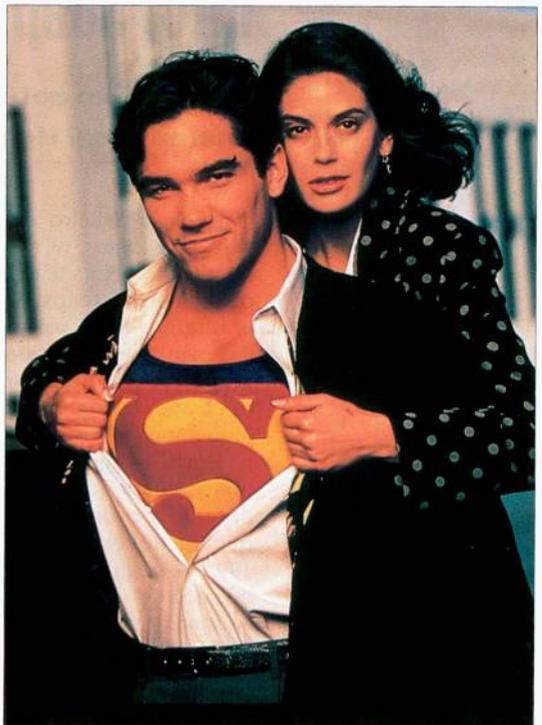
Launches of terrestrial stations in Romania and a program supply deal linking local broadcasters in Slovenia are CME's next ventures, both due to kick off in the last quarter of the year, according to president of development and chief financial officer Len Fertig.

In Romania, CME is partnering with Media Pro, a mini-conglomerate owned by former tennis star Ion Tiriac, in licenses to operate tv stations in eight cities in the country. In Slovenia, it has teamed up with four of the country's leading broadcasters - Kanal A, MMTV, Tele 59 and Euro 3 - to create Pro Plus, a company that will supply the four broadcasters with a 12-hour package of networked programming each day.

CME has been acquiring programming rights for Romania and Slovenia since Mipcom last year through its CME Program Services arm. It now controls the rights to 600 film titles in each country; series acquisitions include *ER*, *The X-Files*, *NYPD Blue* and *Lois & Clark*.

A local station in Budapest, Hungary, where CME won a license with partner 2002 Kft, is next in line after Slovenia and Romania; CME plans to start next spring a microwave and cable service that will serve 800,000 homes.

So far, CME has been thwarted in bids for national and regional licenses in Poland. It has now formed a \$5 million joint venture with local media company ITI to bid for further regional licenses in northern and central Poland. CME is



Lois & Clark: Snapped up for CME stations

METRO'S IMPORT ASSAULT

Metrovision, Malaysia's fourth terrestrial broadcaster, launched on July 1, five months behind schedule. It missed the original sign-on date in February after critical equipment was damaged in shipment from Japan. Metrovision's license permits it to broadcast to a 50 kilometer radius in the Klang Valley area, including national capital Kuala Lumpur. As a result, Metrovision reaches an estimated 3.2 million households and is aiming to capture 12% of total tv advertising revenue in its first year. Executives at Metrovision say they are hoping to have the broadcaster's license extended to cover the whole country. The channel plans to broadcast a line-up of mainly imported English-language U.S., British and Australian shows, a strategy that won't hurt its efforts to get a piece of the country's \$200 million tv advertising spend, according to one ad agency observer. Metrovision is 50% owned and operated by City Television, which is, in turn, 50%-owned by the Negeri Sembilan royal family. The newspaper group Utusan Melayu controls 30% of the company and Medanmas and Diversified Systems each hold 10% stakes.

also looking for opportunities in the Ukraine and Bulgaria, and, last month, learned two of its partners had been awarded licenses in Dresden and Leipzig, Germany.

As another corporate step to help its stations, CME leased a transponder on Eutelsat's Hot Bird 3 – due for launch in 1997 – so the stations can beam their signals to cable systems and terrestrial affiliates within their countries. Fertig said the transponder would be digitally compressed to allow it to serve up to five or six stations at the same time. This means of delivering signals to cable headends would, he said, “greatly reduce (its partners’) operating costs.”

TV Nova, the first private station in the region, uses a former state-owned frequency that gives it nationwide distribution. That is, however, a rare privilege. Many governments have chosen to award only local licenses to private broadcasters, and microwave and terrestrial links are difficult to come by. “(The transponder) provides a resource to make it a lot easier to launch new channels,” said Fertig. “Once you have it there, you can expand your network by adding cable headends and terrestrial affiliates.”

by Chris Dziadul — LONDON

BRAZIL

Bartering Novelas Into 'Soap' Operas

Number two network is offering international rights to sponsors

Sistema Brasileiro de Televisao (SBT), Brazil's second largest tv network, has hit on barter as the way to get its telenovelas sold abroad. Instead of selling the soaps to foreign broadcasters, SBT is offering them to major multinationals. Under the plan, the multinationals would buy the novelas and provide them to foreign broadcasters free of charge, taking in return airtime during the programming.

Brazil's biggest network, TV Globo, has for many years sold its soaps to broadcasters in dozens of countries. SBT, which only began producing novelas (all of them period pieces) in 1993, is beginning to do the same, but with limited success.

It sold its first in-house soap, *There were Six of Us*, about the trials of a middle class Brazilian family from the 1920s through the 1940s, to Portugal last year for \$7,000 an episode. It plans to sell a Portuguese network its second in-house production, *The Wards of Mr. Priest*, about the

priest/guardian of two adolescent girls in a 19th century Portuguese village.

SBT vice president Guilherme Stoliar said the network didn't have the name recognition needed to interest a wide range of foreign networks in buying its telenovelas. “SBT doesn't yet have the TV Globo-type prestige needed to sell its soaps to a wide number of foreign countries,” he explained. “So we're looking for multinationals, like Unilever or Johnson, who will buy the soaps and allow foreign broadcasters to run them in exchange for free commercial airtime. In that way, the multinationals can act as go-betweens for getting our soaps on the air in other countries.”

In addition to barter, SBT is working to become a more diversified domestic programmer in an attempt to increase its share of audience. The network, which attracts just over 20% of the viewing audience – and which earned \$220 million in 1994 – only produces two soaps per year and runs only one soap a night. By comparison, TV Globo, which attracts 65% of the TV audience – and earned around \$1 billion in 1994 – produces six soaps a year, airing three of them a night.

As an alternative to TV Globo's back-to-back nightly soap format, SBT airs live audience and quiz shows hosted by Silvio Santos, the businessman and two-time presidential candidate who owns the Sao Paulo-based SBT; a late-night talk show hosted by Jo Soares, Brazil's best-known comedian and formerly of TV Globo, and numerous films, news and sporting events

SBT, which aired the World Cup last year, bought the rights to transmit the Indy 500 this year. Audience ratings for the race were up because numerous Brazilian drivers are competing. By contrast, TV Globo, which airs Formula 1 racing, has watched its Formula 1 audience drop following last year's death of Formula 1 champion and Brazilian national hero Ayrton Senna.

by Michael Kepp — RIO DE JANEIRO



Ratings for Formula One have dropped off this year

SVT CUTS BACK

Sweden's public broadcaster Sveriges Television (SVT) has unveiled the first stage of a corporate reorganization triggered by the Social Democrat government's decision to cut Skr350 million (\$45 million) from its budget over the next three years. Over 20 management positions and 400-450 of the present 1,000 staff will be shed by natural wastage over the next few years. SVT is setting up a planning department responsible for programming and scheduling its two channels, headed by Hans Bonnevier, currently director of programs at SVT2. SVT's drama department, headed by Ingrid Dahlberg, will now be a separate production unit along with news and five regional production centers in Stockholm, Gothenberg, Malmö, Örebro and Luleå. Sam Nilsson, director-general of SVT since 1981, has been re-elected for another two years. All the changes will be effective January 1, 1996.

CHANNELS

HEN To Hatch In Benelux And Scandi

Hallmark Entertainment said it planned to launch 24-hour premium cable channels in Benelux and Scandinavia by the end of the year in addition to its UK venture announced in May. The Hallmark Entertainment Network will launch in Benelux on August 1 and in Scandinavia on January 1, 1996. Both versions of the channel will be joint ventures with pay-tv company Nethold.

M4 Bill For Spring 1996

Sweden's government said it would present a bill inviting applications for a fourth national tv network next spring. It is expected to stipulate that the so-called M4 will be a made up of a network of regional stations carrying educational programs in daytime but allowed to network and carry advertising during evening primetime. Interested bidders are already lining up, with commercial channels TV4 and SBS already active in creating local stations and the Bonnier publishing group and Nethold also voicing interest.

DISTRIBUTION

Sony Opens Sales Office In China

Sony Pictures Entertainment (SPE) has opened an office in Beijing to handle sales of theatrical, tv and home video product in China. The office will be headed by Mishka Chen. In addition to handling marketing and sales for SPE's theatrical product, Chen will handle barter and sales of film and tv product and assist in the development of local tv production and broadcasting ventures, said the company.

PEOPLE

Nick UK's Head To Take On Intl Role

Jon Miller, head of Nickelodeon UK since the channel's launch two years ago, has been promoted to the new position of managing director, Nickelodeon International. Based in London, Miller will oversee the launch of new channels and develop co-productions between Nickelodeon channels and will be looking to form "some strong alliances in the production and marketing areas." Nickelodeon has lined up channel launches in Germany and Australia this year and plans to look at Scandinavia, Benelux, India and south-east Asia in 1996, said Miller. Janie Grace, currently head of children's programs at ITV company Meridian, will replace Miller at Nick UK in September.

NBC Staffs Up In Europe And Asia



Ogden: Denver to London

NBC has added two senior executives to its overseas broadcasting operations in Europe and Asia. Roger Ogden has been moved to the post of president and managing director of European satellite network NBC Super Channel. Ogden, previously head of NBC affiliate station KCNC in Denver, Colorado, joins the London-based channel on August 7. In Asia, NBC has poached SK Fung, general manager of Hong Kong-based TVBI, to head up its operations, including ANBC Asia, a 24-hour news and current affairs channel which launched in June, and NBC Super Channel Asia, due to launch August 5.

Erratum

The picture on page 32 of last month's TBI was of Pekka Hyvärinen, editor-in-chief of MTV3, rather than Jaakko Paavela, executive vice president, as captioned.

REGULATION

Spain Takes Up Deadlocked Quota Issue

A meeting of European Union ministers responsible for broadcasting passed last month with no agreement on a revised Television Without Frontiers directive. France had hoped to agree on a new directive, with tougher quotas on non-European programming, during its presidency, but was opposed by member states including Germany and Britain which want quotas scrapped. Ministers did reach agreement on a new program of financial assistance for European distribution and development, Media II, though the budget of \$230 million over five years was \$90m lower than the commission's proposal. Officials will now attempt to thrash out an agreement behind the scenes for discussion under Spain's six-month presidency, which starts July 1.

Malaysia To Lift Dish Ban

The Malaysian government will lift its ban on satellite reception equipment by the end of the year. According to information minister Datuk Mohamed Rahmat, amendments to the broadcasting laws are being drawn up for tabling in the next session of Parliament. He said amendments will specify the type of antennas allowed, a possible indication that only receivers trained on the government's Measat system, due to launch in December, will be licensed.

The outcome of the Italian referendum last month is more than a case of the schemes of Silvio Berlusconi's opponents backfiring. Its repercussions reach well beyond beyond *sua emittenza's* homeland.

For one, politicians have once again been warned against confusing their own special interests with the demands and wishes of the general public.

The message to the tv industry is that the general public, the masses of potential viewers and customers, can – only – be won over by an attractive package of programming made available at affordable prices.

Whoever neglects this rule is doomed to failure, and that includes, as the Italians have found out, politicians who convey the impression that they want to take away what has become an accepted staple of the tv consumer's life. The typical tv consumer of the 1990s simply is not interested in who owns and controls what is shown on his screen.

Nor is he or she interested in the technical prerequisites for receiving an ever-growing menu of programs.

The success of the Astra satellite system was built on this insight. The Luxemburgers never marketed dishes and fancy reception equipment, but packages of alluring programs.

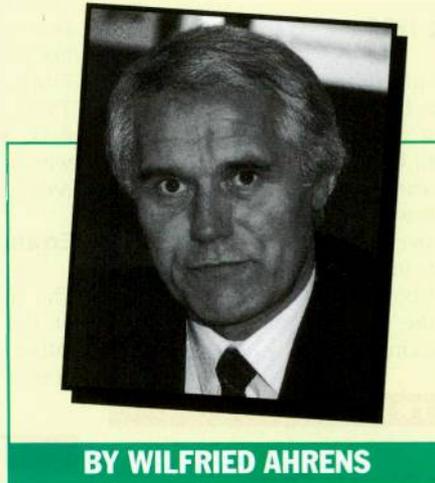
As axiomatic as all this may seem, there have been many instances in the past when this rule was ignored – to the dismay of failed would-be tv entrepreneurs, hardware manufacturers and, sometimes, the taxpayers.

At the threshold of the digital age, similar misunderstanding of the market priorities could thwart ambitious business plans.

In Germany, several so-called pilot projects for multimedia services have been technology-oriented. Mostly under the roof of Deutsche Telekom, millions of dollars and months of debate have been devoted to problems of reception and server hardware and software.

Until very recently, nobody appeared to have thought about the content to supply to all those wonderful glass fiber highways and technical gimmicks like set-top boxes and interactive computer-tv-telephone combinations.

More Channels, Not Better Boxes



BY WILFRIED AHRENS

The infrastructure is nothing more than a technical necessity.

The MSG concept of a multimedia joint venture between Bertelsmann, Telekom and Kirch Group, vetoed by the European Commission, is now being revived with a different combination of players, without Kirch but with Bertelsmann and Telekom again plus ARD, ZDF, RTL, CLT and Canal Plus. It remains to be seen how this will work out, given the Bertelsmann-Canal Plus-Kirch co-ownership of pay-tv channel Premiere. The more than 900,000 analog Premiere decoders could easily be exchanged for digital equipment.

In any case, Kirch Group is still in the game, and given its unparalleled resources of 80,000 tv program hours is the player most likely to come out on top. Kirch Group's technical arm, Beta Technik, has developed its own set-top

box able to decode digital signals and be connected with personal computers as well. What is more, the Kirch Group has contracted five transponders on digital Astra satellites. CLT in turn has secured six Astra transponders.

In Germany as elsewhere, the very possibility of competing set-top devices and standards causes nightmares reminiscent of the VHS/Betamax battle.

But again, which technology is more sophisticated than others will be less decisive in the multimedia era than who will offer the most attractive programs and services.

The much-debated question about which will win the multimedia future first and fastest – television (free, pay, on-demand, and pay-per-view) or services like homeshopping – is futile.

The lure of the German market, potentially the most lucrative of them all, has already forged alliances within Europe as well as across the Atlantic. CLT, Canal Plus and Bertelsmann have all been trying to acquire program rights and to push their own production and co-production.

At that, foreign players may have the German territory to themselves because the natives are still facing the perennial imponderables of regulation and political strangulation. In Germany it is still undecided, to mention just one example, whether homeshopping is television or not. As things stand, this and other open matters will not be decided on until the end of 1996. In the meantime, nobody would or could hinder the Time Warners, Viacom and Turners of this world from stepping in.

After what happened to their colleagues in Italy, the politicians will certainly do anything but ask the German people what they want and expect in the digital age.

The answer would, all the evidence suggests, be simple enough: Enjoyable and useful programs and services, as many and as cheap as possible. 

Which digital technology is more sophisticated than others will be less decisive than the attractiveness of programs and services

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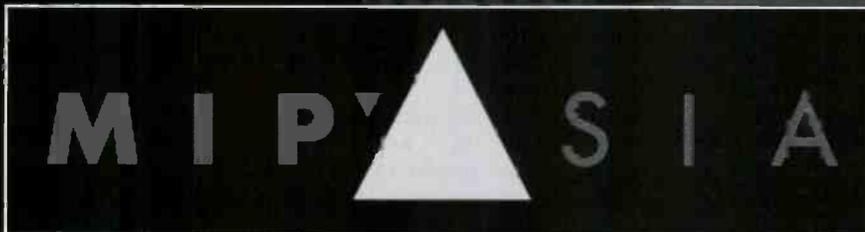
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Watching Wildlife



GLOBAL REPORT: Few broadcasters are immune to the attractions of natural history. Wildlife programming wins a family audience, can fit in most schedules almost anywhere and is some of the easiest programming to co-produce. But despite all the positives, producers the world over complain slots for natural history are too few and primetime is fast becoming a wildlife no-go area in some countries.

The BBC is keen to pioneer new filming techniques in series like *Alien Empire*, its close-up on the insect world.

UNITED KINGDOM

Britain's broadcasters, both public and commercial, have long been associated with blue-chip natural history production. **Marie Beardmore** finds they are as committed as ever to wildlife documentaries. The BBC alone has increased output by 20% in two years.

London may be the UK's capital, but Bristol is where it's at in natural history film production. Bristol is home to the BBC's natural history unit – at 60 to 70

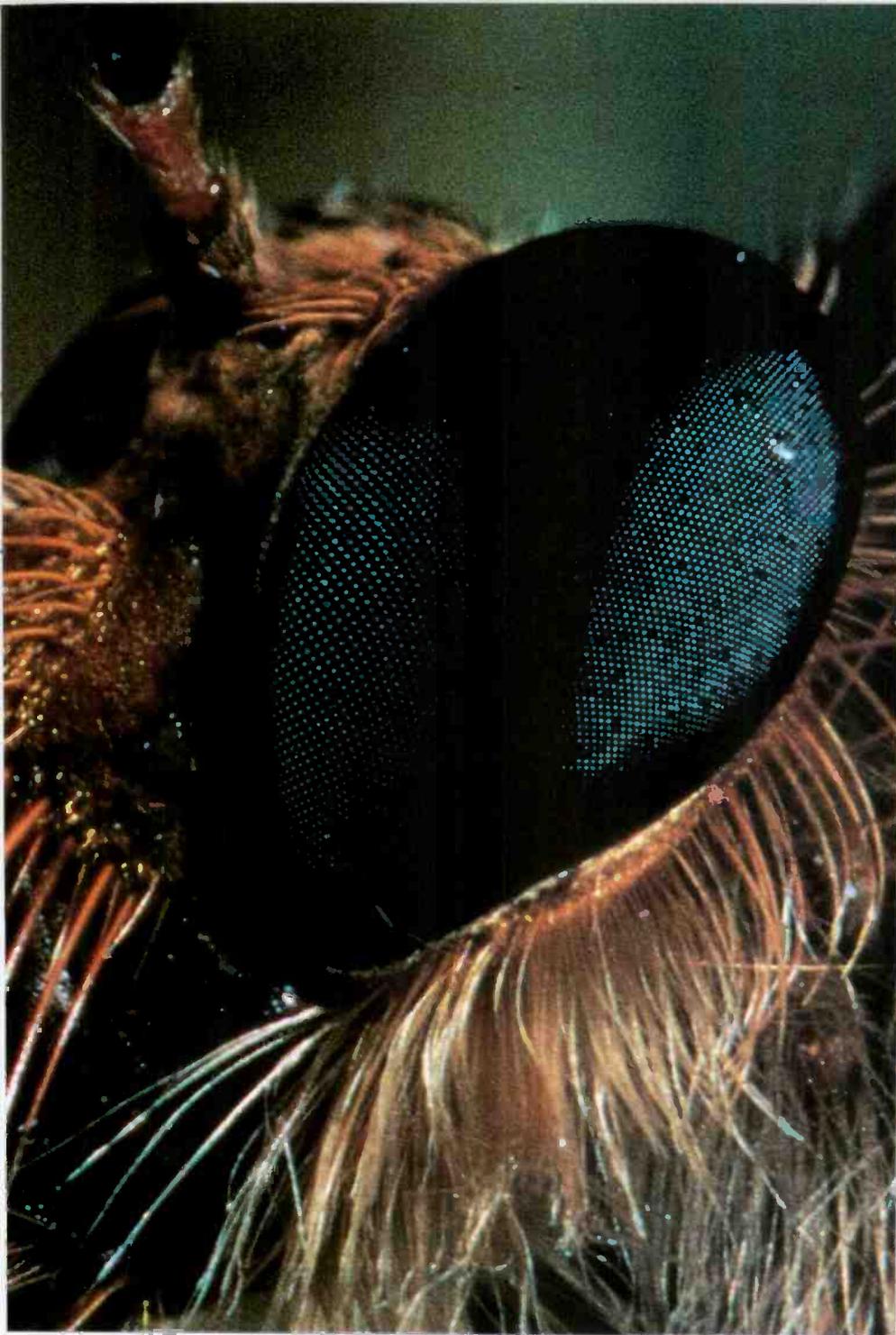
hours a year the biggest producer of the genre in the UK – as well as several independent production companies, including Partridge, part of the HTV Group and a member of HIT's Wild Media division.

Survival, the natural history strand produced by Anglia for the ITV network, is the UK's other main producer in the genre, and though only turning out nine hours a year, it does qualify as the longest running strand, having been established in 1961.

The BBC has two strands for natural

history output: *Wildlife on One* for BBC1 and the *Natural World* for BBC2. "Over the last two years natural history hours have increased 20%, with *Wildlife on One* alone up from 10 to 13 hours," said Alastair Fothergill, head of the BBC Natural History Unit.

The pubcaster is keen to pioneer new filming techniques for its latest projects. A major project for the BBC's *Wildlife on One* autumn schedule is *Alien Empire*, a six-parter on insects that uses new camera lenses and computer animation techniques, enabling the viewer to go close



up to — and even inside — insects. Another breakthrough, the animation of the electron microscope, allows microscopic processes to be filmed rather than still photographed.

Meanwhile, *Nightmares of Nature*, (5x30), a *Wildlife on One* series late in the year, asks if the world's most feared animals deserve their reputations. Over on *Natural World*, *Incredible Suckers*, a film about the giant squid, an animal that's never actually been seen before but is believed to be 70 feet long, is slated for the start of the 1996 season. And

BBC wildlife doyen David Attenborough's follow up to *The Secret Life of Plants*, *Birds of the World*, is set to air in the fall of 1998, as either eight or 10 x 50-minute specials, reported Fothergill.

Survival, traditionally master of womb-to-tomb films that show animals in all stages of life in their natural habitat, is adding to its repertoire using film from its 30-year-old library to create original programming. *Survival* also plans more presenter-led programming, said Petra Regent, executive producer. *Predators*, a six-part series on predatory ani-

mals, is the first product of the new thinking and has Gabby Roslyn of Channel 4's *Big Breakfast* in front of the camera as *Survival*'s first on location, on-screen female presenter. Another new project, *Tooth and Claw*, a six-part series that looks at the relationship between people and animals, uses library footage juxtaposed with new film. And for its late summer schedule, the BBC has ordered from *Survival* a new series *The Animal Show*, a half-hour kids series that mixes animal footage with Muppets.

Blue-chip programming is still important to *Survival* and there are a number of films queued up waiting for an ITV network slot. *Mountains of the Snow Leopard*, a one-hour special on Mongolia, and *Creatures of the Magic Waters*, a film about the Amazon rain forest, are both ready to screen, while baboons and genets are the subjects of two films currently in production.

USA

A resurgence of sorts in natural history programming has producers excited about the future. While a majority of natural history shows still air on the nation's cable networks and the Public Broadcasting System, Richard Huff reports the big broadcast networks are showing renewed interest in a genre they had all but abandoned.

For the first time in 20 years, the *National Geographic Specials* are airing on NBC. Another commercial network, ABC, has made its own, albeit limited, commitment to regular natural history and wildlife fare. Both moves are seen as important signs by industry executives.

"I think we're seeing a resurgence," said Clark Bunting, senior vice president of programming at the Discovery Channel. "People are saying, 'I want to be educated. I want to be entertained.'"

National Geographic Television and Discovery are by far the largest producers and distributors of natural history programming in the States. National Geographic alone produces five hours of *Specials* programming for NBC, another 60 hours for Turner Broadcasting's TBS, and several more hours for the Public Broadcasting Service.

Industry observers point to several factors for the increased exposure for natural history programming. Some cite the nation's growing displeasure and disenchantment with the extensive coverage given to the murder trial of O.J. Simpson. Others point to a desire by

viewers for more stimulating fare. And some mention the increased quality of natural history shows available in the marketplace.

"The American audience has always had an appetite for good action natural history programming," said Dennis Kane, executive producer of ABC's *World of Discovery* and president of ABC/Kane Productions International, Inc. Kane, a former National Geographic producer, oversees the production of a series of one-hour specials that air quarterly on ABC. "ABC has been at it for seven years," he said. "Our ratings are reasonable."

Compared to other hour-long forms of programming, natural history can be fairly inexpensive. Costs vary depending on where the shooting is to take place and how difficult it is to get there. Producers working exclusively in video can bring projects in at around \$150,000 per hour, while those working in film average in the \$500,000 per hour range. High-end production in remote locations can climb into the \$750,000 range.

However, when compared with the costs of hour-long drama, natural history shows come in cheap. The production budget for the typical hour-long network drama averages \$1.5 million. And costs are climbing.

Natural history programming also travels abroad better than most programming forms, according to those involved in the genre. The content transcends international boundaries. "One of the reasons ABC got into it, was because these are evergreen programs," Kane said. "They just go on and on and on. Nothing really dates them."

The fare also lends itself to a number of other multimedia areas, including home video and CD-Rom.

But despite the various revenue outlets, few would argue that there can be any comparison to typical broadcast fare in the ratings, which, after all, are what drive the broadcast network system. A primetime drama such as NBC's hit *ER* averages ratings in the 20-plus range, with each ratings point representing 954,000 U.S. television homes. Ratings for ABC's *World of Discovery* specials come in at less than half that.

As a result, most producers believe the future for such programming remains the cable networks. Cable networks, they say, have the dual revenue streams – subscriber fees paid by cable operators and advertising revenues – which allow them to survive on often minuscule ratings.

"Let's face it," said Kane, "the net-

works survive on numbers and we just don't bring them those big numbers. We bring them modest numbers."

Discovery's Bunting is pleased cable is leading the way in the genre. Indeed, Discovery recently launched a movie division to produce and develop theatrical natural history properties. Its first, *Leopard's Son*, is due next spring.

AUSTRALIA

As the home of the kangaroo, platypus, koala bear and most species of lizard, Australia is ideal for natural history producers. But Liz Fell reports independents with blue-chip projects are often forced to look offshore for most of their funding. Why? The three commercial nets rarely buy wildlife programs.

Australia's powerful Federation of Commercial Television Stations last year told the country's broadcasting regulator, "The commercial programming reality is that documentaries are now an archaic program type in which viewers no longer show much interest."

With the commercial broadcasters taking that hard line, public broadcaster ABC's tiny Natural History Unit is left as Australia's major producer, purchaser and broadcaster of local wildlife documentaries. The unit has an extensive library of natural history footage but, like most public service broadcasters, is so squeezed for funds that the unit's production budget for the next 12 months will cover only three fully-funded projects.

The state-funded Film Finance Corp. has taken steps to alleviate the funding problem. The fund previously invested in documentaries that had secured a local and an overseas pre-sale. But, recognizing that natural history travels well, the FFC now invests in quality local projects that can raise 60% of budget from two overseas pre-sales.

As a result, wildlife producer Roger Whittaker secured FFC support for his *Little Killers* project after Devillier-Donagan offered a distribution guarantee and Discovery provided a pre-sale. Another of his projects, *Pythons*, has been pre-sold to Canal

Plus and Discovery. In fact, Whittaker's last five documentaries have failed to gain a local pre-sale, though he said they do eventually get local airtime.

The FFC has also invested in *Heaven's Breath* with Germany's ZDF, Asahi TV Japan and Austria's ORF. Produced by independent Stuart Quinn, this four-part series will explore the wind's influence on natural life. Quinn said local broadcasters offer a tiny license fee of \$25,000 (U.S.) an hour at the most, and none had a dedicated wildlife slot in 1993 when he approached them about the series.

Network Seven now has a regular documentary slot, *The World Around Us*, while Nine has won high primetime ratings with *Wildlife*, a magazine series produced by Beyond and fronted by star Olivia Newton-John. However, some producers argue Nine's infotainment approach really isn't natural history programming.

Despite a tight budget, Dione Gilmour, head of ABC Natural History, has several exciting projects in development. A bio-geography series, *Between Two Worlds*, will explore how animals and plants from Asia meet and mingle with those from Australia on Indonesia's archipelago. Another upcoming ABC production with the BBC and National Geographic is *Dragons of the Galapagos* from award-winning producers David Parer and Elizabeth Parer-Cook.

Gilmour also pointed to *Once Upon Australia*, a new in-house production slated for air on ABC's *Wildscreen* slot in August. This 30-minute documentary, which will be offered at Mipcom 95, uses 3D animation to show Australia as a land where dinosaurs roamed, giant kangaroos browsed on tree branches and marsupial lions stalked the forests.



Eye On The Reef: Co-pro between Tina Dalton and U.S. public tv



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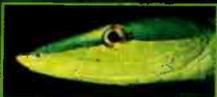
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FRANCE

The home of Jacques Cousteau is not the home of the primetime wildlife show. Even Cousteau himself can't get into prime on France 2, writes Serge Siritzky. The good news: Pay operator Canal Plus plans a weekly slot.

Natural history programming has a fight on its hands in France. The major networks here set aside few slots in their schedules for the genre, and those they do program are all outside of primetime, except in the case of magazine-style programs. The most successful of the magazines, 20-year-old sea life show *Thalassa*, airs Friday evenings on France 3 and also covers human and economic problems.

The situation in France is ironic, since it is the nation that provided American audiences with their most popular wildlife personality – undersea explorer Jacques Cousteau. France 2 airs Cousteau's series, a co-production with Turner and Amaya Films, on Sundays in access prime. This year, Cousteau will produce four 52-minute programs – each budgeted at \$1 million an hour.

The only French channel that regularly broadcasts nature documentaries is pay-tv operator Canal Plus, which is now considering scheduling a weekly slot because of audience demand. Canal Plus

has had success with Frederic Foguea's two half-hour series *Les contes sauvages* – about ancestral relations between humans and wild animals – and *He Dances For His Cormorants*. Both series have been sold around the world, including to regular American pre-buyer Discovery. Still, Canal Plus is the only domestic broadcaster that has shown any interest in Foguea's work.

The tough domestic climate hasn't stopped other indies from taking the plunge. Jean-Louis Burgat of Leo Productions started Léo Wildlife to produce "scientific series" about natural history subjects. "But it is difficult for a French company to enter a market dominated by the British and Americans," said Burgat. "For instance, when we made a documentary in Ethiopia, the country was controlled by the British. It took a very long time to convince the local authorities that the French could also make documentaries about wildlife. Finally, we had to bribe the guards to shoot our documentary about a baboon's harem."

Burgat said his biggest challenge is to be scientifically accurate, teach the audience, show unknown things *and* tell a story that will grab the public. His next project is for La 5, the new educational channel. The station's license fees are small, but the deal will let him reformat shows in Léo's library. "They pay one tenth of the price, but that is more understandable than France 2's offer to buy for \$32,400 two hours when Canal Plus paid ten times that price. I refused." Like others in France, he is working with the BBC and Discovery, in his case to make an 8x30 series on men who devoted their lives to wild animals.

"The advantage of the genre is it sells everywhere," explained Olivier Brémond of Marathon. "French broadcasters pay only 15% of the budget, but we can get not far from that money through related (local) subsidies, and then we pre-sell around the world." Brémond specializes in the nature and adventure field as a producer and, through Marathon International, as a worldwide distributor. He is producing a four-hour series on wildlife in Europe for France 2 and also distributes for XL Productions (*Savage Sanctuaries*).

JAPAN

Nature and wildlife programs, especially programs about exotic animals, have long fascinated Japanese viewers, who see so little of the real thing in their concrete jungles. Nonetheless, Mark Schilling writes, the production boom of a decade ago is over.

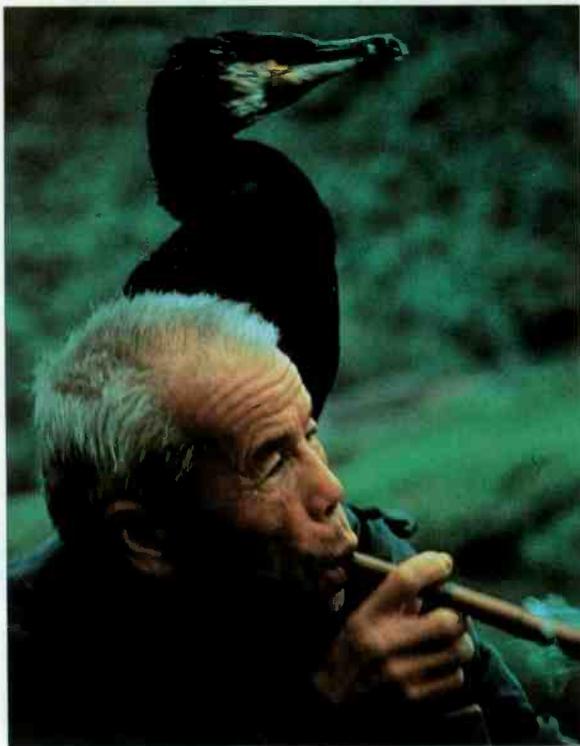
The Japanese loved their animal shows for the longest time. One Tokyo Broadcasting System (TBS) animal quiz program, *Waku Waku Animal Land*, even started a nationwide craze for the Australian frilled lizard in the mid-80s. *Waku Waku* went on to become a long running domestic and international hit, appearing in more than 40 countries.

In this decade, however, surfeit has set in; having long since seen every species on the planet, with the possible exception of a few fast-mutating microbes, Japanese viewers are jaded. The demand for nature and wildlife shows remains, but the various animal booms of the 70s and 80s – panda bears and koala bears being among the biggest – are a thing of the past.

Public broadcaster NHK remains the leader in this genre, in both quality and quantity. One reason is resources; with receiving fee income from more than 36 million tv households, NHK can afford to dispatch its own crews to the four corners of the earth to film a polar bear's cubhood or life on the African savannah. Another is mission: NHK keeps making about the same number of shows each year, regardless of ratings. "It's our obligation as a public broadcaster," explained NHK spokesman Mayumi Fujikawa.

NHK currently has two regular nature shows on the air. One is *Home Town Nature Discover*, a 10-minute domestic travelogue program aired every Saturday at 6.15 am. The other is *World Travelogue of Living Creatures*, a 40-minute show broadcast every Monday at 8.00 pm. On the air for three years, the program's footage of rare animals in natural settings – one recent instalment featured mountain gorillas in Central Africa – has attracted a large, mainly family audience, with household ratings averaging 15. "Viewers say that, because of the animals on the show, even their dogs like to watch it," said Fujikawa.

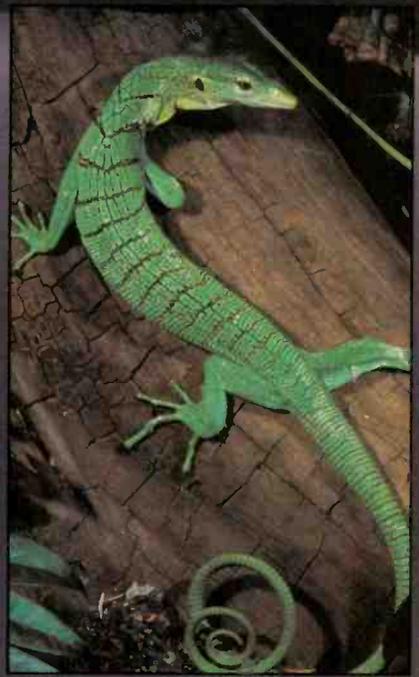
NHK also makes and markets a broad range of nature and wildlife specials. Recent programs included *Savannah Watch*, an exploration of the natural history of the African savannah, *Secrets of the Chichild*, about chichild fish in Lake



Cormorants: Lucky to get a domestic window



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Tanganyika, and *Arctic Hunters*, about predators living in the Arctic Circle.

Nature and wildlife programs are rarer on the five commercial nets, where cost efficiency is the order of the day and viewer enthusiasm for the shows has waned. One of the few commercial broadcasters still doing pure nature shows is TV Asahi, whose *Nature Specials* are a decade-old tradition. Broadcast three times a year, these two-hour specials have featured not only the nature and wildlife of five continents, but the people who live there. "It's somewhat different from most programs of this type because we send in one reporter with a crew to cover the story," said a spokesman. "This gives the series a human element that other documentary specials lack." Ratings in the show's primetime slot average 12 to 13. "But ratings are not the only consideration in making a program of this type," the spokesman added. "High quality is more important."

Regular programs with a nature theme on the remaining commercial networks take a strong entertainment slant. TBS's other contribution to the genre, *Animal Shopping Street*, uses the now-standard quiz panel format. On one recent show, panellists tried to guess how various baby animals would react in a given situation. On the air for two years, the show averages a 15 rating. Trying to explain the show's success, TBS TV program publicity department manager Takakazu Hirose said, "It's one of the few programs on the air that appeals to the whole family. Also, though viewers may like or dislike celebrities, they don't have the same objections to animals."

NTV broadcasts no nature shows in primetime and only a few in off-peak hours. "They don't get high ratings and they're expensive to make," said a spokesman. "The third reason is that though viewers want to see rare and unusual places, there aren't that many left. They've already seen them all."

NEW ZEALAND

Eco-friendly Kiwis enjoy wildlife shows and in TVNZ Natural History has an aggressive self-supporting unit that keeps coming up with good stories, reports Paul Nicholson

New Zealand is one of the traditional homes of excellence in the production of wildlife programs. Domestic production comes almost exclusively from public broadcaster Television New Zealand's

Natural History Unit. But demand for the genre sees TVNZ (and its competitors TV3 and the new regional stations) acquiring from overseas.

"TVNZ has a long history of successfully screening natural history programs under the generic title *Our World*. This strand of programs in recent years has played on both TV1 and TV2 and between the two networks it covers a wide variety of material from Steve Irwin's *Crocodile Hunter* series (Australia) to the more traditional wildlife programs like *Natural World* and *Survival*," said Glenn Usmar, program manager - TV One.

TVNZ's own wildlife strand, *Wild South*, is a strongly established domestic brand. *Wild South* and *Our World* are usually scheduled in early evening slots at the weekend, often after the 6pm news on a Sunday. Ratings regularly attract 15-20% of the population for an audience share of 35% on average.

Wild South has become a long running series for TVNZ with annual series generally being made up of 10 or 12 programs, all one-offs in subject matter. "Now about 20% of the programs are about New Zealand and the region. It used to be 100%," said Michael Stedman, managing director of TVNZ Natural History.

Stedman operates his division as a separate profit center within TVNZ. As such it is expected to fully fund all its productions without the guarantee of a network slot, but rather treating TVNZ as another market. "We can do without TVNZ because we are driven as a business and TVNZ is one of our clients, but it would be unusual for it to happen," said Stedman. Typically an hour from Stedman's unit will cost between \$300-400,000 (U.S.), with some going as high as \$500,000. With TVNZ generally paying between 15-20% of the budget the remaining 80% plus via co-production or pre-sales monies.

Stedman, who reckons to spend \$8 million on natural history programming in 1995, targets the world south of the equator "as our patch" for the generation of stories. "South east Asia is more diverse and rich than Africa in wildlife and to a large degree it is untouched," said Stedman. Last month he announced TVNZ Natural History is co-producing a four-hour documentary series, *Chile - Land of Extremes*, with The Discovery Channel. Stedman is also expecting to close a co-production deal with Survival Anglia in the UK which will result in an extra 12 hours of co-produced natural history a year.

AUSTRIAN TELEVISION

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DENMARK

Danish channels consistently rank natural history and environmental documentaries as priority items on their schedules. **Thomas Dodd** finds both the public and the commercial networks remain committed to the genre despite economic constraints.

In 1994, national broadcaster Danmarks Radio (DR) TV screened approximately 30 hours of nature documentaries out of a total of 80 hours of documentaries scheduled.

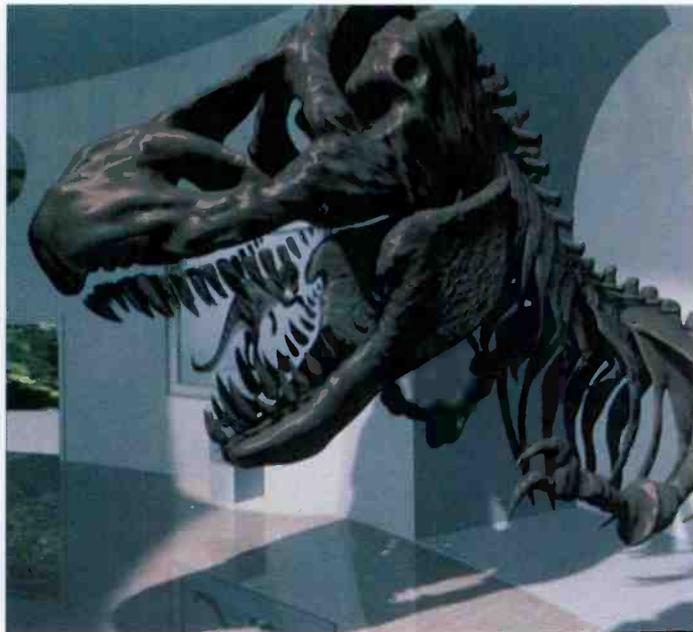
DR TV buyer Hanne Lindemann last year bought material from UK production company Partridge Films (distributed by Canal Plus), 13 episodes of *Wildlife on One* from the BBC and 26 half-hour episodes of *Wildlife Tales* from the Australian Broadcasting Corp. There is no regular nature slot on DR TV, although Lindemann is pushing for one. Some of the material is used in the quiz series *Viden Om (Knowledge About)*.

In the first half of 1995, the main commercial station, TV2, screened 35 hours (including repeats) of nature programs, roughly equivalent to its output for the previous six months (33 hours). A screening on TV2 of *Eyewitness*, a BBC/Dorling Kindersley Vision co-pro-

duction, registered a 30% share of viewing in a weekday primetime slot.

In recent years, Danish broadcasters have discovered the benefit of domestic programming and its ability to attract primetime audiences. As a result, personality-led nature series have appeared on all the national channels; TV2 even signed up an eccentric former Copenhagen Zoo director, Bent Jørgensen, as nature quizmaster.

In terms of own production, in 1995 DR TV expects to commission at least six natural history productions, all of them documentaries produced by local independent producer Fauna Film. Fauna has in the past co-produced programs with



Eyewitness: 30% viewing share in a prime DR slot

the BBC and various French companies.

With increased competition from private tv, cost considerations have come to the fore. Budgets for nature films especially can be prohibitive for broadcasters in smaller countries like Denmark. 

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A TIGER SUNBATHING IN THE JUNGLE?

A PAIR OF TUSKED WETAS FIGHTING?

OR, A BIRD-EATING TREE?

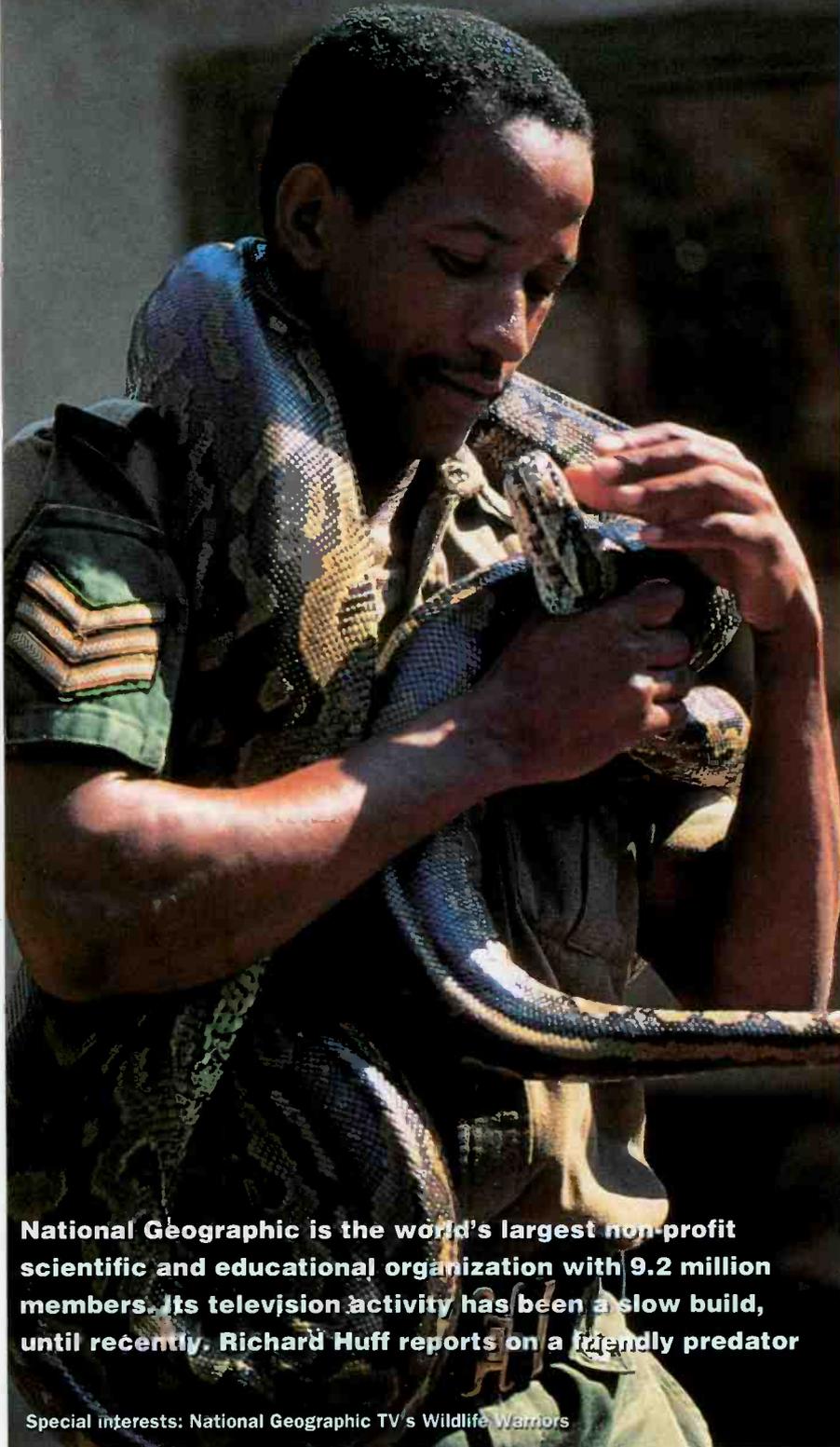
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Peak Performer



National Geographic is the world's largest non-profit scientific and educational organization with 9.2 million members. Its television activity has been a slow build, until recently. Richard Huff reports on a friendly predator

Special interests: National Geographic TV's *Wildlife Warriors*

Three decades ago, the folks who run National Geographic magazine decided to expand into television. This September, National Geographic Television, the venture they created, will celebrate its 30th year on the air.

Three years ago they planned a push of the National Geographic brand name into international television markets. The growth has been rapid. Next month the international television marketing and distribution unit under Helen Turrell relocates itself in London offices with the aim of bettering service to the 60 countries (up from 25 in 1993 and 50 in 1994) which air National Geographic-branded strands of programs.

The drive into international markets has been fast. While many tv pundits claim that the fastest-growing life form in natural history and documentary programming in recent years has been the Discovery Channel, with its global rollout and huge increase in program production, National Geographic's growth is still very significant.

Driven by the Society's central objective to create an organization "for the increase and diffusion of geographic knowledge," the embracing of television as a way of getting the message across globally has been handled with determination and sensitivity. No more than the 33 men who in 1888 convened in Washington's Cosmos Club to form the Society would expect.

Television for National Geographic is not an end in itself, but just another means (a very powerful one) by which to extend the brand name.

The concept for a tv unit was hatched in 1961, though National Geographic's first *Special* didn't air until 1965. But when it did, the documentary hit with a loud ratings bang. In fact, the program, *Americans on Everest*, earned the highest ratings for any documentary at the time.

Today, National Geographic Television produces some 80 hours of programming each year, reaching viewers on cable, commercial and public broadcasting, home video and syndication. And coming down the road are feature films bearing the National Geographic name.

"Consumers are still fascinated by the images and the programming serves as an alternative to the other kinds of drama that are offered," said Tim Kelly, senior vice president of National Geographic Television. "Clearly there is an audience out there for well-produced dramatic, real-life kinds of programming, like the kind we do."

Currently Kelly oversees a programming arsenal that includes five annual

hours of *National Geographic Specials* on NBC, a new children's series that will debut on CBS this fall, *Explorer*, a two-hour weekly program on TBS, and *On Assignment* and *World of National Geographic*, two series sold to stations on a barter basis. And if that was not enough, he also oversees a home video unit and the upstart feature films unit.

Specials has traditionally been the television production division's flagship unit. For nine years after its initial telecast in 1965, the series bounced between CBS and ABC. In 1975, National Geographic partnered with public station WQED-TV in Pittsburgh to co-produce the specials and distribute them to public stations. In 1991, National Geographic took production in house, where it's remained since.

However, in 1994, Chevron, the series' major underwriter, cut back its funding. While normally a crisis for any public program, the decision by the oil company to back out worked in National Geographic's favor. As a result of the funding search, *Specials* ended up back on a commercial network, only this time it was NBC.

"For 30 years the series has been available nationally. It was important for us to have this flagship series on broadcast television," said Kelly.

Like any other program licensed by a broadcast or cable outlet, the license fee doesn't cover the production costs. According to Kelly, National Geographic spends between \$300,000 and \$1.5 million to produce an hour of television.

"Sometimes we feel that we want to go the extra mile," Kelly said. "Sometimes that involves an expedition or some kind of scientific operations."

Yet compared to the typical hour-long drama, which costs anywhere from \$1.5 million to \$2 million, the development period for a National Geographic program is two to three times as long. Programs also take longer to make money.

Indeed, some National Geographic documentaries take two years to produce — if all goes to plan. Occasionally it takes longer.

"Sometimes it takes years for these shows to pay off," Kelly said. "We kind of pick our projects carefully for that reason."

The company makes its money back through syndication, international sales and home video releases. International co-funding provides another cash stream.

"It takes three or four years before we start seeing some money from these shows," Kelly said. "That's one reason we have to have partners. We see a lot

of cash go out the door early, and for a long time before we even get the thing to air. It can be less expensive (when compared to drama hours) but the costs go out for such a long time before you have a finished project."

Last year the company generated revenues of \$65 million, which is almost entirely earmarked for programming.

Kelly said the production process has an impact on the cash flow. And as a result, the company tends to make deals where its partners are contributing cash early on.

The international concerns acting in some fashion as partners with National Geographic are many of the blue chip corporations of the world's public and commercial broadcasters. They include Canal Plus, Bertelsmann, NHK, Channel 4, the BBC, TV Tokyo and Rai. With this kind of international partner the society has found itself taking a place very quickly at the top table of international television. It has also forced the Washington-based society to listen to the reports coming back from international marketplaces about the television product.

Initially distributed by Turner and Public Television International (PTI), the society found it had no real involvement in the promotion or marketing of its programs in the international marketplace. After a long process of finding a replacement distributor, the UK's ITEL was appointed three years ago. With Helen Tourell, managing director of international distribution, moving her unit to London, the role of ITEL will change, with many markets reverting back to National Geographic to sell. ITEL is likely to hold on to the South American and Eastern Bloc markets where it has a strength, as well as some Western European markets.

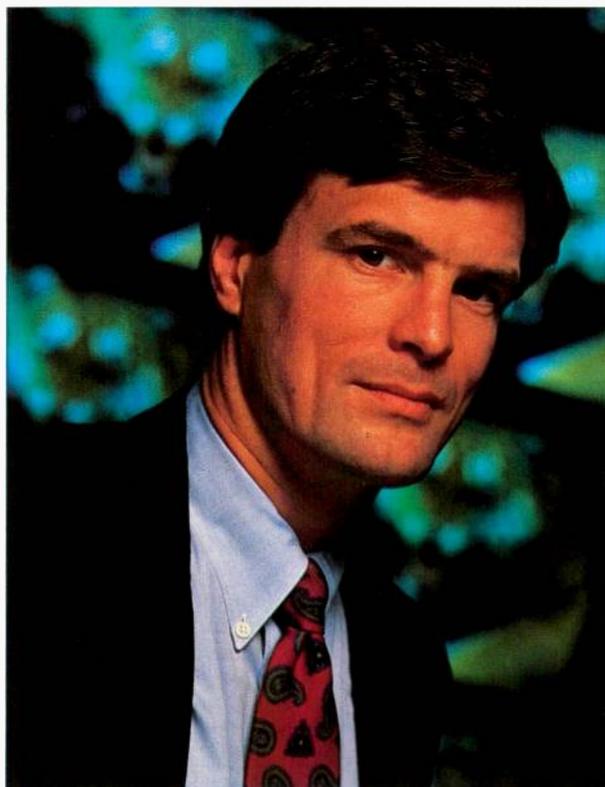
As much as 50% of revenues for new programs now come from international markets in the form of presales, and the Society is increasingly moving to a position where programs will be fully funded prior to completion. The main strategy here has been to secure output deals where major broad-

casters get a first look at everything being developed, though Tourell stresses that "we won't impose programs on a broadcaster."

Now the Society is prepared to spend on marketing and promoting its product in international markets, as well as on versioning the programs for local markets. Tourell sees it as important that National Geographic as far as possible owns its foreign version for future sales into the marketplace and to other windows when they arise. Tourell is also making headway in convincing the program-makers to gear programming to more international markets.

In the U.S., the first three instalments of National Geographic's *Specials* have earned respectable ratings. Its first appearance, a 30th anniversary special that aired in January, earned a 15.5 rating (percentage of the nation's 95.4 million tv homes) and a 24 share (percentage of the sets in use.) The program was ranked No. 5 among all specials that aired during the 1994-95 television season, which ended in April. The NBC debut won its time period. NBC's other *Specials* telecasts were *Secrets of the Wild Panda*, which averaged an 11.0 rating/17 share and *Great White Shark*, which earned a 10.7/17.

In Japan, the company's documentary



Kelly: National Geographic picks its shows "kind of carefully"



Tourell: Move to London is part of a strategy to develop international presence

Wolves of the Sea drew about 16 million viewers, *Eternal Enemies: Lions and Hyenas* earned a 17% audience share for Canal Plus in Spain, and National Geographic fare averages a 14% audience share on Germany's ZDF. Generally it is the big animal shows that pull in the highest ratings in international markets. Exploration and archaeology shows tend to be more difficult internationally as they are usually too people-oriented.

The domestic ratings aren't as high as the top network dramas, but neither are the costs. Although one downside to the programming is that it tends to attract a large number of the 50-plus demographic, which is not a strong market with advertisers.

And like network dramas, the natural history programming sells well internationally. According to Kelly, most, although not all, of what the company produces sells well abroad. Wildlife and adventure programming sells, though programming with a distinct domestic topic may not.

For the future, the company is looking to create projects for the under-40 crowd, which typically goes to a lot of movies, but tends not to watch non-fiction programming.

In addition to the new kids' series for CBS, Kelly said National Geographic is readying another for "the *Barney* crowd," and expects to announce a broadcast outlet for the project in the near future.

"We also looking at other new non-fiction series of various kinds," Kelly said. "Drama is another area. We have a

small group working in Los Angeles on several different projects, as a way for us to reach the 40 and under crowd."

According to industry statistics, 75% of the theatre-going public is 40 and under. It's that audience, which will watch a movie, but not tv, that Kelly wants. And if he can't get them at home, he's hoping to lure them in at the theatres. National Geographic is developing a feature film project that will be a natural history film, with an adventure bent. He's also looking at developing an Imax film.

However, as National Geographic enters its fourth decade, it's doing so with more competition than ever. Cable's Discovery Channel produces 1,600 hours of original programming each year, of which a large portion is natural history. Arts & Entertainment has some, and ABC produces about five hours annually through a partnership with one of Kelly's old cronies at National Geographic, Dennis Kane.

"It always goes back to the programming," Kane said of National Geographic's success. "It's the quality of the program, and the quality of the organization. They've got some good people and a brand name."

Discovery's Clark Bunting also admits to being "a big fan of National Geographic. They do an awfully good job." He too is overseeing the production of a theatrical natural history project.

The progress of the international television team is opening up new doors for the society. In France and Spain major deals for books and magazines came off the back of television's presence. In Japan, television was an important element in the successful launch of the first foreign-language edition of the magazine.

These days National Geographic is very much a part of new media frontiers. It is currently part of a video-on-demand test in Singapore, though it has yet to see any of the results.

A channel has been proposed in the recent past, and the proposal will keep coming up. But so far the answer has been negative. In the end it all comes down to branding. The society does not have enough of its own programming for a channel and is not prepared to risk diluting its brand through acquired programs. Ultimately it is the power and the message behind the brand that is National Geographic's global objective. Not world domination of the television screen. ■

Mission Position

National Geographic Society 1993

Revenues (\$000s)

Members' dues and contributions	221,459
Educational programming and materials	136,333
Advertising	47,624
Investment and related income*	13,686
Corporate, foundation and other support	4,654

Total **423,755**

*Figures do not reflect market activity

Expenses (\$000s)

Printed educational information	347,772
Electronic educational information	57,285
Scientific research and exploration	6,324
Classroom geography programs	10,138
Community outreach	6,272
Other expenses	40,455

Total **468,245**

Net loss before market activity **44,490**

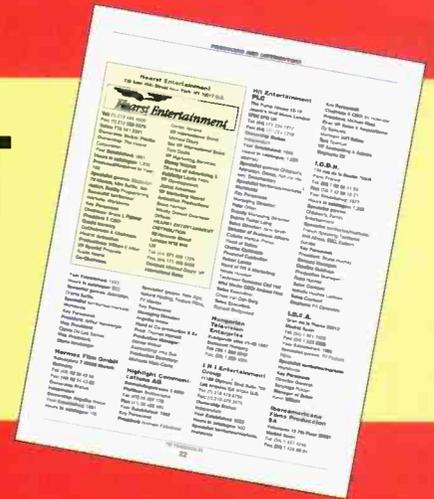
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Another Breath

Thousands of films and tv programs which have fallen into the public domain in the U.S. could be back in copyright next year. Adrienne Halpern explains why

Readers with long memories will recall the wrangling over the Uruguay Round of the GATT trade negotiations around a year and a half ago. The upshot of the sometimes bitter arguments traded across the Atlantic, over whether audiovisual productions should be included in the agreement, was that the U.S. and Europe would have to agree to differ.

Culture wasn't, however, entirely unaffected: Due to a little-noticed but significant provision of the Uruguay Round Agreement Act signed by President Clinton on December 8, 1994, thousands of copyrights to foreign-made movies, tv programs and sound recordings which had fallen into the public domain in the U.S. will be restored.

Motion pictures which will no longer be open to free exploitation include some milestones of the cinema: Godard's *A Bout de souffle* (Breathless), Renoir's *La Grande Illusion*, and Fellini's *8 1/2*. Thousands more titles and libraries could be affected; U.S. authorities expect between 30-50,000 notices of intent to enforce restored copyrights to be filed with the U.S. copyright office annually from the time the new rules take effect at the beginning of 1996.

The Act creates an extraordinary opportunity for European and other foreign copyright owners at a time when the stock of independent movies is high and digital technology promises a host of new distribution outlets.

The most important change to U.S. copyright legislation is that protection — for any restored work which qualifies — is automatic. Works which are restored will be protected for the remainder of



Films back in copyright include cinematic milestones such as *A Bout de Souffle*

the term of copyright that the work would have otherwise enjoyed in the U.S. (generally, for motion pictures and other "works for hire" and for pre-1978 works, a period of 75 years from release or publication; for other works, life of the author plus 50 years).

The U.S. Copyright Office has taken the position that the automatic-restoration provisions take effect January 1 1996, a date that has been confirmed by

a Presidential proclamation.

To qualify as a restored work, a foreign work must be an original work of authorship that is not in the public domain in its source country, but is in the U.S. public domain for one of the following reasons:

- Non-compliance with U.S. statutory formalities, (such as failure to renew the copyright, failure to register within the first 28-year period of copyright with

Pictures: The Kobal Collection

respect to pre-1978 works or publishing the work without a proper copyright notice).

- Lack of subject matter protection in the case of sound recordings fixed before February 15 1972.

- Lack of national eligibility, such as when the work is from a country with which the U.S. did not have copyright relations at the time of publication.

In addition, the work must have at least one author or rightholder (in the case of a sound recording) who was, at the time the work was created, a national or domiciliary of an eligible country, defined as a country other than the U.S. that is a member of the World Trade Organization or the Berne Convention or that is subject to a Presidential proclamation extending copyright restoration to works of that country based on reciprocal treatment of U.S. nationals or domiciliaries.

Finally, if the work was published, it must have been published first in an eligible country and not published in the United States until more than 30 days later.

Copyright in a restored work vests initially with the author or initial rightholder of the work as determined by the law of the source country of the work. Assignments, licenses and other dispositions of an interest in the copyright in a work are to be given effect according to the terms of the disposition agreement,

taking into account the expectations of the parties and relevant laws. This seems to leave open the possibility of conflicting interpretations by the author and the party that was granted rights and may result in lawsuits to determine who holds the restored copyright in a work.

In general, the remedies provided by the Copyright Act are available for acts of infringement commenced on or after the date of restoration. In order to achieve a degree of fairness, however, the act includes some protection for "reliance parties" who have relied on the public domain status of a work. Essentially, reliance parties are those who used a work both before and after December 8 1994 in a manner that would have constituted infringement had that work been protected by copyright in the U.S.

The act gives reliance parties a one-year grace period which begins to run from the date the reliance party receives either actual written notice of the owner's intent to enforce the recaptured copyright or constructive notice through the publication in the Federal Register of a list of notices of intent to enforce filed with the Copyright Office. The Copyright Office plans to publish the first such list in May 1996 and then at regular intervals of four months or less. During such a one-year period, a reliance party may sell off previously manufactured stock and publicly perform or display the

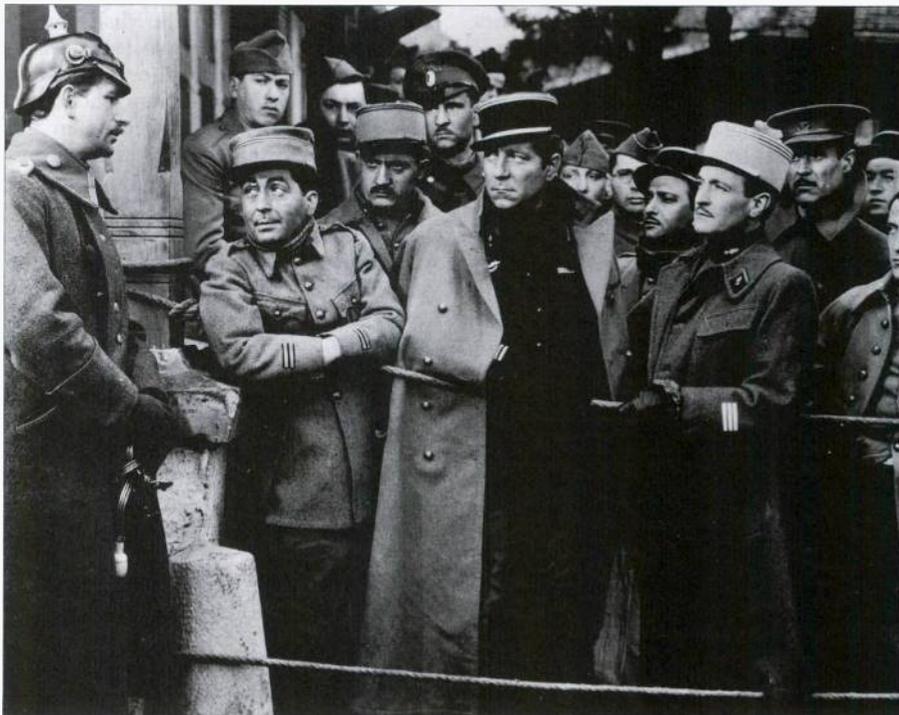
work, or may authorize others to do so. However, during that year, the reliance party may not make further copies of the work. Without such notice, reliance parties are free to continue making and selling copies of the restored works in the U.S.

The act also attempted to ensure fairness for those who created "derivative works" based on a work which at the time of creation was in the public domain in the U.S., such as a remake of the European motion picture that was released in the U.S. without a proper copyright notice, or which was not properly registered and renewed, by providing that such derivative works may continue to be exploited for the duration of the restored copyright if the reliance party pays to the owner of the restored copyright "reasonable compensation" for such use.

Beyond the basic requirements that a notice must identify the title of the restored work (including an English translation and any alternative titles by which the work is known) and be signed by the owner of the restored copyright or the owner of an exclusive right in the work or by the owner's agent, the procedures governing the timing, form, content and treatment of the notice vary depending on whether the owner provides actual notice or constructive notice.

For example, a notice may be filed with the Copyright Office only during the 24-month period commencing on or after the date of restoration, while a notice may be served on a reliance party at any time after the date of restoration. A filed notice is effective against any party, while served notice is effective only against the party served. A filed notice is effective against all infringing uses, while a served notice must specify the uses to which the owner objects, and presumably does not start the one year sell-off period for uses not specifically identified in the served notice.

The Copyright Office is required to publish regulations governing the filing of notices of intent to enforce and the registration of works in which copyright is restored by October 1 1995. Owners of restored copyrights may begin filing notices of intent to enforce on January 1 1996. It is advisable for copyright owners to file their notices as soon as possible after that date to begin the running of the grace period for reliance parties.



La Grande Illusion: Unexpected cause for rights holders to celebrate GATT

Adrienne Halpern is an attorney at law firm Loeb and Loeb, New York, specializing in entertainment and copyright law

User Friendly

Changes in European copyright legislation will impact on the tv business throughout the 15 member states of the European Community (EC) and the EEA territories of Norway and Iceland.

The aim behind the EC's directive on the duration of copyright was originally to harmonize this aspect of the laws of the member states. In Germany, copyright lasted for the life of the author plus 70 years, while France had recently extended its life plus 50 years rule to life plus 70 years for music. Most of the other member states gave protection only for life plus 50 years.

All the EC had to do, apparently, was to decide whether to require the Germans and French to reduce their terms or to require the other members to increase theirs.

The latter was the option chosen, although eyebrows were raised at the slim justification given for it: that increased life expectancy meant that a term of life plus 50 years was now inadequate to protect two generations of an author's heirs. The public interest in having unrestricted freedom to use works after a reasonable period did not appear, to many commentators, to have been given sufficient weight.

In the UK – one of the countries where the 50-year term applied – a number of public domain works will have their copyright revived until 70 years from the death of their authors, including the works of Rudyard Kipling, Thomas Hardy, DH Lawrence and Beatrix Potter. All UK works still in copyright this year will gain an extra 20 years' protection.

Despite its aim of harmonizing national copyright rules, the directive gives wide discretion to member states as to its detailed implementation. The term of copyright itself is to be harmonized uniformly, but such issues as who is to own a revived term, and what protection should be given to a person who had commenced use of a public domain work which is now to have its copyright revived, were left unresolved.

It is now clear that there will be considerable disharmony between member states in the way they deal with these issues. For instance, Ireland and most others will award the revived term of copyright to the author's heirs; the UK,

European regulations on copyright are being brought into line. But, report Stephen Edwards and Laurence Brown, national definitions of ownership will still vary

by contrast, will in the absence of a clear existing agreement on the issue award it to the person who owned it when it expired or, if the copyright was subject to an exclusive license at that time, to the exclusive licensee. Film and television producers, if they held ownership or exclusive licenses of the works of authors who had contributed to their productions (as they frequently do), will accordingly gain ownership of any revived term. As regards extended copyright, the UK is to award the additional period to the owner, as at probably November 1995, of the existing copyright term. Other features of the UK's implementation plans (which are still in draft form at the time of writing) that can clearly be seen to favour users are these:

- If a film or program includes or is an adaptation of a revived copyright work and that work was included or adapted at a time when it was in the public domain, the revived copyright will not be infringed by continued exploitation of the film or program (provided the revived copyright work was included in the film or program before July 1, 1995 or pursuant to arrangements made before that date).

- Any act done in pursuance of an agreement entered into prior to January 1, 1995 will not infringe a revived copyright. The agreement referred to here might, for instance, be an agreement under which a broadcaster commissioned a producer to make a series based on a novel then in the public domain.

- Even in the absence of such an agreement a user may be able to exploit a revived copyright work, under a license of right subject only to payment of such royalties or other payments as may be agreed or, in default of agreement, be fixed by the Copyright Tribunal. This freedom will not be available, however, if a licensing body is able to grant a license for the use in question.

- As to extended copyrights (that is, copyrights which had not expired and

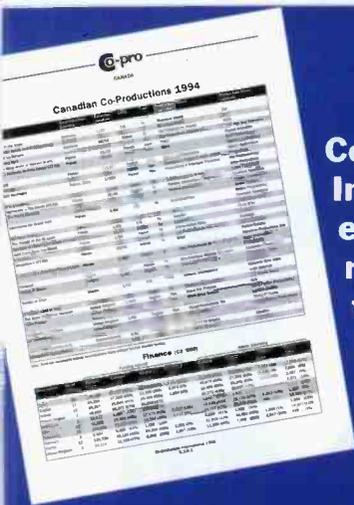
which will be extended by 20 years), again a bias in favour of users can be seen, in the provision that any agreement which was effective for the duration of the original period will continue throughout the extended period.

- Likewise, again in relation to an extended copyright work, any act done during the period of extended copyright in pursuance of an agreement entered into before January 1, 1995 is to be treated as licensed by the copyright owner subject to payment of royalties or other payments as may be agreed or fixed in default of agreement by the Tribunal.

- Where the owner of a revived copyright work cannot be identified or found by reasonable enquiry, exploitation will not constitute infringement.

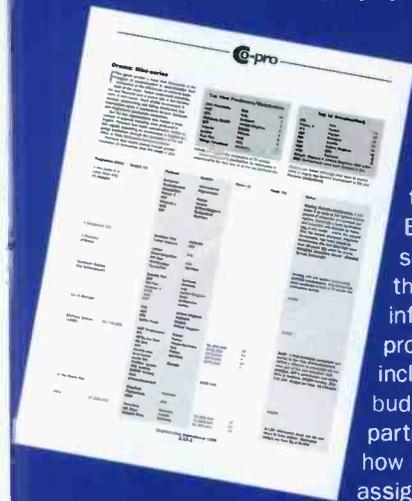
Until a body of understanding and practice has been built up over the next few years, it seems likely that a good deal of time and money will be spent in coming to terms with the disharmony that this directive will leave in its wake. Film and television producers and distributors may take consolation, however, in the potentially vast increase in the length of copyright protection that films and programs will in future enjoy in the UK and other EC countries. Throughout the EC the term of copyright in a film will run for 70 years from the end of the year in which the death occurs of the last to die of the following people: the principal director of the film, the author of the film screenplay, the author of the film dialog, and the composer of music created specifically for and used in the film. Producers and distributors, particularly those with substantial archives of older films, will need to review their holdings to ensure that they will have the necessary information on these individuals to hand if and when they need to prove the subsistence of their rights.

Stephen Edwards is a partner and Laurence Brown is a solicitor at Richards Butler, London, specializing in entertainment law



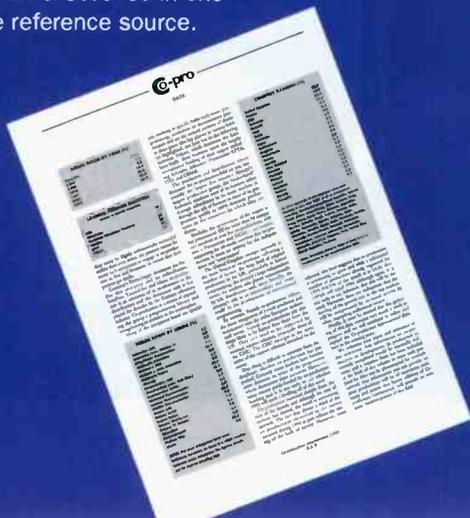
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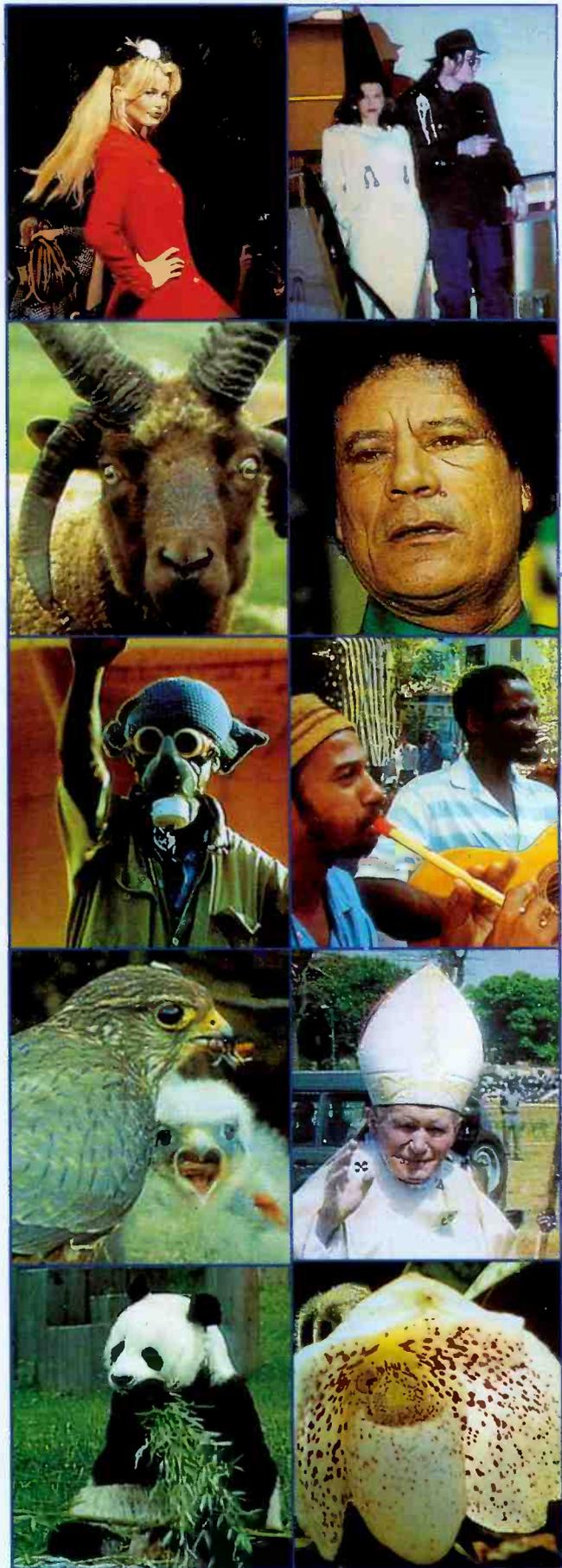
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Mining The Gold

Researchers for The Cold War and The People's Century, both massive documentary series, are scouring the world's archives for the perfect clips to illustrate stories of historic sweep. Tim Westcott talked to the producers about the art and science of film research

This December will mark 100 years since the Lumiere brothers made the first public display of moving pictures. Since then, the world's film archives have been accumulating a massive store of audiovisual memory – film reels, still photographs and tapes. Now, almost any anniversary known to schedulers can be commemorated, evoked or analysed by the visual media with a plentiful supply of yesterday's footage. Unlike old newspapers, old footage increases in value every day.

Dann Moss, president of archive company TimeSpan's production arm, TimeSpan

Entertainment, described his company's holdings as a "mine" which it is just starting to exploit. As well as developing its own productions for tv and video (see box, p.41), TimeSpan is hoping to capitalize on anticipated strong demand for material from producers working on a range of projects which depend, to a varying extent, on archive material.

One of the biggest series in-the-works right now is Turner Productions' 20-part history of the Cold War, which, according to executive producer Jeremy Isaacs, is planned to include about 12 hours of archive material.

It's obvious a series like *The Cold War*, which will attempt to tell the story of the global power struggle between the West and the Soviet Union over a 40-year period, must draw heavily on archive. But using archive isn't a production quick fix. The task of tracking down suitable material from sources all over the world, selecting footage which is appropriate, and then clearing the international rights is complex, time consuming and potentially expensive.

Isaacs, who produced the seminal historical series *The World At War* for Thames TV in the 1970s, said the series would "almost be the story of our lives. We want to give it some sort of epic narrative

sweep." The biggest editorial challenge is how to tell the story: whether to concentrate on narrow themes, such as intelligence, or on the impact of the ideological conflict in particular regions of the world.

Isaacs and his London-based team, which includes *The World At War* veteran Martin Smith as series producer, opted for a narrative approach so that the 20-part series will unfold chronologically. "Every good program should tell only one story," said Isaacs. The film sources, moving from black and white newsreel in the early days to the color images of more recent news footage, will be crucial in conveying the passage of time. "You film witnesses, remembering what things were like 50 or 20 years ago. In that sense, it enables you to catch history."

The series budget of \$600,000 an episode – or close to \$12 million overall – provides for 200 to 300 weeks of film research.

The only series comparable in size to *The Cold War* are the handful of millenium projects which are at various stages of development. Isaacs had previously developed one himself, *Century*, which figured in Carlton Television's application for an ITV franchise but was never commis-

sioned. ABC and NHK are jointly producing a series, while Turner and CBS both pondered similar projects.

At this stage, *The People's Century*, a co-production between the BBC and WGBH in Boston, is furthest forward. The 26-part series is due to start airing in the UK this September and in the U.S. next year. The BBC's version will feature between 40% and 50% archive, while WGBH is aiming for around 60%.

According to Peter Pagnamenta, executive producer for the BBC, there will be at least 25 minutes of archive in any one program. Sources for material, because it is an international series, are all over the world, and, since the series goes back to 1900, the

BBC's own massive archive will not come into play until the episodes covering the latter part of the century.



Pagnamenta: Popular experience

"We have a rather different cut on the century than straightforward political, military or diplomatic history," said Pagnamenta. "We're very much concerned with popular experience and with the great changes seen from the point of view of ordinary people.

(The series) uses a different range of archive film from what people might expect."

Social change will, therefore, be just as important as the "film of treaties being signed and great leaders meeting."

Research is a key element in the

production, and the BBC took the step, a rare one these days, of appointing a full-time researcher as part of the production team. In addition, specialist researchers were hired to seek out specific material.

Research costs, which included sending one researcher to Beijing for six weeks to view and agree a price for footage for an episode on the Cultural Revolution, are a sizeable part of the \$13 million budget. Said Pagnamenta, "Just the costs of getting them there, looking at a lot of stuff we don't want to use and the technical costs of transfer become enormous. The more original the archive is, the more expensive it becomes to find it."

The producers of the acclaimed series *Promised Land* should have had an easier time given the narrower geographic focus of their series, a six-parter on the migration of five million black Americans from the rural south to the urban north between 1940 and 1970.

Series producer Anthony Geffen said, however, that starting out they faced an enormous problem in that source material for the story appeared to be virtually nonexistent in the major archives. "The whole reason this story was so little-known is that there was very little notice taken of it by documentary reporters and photographers and other people."

Researchers for the series interviewed thousands of people who had taken part in the migration, through them gaining access to thousands of personal photographs. Records of the Farm Security Administration proved to be another goldmine.

Much of the best footage came from out-takes - material cut from films because "at the time, they weren't interested in black folks," said Geffen. Reels of film showing laborers at work

were found in the loft of one plantation house.

Promised Land aired on the Discovery Channel (which co-produced the series with the BBC) earlier this year to an excellent critical reception. USA Today's reviewer enthused: "It plays like a page-turner."

Such reactions were testimony to the producers' success in stitching together a compelling narrative from their widespread sources. The task of constructing a series out of ready-made footage doesn't, of course, end with the research. Isaacs said it is imperative that *The Cold War*, which is destined, at least in the U.S., for airing on a commercial network, be "watchable" as well as educational. Geffen added: "What we never tried to do is just to use archive to illustrate. There's a reason to use archive, especially when it's a meaningful part of the story."

Discovery, seeing the value of co-producing a high-quality series of the type which used to be associated with public service broadcasters, was keen for *Promised Land* to be made on film, despite the expense.

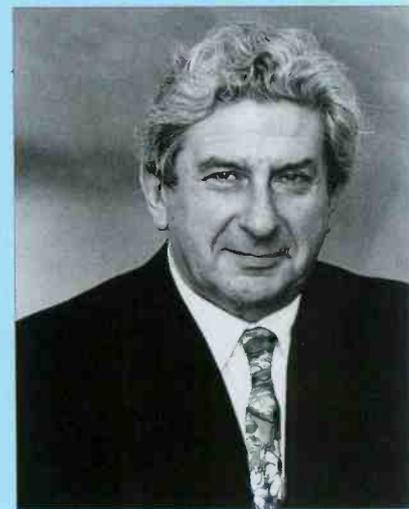
Zvi Dor Ner, WGBH executive producer of *The People's Century*, said his intention was "to find footage which is relatively fresh, which has some emotional content, technically as well as we can do. It is a high-end series. We're going after the best."

The question of viewer tolerance of black and white, sometimes grainy footage is another which producers have to take into account. *Cinema Europe: The Other Hollywood*, a six-hour series on the early years of the medium in Europe, is made up almost entirely of clips from silent films. The quality of the pictures is strikingly good. Producers Kevin Brownlow and David Gill had previously made several programs on the silent cinema, including Emmy award-winning series on Charlie Chaplin

and Buster Keaton. Telecine technology has made their work easier; because early films had fewer frames per second than in modern times, it used to be common for tv replays to look speeded up and jerky. This can be remedied by simply playing the film at the correct speed through a telecine. The use of tape rather than film also helps retain the quality of the original films.

Most of the films which make up the series have never been seen on tv and in the course of research, which took 18 months, several films which were officially thought to have been lost were "rediscovered" in private archives. "Our problem was where to find the best available print. Films were copied and recopied. It's one thing trying to access the material - another trying to access the best," said Gill.

Although much of the content of the series came from public film archives in Europe, a lot of the archives were in private hands. Brownlow believes that as much as two-thirds of the early European cinema (the series covers the period up to 1933) has been lost. Film studios, distributors and rights holders have made little effort to maintain or preserve films they own; some don't even own copies of films to which



Issacs: A watchable series

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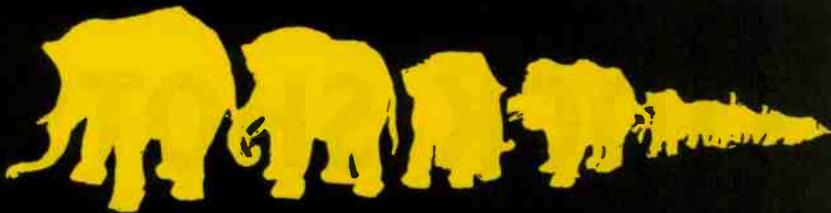
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they hold the rights. "People own the rights and are quite happy to take the fees, but don't invest anything in the material," noted Gill.

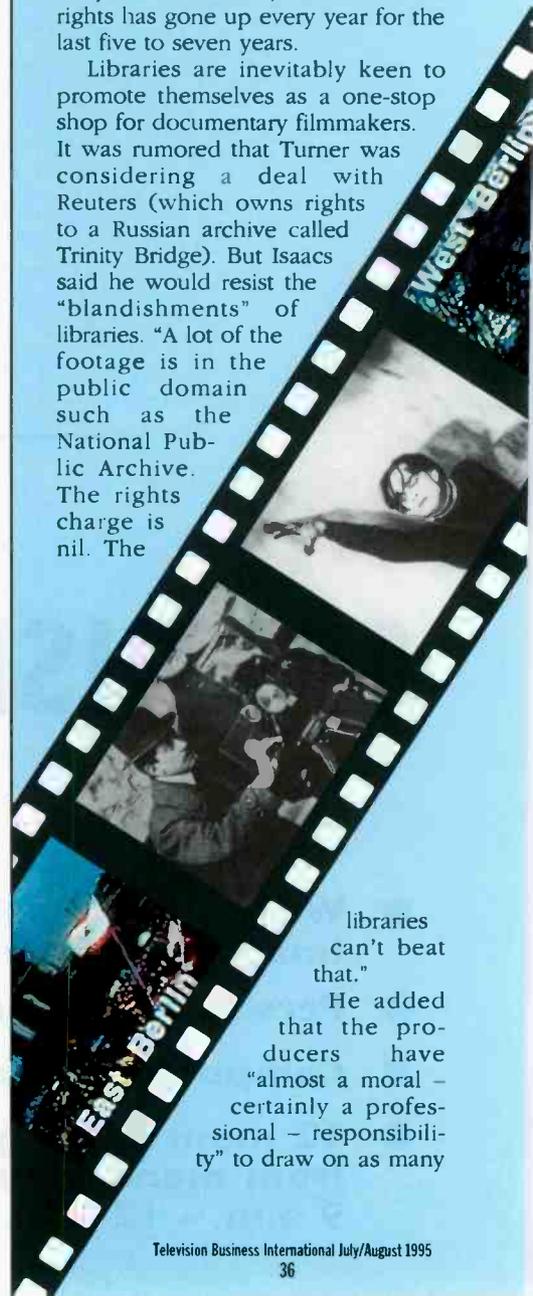
"Some companies are very mean in what they allow you to use in quantity, particularly the studios. We depend heavily on personal relations and goodwill," said Patrick Stanbury, Gill and Brownlow's partner in series producer Photoplay Productions.

The cost of archive material is starting to reflect its increasing importance in historical film-making, as well as the more commercial approach of rights owners. Geffen, who has been using archive material to make documentaries since the early 80s at the BBC, said the cost of rights has gone up every year for the last five to seven years.

Libraries are inevitably keen to promote themselves as a one-stop shop for documentary filmmakers. It was rumored that Turner was considering a deal with Reuters (which owns rights to a Russian archive called Trinity Bridge). But Isaacs said he would resist the "blandishments" of libraries. "A lot of the footage is in the public domain such as the National Public Archive. The rights charge is nil. The

libraries can't beat that."

He added that the producers have "almost a moral - certainly a professional - responsibility" to draw on as many



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The problem with single-library deals, according to film researcher Jane Mercer, is that "no single library holds everything you want. You may get 70-80%

from one source, but the best bits, the bits you really want, will be somewhere else." Moss said of the Time

Span archives: "We'd like to think we have a definitive archive, but the key to making a good production is understanding the smaller archives and the other great jewels that are out there."

Major historical documentaries are not the only source of business for archives. Locally-made, studio-based shows which use archive are a different economic proposition than the big factual series. In a lot of these cases, the use of ready-made footage fits in with a tighter budget.

How'd They Do That?, a series produced by Telepictures for CBS in the 1993-4 season, used a range of footage to explain, for example, how film stunts are done. Grundy Worldwide, which acquired European format rights, is now working on a second series for the BBC and is producing three shows for

TF1.

The use of archive

footage gave vital background to the explanation segments and saved the program from a preponderance of "talking heads," said Earl Durham, one of the producers. "Everything I've ever done I've tried to use archival footage because to me it broadens and gives breadth to a piece. Usually shows that tell you how things work bore you to death."

Although Durham hesitates to call the genre either cheap or easy, he said: "Budgets were very tight." Reality series have gone out of vogue on U.S. network tv, apart from ABC's long-running *America's Funniest Home Videos*, yet Durham believes they will be back "because they're the best and the thriftiest kind of television."

One of Europe's leading independents, Endemol Entertainment, acquires footage for many of the shows it produces for Dutch tv, and it's now looking to acquire rights for Germany, Spain and Portugal. "We use everything from commercials to hidden camera clips and reconstructions from (CBS show) *Rescue 911*," said Hedy van Bochove, vice president, acquisitions and development. Endemol also has an on-going agreement with WTN for its entertainment footage and bought Benelux rights to offbeat factual series *Tilt 23 1/2* from distributor Fox Lorber. Rather than screening the whole series, Endemol cherry-picked clips for use in its lottery show *Postcodejackpot*.

Endemol is planning to export many more of its

New Riches

Countries like Poland have only recently opened huge archive collections to the world, Chris Dziadul reports

Telewizja Polska's (TVP) archive company was formed in 1986 and has since grown into one of Poland's largest print and audiovisual archives. Owned by the Polish state, it includes all programs produced by public broadcaster TVP over the past nine years and contains at least 9.4 million items.

The company, called *Osrodek Dokumentacji i Zbiorów Programowych (ODiZP)* in Polish, joined the International Association of Television Archives (FIAT) as a full member in 1994 and in the same year provided access to around 650,000 clips. According to Ewa Podgórska, ODiZP's deputy director, demand for TVP's programming has grown considerably in recent years; its customers include local independent producers, cable operators and – on an international basis – companies from all over the world, with Japan and France particularly well represented.

TVP itself is able to draw on material contained in several other Polish archives, including *Wytwórnia Filmów Dokumentalnych i Fabularnych (WFDiF)* and *Filmoteka Narodowa*. The former, which was formed in 1949, initially dealt with documentary film and newsreel production, but in the 1960s expanded to feature films and became one of the country's leading studios.

WFDiF – otherwise known as the Documentary and Feature Films Studio – currently has a comprehensive archive which includes over 4,095 films produced from 1944 to the present date, along with all Polish newsreels made over the same period, 41,462 documentary items and 353 foreign films. It also contains valuable historical items detailing the First and Second World Wars and more than 1,000 deposited feature films produced in Polish film studios. The library is catalogued and thousands of additional meters of film from in-house productions, purchases from private collections and foreign archives are added each year.

Filmoteka Narodowa came into being in June 1955 as the Central Film Archive and was renamed 15 years later. Funded solely by the state, its collection currently includes around 15,000 mostly Polish made films and is chiefly accessed by TVP, schools and universities. Films made between 1918-41, however, are invariably sought after by foreign broadcasters in Israel and the U.S. (such as a Polish-language channel in Chicago). They are also among the most valuable, since 90% of all Polish silent movies and around 35% of talkies produced during that period have already been lost.

shows and some of the format deals could travel as well. "We are interested in footage format deals in countries where we're placing shows," said van Bochove. "It's a bit more than a local wrap-around, but it's not a completely self-produced show.

Even though it's quite expensive to clear the rights, it's cheaper than shooting your own footage." ■

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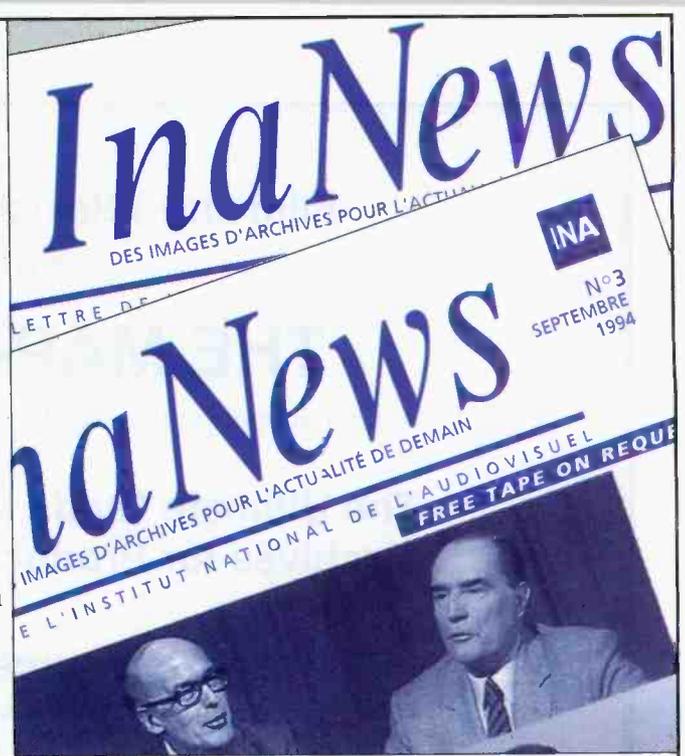
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The Price Of Gold

If the original purpose of archiving was to preserve and maintain moving images for posterity, rising demand has transformed most libraries into businesses as well. By Tim Westcott

TimeSpan Communications, a property company that branched out into archives last year with the purchase of the Grinberg Film Libraries, spent over \$10 million on the acquisition and on restructuring. But that price seems comparatively modest given the ratecard cost of clearing an hour of footage – \$250,000. Over the Atlantic, the British Pathé newsreels were bought for \$8 million from the administrators after their previous owner went bust four years ago. British Pathé News, according to joint managing director Robert Jackson, is now turning over \$5 million a year.

The cost of rare footage, such as the Zapruder film of Kennedy's assassination, or performance footage, such as anything with Elvis Presley in it, can go well beyond the scope of most documentary budgets. One producer compares the task of clearing rights for highly-prized footage to buying a Picasso. Feature film clips are also pricey: In *People's Century*, WGBH had to give up on using a 40-second excerpt from Charlie Chaplin's *Modern Times* because the fee named was equivalent to one-third of the budget.

Otherwise, the cost of footage is pretty much dictated by supply and demand. Clearance for all territories and all media (broadcast tv, cable, video and CD-Rom) in perpetuity entails the highest fees, but is a requirement for most productions destined for the international market.

Libraries are, however, ready to be flexible about their rates if the producer is buying in bulk. Moss said TimeSpan's rate card prices would drop significantly for producers buying several hours of footage. In addition, TimeSpan will help to track down footage from other libraries and negotiate a cheaper rate.

Reuters, according to head of library Pam Turner, is not only willing to negotiate, but looks for "equity" in large productions it is supplying – that is, a share of distribution revenues. The cost of accessing the London-based news agency's archive is also significantly lower for productions based in Europe.

(Another bonus for European producers is Map-TV, part of the EU's Media fund. It has supplied development loans to over 130 projects since 1991. To qualify for funding, productions must have at least 20% archive content.)

Rather than following the route of many libraries and exploiting archive by creating video, Reuters decided to develop its own tv productions, such as a weekly newsreel program for BSKyB. France's publicly-owned INA is planning to go one step further than Reuters, taking a significant equity interest alongside France 3 and A&E's History Channel in a documentary network planned for French cable.

Moss said TimeSpan aims to expand its own production from 15 hours a year this year to 45 hours by 1997. He is negotiating with Turner over one project TimeSpan has in the works, a ten-hour video history of the 20th Century.

The incentive for a broadcaster to work with an archive company turned producer is massive savings. British Pathé can make a one-hour documentary from its archive for \$11,000 to \$19,000 – using footage that would cost \$75,000 for a broadcaster to clear, according to Jackson. British Pathé has a strategic alliance with the BBC – whose archives of 450 million feet

of film and tape start roughly where those of British Pathé end – and has co-produced with British indie Primetime and video companies BMG and THE.

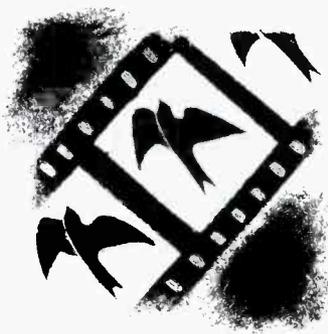
Broadcasters and producers are accumulating their own archives of tv programming and footage. Trans World International (TWI), the production company owned by sports marketers IMG, makes programs ranging from daily sports news packages for CNN and ESPN to documentary series like *The Olympic Century* and *The People's Game*. As well as its own footage, the London-based independent can draw on the Olympic archive which it represents and manages and others, such as the archive of world football federation FIFA.

Archive owners are also investing in replacing the often low-tech process of accessing archives with more state-of-the-art systems. Most are moving towards computerized, cross-indexed systems rather than card indexes. Moss said that within a year the entire TimeSpan archive would be converted to digital tape, making possible rapid delivery via satellite to anywhere in the world.



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TBI's Guide To Archives Worldwide

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20, rue Escoffier - Bat 26, 94220 Charenton, France
Tel: +33 1 43 76 00 03
Fax: +33 1 43 76 02 08

Alpa houses a collection of skiing material and medical images.

Antena 3 Television

Avenida Isla Graciosa, s/n,
28700 S.S. de los Reyes, Madrid, Spain
Tel: +34 1 623 0854
Fax: +34 1 654 84 17

The archive was set up in 1989 at the same time as the inauguration of the private television company, Antena 3 Televisión.

April Television

Birger Jarisgaten 55, 115 45 Stockholm, Sweden
Tel: +46 8 208 920
Fax: +46 8 208 933

Representative for Archive Films in Sweden, Norway, Denmark, Finland and Iceland. Houses material from Nat Geo, Timescape, Rock and Roll music collection of the 50s and 60s and the Lennart Nilsson Medical Collection.

Archive Films, Inc.

530 West Street, New York City, NY 10001, USA
Tel: +1 212 620 3955
Fax: +1 212 645 2137

Archive comprising all types of archival footage from 1896 to 1970 including footage

from silent and feature films, newsreels, industrial and educational. Affiliated offices in Amsterdam, Cologne, London, Milan, Madrid, Paris, Stockholm and Tokyo.

Associated Press TV (APTV)

The Associated Press House, 12 Norwich Street, London EC4A 1BP, England
Tel: +44 171 353 1515
Fax: +44 171 583 0207

Established in 1994, the APTV library archives all material on Betacam SP videotape. Access is via a free text-retrieval database.

Australian Broadcasting Corporation

Box 9994 Sydney, 2001 NSW, Australia
Tel: +61 2 950 3269/3267
Fax: +61 2 950 3277

The ABC's library started in 1956 and now houses 50m feet of film and video material. As well as Australian items, there is material on nearby regions such as Antarctica and Asia Pacific countries and an extensive wildlife collection.

Austrian Film and Video Ltd

Siebensterngasse 19,
1070 Wien, Austria
Tel: +43 1 523 8276
Fax: +43 1 523 0398

The archive consists of footage of newsreels and cinema magazines since 1949. Since the mid 1980s the company has been producing films about Austria and topical films for foreign tv companies.

BBC Worldwide Television

Library Sales, Woodlands, 80 Wood Lane, London W12 0TT, England
Tel: +44 181 752 5824
Fax: +44 181 576 2939

The BBC archives hold 400 million feet and covers BBC output since 1948 with a limited amount of pre-war originated material; over 150 videotapes from the mid-60s onwards, and a videocassette collection of programmes dating back mainly to 1981.

British Movietone News

Rank Laboratories Site, North Orbital Road, Denham, Middx UB9 5HQ, England
Tel: +44 1895 833 071
Fax: +44 1895 834 893

This collection houses over 5,000 newsreels covering the period 1929-1979. As part of the world's largest newsreel organization the library has extensive international coverage.

BRTN - Television Archives

A Reyersiaan 52, 1043 Brussels, Belgium
Tel: +32 2 741 3720
Fax: +32 2 733 5815

Has programs dating from the start of Belgian tv in 1953 and collections covering the period from 1930 onwards, and different territories, especially Central Africa

British Pathe News Ltd

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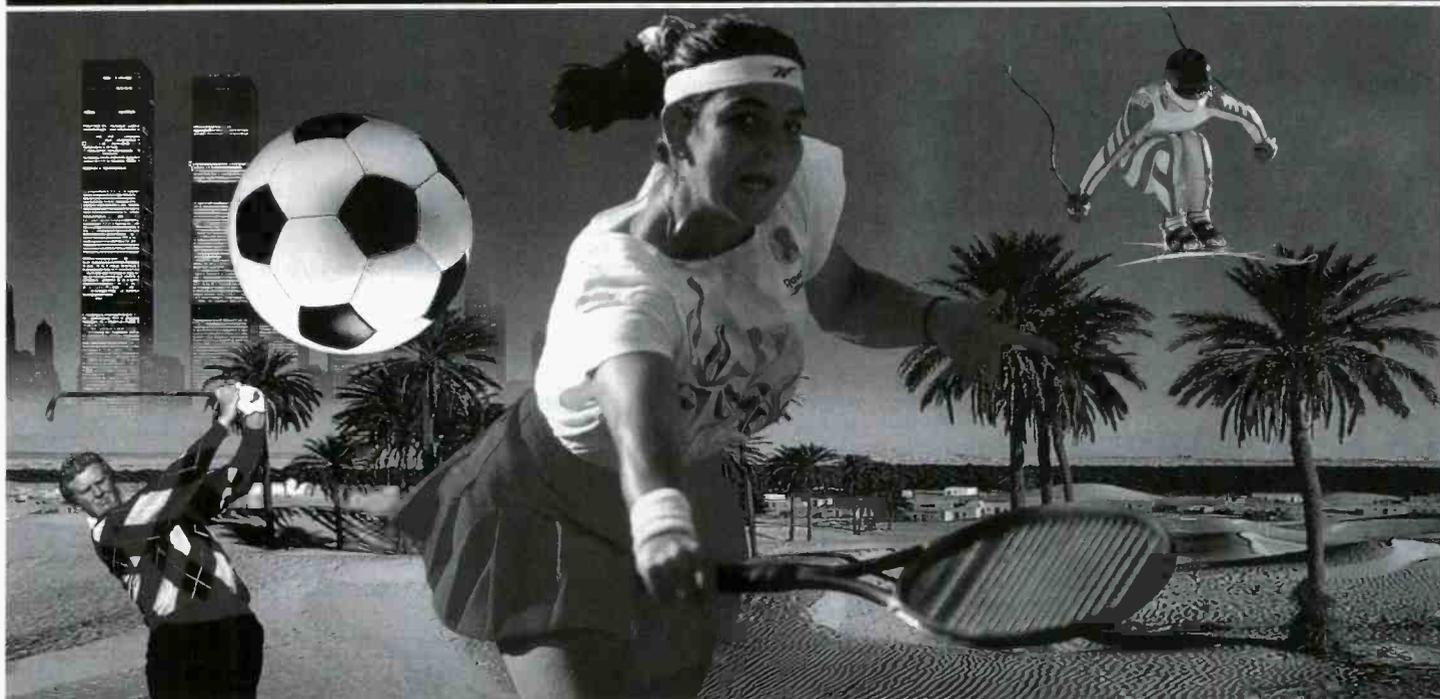
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International news archive dating from 1896 to 1970 covering political, social and technological advances, cultural and world figures and events that shaped the 20th century.

Bulgarian National Television

29 San Stephano Street, 1504 Sofia, Bulgaria
Tel: +359 2 44 34 21
Fax: +359 2 46 35 38

Established in 1964, earlier tv material in the archive dates back to the beginning of Bulgarian broadcasting in 1959.

**Canadian Broadcasting Corporation/
Société Radio Canada**

PO Box 500, Station A, Toronto, Ontario M5W 1E6, Canada
Tel: +1 416 205 7608
Fax: +1 416 205 6736

The CBC's archive has Canadian and international news from 1952, which is added to daily. Footage is shot on film from 1952 to 1975 and from then is shot on tape.

**Central Office of Information
Footage File**

Hercules Road, London SE1 7DU, England
Tel: +44 171 261 8951
Fax: +44 171 261 8555

Archive has footage of social history, industrial, geographical, scientific and political, produced by the Crown Film Unit and COI over the last 60 years.

Central Independent Television

Central House, Broad Street, Birmingham, B1 2JP, England
Tel: +44 121 643 9898
Fax: +44 121 616 1088

Collection features news and regional material from 1956 to date and all programs produced by Central Independent Television from 1982 to date.

Czech Television Archive

Ceska televize, Kavci hory, 14070 Praha 4, Czech Republic
Tel: +42 2 423326
Fax: +42 2 6121 2885

The archive of the former Czechoslovak tv, since 1993 the Czech Television Archive, collects audiovisual material dating from 1953 onwards.

Danish National Film Board

27, Vestergrade, 1456 Copenhagen Denmark
Tel: +45 33 13 2686
Fax: +45 33 13 02 03

Established in 1939, the ministry of culture funded Statens Filmcentre is a national film institution which supports the production and purchase of all visual genres, including documentaries, short films, video experiments and children's films.

Danmarks Radio

TV-Byen, 2860 Søberg, Denmark
Tel: +45 35 20 38 50
Fax: +45 35 20 38 08

The Danish national broadcaster's tv archive includes programs broadcast from 1951 to the present. DR also owns a historical archive made up of private collections dating from 1896.

Education and Television Films Limited

247a Upper Street, London N1 1RU, England
Tel: +44 171 226 2298
Fax: +44 171 226 8016

Archive covers all aspects of history and life in USSR, China, Eastern Europe, Vietnam, Korea, Mongolia and Africa.

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Studio Hamburg, Jenfelder Allee 80, D-22039 Hamburg, Germany
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Fax: +49 40 6688 5399

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Gaumont Film Library

24 rue Jacques Dulud, 92200 Neuilly-sur-Seine, France
Tel: +33 1 46 43 23 30
Fax: +33 1 47 38 12 18

The archives of Gaumont, founded in 1895, include feature films and cinema newsreels dating from 1897 to 1973. The collection, which holds 150,000 titles, is not being added to.

German Federal Archive

(Bundesarchiv - Filmarchiv)
Fehrbelliner Platz 3, 10707 Berlin, Germany
Tel: +49 30 8 68 11
Fax: +49 30 8 68 13 10

West and East German film archives, housed in Koblenz and Berlin respectively, are in the process of being merged in Berlin. The Bundesarchiv, one of the largest in Europe, includes 900,000 cans of amateur, documentary and feature films, news and current affairs.

Greenpeace Communications Video Library

5 Baker's Row, London EC1R 3DB, England
Tel: +44 171 833 0600
Fax: +44 171 837 6606

The video library holds footage on Greenpeace International campaigns and environmental issues. Subjects include marine and toxic pollution, atmosphere and energy, nuclear issues.

Grinberg Film Libraries

630 Ninth Avenue, New York City,
NY 10036, USA
Tel: +1 212 397 6200
Fax: +1 212 262 1532
1040 North McCadden, Hollywood,
Ca 90038, USA
Tel: +1 213 464 7491
Fax: +1 213 462 5352

Acquired last year by TimeSpan Communications, the Grinberg library includes the Pathé and Paramount newsreel collections and a number of specialist collections. TimeSpan recently signed a five-year deal with ITN to represent its archive in the U.S.

Image Bank

111 5th Avenue, New York, NY 10003, USA
Tel: +1 212 529 6700
Fax: +1 212 529 8889
17 Conway St, London W1P 6EE, England
Tel: +44 171 312 0300
Fax: +44 171 394 9111

The Image Bank is the leading stock library with 66 offices worldwide. Among the 200 companies it represents are MGM, Turner and the Audubon Film Library.

Independent Television News

The Television News Archive, 200 Grays Inn Road, London WC1 8XZ, England
Tel: +44 171 430 4771
Fax: +44 171 430 4453

Collection consists of full coverage of UK & world events from 1955 to date, including all ITN news programs for ITV, Channel Four and Superchannel, ITN documentaries and special projects. UPITN and WTN programs from 1967 to date.

Institut National de l'Audiovisuel - INA

4 avenue de l'Europe, 94366 Bry-sur-Marne, France
Tel: +33 1 49 83 20 00
Fax: +33 1 49 83 25 85

The collection houses footage of news, public affairs, and sports holdings, some 40,000 hours of film and video material, covering French and international current events since 1949.

International Video Network Limited

107 Power Road, London W4 5PL, England
Tel: +44 181 742 2002
Fax: +44 181 995 7871
2246 Camino Ramon, San Ramon, Ca 94583, USA
Tel: +1 510 866 1121

The IVNL archive comprises over 100 travel destinations, sporting action and adventure shots. Local culture, dance art and food footage is also available.

London Weekend Television - Images

The London Television Centre, Upper Ground, London SE1 9LT
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Archive includes extensive catalog of over 2,000 feature films dating from 1925 onwards. Also keeps tv series from 1950 onwards and stock footage library.

The National Film Archive

Národní Filmovy Archiv
Národní 40, PO Box 1001, 1121 Praha 1,
Czech Republic
Tel: +42 2 2422 7137
Fax: +42 2 2422 7744

Archive was established in June 1943. Fiction and non-fiction (documentary, popular science, newsreel, animated) films made during the period from the beginning of Czech cinema (1898) up to the present are held.

**National Film & Television
Archive - London**

21 Stephen Street, London W1 1PL, England
Tel: +44 171 255 1444
Fax: +44 171 436 7950

Collection houses over 146,000 titles dating from 1895 to the present day including: feature films, shorts, documentaries, newsreels, amateur films and television programs.

**National Geographic
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1600 M Street North West, Washington DC
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Tel: +1 212 841 4460
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4370 Tujunga Blvd, Studio City, Ca 91604,
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Tel: +1 818 506 8300
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Archive has 10 million feet of 16mm original film out-takes from 25 years of National Geographic television specials, explorer and educational films including a wide variety of wildlife, adventure, exploration and archaeology, scenic, exotic people and places.

New Zealand Television Archive

Television New Zealand Ltd, 100 Victoria
Street West, PO Box 3819, Auckland,
New Zealand
Tel: +64 9 375 0941
Fax: +64 9 375 0872

TVNZ's archive features a diverse range of New Zealand scenery footage as well as covering the whole spectrum of natural history footage - Antarctic shots on the one hand and

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P.O Box 26444, 1202 Hilversum, Netherlands
Tel: +31 35 778037
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NOS Sales handles the distribution of tv-programs and archive material of all Dutch public broadcasters, such as AVRO, TROS, VARA, NCVR, KRO. The Dutch newsreel archive of Polygon is also part of the NOS collection.

**NRK - Norwegian Broadcasting
Corporation**

NRK TV International - Archive Sales, N-0340
Oslo, Norway
Tel: +47 22 45 96 78
Fax: +47 22 45 73 10

Collection houses NRK's productions from the 1960s to the present date. Also, the News Reel Library of Norwegian Film - 1941 to 1963 and an archive of various events in Norway - 1905 to 1940.

**Olympic Television Archive
Bureau**

Axis Centre, Level 5, Hogarth Business Park,
Burlington Lane, Chiswick, London W4 2TH
Tel: +44 181 233 5353
Fax: +44 181 233 5354

Administered by Trans World International, this archive contains official footage from the International Olympic Committee and covers the entire history of the Olympic Games.

**ORF - Austrian Broadcasting
Corporation - Television Archive**

Würzburggassasse 30, 1136 Wien, Austria
Tel: +43 1 878 78 23 80
Fax: +43 1 878 78 27 39

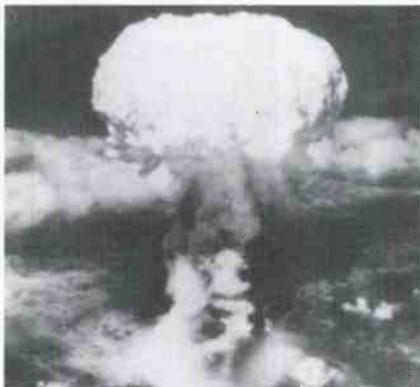
This archive comprises all the programs of the ORF since its foundation in 1955.

Oxford Scientific Films

Lower Road, Long Hanborough,
Oxford OX8 8LL, England
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Koln: 0221-36-20-23
Fax: 0221-36-41-12

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Paris: 01-40-32-47-47
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Milan: 02-70635445
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Tokyo: 03-3406-9055
Fax: 03-3406-9066

Archive Films (Scandinavia)

Stockholm: 08-20-89-20
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Pathe Television Archive

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Paris, France
Tel: +33 1 49 48 15 15
Fax: +33 1 49 48 15 10

Archive comprises: Newsreels from 1895 to 1980; silent and feature films from 1895 to 1989; and tv programs from 1960 to the present day.

Radio Telefis Eirean - RTE

Library Sales, RTE, Donnybrook, Dublin 4,
Ireland
Tel: +353 1 2083111
Fax: +353 1 208 3096

The RTE archive contains all transmitted news items from 1985 and a collection of archive film of Irish interest acquired from international news agencies and local sources.

Reuters Television Library

40 Cumberland Avenue, London NW10 7EH,
England
Tel: +44 171 510 6444
Fax: +44 171 510 8568

Collection houses an international news archive dating from 1896, including newsreels and the Visnews Daily Television News Services 1957-1992 and Reuters Television Daily News Services.

RTBF - IMADOC

Boulevard Reyers, 52,
1044 Brussels, Belgium
Tel: +32 2 737 24 62
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Archive has programs made by the RTBF since start up in 1953: 45,000 cans of documentary, feature films, news and current affairs, science and education.

Rete Televisive Italiane - Spa

(A Fininvest Group company)
International Library Sales Head Office:
Via Marconi, 27 20090 Segrate Milan, Italy
Tel: +39 2 210 25586
Fax: +39 2 210 28476

The RTI archive has over 30,000 video tapes of stockshots coverage covering all main Italian and international events from the late 1970s to date, plus programs produced by Fininvest's three national networks since 1980.

Royal Society for the Protection of Birds (RSPB)

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Sports Video Library

Axis Centre, Level 5, Hogarth Business Park,
Burlington Lane, Chiswick, London W4 2TH
Tel: +44 181 233 5500/3500
Fax: +44 181 233 5301

Library has footage of TWI events covering golf, tennis and soccer, test cricket, gymnastics, show jumping, skating, snooker, etc.

Steven Spielberg Jewish Film Archive

Law Building, Hebrew University,
Mount Scopus, Jerusalem, Israel
Tel: +972 2 812 061
Fax: +972 2 322 545

Established in 1970, this archive includes the Israel Database Filmography Project, which gathers information on all films dealing with the Jewish/Israeli experience.

Survival Anglia Limited

Anglia House, Norwich, NR1 3JG, England
Tel: +44 1603 615 151
Fax: +44 1603 765 886/7

Library houses 10 million feet of natural history film shot on 16mm. Footage is in color and available for television, cinema, commercial, educational and non-theatrical use.

SVT - Swedish Television

Library Sales- S
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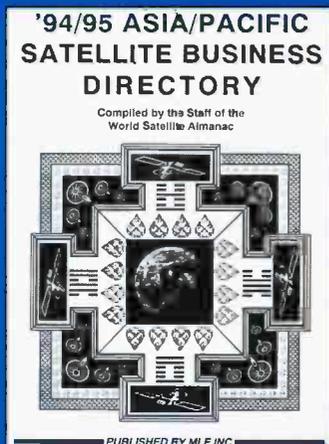
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The Television Centre, Kirkstall Road, Leeds LSJ 1JS, England
Tel: +44 113 438 283
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Collection has regional news material covering most of Yorkshire region, and all programs produced by Yorkshire TV from 1968 to date - including documentary, drama and children's.

ZDF Central Division - Archive, Library and Documentation

Postfach 4040, 55100 Mainz-Lerchenberg, Germany
Tel: +49 6131 704700
Fax: +49 6131 70 49 41

The German public broadcaster's complete program stock is housed in the library.

The archives listed in this section are mainly taken from two sources: 1. Film and Television Collections in Europe: The MAP-TV Guide (published by Blueprint). For more information, contact The British Universities Film & Video Council, Tel: +44 171 734 3687, Fax: +44 171 287 3914. 2. The FOCAL (The Federation of Commercial Audiovisual Libraries Ltd) Members' Guide. Contact Focal on Tel/Fax: +44 181 423 5853.

PRODUCT NEWS

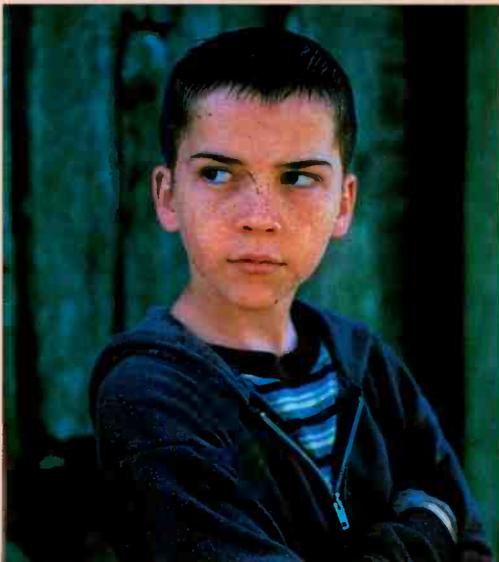
Buyers In Murderous Screenings Battle

IF it didn't quite end up with blood on the carpet, the bidding activity surrounding Fox's new series *Murder One* at the May/June screenings in Los Angeles was by all accounts the most intense for some years. The fierce competition was partly a tribute to expectations of the Steven Bochco-produced show, which recounts the story of a murder trial, and partly the increased willingness of broadcasters to put money on the table to secure Hollywood product at pilot stage.

Marion Edwards, executive vice president, international television, at Fox, said there was competitive bidding for the show "in every single market." ABC has committed to 22 episodes of the series. The BBC and Rupert Murdoch-owned BSkyB reportedly paid a combined \$250,000 an hour for the UK broadcast and pay-tv rights.

Although Edwards wouldn't confirm what broadcasters paid, she said the show was attracting "higher license fees than the norm."

"It seemed as though everyone wanted *Murder One* wherever they came from," said Alan Howden, head of acquisitions for the BBC. "It's a very well-crafted piece of work. There's an element of risk about whether it will hold the audience's attention... We'll have to make sure we get their interest early on."



MCA's *American Gothic*: Screenings hot property

Howden said that although they have made joint bids in the past, this time BBC and Sky negotiated separately. The other UK broadcaster bidding for the series was Channel 4, which instead opened its chequebook for MCA's *American Gothic*.

Colin Davis, president of MCA TV International, said the pubcaster had "paid the highest price ever for a one-hour series." The Sam Raimi-produced series, airing on CBS, also sold to RTL in Germany, RTVE, Mediaset, Canada's WIC and Australia's Network 10.

Other hot series were Fox's *Space: Above And Beyond* and Paramount's *J.A.G.*, CBS's *Central Park West* and Warner Bros' *The Client* and *Charlie Grace*.

According to Rainer Siek, head of CBS Enterprises, *Central Park West* sold everywhere in Europe with multiple bids in France, Germany and Italy, and to Canada, Australia and New Zealand. NHK in Japan was interested in the series, the glamorous saga of a New York publishing family. ITV in the UK, which wanted the series, demurred at doing a joint deal with BSkyB, which had already bought the show. ITV, one of the biggest networks in Europe, came away without buying anything.

Siek said he had been pleasantly surprised by interest in *Caroline in the City*, a sitcom which NBC has given a prime site in its schedule between *Seinfeld* and *ER*. He said the show had sold in all English-speaking territories, to Germany and Scandinavia. "It's not impossible to sell comedy series, but more and more, buyers wait until you have two seasons of a proven series and then they might buy it and strip it."

MCA's *Partners* sold to the same territories as *American Gothic*, while Touchstone sitcom *If Not For You* sold to the BBC.

Overall, buyers and distributors said the screenings were getting bigger, better organized and a crucial element of broadcasters' year-round battle for viewers the world over. Around 800 buyers were in LA over the three weeks of the screenings.

"The screenings have come a long way. Years ago they used to be a happening for South American buyers," said Klaus Lackschewicz, head of ARD Degeto. "It has become a seller's market. You have to get in there first."

- The Cartoon Network has unveiled its first pre-school programming venture, a partnership with the Children's Television Workshop (CTW). They will develop *Big Bag*, a weekly, commercial-free program which will feature a Muppet character designed by Jim Henson Productions – the first collaboration between Henson and CTW since *Sesame Street*. The 13-part series will launch on the Cartoon Network in May 1996 as part of a two-hour block airing at weekends. The 55-minute show will combine original, co-produced and some acquired domestic and international animation.

- Film Roman has sold the UK rights to animated series *The Twisted Tales Of Felix The Cat* to ITV and The Children's Channel. ITV will air the series simultaneously with CBS from the beginning of September, with the satellite channel launching the 13x30-minute series from the end of the month.

- NBC has formed a joint venture with UK sports promoter Parallel Media Group to supply live and recorded sports programs for its international networks. NBC Super Sports will be managed by Parallel Media, which is already supplying a sports strand to European satellite network NBC Super Channel. Chairman is Dick Ebersol, president of NBC Sports, with Parallel's David Cicilattira as chief executive. NBC Super Sports will also supply NBC Super Channel Asia, due to launch on August 5, rolling out to NBC affiliates in Mexico and Latin America. Events featured in Europe will include NCAA basketball, PGA golf, Davis Cup tennis and American college football. Advertisers will be offered a global buy for airtime and sponsorship, including the U.S. network.

- Nelvana has pre-sold its \$5.2 million animated children's series *Blazing Dragons* to the UK's ITV network and signed up French and German partners. David Ferguson, the Canadian company's director of co-production, said the 13 x 30-minute series was fully financed and though he wouldn't say who the its partners were, said Nelvana had worked with them before. Devised by former member of the Monty Python team, Terry Jones, *Blazing Dragons* is set in the land of Camelhot, where the good guys are the dragons, the bad guys are the knights and the round table is square.
- The Southern Star Group and Film Australia have formed an alliance to develop and produce drama projects currently in development at Film Australia. Ron Saunders, the creator of Film Australia's *Johnson and Friends*, *The Girl From Tomorrow* and *Escape From Jupiter*, will join Southern Star Entertainment to head up new venture Southern Star Pacific in mid-July.



- Warner Bros. International Television Distribution has teamed up with animation producer Fred Wolf to co-produce 26 episodes of the half-hour animated series *The Fantastic Voyages of Sinbad the Sailor*. WBIDT will handle worldwide distribution for *Sinbad*, its first internationally co-produced animated series.
- Marvinia Anderson has joined Kushner-Locke International as president of its tv distribution arm. Anderson, who will report to Gregory Cascante, president and CEO of Kushner-Locke International, was previously head of world sales for WIN.

Star TV Warms Up Production Activity

"THE first episode took 12 hours to tape and 70 hours in post production, but it's all part of a learning curve," said Star TV's head of production John O'Loan, talking about *Kriket*, its Indian gameshow production.

A 30x60-minute co-production between Star, Grundy Productions and United Television (UTV) – of which News Corp subsidiary Twentieth Century Fox owns 50% – *Kriket* is airing on Star Plus and, despite a few initial teething problems brought about by an initial lack of local tv-making experience, a second series has already been commissioned.

Kriket may be one of the pan-Asian broadcaster's earlier forays into the field of original production but it won't be the last. O'Loan said that for Star Plus in India alone, around 900 hours of programming is being planned, with six new infotainment and light entertain-

ment shows already in the pipeline.

India and Taiwan are Star's biggest markets in terms of ad revenue. In Taiwan, the pan-Asian broadcaster produces a twice weekly, 45-minute talkshow for the Chinese Channel called *The SuperTalk Show* plus a number of productions for music channel Channel V.

This year it is also making a foray into drama, co-producing a Mandarin-language 30x60-minute drama called *Fist Of Fury* with Hong Kong terrestrial ATV, which will air the production in Cantonese. Two other large drama co-productions with ATV are also in the pipeline, said O'Loan. Elsewhere Star is working with Thai cable operator Thaisky on original productions and has a joint venture with Filipino company Viva to make Tagalog-language films. Conversations have also begun in Indonesia.

Alliance Looks South Of The Border

CANADA'S Alliance Communications Corporation, the country's premier independent production house, was last month reported to be negotiating separate deals with U.S. companies Liberty Media and Turner Broadcasting.

TCI's programming subsidiary Liberty Media is believed to be backing an Alliance bid for the broadcast assets of John Labatt Ltd, on the block following the sale of the brewer to Belgium's Interbrew. Under Canadian ownership rules, Interbrew is obliged to sell the broadcast interests: sports network TSN/RDS, 80% of the Canadian Discovery Channel and 25% of pay-per-view channel Viewer's Choice.

The sale, valued in the \$780-820 million (U.S.) range, is expected to be completed by late July. Industry sources say Liberty would

put up \$160 million, with Alliance raising \$100-130 million from pension fund backing and \$550 million in debt.

Meanwhile, Alliance, which has been searching for a U.S. deal that would provide synergies and cash for expansion, is said to be discussing the sale of a 20% stake (the current maximum permitted foreign ownership) to Turner.

Analysts regard the possible deal with Turner as more favorable for Alliance than the bid for the Labatt interests, given the debt load involved. If the deal goes through, Alliance could be expected to gain access to Turner programs and increase co-production activity.

Alliance itself did not comment about either negotiation.

Granada and Yorkshire Concentrate Sales

IN the latest phase of concentration to hit the UK's ITV system, two of the biggest ITV companies, Granada LWT and Yorkshire Tyne Tees TV, are to merge their international sales operations.

The new entity, jointly owned by the two companies and based in London, will be launched at Mipcom. A name still hasn't been chosen.

YTTTV managing director Bruce Gyngell will be chairman and Nadine Nohr, currently head of sales at GLWT, will be director of sales. A chief executive is due to be announced shortly.

Nohr said the entity would have "something like 7,500 hours of active programming to sell," making it the biggest UK distributor after the BBC. The merger will bring a range of product such as police dramas *Prime Suspect*, *Cracker* and *A Touch Of Frost* and documentary series *First Tuesday* and *World In Action* under the same roof, giving the distributor "greater clout and a competitive advantage in the marketplace," said Nohr.

The merger would also enable joint development of merchandising and new media activities, as well as making potential investments in start-up broadcast ventures easier.

DR Banking On Support For Major Drama

DANMARKS Radio (DR) is currently producing Scandinavia's most expensive film or television venture – a 12-hour costume drama about JC Jacobsen, the founder of the Carlsberg brewery.

Bryggeren (The Brewer), a co-production between the pubcaster and independent producer Nordisk Film, is budgeted at Dkr100 million (\$19 million), weighing in with a cast of 4,200 and an Oscar-nominated director, Kasper Rostrup. Filming will take one year with the first episode due to air on DR at Christmas 1996. Vital extra cash came from the Kabelfunden (which funds co-productions by Scandinavian pubcasters) and a sponsor, Den Danske Bank.

By law DR cannot sell spot advertising time, but it is allowed to sell program sponsorship – regarded by many as just another form of spot advertising.

Exploitation of the connection with Den Danske Bank, which is investing \$2.3 million, will be limited. On-screen, the bank receives eight second static credits before and after each program – the most allowed by Danish



The Brewer: Bank supplied 10% of budget for sponsor credits

regulations. The bank won't be featured on trailers. And while potential for off-air PR and promotional activity is enormous, it is restricted by mutual agreement.

Television production deals of this size are rare in any country – let alone one as small as Denmark, and producers are often suspicious of the motives of potential sponsors.

The series probably would have been made even without sponsor support.

- CNN International is to produce at least one hour a day of current affairs and entertainment programming for India's state broadcaster Doordarshan under an agreement signed last month. CNNI will be transmitted to a claimed 16 million cable tv viewers in India via Doordarshan's transponder on the Insat 2B satellite, making it the first foreign network to use an Indian transponder. The feed will include one and a half hours of Doordarshan programs on weekdays and two hours at weekends. Turner International has appointed Bhaskar Pant, previously at the Sony Corporation of America, as its president in India.

- Solomon International Enterprises (SIE) and Canal Plus have signed an agreement to handle international distribution for animated series *TerraTopia*. The 26-part series, produced by Los Angeles-based TerraTopia Productions, will be available in fall 1996, and will be accompanied by a CD-Rom series developed by Virgin Sound and Vision.

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The Svensk Text International Group is by far the largest and most experienced subtitling organisation in Europe. Together with associated companies in Denmark and Norway, it produces subtitles in seven countries for well over 25,000 hours of television, video and cinema annually. While the core business of the Group is subtitling, it also offers dubbing, transmission services and specialised subtitling and transmission equipment.

For subtitling, speak to Nils-Olof Westberg at Svensk Text.

MediaDubb International is a company in the ST International Group specialising in voice dubbing of animated features and series. In January 1994 the company moved to new premises, which have three fully digital studios, one large enough to dub full length feature films. A fourth digital studio will be put into production in June. In 1994 MediaDubb dubbed some 500 episodes of animated series into Swedish and administrated the same number for dubbing into Norwegian and Danish by subcontractors.

For dubbing, speak to Per-Håkan Westberg at MediaDubb.

TVT (Scandinavian TV Traffic) is a specialised playout house using a highly automated system of robotics and digitised hard disks. TVT can handle any client's traffic and transmission requirements. It can uplink directly to satellite and is one of the first companies in Europe to use the digital MPEG-2 transmission format.

For traffic and transmission, speak to Kersti Winblad at TVT.

 Subtitling International Sweden
Svensk Text AB

Box 11092, S-100 61 Stockholm, Sweden.
Phone: +46 8 642 12 55. Fax: +46 8 642 19 30.

Media
DUBB
INTERNATIONAL

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TVT

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Micro Economics

MMDS, or microwave distribution, offers a cheap and quick way of carrying tv channels to viewers. Digital compression could make it even more appealing. As Jean-Luc Renaud reports, operators in the U.S. are well ahead of the game

Transmitting television services has always been an expensive business, whether it's via terrestrial broadcast, cable or satellite. Receiving television can be onerous as well, especially when a home satellite antenna and decoder are required. It is, thus, no surprise that television – multichannel television, in particular – made a late entry, if at all, into the less well-off countries.

Many of those developing countries are not sitting idle, though. Over 35 of them are deploying what is known as multichannel microwave distribution systems, MMDS for short. But MMDS is not the preserve of the Third World. The advantages of the technology have seduced 175 operators in the United States who are currently serving about 700,000 subscribers. Western Europeans might be forgiven for not taking MMDS seriously – yet. With the exception of Ireland, no country in the region has taken up the technology on a commercial basis. Only in Eastern Europe is what the Americans call wireless cable taken seriously. At the latest count, some three million subscribers in 57 countries are served by MMDS systems.

But what is MMDS? Simply put, MMDS is a technology capable of distributing up to 50 tv channels terrestrially over-the-air using much higher frequency bands than conventional tv broadcasting. Signals for MMDS delivery at the transmitter site originate from a variety of sources: satellite, terrestrial and cable-delivered tv services in addition to locally-originated services.

On the technical side, the MMDS channels are transmitted from an omnidirectional or directional antenna having extensive line of sight in all directions. The range of a transmitting antenna can stretch up to 60 kilometres depending on the broadcast power and the topographic conditions. Transmission power used ranges from 1 to 100 watts – considerably below the transmission power requirements of VHF and UHF terrestrial broadcasting stations.

At the viewers' end, a small rectangu-

lar parabolic-shaped antenna receives polarized signals. The microwave signals are then down-converted to standard or cable VHF or UHF channel frequencies. The tv signal is then fed directly to a tv set or a set-top converter, and can be scrambled.

What is the attraction of MMDS? The fact that many countries have deployed MMDS systems goes a long to explain the attractiveness of the technology: low cost and fast start-up.

Exact dollar figures may vary from country to country. Andrew Kreig, vice-president of Washington-based Wireless Cable Association International (WCAI) provides the following estimates: each of the single transmitters used to transmit up to 50 channels costs from \$250,000 to \$400,000, including duplexers and backup spares. Tower construction, antennas and installation will cost from \$20,000 to \$80,000. The MMDS downlink antennas and receivers for import of programming typically cost about \$80,000.

Cost figures per MMDS subscriber make for comfortable reading when compared with the costs of alternative network transmission technologies. Kreig estimates that connecting a customer to a broadband optical fibre network comes to just under \$2,300 (based on a 40% service take-up). In the case of an hybrid fibre/co-ax network, the cost per subscriber is down to \$1,900. But, the cost per subscriber served by an interactive MMDS system offering telephone as well is as low as \$1,000 (Figure 1).

Gerard Korahnke, R&D manager at antenna maker Tonna Electronique, calculated the cost of bringing 12 tv channels to the home in France. The cable option would cost \$800 per subscribing household, satellite would cost between

Table 1: Comparison of cost elements

Broadband Optical Fibre System

	Home	Customer*
● Fibre to trunk and feeder:	\$250	\$625
● Digital broadband switch:	\$100	\$250
● Fibre distribution and node:	\$400	\$1,000
● Coax drop and home wiring:	\$150	\$150
● Install home terminal:	\$250	\$250
● Storage units:	?	?
● Total Cash Cost:	\$1,150	\$2,275

Hybrid Fibre-Coax System

● Replace trunk with fibre:	\$250	£625
● Upgrade coax distribution:	\$250	\$625
● Upgrade home installation:	\$50	\$50
● Install home terminal x 1.3:	\$500	\$500
● Switching systems:	\$40	\$100
● Storage units:	?	?
● Total Cash Cost:	\$1,090	\$1,900

Interactive MMDS System, with Telephony

	Per customer
● For 100,000 customers:	
● Home install/antenna, etc:	\$290
● Home terminal unit (1.33):	\$550
● Total interactive:	\$840
● Nodal transmitters \$270k @:	\$100
● Central headend facilities:	\$55
● Interconnection system:	\$105
● Total with full telephony:	\$1,000

* Based on 40% subscriber market penetration

\$1400 and \$2700, but MMDS would cost between \$550 and \$650. Terrestrial over-the-air broadcasting is cheaper – \$470 per home – but, in its present configuration, the network can only provide about six channels.

U.S. engineering consultants Baylin & Berkoff estimate that, to serve 50,000 subscribers, a cable TV system would cost in the region of \$50 million, whereas the figure for a MMDS system would be about \$15 million.

Introduced in China in 1990, MMDS is now seen as the medium of choice to reach rural communities. Already 700,000 households in the capital Beijing are served by an eight-channel 50w transmitter. There are currently 24 networks serv-

ing on average 100,000 subscribers. Some of the regional MMDS networks transmit in a 80km radius. Installation costs turn out to be \$30-35 per subscriber.

In Mexico City, MVS Multivision began operation in 1989 and has close to 300,000 wireless cable customers - a 12-fold increase from its level in 1990. The operator predicts 540,000 in the country, including 420,000 in Mexico City.

The Panafrican Rebroadcasting Network (Panafnet) - a private consortium which seeks to promote the diffusion of television in Africa through MMDS - unveiled a low-cost integrated MMDS transmitter at a trade fair in Dakar, Senegal, last month in collaboration with the French-speaking TV5 Afrique channel. Panafnet aims to establish 36 MMDS networks within the next three years, forecasts between 250,000 and 350,000 subscribers.

Another important factor that makes MMDS operations attractive is the comparatively short set-up time. Systems can be deployed in as little as four months.

Digital compression is certain to boost the fortunes of MMDS. Indeed, compared with conventional terrestrial and satellite broadcasting, MMDS can support interactive and transactional services much more easily. In so doing, MMDS may become an essential component of the so-called information superhighway.

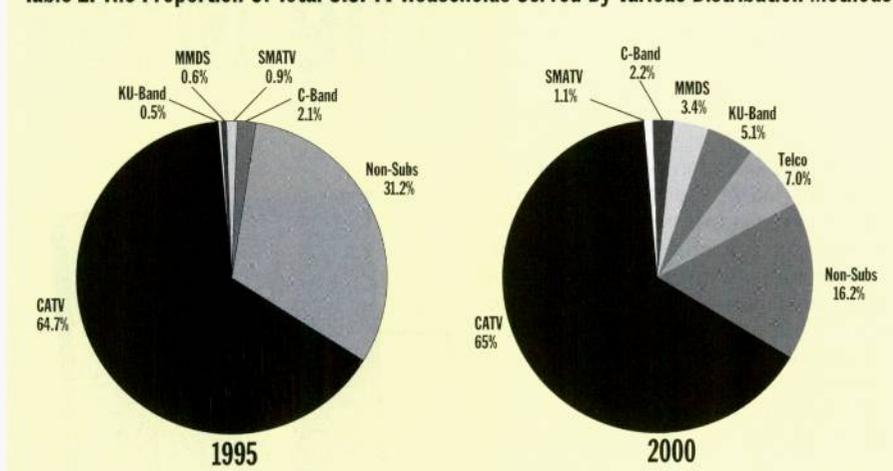
Bell Atlantic and Nynex recently made the largest single investment in wireless cable history, providing \$100 million of financing for CAI Wireless Systems. The U.S. telcos said they were willing to make this investment because of progress in digital compression that will allow wireless to offer more than 100 channels, including advanced services. Wireless cable is seen by telcos as an early entry strategy for video, allowing them to begin providing multichannel video programming and building a customer base in their telephone service areas before they can finish building wired systems.

It could well be that the transition to digital may revive the European fortunes of MMDS - even in its analog version. That is at least the hope of the engineers, operators, service providers and manufacturers who gathered in Metz, France, in May, as part of the Digital Microwave Multipoint/Multichannel Propagation (DIMMP) project - an undertaking of the European Union's RACE industry support program. At this occasion, an interest group was set up, tentatively named Broadband Wireless Association.

Digitization also excites the MMDS operators in the United States. The industry recently set up a new R&D group - the Wireless Cable Digital Alliance - to develop digital technologies

none of the existing MMDS operations in Europe uses this band, and in all those countries who have allocated this band, no commercial MMDS operations are planned - with the exception of the UK.

Table 2: The Proportion Of Total U.S. TV Households Served By Various Distribution Methods



for over-the-air delivery of multichannel digital video programming and other services. The alliance plans to develop wireless technologies that will enable consumers to receive 150 to 300 channels, including near video-on-demand pay-per-view offerings. Interactive services also are on the agenda.

Prototype chip sets for digital wireless are expected to be ready this month, and prototype full set-top boxes by July. Set-top boxes are expected to cost about \$350 per subscriber, and current prices for digital headend equipment are as much as \$20,000 per compressed program channel. The price of headend is expected to drop to \$8,000-\$10,000 per channel quickly.

Whatever the video delivery mechanisms, the transition to digital is certain to be a complex and slow process, but worth it.

An industry generally prospers once technical norms and standards have been agreed by as wide an international community as possible. Equipment can be developed for the mass market and economies of scale can be gained. What is the prospect of that happening to the MMDS industry? If the wide variety of frequency bands used by MMDS operators across the world is any indication, this prospect is not great.

True, in 1990 the European conference of postal and telecommunications administrations (CEPT) agreed on a recommendation that the 40.5-42.5 GHz band be the frequency band for MMDS throughout Europe. The irony is that

Frank Lambert, from the Spectrum Management Lab of Télédiffusion de France, surveyed through a questionnaire the regulatory situation in the world. His findings are telling: Ireland, Iceland, the Czech Republic and Romania have commercial services in the lower frequency band (2.5 GHz or 2.1-2.2 GHz). Hungary and Romania operate services at 10 and 12 GHz. These countries appear to have emulated the successful Hong Kong MMDS system at these frequencies. Sweden has a specialized MMDS service at 17 GHz providing a point-to-point link for other media.

No non-European country has expressed any interest in the 40 GHz band which means that, should progress continue in Europe along this path, the emergence of a global standard, particularly for digital MMDS in terms of frequency usage, will be hindered.

The U.S. is the only non-European country which is conducting research into MMDS at frequencies above 10 GHz. This is at an advanced stage with a smaller commercial models already in place at the 27.5-29.5 GHz band. In Europe, only Belgium and Slovenia have followed the U.S. into this area.

This wide range of frequencies does not bode well for the establishment of an international MMDS band. Whereas Europe has a lot of work in front of her to reach a continent-wide standard, the U.S. is already a vast market under one standard. Economies of scale for mass consumer MMDS receivers will certainly be realized.

Rupert Murdoch said publicly in 1993 that satellite tv posed “an unambiguous threat to totalitarian regimes everywhere.” The Chinese government rewarded the magnate for his candour by banning satellite dishes.

For satellite tv, let us read “free tv,” in which programs and advertising are uncensored. Free tv is indeed a powerful organ. It appeals to the democratic mind, but how free does tv remain when too much power is concentrated into a single pair of hands?

That is the question of media concentrations, or rather the double question, because two distinct sets of issues are involved: on the one hand, economic issues of fair competition, and on the other, mental health issues of influence, plurality of opinion, etc.

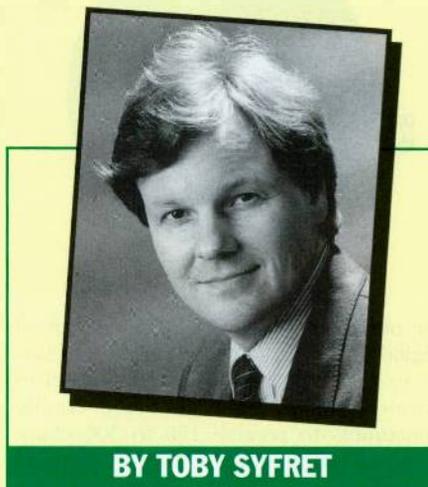
Sometimes national debates focus on economic issues, sometimes on mental health, but nowhere can they have raged more tempestuously or with better reason over both in modern times than in Italy. Not only do Berlusconi's tv stations deliver him the lion's share of television advertising revenues, but also he became Prime Minister with their help.

Unhappily for him, the tv stations which helped him to power were unable to keep him there. Worse still, his fall from grace at the turn of the year coincided with a constitutional court ruling against his ownership of three channels. His political rivals must have smelled blood as they pressed for the June referendum, which contained three questions aimed at dismantling the Fininvest empire. All they wanted was a yes to each.

But what a terrible miscalculation. The public said no to each, with 57% voting against the key proposal that would oblige Berlusconi to sell off two channels within a year.

Among the many reactions, Berlusconi's opponents objected that they had been undone by the media influence that they were seeking to undo. In the battle of advertising slogans, the No campaign fired 520 salvos on the Fininvest channels versus a meagre 42 from the Yes campaign. None was fired on Rai, which delivers the other half of the national audience, because Rai cannot accept

Who Controls The Mass Medium?



BY TOBY SYFRET

political advertising; and the plug was pulled early on the Yes campaign because every time a Yes ad appeared it was sandwiched between two No ads.

It is easy to infer a case of mass brainwashing by Berlusconi; and maybe that is true and reprehensible. Yet, other questions need to be asked before we jump to this verdict. For instance, precisely what extra influence was Berlusconi able to exert from advertising on his stations that no independent big advertiser could have achieved? Or what extra promotional support from their programs beyond what his opponents could achieve on Rai? Just how was the Fininvest factor so special?

Assuming we find Berlusconi guilty, we must ask whether the sole fault lies with his media concentration, or other factors, such as the current advertising content laws.

In any case, the threat of undue influence on public opinion does not proceed only from the Goliaths of media. Consider now another news story coinciding with the announcement of the referendum results in Italy. This other story is about a small group – small in American terms – claiming more than one million supporters, which calls itself the American Family Association. Its political agenda includes a crusading mission to sanitize (for want of a better word) American tv. Among its scalps, the AFA persuaded PepsiCo in 1989 to ditch its multi-million advertising contract with Madonna after accusing her of appearing on a blasphemous video, and it is alleged that many U.S. advertisers avoid programs which the AFA finds objectionable.

Now the AFA has launched a national press campaign in which it has targeted Unilever as a leading sponsor of “sex, violence and profanity” on U.S. television through its association with programs like *NYPD Blue*, which have helped to “open the doors to sexual nudity on primetime tv,” says the advertising copy. The advertisements list all Unilever's products in the U.S. and enroll the public to boycott them.

In some ways the potential influence of this minority – whether right or wrong – appears the more insidious. It may only require minority active support and a spot of bad publicity to stop Unilever's support of a tv program which many Americans presumably like and find unobjectionable. At least Berlusconi campaigned for majority support.

And lastly, spare a thought for the Italian public. Market researchers love telling us ad nauseam how today's consumer has become a more sophisticated recipient of advertising.

If they really mean that, perhaps we should also admit the tiny possibility that the Italian public listened (how could they not have listened?) to the No ads, and voted with intelligence. [E]

The threat of undue influence does not proceed only from the Goliaths of media. A minority pressure group is crusading to “sanitize” American tv

550



In 1967
just 550 came to see us

10,000's



Now we're counting in
tens of thousands

We're not inclined to talk about numbers – quality is more important than quantity. The fact is the right people come to IBC – they always have from that modest start in 1967. Serious people – creative executives – technical directors – top engineers – managers – and now financial controllers as well.

In other words – decision makers.



Of course there is a reason for this – the right people started IBC in 1967, for the right reasons, and right people run it now.

If you are one of the
right people
YOU HAVE
TO BE AT
I B C 9 5 !
RIGHT?

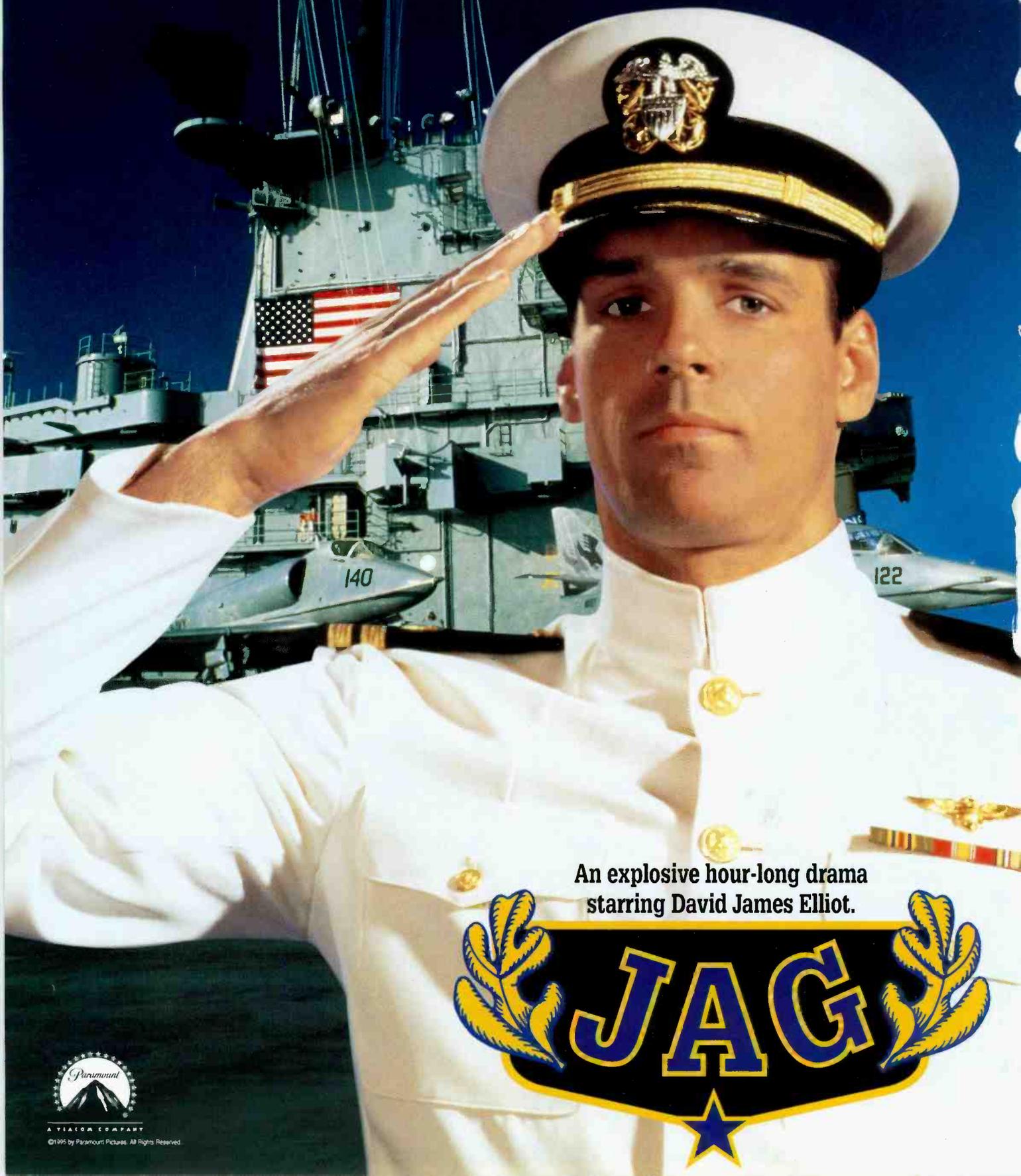


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